Interaction Client Web Edition

Printable Help

Interactive Intelligence Customer Interaction Center® (CIC)

2017 R1

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Abstract

This document is a printable version of the Interaction Client Web Edition online help. It explains how to start and exit, configure and use this CIC client. Online help is available within Interaction Client Web Edition by selecting Show Help from the Help menu.

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Interaction Client Web Edition

Interaction Client® Web Edition Help

Important: Customer Interaction Center (CIC) supports several interaction management client applications. This documentation uses the term "CIC client" to refer to these applications, which include Interaction Connect, Interaction Desktop, and Interaction Client Web Edition. CIC client also refers to the Interactive Intelligence Oracle Service Cloud Integration. The full product name appears at the top of each help topic. The full product name may also be used in a help topic when necessary to distinguish between CIC clients.

For more information about some most frequently used CIC client features, see:

- Set Your Status
- Answer an Incoming Interaction
- Place a call to a number inside or outside your organization
- Forward calls to remote telephone numbers
- Transfer a call
- Transfer a call to your voice mail
- Make conference calls

Note: The CIC client lets you log on to only one station at a time for security reasons. If you log on to a different station, the system drops the original station connection. You receive a message at the original station stating "Your connection has been dropped due to a subsequent logon to a different station". You can run multiple instances of CIC client on the same machine using different user credentials and the same station.

Need Help?

Select **Show Help** from the **Help** menu. A separate browser window displays the help topics along with Contents, Index, Search and other navigation controls.

Note: A printable version of the CIC client help is available on the Interactive Intelligence website at http://help.inin.com/cic/desktop/Printable_Documentation.htm.

Using the Search Feature

You can search for specific terms in both the HTML and the Web Help versions of the help. There is a basic search and an advanced search available from the Search tab.

A basic search is simple: just type whatever single word or phrase you want to search, press [enter] or click the **List Topics** button (HTML version only), and a list of topics containing that word or phrase is displayed. When searching for a phrase, use quotation marks to enclose the phrase. For example, use “directory toolbar” to return only topics that contain that exact phrase.

Some basic facts

- All the words you enter in the search box are used in the query.
- The search is always case-insensitive. A search for [dtmf] is the same as a search for [DTMF].
- Generally, punctuation is ignored, including @#$%^&()=+[]\ and other special characters.

An advanced search involves wildcard (HTML version only) and Boolean expressions. Wildcard expressions allow you to search for one or more characters using an asterisk or question mark. Wildcard search examples:

Search Term(s)	Returns...
init*	initial, initiate, etc.

1?3	123, 133, 143, etc.

Boolean searches involve the use of “OR”, “AND”, and “NOT”. Boolean search examples:

Search Term(s)	Returns...
alert AND configuration	Topics containing both the words "alert" and "configuration"
conference OR chat	Topics containing the word “conference” or “chat” or both
speed NOT dial	Topics containing the word “speed” but not the word “dial”

Feedback and Access Support

Options on the **Help** menu enable you to learn more about Interactive Intelligence’s products, promote and share ideas about Interactive Intelligence’s software, access technical support, and submit feedback about bugs and enhancement requests.

Note: You must have internet access to visit the Interactive Intelligence website or submit feedback.

- To visit the Interactive Intelligence **home page**, do one of the following:
  - Go to **http://www.inin.com.**
  - From the **Help** menu, select **Interactive Intelligence** and then click **Home**.
- To access the Interactive Intelligence **technical support website**, do one of the following:

  Note: You must log on to this site before you can access technical support.

  - Go to https://my.inin.com/products/Pages/default.aspx.
  - From the **Help** menu, select **Interactive Intelligence** and then click **Support**.
- Interactive Community is a free and public service provided by Interactive Intelligence to promote an online community devoted to the sharing of ideas and information regarding Interactive Intelligence software. To visit the Interactive Intelligence **Interactive Community**, do one of the following:
  - Go to http:// community.inin.com.
  - From the **Help** menu, select **Interactive Intelligence** and then click **Community**.
- Use our new social media/crowdsourcing site to submit ideas for enhancing Interactive Intelligence products. Vote on which ideas submitted by others best describe the enhancements you want. Do one of the following:
  - Go to http://ideas.inin.com.
  - From the **Help** menu, select **Interactive Intelligence** and then click **Feedback**.

- To submit **documentation feedback**, send an email message to **documentation@inin.com**.

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Features

Here are some of the most important features included in Interaction Client Web Edition.

Configuration

- Customize Columns

Ease of Use

- Auto Reconnect

- Dial Pad
- Status Bar

Information Organization

- Call History
- Directories
- Directory Entries
- My Interactions
- Speed Dial Views

Interaction Management

- Call Parking
- Call Transfer
- Camping
- Conferencing
- Fax
- Interaction Notes
- Queue Control
- Voicemail
- Voicemail Viewer

Status Management

- Status Notes

Access Control Rights

Access Control rights allow or restrict access to certain objects within the CIC client and determine whether you can view or modify those objects. Your CIC administrator assigns your Access Control rights. Contact your CIC administrator if you have questions about your Access Control rights.

Account Codes

This Access Control right determines whether you can assign account codes to incoming or outgoing interactions. For more information, see Understanding Account Codes; Assign Codes to an Interaction; Assign Codes to an Incoming Interaction; and Assign Codes to an Outgoing Interaction.

Access Control Right	Description
View Account Codes	Determines whether account code fields are visible in dialog boxes. To assign Account Codes to incoming and outgoing interactions, you also need the Account Code Verification Security right. For more information, see Understanding Account Codes.

Attendant Profiles

These Access Control rights determine which Interaction Attendant profiles are available as transfer targets in the Transfer dialog box. This controls whether you can transfer an interaction to a specific Interaction Attendant Profile. For more information, see Transfer a Call to an Attendant Profile.

Access Control Right	Description
Email Profiles	Determines which Interaction Attendant **email profiles** are available.
Inbound Profiles	Determines which Interaction Attendant **inbound profiles** are available.
Operator Profiles	Determines which Interaction Attendant **operator profiles** are available.
Outbound Profiles	Determines which Interaction Attendant **outbound profiles** are available.

Directory Status

This right controls which status columns you can choose to display in a Directory view. For more information, see View Another User's Status and Add or Remove View Columns.

Access Control Right	Description
View Directory Status Columns	Determines which status columns you can add to a directory view. Rights to these status columns can be separately assigned. These columns include: Activated, Forward Number, Logged On, Notes, On Phone, Status, Status Summary, Time in Status, and Until.

General Directories

This right controls which General Directories you can choose to display.

Access Control Right	Description
View General Directories	Determines which General Directory views you can display. Also, you must have this right for the appropriate Interaction Tracker databases in order to resolve a contact manually. For more information, see Resolve a Contact.

Interaction

These rights control whether you can use specific types of pre-defined responses from a system-wide Response Management library named "Interactions." This library exists only in systems upgraded from previous releases where the administrator decided to retain the library. For more information, see Working with Response Management for details.

Access Control Right	Description
View Interaction Files	Enables you to select a **file name** from the "Interactions" Response Management library and immediately upload the file to external chat participants.
View Interaction Messages	Enables you to select a **message name** from the "Interactions" Response Management library and incorporate the text from this stored message in a chat. Messages files typically include standard greetings and closings or responses to frequently asked questions.
View Interaction URLs	Enables you to select a **URL** from the "Interactions" Response Management library and incorporate this stored Internet address in your chat.

Phone Number

These rights control which types of phone numbers you can call, use as follow-me numbers, use as a forwarding number, or employ in the Telephone User Interface (TUI). Your CIC administrator classifies phone numbers into types such as Blocked, Emergency, Local, and Long Distance.

Access Control Right	Description
Classifications	Determines the type of phone numbers you can call from the CIC client. Also determines whether you can send a text message to specific classes of phone numbers (for example, Local, Long Distance or International) Your CIC administrator also determines which specific SMS brokers you can use to send SMS text messages. SMS brokers are associated with your CIC user account or workgroups.
Classifications Follow-me	Determines the type of phone numbers you can use as Follow-me numbers. For more information, see Set Up Follow-me Routing. **Note**: These rights are checked whether you set up Follow-me numbers in the CIC client or via the TUI. For more information about setting up Follow-me numbers via the TUI, see the *Telephone User Interface User's Guide* or *Quick Reference Card* in the CIC Documentation Library
Classifications Forward	Determines the type of phone numbers you can use to forward calls to a remote telephone number. For more information, see Forward Calls to Your Remote Telephone Number. **Note**: These rights are checked whether you set up Forwarding numbers in the CIC client or via the TUI. For more information about setting up Forwarding numbers via the TUI, see the *Telephone User Interface User's Guide* or *Quick Reference Card* in the CIC Documentation Library.
Classifications TUI	Determines which phone numbers you can call from the TUI. This right controls which numbers you can call when you do a "live reply." A "live reply" occurs when you respond to a "To call this person now..." prompt. These rights also control which phone numbers you can call when you access the Company Directory to locate and dial a phone number.

Response Management

This right determines which system-wide Response Libraries you can see and use in the CIC client. For more information, see Working with Response Management.

Access Control Right	Description
View	Each Response Management Library created in Interaction Administrator by your system administrator has a unique name. You can be assigned the right to use **all** of these libraries or **selected** libraries. **Note**: These libraries are also called Response Management server documents in Interaction Administrator. Each of these libraries can contain multiple items such as text messages or stored files.

Station Queues

This right controls whether you can transfer an interaction to a specific Station Queue.

Access Control Right	Description
Search Station Queues	Determines which Station Queues are available as transfer targets in the

	Transfer dialog box. This controls whether you can transfer an interaction to a specific Station Queue.

Stations

Typically, you always log on to one, specific CIC station that belongs to you. However, if there is a need, you can be assigned the right to log on to other CIC stations.

Access Control Right	Description
Logon Stations	Determines to which CIC stations you can log on. For more information, see Logging On.

Status Messages

To use a specific status, you need the appropriate View Status Message right. The CIC administrator can assign this right to all members of a specific workgroup, all users in a certain role, or selected users. These rights determine the status settings available when you Set Your Status or Set Another User’s Status.)

Access Control Right	Description
View Status Messages	This right controls which status settings are available to you. For more information, see Possible Status Values, Set Your Status, and Set Another User’s Status.

User Queues

These rights control which User Queues you can display and work with in the CIC client.

Access Control Right	Description
View User Queues	Determines which User Queue views you can display in the CIC client.
Modify User Queues	Determines which *modify* actions you can perform on interactions in a selected User Queue. *Modify* actions include **Disconnect**, **Hold**, **Mute**, **Pickup** *or* **Transfer** interactions. The Modify User Queues right is also required to enable the **Ring telephone for calls** or **Ring computer** alerting options for a monitored appearance. For more information, see Configure Monitored Appearances.

Users

This right controls whether you can Set Another User’s Status.

Access Control Right	Description
Change Status Users	Determine which users' status you can change. You can be granted the Change Status right to all or selected users.

Workgroup Queues

These rights control which Workgroup Queues you can display and work with in the CIC client.

Access Control Right	Description
View Workgroup Queues	Determines which Workgroup Queue views you can display in the CIC client.
Modify Workgroup Queues	Determines which *modify* actions you can perform on interactions in a selected Workgroup Queue. *Modify* actions include **Disconnect**, **Pickup** or **Transfer**

	interactions. *Modify* actions also include the ability to **Activate Self.** For more information, see Change Your Workgroup Activation Status.
Monitor Workgroup Queues	Determines which *monitor* actions you can perform on interactions in a selected Workgroup Queue. *Monitor* actions include **Coach**, **Join**, **Listen**, **Monitor, Record**, or **Snip** interactions. Determines which *monitor* actions you can perform on interactions in a selected Workgroup Queue. *Monitor* actions include **Coach**, **Join**, **Listen**, **Monitor** or **Record** interactions.
Search Workgroup Queues	Determines which Workgroup Queues are available as transfer targets in the Transfer dialog box. This controls whether you can transfer an interaction to a specific Workgroup Queue.

Workgroups

These rights control which workgroup directory views you can add to the CIC client and which workgroups can appear in the Workgroup Queue view.

Access Control Right	Description
View Workgroups	Determines which Workgroup directory views you can display in the CIC client.
Statistics Workgroups	Determines which workgroups can be included in the Workgroup Statistics view. This right can be granted to all or selected workgroups.

Related Topics

Security Rights

Security Rights

Security rights control your access to certain CIC client features and determine the actions you can perform. Your CIC administrator assigns your Security rights. Contact your CIC administrator if you have questions about your Security rights.

Client Rights

These rights determine which actions you can perform in the CIC client.

This security right	Description
Account Code Verification	Enables you to assign Account Codes to incoming and outgoing interactions. You also need the View Account Codes Access Control right to display Account Code fields. For more information, see Understanding Account Codes.
Conference Calls	Enables you to create a Conference call.
Multiple Calls	Determines whether you are alerted when a new call arrives in your queue when you are already on a call. This alert only occurs on calls into lines that are configured as "Allow Deferred Answer." If you don't have this right, or don't have call coverage set to forward calls when busy, then you aren't alerted to the new call. The new call then rolls to voice mail. This setting does not actually prevent multiple calls from being on your

	queue at the same time. It merely controls whether you are alerted or not. This setting applies only to My Interactions, not to calls to a logged-in station or default workstation.
Persistent Connections	This right gives you the option of keeping your remote telephone connected until you log off. It enables you to select Persistent when using a Dynamic Remote Client Connection.
Receive Voicemail	If you have this right, callers are sent to voice mail when you're in a DND (do not disturb) or other "not available" status or don't answer your phone. If you do not have this right, callers are returned to the Interaction Attendant main menu.
Response Management	Enables you to use a stored response in email messages, chats, or callback requests. Typical stored responses include a standard greeting or your company's support website address. For more information, see Using Response Management.
Status Notes	Enables you to create a Status Note when you set Status details for yourself or another user. Status Notes provide additional details about status, for example, the date an agent expects to return after vacation.
User-defined Telephone Number on Remote Logon	Enables you to enter a new **Remote Number** when logging on. For more information, see Dynamic Remote Client Connections.
Workgroup Statistics	Enables you to display the Workgroup Statistics view.
Workgroup/Profiles Tab	Enables you to display the Workgroup and Profiles view. This view lists workgroups and Attendant Profiles by name.

Interaction Command Rights

These rights determine which buttons appear on the My Interactions Queue Control Toolbar.

This security right	Description
Assistance	Displays Assistance button and the Request Assistance command.
Disconnect	Displays the Disconnect button and the Disconnect command.
Hold	Displays the Hold button and the Hold command.
Listen	Displays the Listen button and the Listen In command.
Mute	Displays the Mute button and the Mute Call command.
Pause	Displays the Pause button and the Pause Recording command.
Pickup	Displays the Pickup button and the Pickup command.
Private	Displays the Private button and the Private command.
Record	Displays the Record button and the Record command.
Secure Recording Pause	Displays the Secure Record Pause button and the Secure Pause command.
Transfer	Displays the Transfer button and the Transfer command.
Voicemail	Displays the Voicemail button and the Send to Voicemail command.

My Interaction Rights

These rights determine the actions you can perform in My Interactions.

This security right	Description
Disconnect Interactions	Enables you to disconnect an interaction using the CIC client instead of hanging up the telephone.
Listen in on Interactions	Enables you to listen to a call. You can hear both sides of a call.
Mute Interactions	Enables you to disable the microphone on your telephone so that the other party or parties cannot hear what you are saying. It also enables you to reactivate the microphone. For more information, see Mute Button.
Park Interactions	Enables you to park a call on orbit. **Note**: You can park only calls appearing in My Interactions.
Pause Interactions	Enables you to use the Pause button to control a recording session. Click this button to pause the recording session. Click it again to resume the recording session. For more information, see Record a Call and Record a Chat Session.
Pickup Interactions	Enables you to pick up an interaction. For more information, see Picking Up Calls.
Private Interactions	Enables you to prevent other CIC client users from recording or listening to your conversation. For more information, see Private Button.
Put Interactions on Hold	Enables you to place a selected interaction on hold. For more information, see Hold button.
Record Interactions	Enables you to record an interaction. The recordings are stored in files.
Secure Recording Pause Interactions	Enables you to Secure Pause a Recording to avoid recording sensitive information, such as a Social Security number or credit card number, when you are recording an interaction.
Transfer Interactions	Enables you to transfer an interaction. For more information, see Transfer a Call After Consulting the Recipient or Transfer a Call Without Consulting the Recipient.
Transfer Interactions to Voice Mail	Enables you to transfer a call to your voice mail.

User Rights

This security right	Description
Directory Administrator	Enables you to edit public directories that other users created. For more information, see View and Edit Directory Entries.
Require Forced Authorization Code	Requires you to enter an authorization code before toll numbers can be dialed from your station. An authorization code prevents someone from using your phone to make a toll call while you are logged on, but away from your desk. For more information, see Dial a Long-Distance Number.
TIFF Faxes	

Related Topics

Access Control Rights

What's New in CIC client 4.0

Note: The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

The following changes and enhancements were introduced in version 4.0:

- **Account Codes:** You can use account codes to organize interactions by customer if they are configured for use on your system and you have the appropriate user rights. For more information, see Understanding Account Codes.
- **Advanced Dialing Options:** If your CIC administrator enables Advanced Dialing Options and you are a member of at least one workgroup or have at least one account code to select, the Advanced Dialing Options dialog box appears every time you place a call and prompts you to assign the appropriate Account Code and/or designate a Workgroup. For more information, see Advanced Dialing Options.
- **Call Transfer:** Advanced Transfer capabilities are available in the Transfer Dialog Box. This includes the ability to search for transfer recipients by name, number, workgroup or other criteria. You can see the status of a selected CIC client user before you transfer a call. You can also easily park a call, transfer a call to voice mail or perform a consult transfer from the Transfer dialog box.
- **Directories**: The features and appearance of the Company Directory, Workgroup and Profiles views, and Workgroup views have been greatly enhanced.
    - **Logged In tooltip:** The **tooltip for the Logged In column** displays the name of the station or IC server where another user is logged in.
    - **Persisted Settings**: All directory setting such as the selected tab, sort order, selected columns, column widths and order, and filter settings are preserved when you log on again to the same IC server from the same web browser.
    - **Resize Columns and Scroll Horizontally:** Each column in a directory has an independent width. This enables you to resize one column without affecting the width of adjacent columns. A horizontal scroll bar appears if the total width of the columns exceeds the space available in the browser window. For more information, see Customize Columns.
    - **Reorder Columns:** You can drag and drop a selected column to change the order in which columns appear in a directory grid. For more information, see Customize Columns.
    - **Select New Directory Columns:** You can add or remove columns from any directory view or queue view. Also, a full range of new columns are available for your selection: including email addresses, phone numbers, contact addresses, and status details such as status notes and forwarding number. For more information, see Add or Remove View Columns.
    - **Single Column and Multi-Column Sorting**: You can sort a directory by clicking on the column heading. You can sort by more than one column by holding down the Shift key while clicking on selected column headings. For more information, see Sort a Directory.
    - **Wildcards in Directory Searches**: Use the asterisk (*) and question mark (?) in directory searches. For more information, see Search a Directory.
- **Interaction Properties:** Use the new Interaction Properties Dialog Box to add notes to an interaction or view the interaction log.

- **Recently Dialed Numbers:** Select from a drop-down list of your most recently dialed phone numbers to place a call. For more information, see Make a Call Using the Number Field.
- **Report a Problem**: You can create an email message and automatically include all of an interaction's critical information when reporting a problem with the CIC client to your support representative. For more information, see Report a Problem.
- **Screen Pops**: Screen pops can open your browser to a specific URL when a specific event occurs. For example, an incoming ACD interaction can cause your browser to open to a specific webpage. For more information, see Site-Specific Screen Pops.
- **Set another User's Status:** If your CIC administrator has granted you the right, you can set another user's status in the Company Directory or other directory view. A Change User's Status button now appears in the Directory toolbar. For more information, see Set Another User's Status.
- **Workgroup Activation Status**: If your CIC administrator has granted you the right, you can set your own Workgroup Activation Status. For more information, see Change Your Workgroup Activation Status.
- **Wrap-Up Codes**: If Wrap-Up codes are configured for your workgroup, you can assign a Wrap-Up code to an interaction. For more information, see Understanding Wrap-Up Codes.

Documentation Library

The latest version of the Interaction Center Documentation Library is http://help.inin.com/cic/desktop/Welcome_Page.html.

Related Topics

What's New in CIC client 4.0 Service Updates

What's New in CIC client 4.0 Service Updates

Note: The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

The following changes and enhancements were introduced in the CIC client 4.0 Service Updates:

4.0 SU 1

- **Drag and Drop Conferencing**

  Creating a conference call is as easy as making or receiving several individual calls, then dragging and dropping each call to connect the participants.

- **Report a Problem**

  You can create an email message and automatically include all of an interaction's critical information when reporting a problem with the CIC client to your support representative. For more information, see Report a Problem.

- **Unsupported Browser Warning**

  A new warning appears if you try to log on using an unsupported or out-of-date browser. For more information, see Logging On.

4.0 SU 2

- **Advanced Dialing Options**

  Advanced Dialing enables you to assign an Account Code and designate a workgroup for outgoing calls. For more information, see Advanced Dialing Options.

- **Assistance Request**

  You can chat with your supervisor when you request assistance with an interaction. For more information, see Request Assistance from Your Supervisor.

- **Change Station**

  You can change your CIC client station without having to log off and then log back in. See Changing Station.

- **Fax Viewer**

  You can use the new Fax Viewer to view a list of your received faxes and view or download the fax document. For more information, see Use the Fax Viewer.

- **Most Recently Used Status list**

  An MRU section has been added to the Status drop down list. It now displays up to 10 of your most recently used statuses at the top of the list. Your status appears first. The next most recently used statuses appear in order. For more information, see Set Your Status.

- **Speed Dial Views**

  You can create and use Speed Dial views. These views can be private or you can share them with other Interaction users. For more information, see Working with Speed Dial Views and Working with Speed Dial Entries.

- Supervisor Client Memos

  CIC administrators can easily communicate with selected users, workgroups or roles by means of brief messages. The administrator creates these Client Memos in Interaction Supervisor. Client Memos appear as notifications in the CIC client. For more information, see Supervisor Client Memos.

- **Workgroup Statistics View**

  You can check basic statistics for workgroup queues. You can compare your Shift and Period Statistics with the statistics for the entire workgroup. See Workgroup Statistics View. You can also change your workgroup activation status based on these statistics.

4.0 SU 3

- Chats

  You can conduct online, real-type typed conversations with other CIC client users or with a chat participant who initiates a chat from your company's website. See Working with Chat Sessions.

- Directory Entries or Contacts

  If you have the appropriate rights, as in the IC Private Contacts directory, you can insert, edit, and delete directory entries. See Insert and Delete Directory Entries and View and Edit Directory Entries.

- **Email messages**

You can use the CIC client to read and respond to ACD-routed email messages or to send email messages on behalf of a workgroup. You can also use a directory entry to address an email message and then send it using your own email program. See Working with Email Messages.

You can attach a file to your email message or reply or view or download email file attachments. See Email Window for Incoming Messages and Email Window for Outgoing Messages.

- **Park Email Messages**

You can park an ACD-routed e-mail message on the queue for another user or workgroup. See Park an Email Message on Another Person's Queue.

- Response Management

Response Management enables you to use pre-defined items such as messages and stored files to handle interactions more quickly. Your CIC administrator can create system-wide response items and organize them into categories. Your CIC administrator can then grant the necessary rights for all or selected users to use a particular library of response items. You can also create your own personal responses for information you type over and over again in interactions with customers or for files you often send to customers.

- Text Filtering

If your CIC administrator enables text filtering, certain sensitive information such as credit card numbers or Social Security numbers is blocked from view. You see only some replacement text such as ########## instead of the numbers. See Chat Window and Email Window for Incoming Messages.

- Wrap-Up Codes and Account Codes

This new Email and Chat window include support for interaction features such as Add Notes and Assign Codes.

4.0 SU 4

- **Follow-Me phone numbers**

You can set up the phone numbers used for Follow-me routing in the CIC client. These are the phone numbers used when you set your status to Available, Follow-Me. The CIC client searches for you at different telephone numbers by dialing phone numbers in a sequence you specify. You can set a timeout value for each phone number or require anyone who answers the forwarded call to enter your CIC client password to accept the call. For more information, see Set Up Follow-me Routing.

4.0 SU 5

- **Auto-Answer on SIP stations**

A new Interaction Administrator configuration option can enable or disable Auto-Answer for incoming calls on a SIP station. For more information, see Answer an Incoming Interaction.

- **Callback Retry**

Callback interactions enable visitors to your company's website to leave a request for an agent to call them back. These callback requests are routed to the appropriate workgroup queue and then to an available agent.

Agents can put Callback requests into a "Snoozed" state if one or more attempts to reach the callback requestor are not successful. A "Snoozed" callback interaction is removed from the agent's queue and is routed back to the appropriate workgroup queue. After an interval configured by your CIC administrator, normal ACD processing of the callback request resumes. ACD processing routes this callback request to the first available agent in the workgroup.

The CIC administrator controls whether the "Retry later" feature is available. The CIC administrator configures how many retry attempts can be made and how long a "Snoozed" callback request remains on the workgroup queue before it is routed back to the agent. For more information, see Working with Callback Requests.

- **Chat**

You can now chat with other CIC client users or remote chat participants who are browsing your company's website. Chats are online, real-time, typed conversations. You can initiate, pickup, conference, record, transfer or disconnect Chat interactions. For more information, see Working with Chat Sessions.

- **Follow Me Phone Numbers**

You can now configure follow me routing when you set your status to Available, Follow Me. To handle calls when you are away from the office, the CIC client can search for you at different telephone numbers. The client consecutively calls the telephone numbers in a follow-me routing list. After locating you, the client can transfer the call to you at that location.

A Validate button now appears in the Set Status dialog box. When you set up Follow-me routing, use this button to check your phone number entry against the requirements of the dial plan for your organization or region. For more information, see Set Up Follow-me Routing.

- **Generic Object Routing**

Customer Interaction Center supports the ACD routing of tasks specific to your organization. You can use Interaction Web Client to handle CRM tickets or others tasks, if your CIC administrator enables this feature. For more information, see Understanding Generic Object Routing.

- **Time in Status**

If you have the appropriate Queue Columns Access Control right, you can display a Time in Status column in any Workgroup, Station, or User queue view. For more information, see Access Control Rights or Add or Remove View Columns.

4.0 SU 6

- **Transfer Options**

The CIC client saves the search criteria selected in the Transfer Dialog Box between sessions.

Related Topics

What's New in CIC client 4.0

What's New in CIC client 2015-2016 Releases

Note: The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

The following changes and enhancements were introduced in CIC client 2015 Releases:

2015 R2

- **Directory Settings**

  Interaction Client Web Edition preserves all your directory settings when you log on again to the same IC server. You can use different workstations or different browsers.

- **Response Management**

  Response Management includes the new **Inherited font** feature. When you use a stored response created with the Inherited font, it adopts the font and font characteristics (size, color, and so on) of the text immediately preceding it in your email message. However, when you insert a response that has a selected font and other font characteristics, then the stored response appears as originally formatted.

Related Topics

Create Personal Responses
My Responses Window
Use Response Management in an Email Message
What's New in CIC client 4.0 Service Updates

Starting and Exiting

Starting and Exiting

This section provides links to information on how to log on, log off, and exit the CIC client. It also contains links to details about running the CIC client remotely.

- Auto Reconnect
- Exiting
- Language Setting
- Logging On
- Logging On Remotely
- Logging Off
- Private Mode
- Remote Station Types
- Running the CIC client from a Remote Location
- Single Sign On
- Status Bar

Auto Reconnect

If the CIC client loses the connection to the web server, it automatically attempts to re-establish the connection. If Auto Reconnect is not successful, contact your CIC administrator.

Related Topics

Switchover

Change Your Password

If your Customer Interaction Center password has expired, you see an "Expired Password" warning when you start the CIC client. Change your password immediately to log on and continue loading the CIC client. Failure to change your password after an "Expired Password" warning causes the CIC client to exit.

Note: The Change Password dialog box enables you to change your CIC password. It does not apply to your Windows password. If you have forgotten your CIC password, contact your CIC administrator. Your CIC administrator can reset your password in Interaction Administrator.

Password Policies

Your CIC administrator creates Password Policies in Interaction Administrator. The password policy that is assigned to you controls how often you must change your CIC password. It also determines minimum password length, how many unique characters are required, whether sequential digits are allowed, how often you can reuse a password and other password restrictions.

If your password is going to expire soon, a prompt appears periodically (usually once per day or on the next logon) asking if you want to change your password now. If you select **Yes**, then the Change Password dialog box appears.

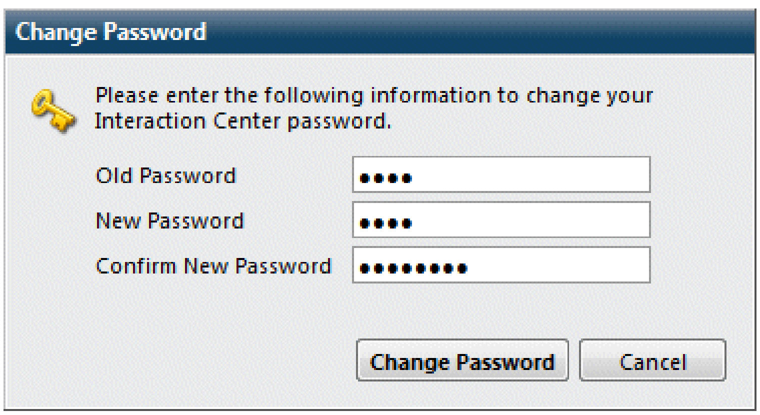
Note: You must have a valid CIC user ID and password to use the CIC client.

Tip: You do not need to wait until you are prompted to change your password. You can change your password at any time. Also, if you previously selected, **Automatically log me in next time**, in the Web Server Log on page, your new password is used for automatic logon.

To change your password at any time:

1. From the **Options** menu, select **Change Password**.

   Result: The Change Password dialog box appears.

2. In **Old Password**, enter your current CIC password.
3. In **New Password**, enter your new CIC password.
4. In **Confirm New Password**, type your new CIC password again.
5. Click the **Change Password** button.

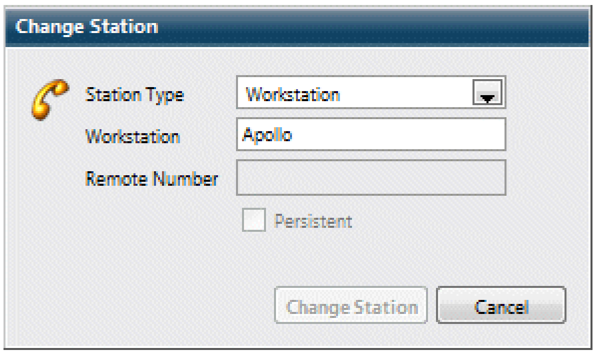
Changing Station

You can change your CIC client station without having to log off and then log back on. You could change station between your desktop workstation and a configured remote station. If you are away from your desk, roaming the office or moving from one remote location to another, using a remote station enables you to route calls to another phone.

To change station:

1. Do one of the following:
    - Click the name of your current station in the Status Bar.
    - From the **Options** menu, select **Change Station**.

    Result: The Change Station dialog box appears.

2. Complete the required fields. For more information, see Logging On.
3. Click the **Change Station** button.

Related Topics

Status Bar

Exiting

To exit the CIC client:

- Click the **X** in the upper-right corner of the browser window or on the browser tab.

Related Topics

Logging Off

Language Setting

If the wanted language is available for the particular version of Interaction Client Web Edition that you are using, you can select a language other than English for the CIC client interface and help.

To select a language:

1. Log off Interaction Client Web Edition, but keep the browser window open.
2. In the browser you are using for Interaction Client Web Edition, change your language preference to the appropriate language.

    Tip: Consult your browser's help for information on selecting a preferred language.

3. Restart the browser and log back on to Interaction Client Web Edition.

Related Topics

Configuration Options

Logging On

Requirements: You need the Logon Stations right to a specific station to be able to log on to it. To log on automatically or use profiles to log on, your CIC administrator must allow the use of cached credentials. Some Interaction Centers prevent automatic log on for security reasons.

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- You can run multiple instances of Interaction Client Web Edition on the same machine using different user credentials and the same station. You can run multiple instances only in independently started browser windows. You cannot run multiple instances of Interaction Client Web Edition in different tabs of the same browser window or in a new browser window created from an existing browser window.

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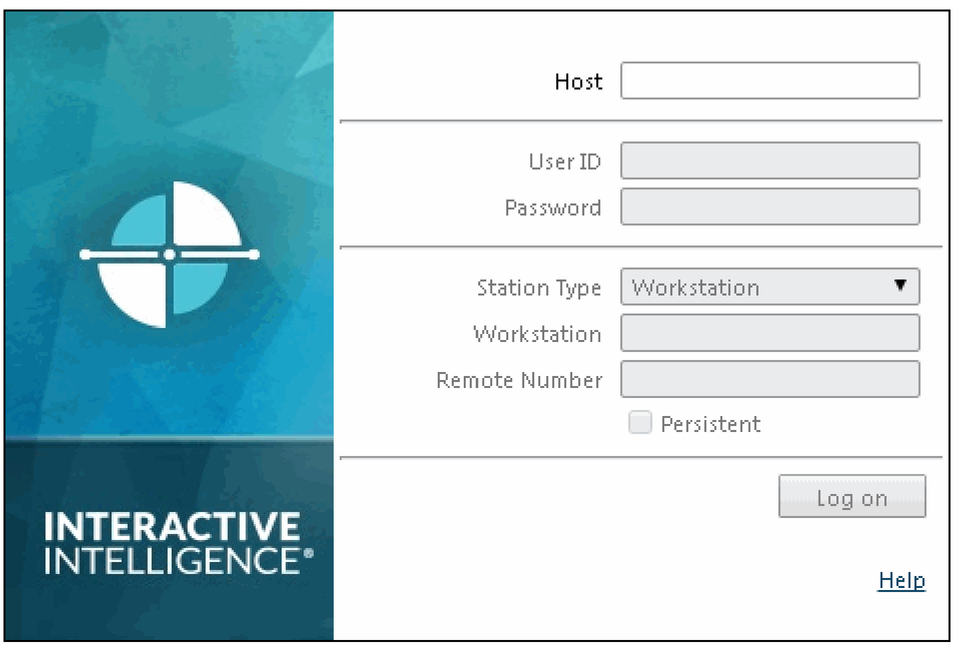
To log on:

1. Point your browser to the log on page.

   Tip: Tip: Your CIC administrator can supply the URL for the logon page. Use the Help hyperlink if you have questions about any of the required entries.

   Result: The Log on page appears.



Note: The user name text box on this log on page is labeled **User ID** or **Domain\user name.** If the label is **User ID,** use your CIC account name and password to log on. If the label is **Domain\user name**, use your Windows user name and password to log on.

2. Do one of the following:

Note: The labels for the user name and password indicate which set of credentials to use for logging on. Your CIC administrator determines which set of credentials you can use to log on.

- In **IC User ID** and **Password**, enter your CIC user account name and password as configured in **Interaction Administrator**.

  Tip: To verify your user account name or password, contact your CIC administrator.

- In **Domain\user name** and **Password**, enter your **Windows** domain\username and password.

  Note: If you select both **Remember** me and **Automatically log me in next time**, and later change your Windows domain password, you see an authentication process error at your next logon attempt. Enter your new password. If you have not cleared your browser cache, all your other logon information is retained.

- In **User ID** and **Password**, enter either your **CIC client** or **Windows** user name and password.

4. In **Host**, enter or select the host name.

Note: The host is the machine running the Interaction Center Session Manager. For most installations, the host is the IC server. If there is only one IC server you can use, this field does not appear. Contact your CIC administrator if you do not know the host name.

4. In **Station Type**, select the type of station you are using to run the CIC client.

If you are running from a remote station or a remote number, see also Remote Station Types and Running the CIC client from a Remote Location.

- Select **Workstation** if you use a computer and telephone connected via telecom outlet (SIP or analog phone) to the IC server.
- Select **Remote Workstation** if you work from a "known" single remote location using a single phone number for all calls to the agent's extension. For more information, see Configured Remote Stations.
- Select **Remote Number** if you work from an Ad hoc remote location using a single phone number for all calls to the agent's extension. For more information, see Dynamic Remote Client Connections.

5. Do one of the following:

- If your station type is **Workstation** or **Remote Workstation,** enter the name of the workstation in the **Workstation** field.
- If your station type is **Remote Number**, then enter the telephone number for CIC to call you in the **Remote Number** field. (Remote Number is for remote access only.)

6. If your station type is **Remote Number**, do one of the following:

- To keep the connection to the IC server active from the first time you require a voice connection to the IC server until you log off, select **Persistent.**
- To end the connection to the IC server when either side disconnects for any reason, **clear** the **Persistent** check box.
- **Requirements**: You need the Persistent Connections Security Right to select a persistent connection when you are using a Dynamic Remote Client Connection.

  If you are using a Configured Remote Station, the **Interaction Station Connections are Persistent** setting in Interaction Administrator Station Configuration controls whether you have a persistent connection.

Note: If you do not have the appropriate persistent connection Security Right, you are still able to logon. However, a License Error appears after you logon. It warns you that your request to establish a persistent connection was ignored.

Example: The first time a remote agent receives a call or requires a voice connection to the IC server, CIC calls the agent at the phone number entered in **Remote Number**. From that point on, you can keep the telephone's handset off-hook and use the CIC client to pick up, disconnect, or listen to calls. If you hang up between calls, CIC must redial the Remote Number and wait for you to answer before completing the operation.

Explanation: When you select **Persistent**, the call to your remote phone stays connected (an open line to the IC server). If you leave the remote phone off-hook, and disconnect via the CIC client, the IC server does not have to create a new call and dial your remote phone again. It just connects the audio path to the new caller.

Note: Usually this preferred setting prevents excessive long-distance charges and keeps lines free.

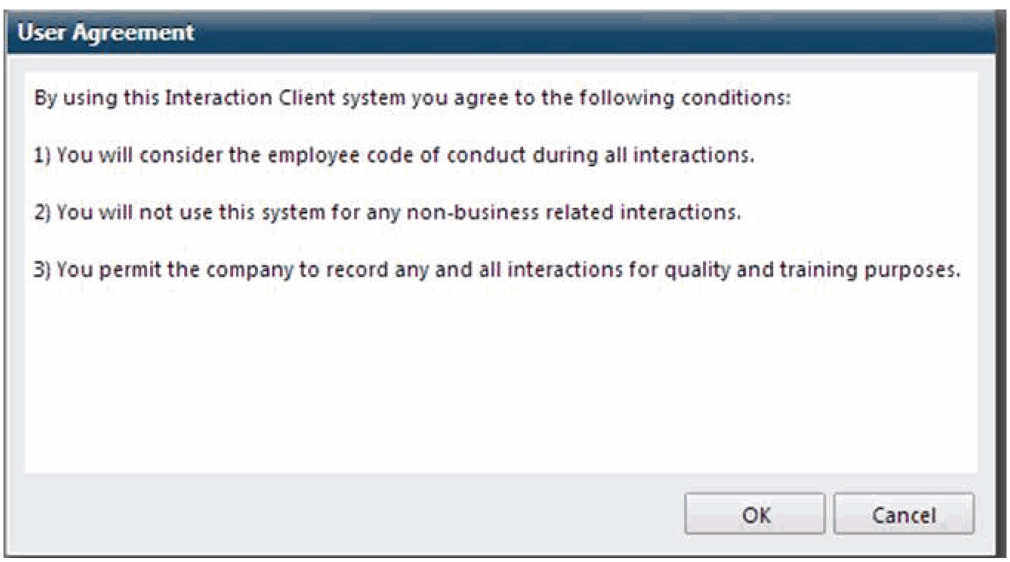
7. Optionally, select the **Remember me** check box. The next time you log on, all the fields on the Web Server Log on page are completed for you, except for **Password**.

1. **Note**: If you use the browser feature that remembers passwords and enters them automatically for you, **Password** is also entered automatically. All these settings are stored in client side cookies. If you clear cookies, "Remember me" does not "remember" your log on settings.

8. Optionally, select the **Automatically log me in next time** check box. The next time you log on, you go directly to the main Web Client page and do not need to enter any settings at all.

9. Click **Log on**.

   Result: In a secure system, a User Agreement similar to this one appears.



10. Click **OK**.

Related Topics

Auto Reconnect

Exiting
Logging Off
Remote Station Types
Running the CIC client from a Remote Location
Status Bar

Logging On Remotely

The procedure for logging on remotely is the same as logging on to the CIC client from an office workstation. See the instructions in Logging On, paying particular attention to **Station Type**, **Remote Number**, and **Persistent** settings.

Related Topics

Remote Station Types
Running the CIC client from a Remote Location

Logging Off

You can log off by clicking **Log off** in the CIC client menu bar. This returns you to the Logon page and does not close the browser window.

Note: When you log off the client, your non-ACD (Automatic Communication Distribution) calls ring on your telephone if the station associated with the telephone is set up as your default workstation in Interaction Administrator. Otherwise, the system announces to callers that you are not available.

Related Topics

Exiting
Logging On

Remote Station Types

Customer Interaction Center supports two types of remote stations: dynamic and configured (static). Each type of remote station connection serves a slightly different purpose, depending on the needs of the call center and of the remote agent. Both provide the same full functionality of the CIC client.

Dynamic Remote Client Connections (Remote Number)

Requirements: In order to use a dynamic station, you need the appropriate rights. The Persistent Connections Security Right enables you to select a persistent connection when you are using a Dynamic Remote Client Connection. The User-defined Telephone Number on Remote Logon Security right enables you to enter a new **Remote Number** when logging on.

Note: When using a Dynamic Remote Client Connection, you must select **Remote Number** as the Station Type when logging on to the CIC client.

Dynamic remote stations enable traveling agents to connect to the IC server and place or receive calls from any remote location. This provides maximum flexibility for agents who may need to work from Ad hoc locations and phone numbers. When such a remote agent starts the CIC client and logs in to the IC server, the agent may enter a phone number (e.g., desk phone or cell phone) to which the IC server routes calls for that agent.

Dynamic remote stations **do not have predefined station names** configured in Interaction Administrator – the telephone number given when the agent starts the CIC client and logs in to the IC server is the remote station. The IC server detects that user is logged on and routes calls for that user's extension to the remote phone number.

Configured Remote Stations (Remote Workstation)

Requirements: You need the User-defined Telephone Number on Remote Logon Security right to use a configured remote station and specify a different remote phone number when logging on to the CIC client.

This option is usually selected by default for all users. If this option is not selected, the configured remote station user’s remote phone number is fixed in the Remote Station Configuration dialog in Interaction Administrator.

Note: When using a Configured Remote Station, you must select **Remote Workstation** as the Station Type when logging on to the CIC client.

Configured remote stations are defined in Interaction Administrator as a “Remote Station” type of workstation with a single remote phone number for all calls to the remote agent’s extension. Configured remote stations ensure that the remote agent always connects to the IC server using the same remote phone number, unless the CIC administrator changes it, or unless that user has been granted the right to change the number dynamically. Some call centers may prefer this approach, to ensure remote agents are working from the prescribed location, and with the option of granting flexibility to those who need it.

The remote station name can be the same as the remote agent’s computer name, or it can be another name. The CIC administrator is responsible for creating these Remote Station workstations and or educating the remote agent on how to use the CIC client (remote) Logon dialog to enter the station name.

SIP Stations are not Remote

Remote agents who use a SIP-enabled device or IP phone to receive calls from the IC server are not classified as either dynamic or configured “remote stations.” This is because SIP devices/phones connect directly to the IC server via an IP-based network connection. Distance or location with a SIP device/phone has nothing to do with its classification as a “remote” station.

Each SIP device/phone is configured as a “local” Workstation type of station in Interaction Administrator, with the Connection Type of “SIP” (instead of a Connection Type of “Line” for analog phone Workstations). The configuration specifies the SIP address of the computer, which must be on the same domain or trusted domain as the IC server. Some “remote” agents with SIP devices/phones may use a Virtual Private Network (VPN) connection over the internet to connect to the domain and to run the CIC client and log on to the IC server. In any case, these stations are treated as local workstations by the IC server.

Remote Station Licenses

Even though dynamic remote stations are not configured in Interaction Administrator, each dynamic station connection is counted toward the total number of station licenses "in use" on your IC server. The number of current dynamic station connections is added to the number of configured stations (i.e., Remote Stations, Workstations, Stand-alone phones) that are Active to calculate the total number of active stations. If a remote agent attempts to start the CIC client and log on to the IC server when the total number of station licenses are in use, that agent is not able to connect, and he or she sees an error message indicating that no stations are available. An error message is logged on the Event Log on the IC server as well.

Related Topics

Running the CIC client from a Remote Location
Logging On

Running the CIC client from a Remote Location

You can run the CIC client from a remote location. This means that users at home or on the road can receive regular and ACD-routed incoming interactions, and use all the other CIC client features.

Answer and Make Calls

The IC server automatically alerts the remote workstation and rings the remote telephone, assuming the station is configured in Interaction Administrator always to ring the telephone. To answer a call, the remote agent can simply pick up the handset to connect to the call. Once the phone is off hook and connected to the IC server with a persistent connection, the remote agent can dial directly from the phone keypad or from the CIC client.

Answer Calls

Once the CIC client starts and the agent's status is available, incoming calls alert only on the workstation. The agent's telephone does not ring at the same time the call alerts the CIC client. The first time CIC sends a call to an available remote agent may be different from subsequent calls, depending on how the agent ends the first call.

To answer the first call from CIC after logging on:

1. Do one of the following:
    - Select the alerting call and click the Pickup button.
    - Double-click the alerting call
2. When the telephone rings, pick up the handset to speak; CIC immediately connects the call.
3. When the call is over, do one of the following:
    - Click the **Disconnect** button and keep the handset off-hook. CIC automatically keeps a persistent connection to remote agents, which means as soon as you click the **Pickup** button on subsequent calls, the call is connected immediately without waiting for the phone to ring.
    - When the call is over, hang up the handset. In this case, CIC must re-dial the remote number to complete subsequent calls.

Remote agents who are taking campaign calls from Interaction Dialer must not hang up the handset between calls to avoid delays talking to the called party. Remote ACD agents should also keep the handset off-hook after the first call from CIC, especially if the agent is configured to automatically connect to incoming calls (the calls are connected to available agents without the agent clicking the **Pickup** button).

Make Calls

Once the CIC client starts, remote agents can place any call they are authorized to dial. The IC server dials the agent's number and then dials the destination number. As soon as the dialed number starts alerting, it simultaneously places a call to the agent's telephone.

To make a call:

1. Enter or select a phone number in the CIC client and click the **Make Call** button.

    Result: CIC dials the agent then the number, and if it completes the call, it immediately connects it to the remote agent's telephone number.
2. Do one of the following:
    - If the handset is on-hook, when the telephone rings, pick up the handset to speak; CIC immediately connects the call.
    - If the handset is off-hook, listen for the called party to answer.
3. When the call is over, do one of the following:
    - Click the **Disconnect** button and keep the handset off-hook. CIC automatically keeps a persistent connection (based on this logon setting) to remote agents which means the agent can make multiple calls without hanging up the handset, and the calls are connected immediately without waiting for the phone to ring.

- When the call is over, hang up the handset. In this case, CIC must re-dial the remote number to complete subsequent calls.

Keep a Persistent Connection to the IC Server

CIC detects when it needs to call a remote agent's telephone vs. when it already has a (persistent) voice connection to a remote agent. If you selected **Persistent** when you logged on, or if the Remote Station configuration requires it, CIC keeps the connection open once you establish it.

For example, the first time a remote agent receives a call or performs any operation that requires a voice connection to the IC server, CIC calls the agent at the phone number given on the agent's Logon dialog box. From that point on, the agent can keep the telephone's handset off-hook and use the CIC client interface to pick up, disconnect, and listen to calls or to record prompts. With the voice connection already established, these operations are instantaneous. If the agent hangs up between calls, CIC must re-dial the agent's telephone and wait for the agent to answer before completing the operation.

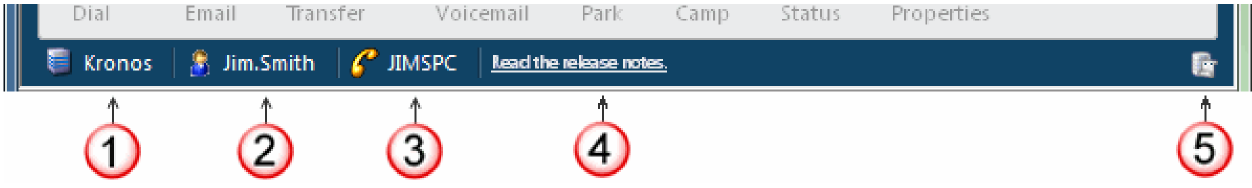
Note: If the IC server is ever restarted or switches to a backup server while a remote agent is on a call, the current call may be disconnected.

Related Topics

Logging On
Remote Station Types
Switchover

Status Bar

The status bar has sections that display your current IC server name, user name, station name, and notifications:



1	**IC Server**	The name of the IC server (Host) to which you are connected. For more information, see Logging On.
2	**User**	Your User ID which is the user account name you used when you logged onto the CIC client.
3	**Station**	The name of your currently active workstation. Click this section to change stations.
4	**Notification Area**	This scrolling list displays your current notifications. For more information, see Supervisor Client Memos. **Tip**: Point to this area to display the full text of the current notification. An underlined message indicates a hyperlink.
5	**Message Viewer**	Click this icon to display the Message Viewer and read all your current notifications.

Related Topics

Switchover

Using Views and Dialog Boxes

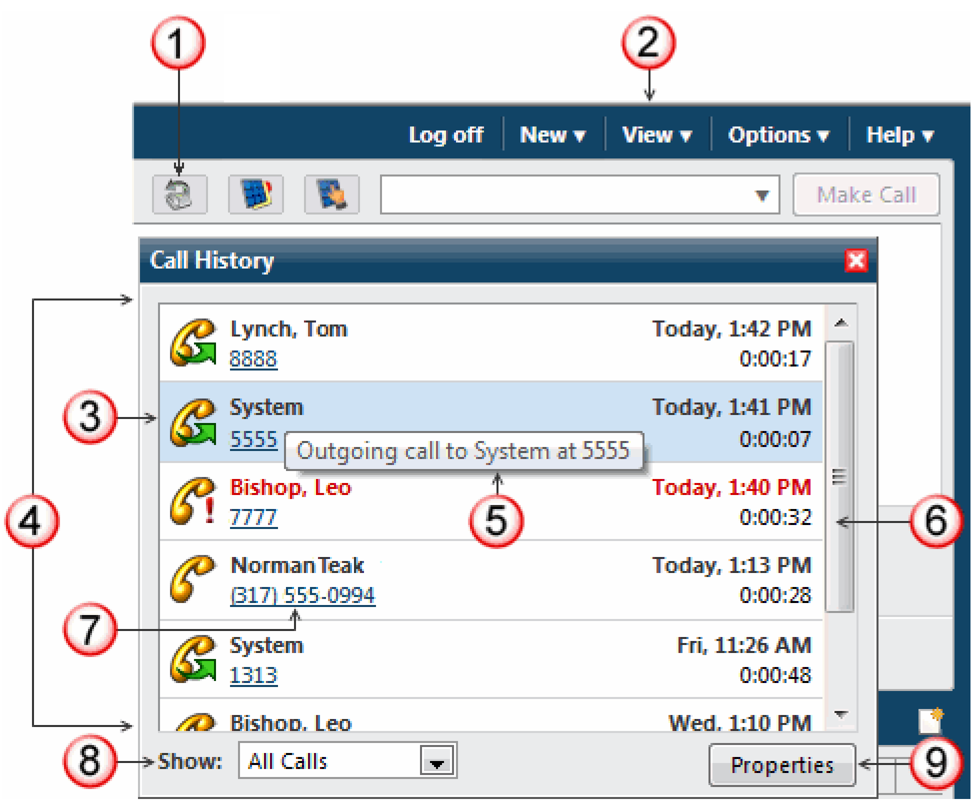
Using Views and Dialog Boxes

This section provides links to information on dialog boxes, views, toolbars, and shortcut keys in the CIC client.

- Call History
- Camp Desktop Alert
- Dial Pad
- Directories
- Directory Properties Dialog Box
- Fax Viewer
- Interaction Properties Dialog Box
- My Interactions
- Set Status Dialog Box
- Shortcut Keys
- Supervisor Client Memos

Call History

The Call History dialog box displays information about your recent incoming and outgoing calls, including the name and phone number of the other party, the day and time of the call, and its duration.



1	Select the **Call History button** to display your call history.

2	You can also select **Call History** from the **View menu** to display your call history.
3	A selected call appears shaded.
4	Each item in the **Call History** list contains information about the call including starting date and time, duration, and the name of the other party (if available). A call icon indicates whether the call was answered, missed or outbound.
5	Point to the call icon to display a tooltip which describes the type of call and displays the name of the other party and their phone number.
6	Use the scroll bar to view other calls in your call history.
7	Click the **phone number hyperlink** to dial the number.
8	Use the **Show** drop-down list to select the type of calls displayed in your Call History. You can choose to display all calls, or just your missed, outgoing, answered or forwarded calls.
9	Click the **Properties** button to view extended information for an interaction or to make notes for a currently active interaction. For more information, see View and Edit Interaction Properties.

Displaying the Call History Dialog Box

To display the Call History dialog box, do one of the following:

- Select the **Call History** button.
- Select **Call History** from the **View** Menu.

Using Call History to Make Calls

Click a phone number hyperlink in the Call History dialog box to dial the number associated with the call.

Call History Retention

History is tracked for **calls** that appeared in **My Interactions**. These are calls that were inbound to you, calls placed by you, calls transferred to you, and calls used to retrieve voice mail messages.

Call history is maintained by Client Services on the IC server. By default, call history information is retained for three (3) days or 300 calls, whichever comes first, per user. The amount of call history data stored per user depends on the version of Client Services running on the server and how it is configured by the CIC administrator.

Note: In some cases, system call activity and other users' transfer activity can appear in your Call History.

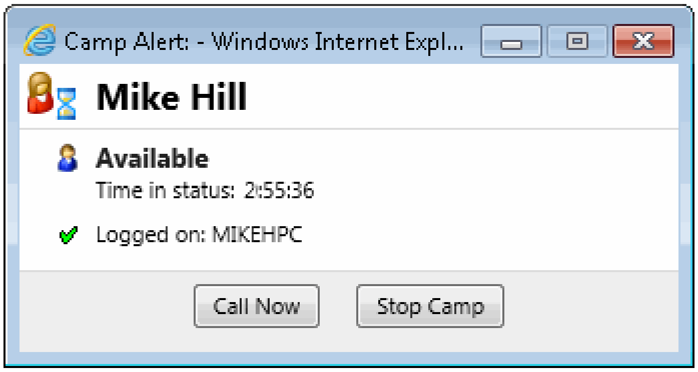
Tip: Call History items are added to your Call History dialog box when a call leaves your queue. When a call disconnects, it stays in the queue for a couple of minutes before it is automatically removed.

Related Topics

Customizing the Interface
Dial a recently dialed number
Use the Voicemail Viewer

Camp Desktop Alert

The Camp desktop alert lets you know when another user whose status you are monitoring, changes his status.



Related Topics

Camp on an Internal Extension

Using the Dial Pad

The Dial Pad enables you to a dial phone number to place a call, send DTMF tones to a connected call or the currently selected call, or make selections from an automated telephone menu system. The Dial Pad can also send DTMF tones through a connected SIP Soft Phone.

The Dial Pad is just one of several ways of initiating phone calls. For more information, see Making Calls.

To display the Dial Pad:

- From the **View** menu, click **Dial Pad**.

To use the Dial Pad:

1. Display the Dial Pad.
2. Click the appropriate buttons on the Dial Pad to dial a phone number.

   Result: The selected numbers appear in the Number field.

   Tip: Use the **CLR** button on the Dial Pad to clear an incorrect number, one digit at a time.

3. On the Dial Pad, click the **Call** button.

   Result: The number is dialed.

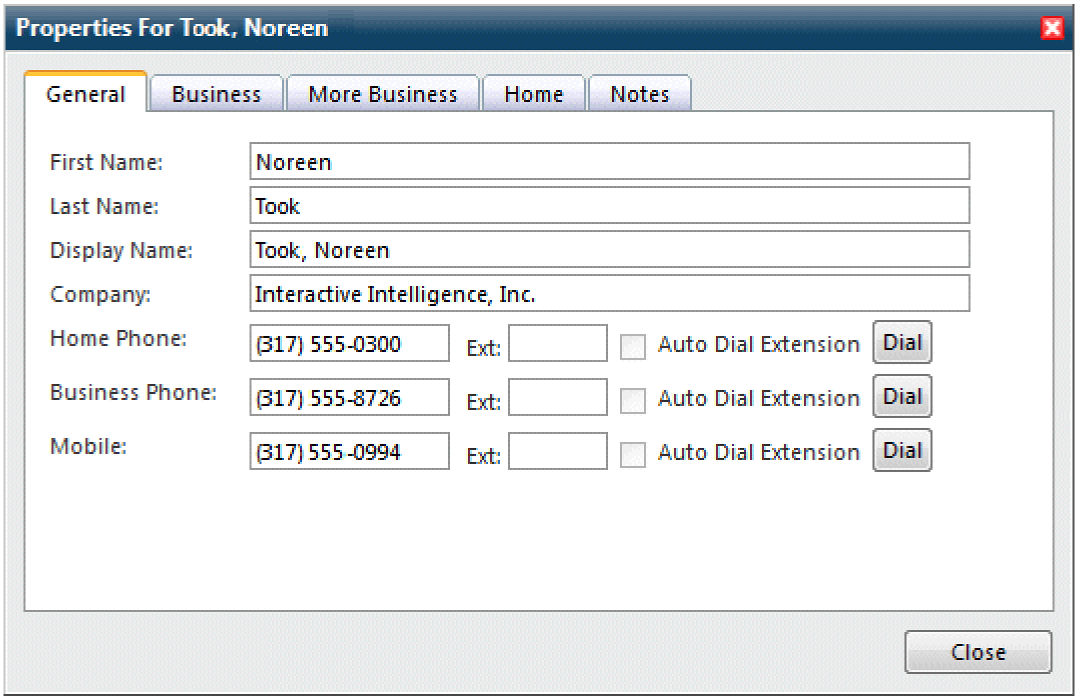
4. Optionally, click buttons on the Dial Pad to make selections from an automated telephone menu system. It's just like using a touch tone phone Dial Pad.
5. Click the **End** button on the Dial Pad to disconnect the call.

Related Topics

Disconnect button
Making Calls

Directory Properties Dialog Box

When you select a directory entry, the Properties dialog box enables you to view directory entry information.



Related Topics

Interaction Properties Dialog Box
Properties Button on the Directory Toolbar
View and Edit Directory Entries
Working with Directories

Interaction

In the CIC client, an interaction is a communication between two parties. An example would be a telephone call. Each interaction is represented by a queue item in **My Interactions**.

Note: In Interaction Client Web Edition, an email message is not an interaction. E-mail messages appear in your email program Inbox, not in My Interactions.

Interaction Properties Dialog Box

Use the Interaction Properties dialog box to add notes to an interaction or view the interaction log. You can also use the Interaction Properties dialog box to assign account codes and Wrap-Up codes to interactions. For more information, see Working with Account and Wrap-Up Codes.

Toolbar

Use the Interaction Dialog box toolbar to manage any selected and connected interaction.

Tip: Your CIC administrator can configure the CIC client to display the Interaction Properties dialog box every time you receive a call. See Calls Configuration.

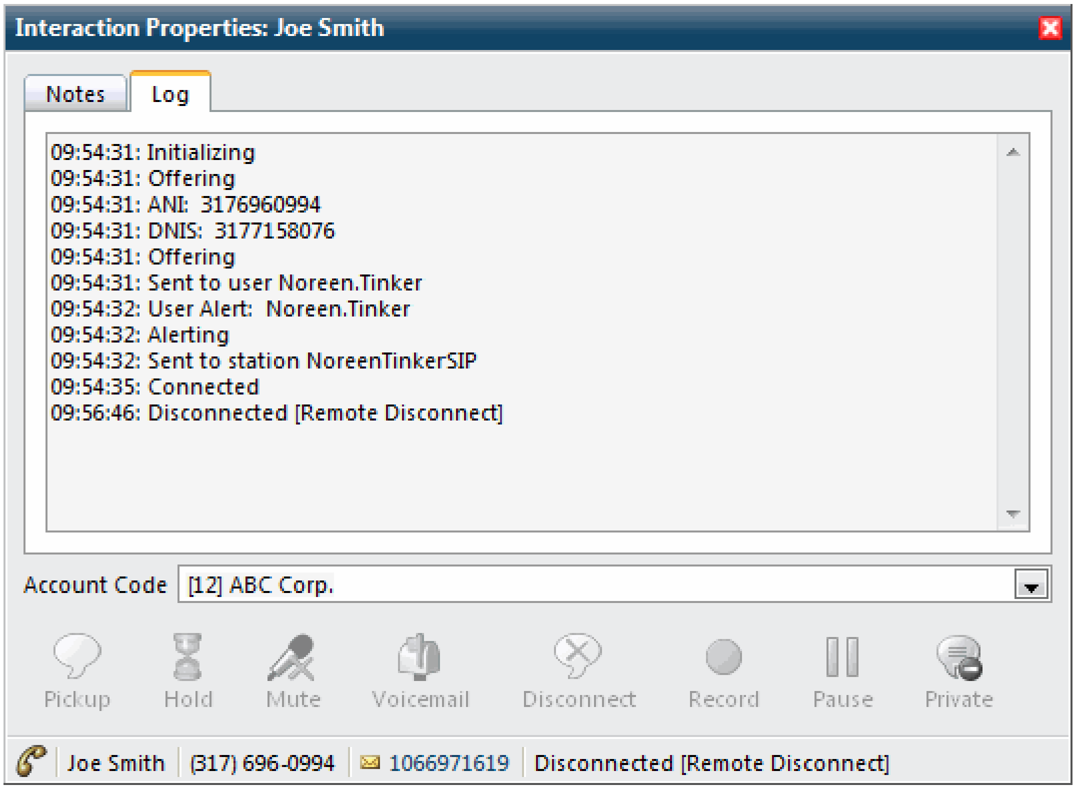
Access from My Interactions

You can access the Interaction Properties dialog box during or just after an interaction; that is before it is removed from My Interactions. You can add notes or view the log for the interaction. Also, if your company uses these codes and you have permission to use these features, you can assign Account Codes or Wrap-Up Codes. For more information, see Working with Account and Wrap-Up Codes.

To access the Interaction Properties dialog box from My Interactions:

- While the interaction is ongoing or still appears in My Interactions, select an interaction and click the Properties button on the Queue Control toolbar.

Result: The Interaction Properties dialog box appears.



Access from Call History

When you access the Interaction Properties dialog box from Call History, you can view Notes taken during the interaction or select the **Log** tab to view interaction connection information. You cannot make additional notes or assign Account or Wrap-Up codes to an interaction that is no longer in My Interactions or other user queue.

To access the Interaction Properties dialog box from Call History:

- Select an interaction and click the **Properties** button in the Call History dialog box.

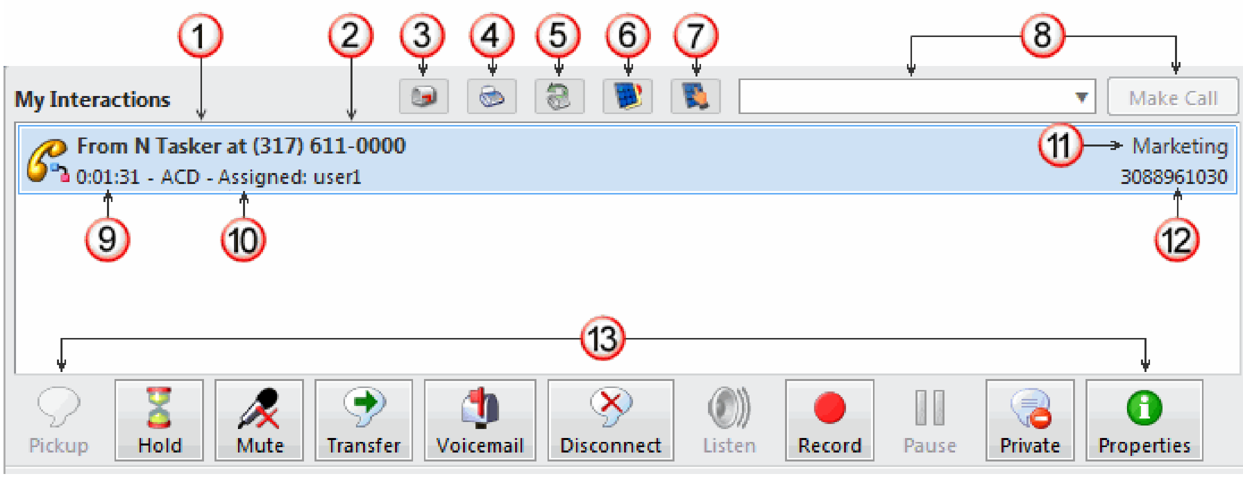
Related Topics

Assign Codes to an Incoming Interaction
Assign Codes to an Outgoing Interaction
View and Edit Interaction Properties
Working with Account and Wrap-Up Codes

My Interactions

The current interactions (calls) in your user queue appear in **My Interactions**. These are the interactions you currently manage. If you are a member of one or more ACD workgroups, interactions assigned to you from those workgroups appear in My Interactions. The name of the ACD workgroup from which those interactions came appears above the interaction ID.

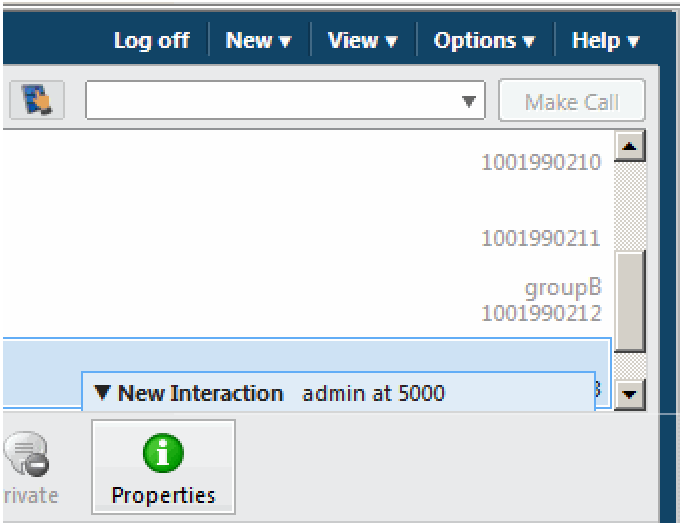
My Interactions contains the following controls and displays information about each interaction.



1	**Name**	The name of the person who is calling or whom you have called. For more information about how Interaction Center identifies a caller, see Caller Name.
2	**Number**	The telephone number of the person with whom you are speaking.
3	**Voice mail**	Click this button to display the Voicemail Viewer.
4	**Faxes**	Click this button to display a Fax Viewer.
5	**Call History**	Click this button to display the Call History list. From here you can click to dial the number of a recent call or display the properties of a call. For more information, see Call History.
6	**Speed Dial**	Click this button to display the Speed Dial List. For more information, see Display a Speed Dial View.
7	**Dial Pad**	Click this button to display the Dial Pad. Use the Dial Pad to place a call, send DTMF tones to a connected call or the currently selected call, make selections from an automated telephone menu system, or end a connected call. For more information, see Dial Pad.
8	**Number Fields and Make Call Button**	This field and associated button enable you to place outgoing calls from the CIC client. For more information, see Make a Call Using the Number Field and Make a Call Using the Make Call Button.
9	**Duration**	How long (hh:mm:ss) an interaction has been active.
10	**State**	The current condition of an interaction. For more information, see Understanding an Interaction's State.
11	**Queue**	If this is an ACD-routed interaction, the name of the ACD workgroup from which the call came appears above the interaction ID.
12	**Interaction ID**	This is an interaction's identification number. Numbers are assigned sequentially.
13	**Queue Control Toolbar**	The Queue Control toolbar helps you manage your interactions. The actions available on the Queue Control toolbar are determined by the state of the currently selected interaction. For more information, see Using the Queue Control Toolbar.

Interaction Notification

A notification appears in the bottom right corner of My Interactions when an interaction is alerting in the queue but is not visible due to the scroll position of the list. This alerts you that an interaction needs attention but is not visible. This notification disappears when there are no alerting interactions out of view anymore or when you select the alerting interaction.

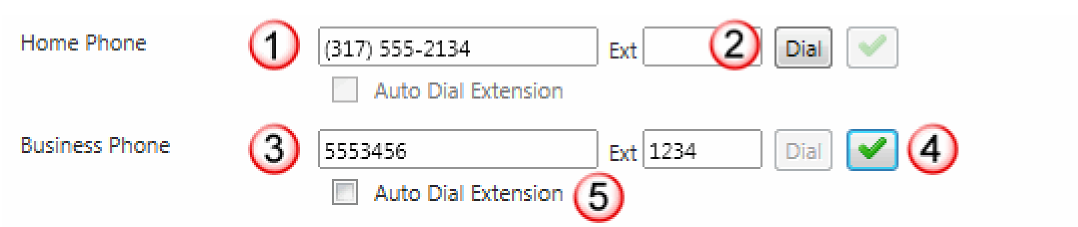


Tip: Click the Interaction Notification to select the out of view and alerting interaction.

Note: Your CIC administrator can configure the CIC client to select new alerting interactions automatically. This causes My Interactions also to scroll automatically to the alerting interactions and select it. In this case, the Interaction Notification does not appear.

Phone Number Controls

The CIC client verifies phone numbers that you enter against the dial plan for your organization or region. Verification ensures that the phone numbers you enter for directory entries and configuration options are correctly formatted and can be dialed.



1	**Validated phone number**	A validated phone number is formatted according to the rules of the dial plan for your organization or region. A validated phone number becomes the **display number** in the CIC client.
2	**Dial button**	Click the Dial button next to a validated phone number to dial that number.
3	**Unvalidated phone number**	A phone number appears exactly as you enter it until you validate it.
4	**Validate button**	Click the **Validate** button to check your phone number entry against the requirements of the dial plan for your organization or region.
5	**Auto Dial**	Select this check box to automatically dial the extension number after your

	Extension	call is connected. **Note**: The **Auto Dial Extension** check box is available only when the corresponding phone number and extension have values.

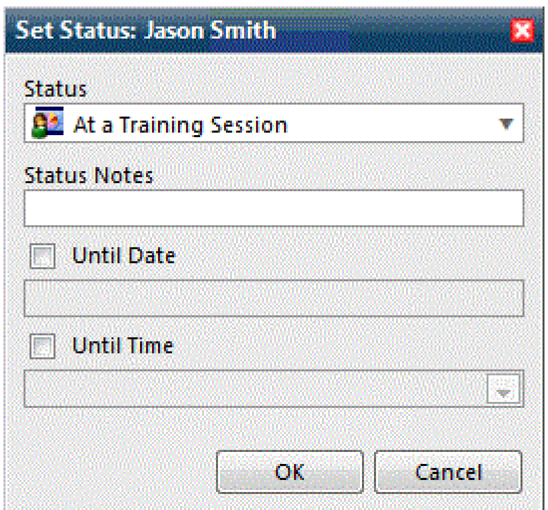
Related Topics

Follow-me Routing Options
Insert and Delete Directory Entries
View and Edit Directory Entries

Set Status Dialog Box

Requirements: You need the Change Status Users Access Control right to a specific user to be able to change that user's status.

The Set Status dialog box enables you to set your status.



Note: The appearance of this dialog box varies depending on the status you select.

Related Topics

Set Status Details
Set Another User's Status

Shortcut Keys

Interaction Client Web Edition does not currently support keyboard shortcuts for buttons and fields.

Supervisor Client Memos

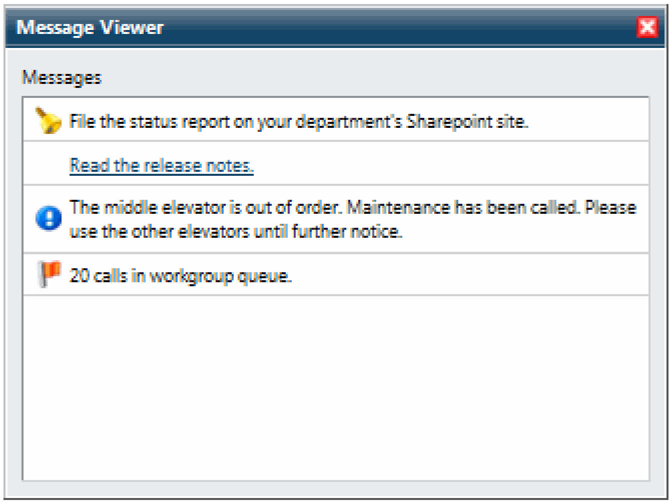
CIC administrators can easily communicate with selected users, workgroups or roles by means of brief messages. The administrator creates these Client Memos in Interaction Supervisor. Client Memos appear as notifications in the CIC client.

Notification Area

Notifications appear in the **Status Bar**. The client notification area presents the text of the client memo in a stock ticker-like format. If you receive multiple client memos, then the memos scroll. Current memos move into the notification area by rotating in from the bottom while any other memo rotates out the top. There is a pause of several seconds between the time the memo is fully rotated in and the time it begins cycling to the next memo to allow you some time to read the memo.

Click the **Message Viewer** icon in the Status Bar to display all the current notifications on your system. You can click a notification that contains a URL link, launching your browser and displaying the appropriate page.

Note: Only notifications appear in the Message Viewer. Desktop pop-ups do not appear.



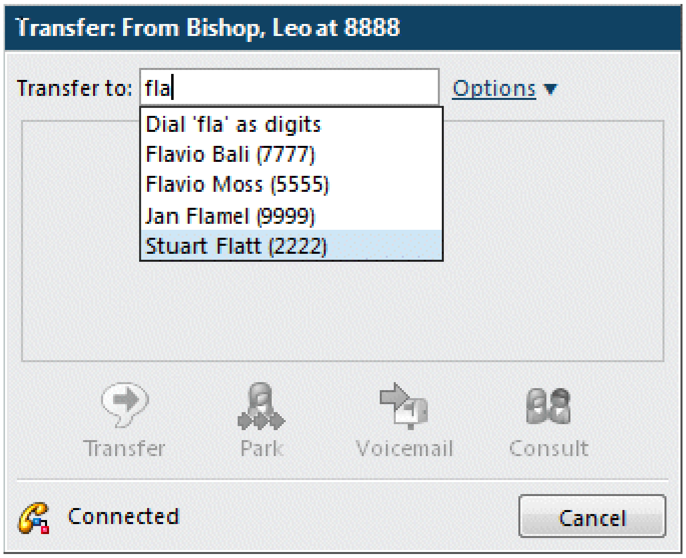
Related Topics

Status Bar

Transfer Dialog Box

Requirements: Access Control Rights determine which Attendant Profiles, Workgroup Queues and Station Queues are available as transfer targets. By default, the Transfer dialog box searches the Company Directory, and the appropriate Attendant Profiles, Workgroup Queues, and Station Queues for matching names and numbers. Your system administrator can use Interaction Administrator to create or change the server parameter, TransferDialogDirectories, to include additional directories in the search.

The Transfer dialog box enables you to locate and select the recipient of a transferred interaction, using the search criteria you prefer. Then you can easily start the transfer by clicking a button.



Using the Transfer dialog box

Warning: Perform a consult transfer only when you need to speak with both parties before completing the transfer. If this is not necessary, perform a **blind transfer**. Using a consult transfer to transfer a call to an attendant profile or to an agent's voice mail is **not a supported feature**. This may result in the original caller being sent to the default attendant profile. For more information about blind transfers, see Transfer a Call Without Consulting the Recipient.

As you type the recipient's name or number in the **Transfer To** text box, a drop-down list of choices appears.

- Selecting "Dial '*your entry*' as Digits" converts a text entry into numbers that the CIC client dials.
- Selecting a contact name from the drop-down list causes the CIC client to dial the associated extension or phone number.

You control the types of information used to find a match.

- Use the **Options** drop-down list to filter the contact search. You can choose to search any combination of Users, Workgroups, Standalone Phones, Station Queues, Station Groups, or Attendant Profiles.

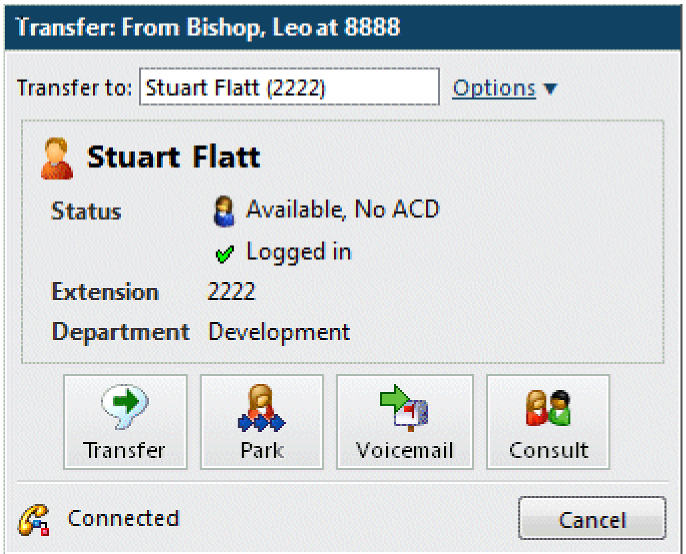
  Requirements: Search Station Queues and Search Workgroup Queues Access Control rights determine which station and workgroup queues are available as transfer targets.

- As you type in the **Transfer to** text box, the selections you made in the **Options** drop-down list determine which information is used to find a match.

  Note: These search criteria are saved and available for future transfers.

Status Information for Transfer recipient

After you select the transfer recipient, the Transfer dialog box displays the user status information if he or she is a CIC client user. This includes current user status, whether the user is logged on or on the phone. This can help you decide what kind of call transfer to use.



Related Topics

Park a Call on Another Person's Extension
Transfer a Call After Consulting the Recipient
Transfer a Call to Another Person's Voicemail
Transfer a Call Using a Transfer Button
Transfer a Call Without Consulting the Recipient

Using the Toolbars

Using the Toolbars

The CIC client includes two toolbars:

- The Queue Control toolbar helps you manage telephone calls. It appears in the My Interactions section.
- The Directory toolbar simplifies working with contacts listed in user directories. It appears on each directory view.

Related Topics

Using the Queue Control Toolbar
Using the Directory Toolbar

Using the Queue Control Toolbar

Using the Queue Control Toolbar

Requirements: Interaction Command Rights determine which buttons appear on the My Interactions Queue Control toolbar. My Interaction Rights determine the actions you can perform.

The Queue Control toolbar helps you manage your interactions. The actions available on the Queue Control toolbar are determined by the state of the currently selected interaction and your rights.

Related Topics

Queue Control Toolbar Buttons

Queue Control Toolbar Buttons

Queue Control Toolbar Buttons

Your CIC administrator controls which buttons appear on the Queue Control toolbar in My Interactions.

Requirements: You need the appropriate My Interaction Right to use a button when it appears in the My Interactions toolbar.

Click a button name for a description of its function.

Assistance

Disconnect

Hold

Listen

Mute

Pause

Pickup

Properties

Private

Record

Transfer

Voicemail

Related Topics

Using the Queue Control Toolbar

Assistance Button

Requirements: The "Assistance" Interaction Command Right determines whether the Assistance button can appear on a toolbar. The Request Assistance from Supervisors Security right enables you to request assistance from your supervisor.

Icon	
Location	Queue Control toolbar Chat window E-mail Window for Incoming Messages E-mail Window for Outgoing Messages
Description	Sometimes you encounter an interaction for which you need assistance. For example, a caller asks a question that you cannot answer. Or you are in the middle of a web chat when you need help from your supervisor. If you need help with an interaction, click the Assistance button to request assistance from your supervisor.

Note: The Assistance button is enabled only for ACD-routed interactions. If the interaction is not in a state in which this action can be performed, the Assistance button appears dimmed.

Related Topics

Assistance Process
Request Assistance From Your Supervisor
Using the Queue Control Toolbar

Disconnect Button

Requirements: The "Disconnect" Interaction Command Right determines if the Disconnect button can appear on a toolbar. The Disconnect Interactions Security right enables you to disconnect an interaction appearing in My Interactions.

Icon	
Location	Queue Control toolbar Interaction Properties Dialog Box
Description	Click Disconnect to disconnect the current interaction. When you click Disconnect, the icon for that interaction changes to a Disconnect icon. 

Note: The Disconnect button is unavailable if the interaction is not in a state in which this action can be performed.

Related Topics

Disconnect a Call
Using the Queue Control Toolbar

Hold Button

Requirements: The "Hold" Interaction Command Right determines if the Hold button can appear on a toolbar. The Put Interactions on Hold Security right enables you to hold an interaction appearing in My Interactions.

Icon	
Location	Queue Control toolbar Interaction Properties Dialog Box
Description	Click Hold to place the selected interaction on hold. To take the interaction off hold, click Hold again, or click Pickup. When you click this button, the icon for the selected interaction changes to a Hold icon 

Note: The Hold button is unavailable if the interaction is not in a state in which this action can be performed.

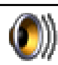
Tip: Your CIC administrator can configure a maximum hold time for interactions. By default, interactions on hold for longer than fifteen minutes are disconnected. Your administrator can change the amount of time an interaction can remain on hold and the behavior that occurs once the hold time is exceeded. For example, your administrator may choose to transfer interactions on hold longer than twenty minutes to another queue. For more information, see your CIC administrator.

Related Topics

Place a Call on Hold
Using the Queue Control Toolbar

Listen Button

Requirements: The "Listen" Interaction Command Right determines if the Listen button can appear on a toolbar. The Listen in on Interactions Security right enables you to listen to an interaction appearing in My Interactions.

Icon	
Location	Queue Control toolbar
Description	Click the Listen button to listen in on a call. You can listen to a caller leaving a voice mail message, to a call on hold, or to a conference call. The parties being listened to may not be aware that someone is listening to the call. For more information, see Determine if Someone is Listening to or Recording Your Interactions. **Tip**: Click the Private button while you are connected to an interaction if you do not want anyone to be able to listen to the conversation.

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Related Topics

Determine if Someone is Listening to or Recording Your Interactions
Listen to a Call
Listen to Someone Leave a Voicemail Message
Using the Queue Control Toolbar

Mute Button

Requirements: The "Mute" Interaction Command Right determines if the Mute button can appear on a toolbar. The Mute Interactions Security right allows you to disable the microphone on your telephone while working with an interaction appearing in My Interactions.

Icon	
Location	Queue Control toolbar
Description	Click **Mute** to disable the microphone on your telephone so that the other party or parties cannot hear what you are saying. Click **Mute** again to reactivate the microphone. If you are in a conference call hosted by a different IC server and you put the call on hold, you should first click Mute to avoid playing on-hold music to the other parties in a conference call. Also, if you are currently being assisted by a supervisor, the customer no longer hears you, but the supervisor can continue to converse with you. For more information, see Coach Button.

Note: The **Mute** button is unavailable if the call is not in a state in which this action can be performed.

Related Topics

Using the Queue Control Toolbar

Pause Button

Requirements: The "Pause" Interaction Command Right determines if the Pause button can appear on a toolbar. The Pause Interactions Security right also enables you to pause while recording an interaction appearing in My Interactions.

Note: **Pause** is unavailable if the call is not in a state in which this action can be performed.

Icon	
Location	Queue Control toolbar Interaction Properties Dialog Box
Description	Use this button to control a recording session. Click this button to pause the recording session. Click it again to resume the recording session.

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Related Topics

Record a Call
Record Button
Secure Record Pause Button
Using the Queue Control Toolbar

Pickup Button

Requirements: The "Pickup" Interaction Command Right determines if the Pickup button can appear on a toolbar. The Pickup Interactions Security right enables you to pick up an interaction appearing in My Interactions.

Icon	
Location	Queue Control toolbar
Description	Click this button to pick up the current interaction, or to take the current interaction off hold. When you click this button, the icon for a call changes to a Connected icon. 

Note: The **Pickup** button is unavailable if the interaction is not in a state in which this action can be performed.

Related Topics

Pick Up a Call From Voicemail
Using the Queue Control Toolbar

Private Button

Requirements: The "Private" Interaction Command Right determines if the Private button can appear on a toolbar. The Private Interactions Security right enables you to mark an interaction appearing in My Interactions as private.

Icon	
Location	Queue Control toolbar Chat Window Email Window for Outgoing Messages Interaction Properties Dialog Box
Description	Click this button to prevent other Customer Interaction Center users from recording or listening to your conversation. **Warning**: Use of the Private feature may be subject to your company's policies and should only be used in accordance with those policies. CIC handler customization can be used to track the use of the Private feature to ensure compliance with such policies.

Related Topics

Using the Queue Control Toolbar

Properties Button on the Queue Control Toolbar

Icon	
Location	Queue Control toolbar
Description	The Properties button enables you to view and edit detailed information on the selected interaction. For more information, see View and Edit Interaction Properties.

Related Topics

Properties Button on the Directory Toolbar
Using the Queue Control Toolbar
View and Edit Interaction Properties

Record Button

The Record button enables you to make recordings of all or selected parts of an interaction. These Ad hoc recordings are stored as WAV or XML files.

Requirements: The "Record" Interaction Command Right determines if the Record button can appear on a toolbar. The Record Interactions Security right enables you to record an interaction appearing in My Interactions.

Icon	
Location	Queue Control toolbar Chat Window Interaction Properties Dialog Box
Description	Click Record to record the currently selected call or chat. A call recording is saved as a. wav file. A chat recording is saved as a .txt file. Clicking Record the first time starts the recording session for a call. Clicking Record again stops the recording session for a call. **Note:** You can press the Record button more than once to stop or continue recording your interaction. The CIC client stores each part of the recorded conversation in separate audio files or text files, and sends them to you in email message attachments after you end the call.

Note: The Record button is unavailable if the call is not in a state in which this action can be performed or if you do not have rights to record calls. Contact your CIC administrator if you need security rights to use this feature.

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Related Topics

Record a Call
Using the Queue Control Toolbar

Secure Pause Button

Requirements: The "Secure Recording Pause" Interaction Command Right determines if the Secure Pause button can appear on a toolbar. It also controls whether the Secure Pause command appears on a shortcut menu or is available via a keyboard shortcut. The Secure Recording Pause Interactions Security right enables you to secure pause a recording of an interaction appearing in My Interactions.

Note: The **Secure Pause** button is enabled when you select the parent interaction (call), not the recording.

Icon	
Location	Queue Control toolbar
Keyboard shortcut	**Ctrl+Shift+E** **Tip:** Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
Description	Click **Secure Pause** to avoid recording sensitive information, such as a Social Security number or credit card number, when you are connected to a **call interaction**. During a secure recording pause, your recording of the interaction (and all recordings by any other monitors of this interaction) are paused for a configured period of time. The Secure Pause button displays a countdown timer of how long all recordings will continue to be paused. **The Secure Pause does not end until the timer reaches zero.**  You can press **Secure Pause** again during a pause to reset the countdown timer to the maximum duration of a pause. The maximum duration of a Secure Pause is configured in Interaction Administrator. Contact your CIC administrator if you have questions about the length of a Secure Pause. **Tip**: Pressing **Secure Pause** multiple times during a pause does not increase the duration beyond the maximum time limit. **Note:** The final recording contains a beep to indicate secure (non-recorded) segments. The recording does not play silence during the secure pause segment. These segments are omitted from the recording.

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Related Topics

Record a Call
Secure Pause a Recording
Using the Queue Control Toolbar

Transfer Button

Requirements: The "Transfer" Interaction Command Right determines if the Transfer button can appear on a toolbar. The Transfer Interactions Security right enables you to transfer an interaction appearing in My Interactions.

Icon	

Location	Queue Control toolbar
Description	Click this button to open the Transfer dialog box where you can enter the telephone number of the transfer recipient in the **Transfer to:** text box, then click **OK** to complete the transfer.

Note: The Transfer button is unavailable if the selected interaction is not in a state in which this action can be performed.

Related Topics

Transfer a Call After Consulting the Recipient
Transfer a Call to Another Person's Voicemail
Transfer a Call Using a Transfer Button
Transfer a Call Without Consulting the Recipient
Using the Queue Control Toolbar

Voicemail Button

Requirements: The "Voicemail" Interaction Command Right determines if the Voicemail button can appear on a toolbar. The Transfer Interactions to Voice Mail Security right enables you to transfer an interaction appearing in My Interactions to your voice mail.

Icon	
Location	Queue Control toolbar Interaction Properties Dialog Box
Description	Click this button to transfer a selected call to your voice mail account. Use this button if you want to send an incoming call to your voice mail instead of speaking with the caller.

Note: The Voicemail button is unavailable if the call is not in a state in which this action can be performed.

Related Topics

Send to Voicemail Button
Transfer a Call to Another Person's Voicemail
Transfer a Call to Your Voicemail
Using the Queue Control Toolbar

Using the Directory Toolbar

Using the Directory Toolbar

Use the Directory toolbar to simplify working with contacts and managing the flow of incoming interactions. The Directory toolbar provides actions involving directory entries and active interactions. The Directory toolbar is located at the bottom of each directory tab.

Some buttons may not be available in all situations. If a button appears shaded, or grayed-out, you may not be able to use it on the currently selected interaction or contact.

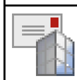
Related Topics

Directory Toolbar Buttons
Using the Toolbars

Directory Toolbar Buttons

Directory Toolbar Buttons

The following list contains the buttons available for the Directory toolbar. Customizing Toolbars

Toolbar Button	Label	Function
	Camp	Camp
	Chat	Initiate new Chat
	Dial	Dial default phone number
	Email	Send an email message to the business address for the selected directory entry.
	Park	Park on Queue
	Properties	Properties
	Status	Change user’s status
	Transfer	Blind transfer to default number
	Voicemail	Send to Voicemail

Related Topics

Using the Directory Toolbar

Camp Button

Icon	
Location	**Directory Toolbar**
Description	Click this button to camp on the internal extension of a selected directory entry. Use this button to watch another user’s status. You are alerted when the other user’s status changes to an available type.

Related Topics

Camp Desktop Alert
Camp on an Internal Extension

Change User’s Status Button

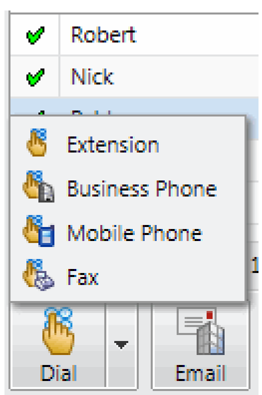
Requirements: You need the Change Status Users right for the selected user to set another user's status.

Icon	
Location	**Directory Toolbar** **Note**: The Change User's Status button may not appear on your Directory toolbar by default. Contact your CIC administrator about the necessary user rights. For a list of available buttons, see Directory Toolbar Buttons.
Description	You can set another user's status in the Company Directory or other directory view.

Related Topics

Set Another User's Status

Dial Button

Icon	
Location	**Directory Toolbar**
Description	Use this button to dial a specific number associated with a selected directory entry by doing one of the following: § Select an entry in the Company Directory and then click the Dial button to dial the default number. § Select an entry in the Company Directory and then click the arrow on the Dial button. Click one of the displayed "Dial" entries to dial the associated number. 

Related Topics

Make a Call Using the Dial Button
View and Edit Directory Entries

Send Email Message Button

Use the Send Email message button to send an email message to the business email address associated with a selected directory entry.

Note: For more information about checking which email addresses are associated with your directory entries, see View Directory Entries.

Icon	
Location	**Directory Toolbar**
Description	Select a Company Directory entry and click the Email button to use your email program to send an email message to the business address for the selected directory entry.

Related Topics

Send an Email Message

Park on Queue Button

Icon	
Location	**Directory Toolbar**
Description	You can place any connected call or connected ACD-routed email interaction in your queue in a selected user's queue or workgroup queue. Select a directory entry and then click this button. This removes the interaction from your queue (My Interactions). It appears in the selected person's queue.

Properties Button on the Directory Toolbar

Icon	
Location	Directory Toolbar
Description	The Properties button on your Directory toolbar enables you to view and edit detailed information for the selected directory entry. For more information, see View and Edit Directory Entries.

Related Topics

Properties Button on the Queue Control Toolbar
View and Edit Directory Entries

Send to Voicemail Button

Icon	
Location	**Directory Toolbar**
Description	Use this button to transfer a call to a selected CIC user's voice mail account. Select a directory entry and click this button. The currently selected call is transferred to

	the designated user's voice mail.

Related Topics

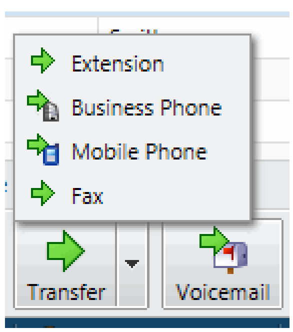
Transfer a Call to Another Person's Voicemail
Transfer a Call to Your Voicemail
Using the Queue Control Toolbar
Voicemail Button

Transfer Button

Requirements: The "Transfer" Interaction Command Right determines if the Transfer button can appear on a toolbar. The Transfer Interactions Security right enables you to transfer an interaction appearing in My Interactions.

<table>
<tr><td>Icon</td><td></td></tr>
<tr><td>Location</td><td>Directory Toolbar</td></tr>
<tr><td>Description</td><td>Use this button to transfer a call to a specific number associated with a selected directory entry by doing one of the following:

Select an entry in the Company Directory and then click the Transfer button to transfer the call to the default number.
Select an entry in the Company Directory and then click the arrow on the Transfer button. Click one of the displayed "Transfer" entries to transfer the call to the associated number.


</td></tr>
</table>

Related Topics

View and Edit Directory Entries

Configuration Options

Configuration Options

The CIC administrator sets your CIC client configuration options in Interaction Administrator. Contact your CIC administrator if you have questions about your settings.

Alerting Options

Alerting Options

Requirements: The Multiple Calls Security right controls whether you are alerted to the arrival of a new call when you are already on a call. This type of alert is in addition to the alerting options you can figure yourself.

The CIC administrator configures how the CIC client notifies you of new incoming calls, faxes or voice mail, among other options. For more information about alerting options, see:

- General Alerting Options
- Voice Mail / Fax Paging

Firefox Ring Sounds

If you use the Mozilla Firefox browser with Interaction Client Web Edition, you need to install the Adobe Flash add-on for Firefox, version 9 or later, in order to hear a ringing sound when a new call alerts in My Interactions.

Consult the Mozilla Firefox website for instructions on downloading and installing Firefox add-ons.

Note: If you do not install this add-on, you may see a warning to "Install Missing Plug-ins" when a new call alerts.

General Alerting Options

Your CIC administrator can configure how the CIC client works. Contact your CIC administrator if you have questions on how any of these options are set on your system.

Among the general alerting options that can be set by your CIC administrator are:

- If your telephone rings when new calls appear in My Interactions.
- If new interactions ring through your computer’s speakers.
- If new interactions ring on the computer if you are already on the phone.
- If an incoming interaction causes the CIC client to appear on top of any other application you are running. This is also called "popping the client."
- How long an incoming non-ACD call rings before timing out.

Voice Mail / Fax Paging

Your CIC administrator can use Interaction Administrator to configure how Interaction Client Web Edition works. Contact your CIC administrator if you have questions on how any of these options are set on your system.

Your CIC administrator can set voice mail alerting options. These options control whether you receive alerts:

§ When you have voice mail.

§ At a designated telephone number.

§ For new voice mail messages.

§ Every time you receive a voice mail message.

§ Only for voice mail messages marked urgent.

§ Any time of the day or only during specific hours (office hours, for example).

Call Options

Call Options

The CIC administrator configures how the CIC client manages incoming interactions. For more information, see:

- Calls
- Follow Me
- Call Coverage
- Personal Prompts

Calls Configuration

Your CIC administrator uses Interaction Administrator to configure how Interaction Client Web Edition works. Contact your CIC administrator if you have questions on how any of these options are set on your system.

Your CIC administrator can set the following calls options:

Calls Options

Timeout for external calls (in seconds):	This option determines the number of seconds your outgoing calls ring before they are disconnected. **Note**: This setting is always used for calls forwarded to you when your status is **Available, Forward**. For calls you place yourself, this time out setting is ignored unless **Analyze outgoing external calls** is also selected and you are dialing from the CIC client. If you are dialing manually (using the handset), your outgoing call ignores this setting and continues ringing until answered.
Use advanced dialing options (account code, workgroup)	If enabled, the **Advanced Dialing Options** dialog box appears when you call. You can then assign an Account Code to the call and associate the call with a Workgroup. For more information, see Advanced Dialing Options. **Note**: This setting defaults to the setting in Interaction Administrator every time you log on. You can temporarily override this default setting, by selecting or clearing the **Use Advanced Dialing** check box on the **Options** menu.
Analyze outgoing external calls	If enabled, Telephony Services (TS) monitors whether the outgoing interaction connects to a person or an answering machine. An interaction is listed in the Dialing state after dialing a number from the **Number** field. After the remote party picks up the interaction, the state changes to Connected. If an interaction does not connect, then TS tries to diagnose why the attempt to connect failed. TS displays the reason: the other party did not answer or the line is busy.
Show alert dialog when call becomes unsecure	If enabled, a Security Alert dialog box appears when a call is downgraded from secure to non-secure.
Enable call waiting	If enabled, you are notified when another call is coming in while you are on the phone.
Mute calls when transferring	If enabled, transferred calls are muted so the caller cannot hear what you are saying. (However, the transfer recipient can hear you.) Once you have either transferred the call or closed the Transfer dialog box, the call is no longer muted.
Open new window for	If enabled, the Interaction Properties dialog box appears every time you receive a call. You can enter notes on the current call in this dialog box. For more

incoming calls	information, see Interaction Properties Dialog Box.
Operator target number:	This option determines the telephone number or extension to which callers who choose **0** (zero) to exit out of your voice mail are sent.

Set Up Follow-me Routing

Requirements: You need the Follow Me Security right to use Follow-me routing in the CIC client. Your Phone Number Classifications-Follow Me Access Control rights determine which phone numbers you can use as Follow-me numbers.

To handle calls when you are away from the office, the CIC client can search for you at different telephone numbers. The client consecutively calls the telephone numbers in a follow-me routing list. After locating you, the client can transfer the call to you at that location.

You can set up follow-me routing in the CIC client. You can also use the Telephone User Interface to turn Follow-me on or off and configure Follow-me phone numbers. For information about setting up Follow-me numbers via the TUI, see the *Telephone User Interface User's Guide* or **Quick Reference Card** in the CIC Documentation Library.

To add a follow-me phone number:

1. Set your status to **Available, Follow-Me**.
2. Click the **Set status details** link next to the My Status drop-down list.
3. In the **Set Status** dialog box, complete the fields as described below:

Status Notes	Enter any additional information on your current status. As a convenience, the notes from the last time you selected this status appear in Status Notes. You can make any necessary changes to these notes. **Requirements**: You need the Status Notes right in order to create or modify Status Notes.
Until Date **Until Time**	**Do any of the following:** · Select the **Until Date** or **Until Time** check box to use the default date and time. **Result**: The current date appears in the **Until Date** field. The CIC client automatically rounds the current time to the next half hour, and sets that time in the **Until Time** field. · To change the **Until Date**, select the check box and click in the text box. Select a date from the displayed calendar. · To change the **Until Time**, select the check box, and click the drop-down list arrow to select a different time. **Note**: The date and time you select are played for your incoming calls.

4. Click **Configure Follow Me Numbers**.
5. To prompt callers for their name, select the **Screen Calls** check box.

Note: If **Screen Calls** is selected and you answer a follow-me call, you hear a recorded segment from the caller before you accept the call. You can either accept the call or send it to voice mail.

6. In the **Follow Me Numbers** dialog box, click the **Add** button (plus sign).

7. Complete the fields as described below.

Number	Enter a telephone number you want the CIC client to call if you are not available. Click the **Validate** button to check your phone number entry against the requirements of the dial plan for your organization or region. **Note**: For information about entering, editing and verifying phone numbers, see Phone Number Controls. **Dialing Pause** You can use both commas (,) and slashes (/) with the number. A comma causes a two-second delay and numbers typed after the slash are dialed only after a connection is made. For example, if you typed the number "555-1212 / 101, 2222", the first seven digits are dialed. After a connection is made, the digits 101 are dialed, and after two seconds, the digits 2222 are dialed. **Note**: Use of the comma (,) to create a two-second delay is not supported in all platforms. This issue will be resolved in a future release.
Extension	Enter an extension number. This number is dialed after a connection is made.
Timeout	Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds. **Note**: If the forwarding number is an internal station extension, this timeout value is ignored and the station is alerted for 45 seconds.
Use Pin	Select this check box to require that anyone who answers a follow-me router call to enter your CIC client password to accept the call. **Note**: This feature can prevent someone else from answering your calls through the follow-me routing process.

8. To add another number, repeat steps 4 and 5.

9. Click **OK** to save your settings and close the **Follow Me Numbers** dialog box.

To change your follow me settings:

1. Perform any of the following actions to update your follow me settings:
    - To change the order of your follow-me numbers, select a number and click **up** or **down arrows** above the number list**.**
    - To delete a number, select a number and click the **Remove** button **(red X)**.
    - To change the settings for a number, double-click the number and type new values in the **Number**, **Extension**, and **Timeout** text boxes and select or clear the **Use Pin** check box.

2. Click the **OK** button to save your settings and close the Follow Me Numbers dialog box.

Related Topics

Understanding Follow-me Routing
Start Follow-Me Routing

Call Coverage Options

Your CIC administrator can use Interaction Administrator to configure how the CIC client works. Contact your CIC administrator if you have questions on how any of these options are set on your system.

Among the call coverage options that can be set by your CIC administrator are:

- The internal number or CIC extension designated as your call coverage number.
- Whether forwarded callers leave voice mail in the mailbox for the designated call coverage number or your regular voice mailbox.
- The types of calls that are forwarded to a designated call coverage number.
  - **All Calls**.
  - **Internal Calls**. This includes calls from internal numbers or extensions on the CIC system.
  - **External Calls**. This includes calls from outside the CIC system (calls from public service telephone networks).
  - **Unknown Calls**. This includes calls from outside the CIC system that do not have caller ID.
- Whether calls are forwarded to a call coverage number when your status is Do Not Disturb (DND), including not being logged onto the CIC client.
- Whether calls are forwarded to a call coverage number when you are on the phone.
- Whether calls are forwarded to a call coverage number when you do not answer.

About Personal Prompts

Personal prompts are messages you record which are played to people who call you. The specific prompt played depends on your status. The default statuses are divided into two categories; DND (Do Not Disturb) and a form of Available. Your CIC system administrator assigns these attributes to statuses in Interaction Administrator.

For example, if your status is DND (for example, At Lunch or Gone Home), then calls are automatically directed to your voice mail. The call does not ring to your station. If you have recorded and activated an "Out of Office Message," then your "Out of Office Message" immediately plays to the caller. If you have not recorded an "Out of Office Message," then the appropriate status message plays to the caller. The status message also plays if you have recorded the "Out of Office Message" but have not activated it. If a status message is not recorded, the generic message is, "<Your name> is not available. Please leave a message after the tone."

If your status is a form of Available (for example, Available, Forward), then interactions alert your queue. If you recorded a "No Answer Message" and you do not answer an incoming call (the alert times-out), then your "No Answer Message" plays to the caller. If you have not recorded this personal prompt, then the above-mentioned generic message plays to the caller.

Note: A server parameter set in Interaction Administrator can suppress the generic message for "Available, Forward" status. Contact your CIC administrator for details.

Click here for possible status values.

Note: You can use the default TUI (Telephone User Interface) to manage your personal prompts, including recording and activating the Out of Office greeting and recording the No Answer greeting. For more information, see the *IC TUI User's Guide*.

Related Topics

Set your status

Miscellaneous Configuration Options

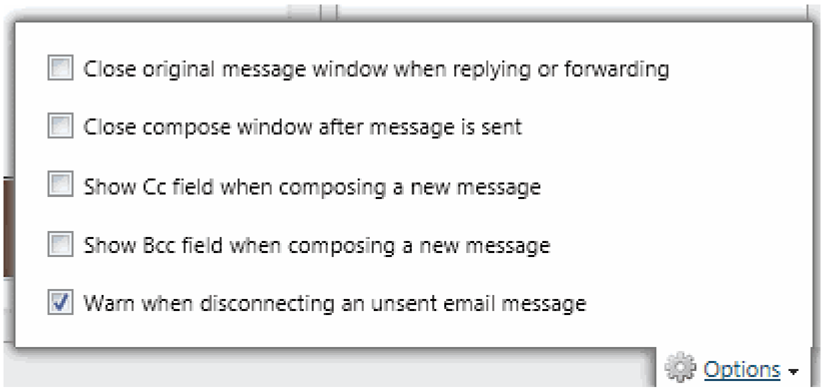
Email Configuration

Requirements: You need the Customize Client Security right to configure email pickup or reply options. Client templates can contain configuration settings that determine your Emails configuration and control whether you can alter configuration settings.

You can configure the default behavior of email messages in the Email Window for Incoming Messages and Email Window for Outgoing Messages when you pick up or reply to an ACD-routed email message.

1. In the Email Window for Incoming Messages and Email Window for Outgoing Messages, click the **Options** link.

   Result: An Options popover appears in the email window.



2. Select any or all of the following options:

Close original message window when replying or forwarding	· Select this option to close the Email Window for Incoming Messages automatically when you select **Reply** or **Forward** to open the Email Window for Outgoing Messages. This does not disconnect or put on hold the original email message. The original email message remains in My Interactions. · Clear this option to leave the Email Window for Incoming Messages open while composing your reply or forwarded email message. You must close this window manually when you finish work with the interaction.
Close compose window after message is sent	· Select this option to close the Email Window for Outgoing Messages when you send an email message or replay or forward an email message. · Clear this option to enable you to close the Email Window for Outgoing Messages manually. **Note**: The corresponding interaction is automatically disconnected when you send an email message or message reply, regardless of whether the window closes automatically.
Show Cc field when composing a new message	· Select this option to display the Cc (Carbon copy) field automatically in the Email Window for Outgoing Messages. · Clear this option to hide the Cc field. You can display this field as needed by selecting the Add Cc control in the Email Window for Outgoing Messages.

Show Bcc field when composing a new message	· Select this option to display the Bcc (Blind carbon copy) field automatically in the Email Window for Outgoing Messages. · Clear this option to hide the Bcc field. You can display this field as needed by selecting the Add Bcc control in the Email Window for Outgoing Messages.
Warn when disconnecting an unsent email message	· Select this option to receive a warning that an email message cannot be sent after it is disconnected. · Clear this option to avoid the warning message. However, if you accidentally disconnect an email message, the message is not saved in draft form and cannot be continued later. It is removed from the queue.

3. To apply the changes and close the Options popover, click anywhere in the email window outside the popup area.

Related Topics

Pick Up or Reopen an Email Message
Reply to an Email Message
Working with Email Messages

Views

Customizing the Interface

You can customize queue or directory views.

- Add or Remove View Columns
- Add or Close Views
- Change View Order
- Customize Columns
- Display the Workgroup and Profile View
- Move Views

Add or Remove View Columns

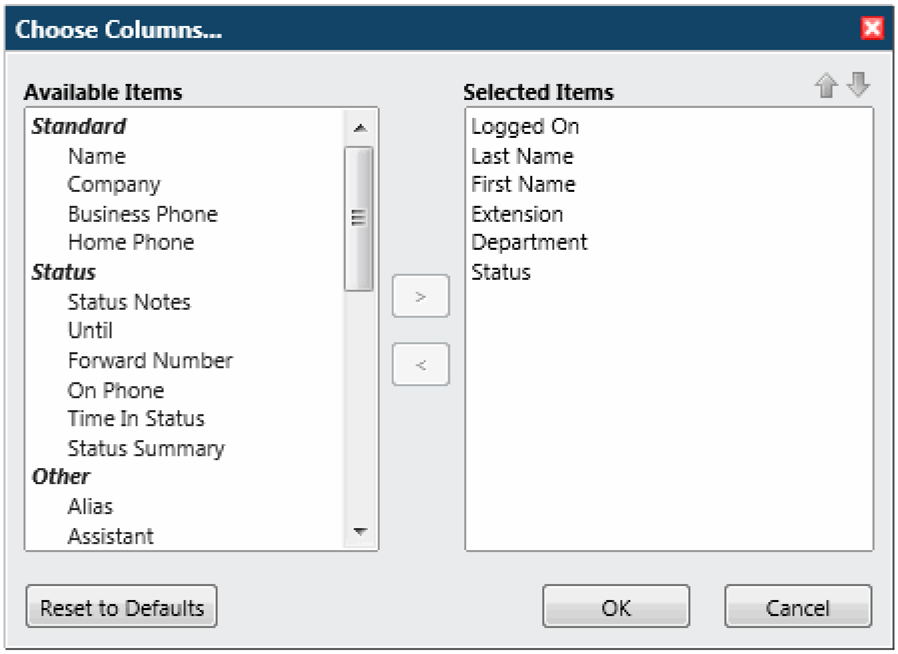
Requirements: The View Directory Status Columns Access Control right determines which Status columns you can add to a directory view.

You can add or remove columns from any directory view.

To add or remove a column:

1. Click the Choose Columns control on the directory view.

   Result: The Directory Columns dialog box appears.



2. Do one of the following:

   - To add a column, select a column name in the **Available Column**s, then click > to move it to the **Selected Columns** list.
   - To remove a column, click the name of a column in the **Selected Columns** list, then click < to move it to the **Available Columns** list.
   - Click **Reset to Defaults** to restore the initial column settings for the currently selected directory view.

   Note: This resets column sort, filter, width, and order settings to the default values.

3. Click **OK**.

Related Topics

Customize Columns
Working with the Company Directory
Working with Other Directories

Add or Close Views

Requirements: The View General Directories Access Control right determines which General Directories you can display. If you have the Directory Administrator Security right, you can edit other user's public directories. Certain rights control which directory views you can display. For more information, see the View General Directories right and the View Workgroups right.

You can configure which available directory views appear in the CIC client interface by adding or removing views. You also control the order in which the views appear.

Note: Any directory views that you open during a CIC client session are restored (along with any filters) in future sessions or after a browser refresh.

Tip: To display directories in a specific order, see Move Views.

To add a directory view:

1. Click the **New Tab** button.

   Result: A drop-down list of types of directories appears.

2. Click the appropriate directory type.

   Result: The drop-down list expands to show the names of each directory in this type.

3. Click the name of the directory you want to display.

   Result: The directory view appears in a new tab in the CIC client.

To close a directory view:

- Click the **Close** button on a directory tab.

Related Topics

Customizing the Interface
Working with the Company Directory
Working with Other Directories

Customize Columns

Requirements: The Customize Client Security Right enables you to customize columns.

Any changes you make to the order and size of columns are persisted between logons to the same CIC server from the same web browser. A horizontal scroll bar appears as needed if the total width of the columns exceeds the space available in the browser window.

To reorder columns:

1. Click and hold on a column heading.
2. Drag it over the desired location.
3. Release the column heading.

To resize columns:

- Drag the boundary on the right side of the column heading until the column is the width you want.

To sort a view:

- Click on a column heading to sort the contents of a view.
- Click on the same column heading to sort the contents in reverse order.

Related Topics

Add or Remove View Columns
Working with the Company Directory
Working with Other Directories

Move Views

You can rearrange the order of directory views with drag and drop.

Note: You cannot move the My Interactions view.

To move directory views:

1. Click and hold the directory tab for the view you want to move.

   Result: The tab moves where you point.

2. Without letting go of the mouse button, point to the directory tab occupying the position where you want to move the view.

   Result: A copy of the tab appears in the position to which the view will move.

3. Release the button to drop the view in its new location.

   Result: The view moves to the selected tab position.

Related Topics

Add or Close Views

Working with Account and Wrap-Up Codes

Working with Account and Wrap-Up Codes

Requirements:

- To display Account Code fields, you need the View Account Codes Access Control right.
- To assign an Account Code to an interaction, you need the Account Code Verification Security right.
- To see the **Advanced Dialing Options** dialog box, select **Use Advanced Dialing** on the Options menu.
- To display the Account code column in My Interactions or other queue view, you need the View Queue Columns Access Control right.
- To assign a Wrap-Up code, you must be a member of a workgroup for which Wrap-Up codes are configured and active.

This section provides background information on account codes and Wrap-Up codes and how they are used in this CIC client.

Related Topics

Advanced Dialing Options
Assign Codes to an Interaction
Assign Codes to an Incoming Interaction
Assign Codes to an Outgoing Interaction
Numerically Sort Account Codes
Understanding Account Codes
Understanding Wrap-Up Codes

Advanced Dialing Options

Advanced Dialing enables you to assign an Account Code and designate a workgroup for outgoing calls.

Note: Designating a workgroup after you dial enables you to associate an outbound call with your workgroup. For more information, see Dial on Behalf of a Workgroup.

Configuration Requirements

Your system must be appropriately configured in order for you to use Advanced Dialing Options. Also, your CIC administrator must configure this feature in Interaction Administrator before it is available to you.

In Interaction Administrator, your CIC administrator:

- Configures and enables Account Codes.

  Note: This configuration is not required if your CIC administrator wants you to designate only a workgroup name on outgoing interactions and not assign an account code.

- Grants you access to all or some of the configured Account Codes.
- (Optionally) Enables **Advanced Dialing Options** on your CIC user account.
- Assigns you to at least one ACD workgroup.

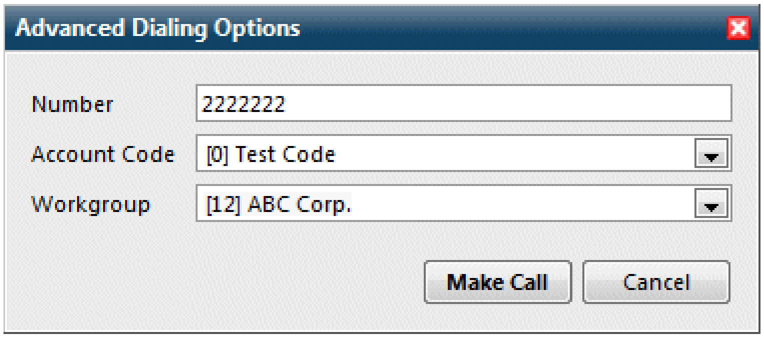
In the CIC client, you:

- Select **Use Advanced Dialing** on the **Options** menu.

  Note: Your CIC administrator can have already selected this setting for you. You can override the default setting for this option, by selecting or clearing this check box. When you log on, this setting defaults to the setting in Interaction Administrator. See Calls Configuration.

Using the Advanced Dialing Options Dialog Box

If Advanced Dialing Options are appropriately configured, the Advanced Dialing Options dialog box appears when you start a call.



Here are some things to note about the Advanced Options dialog box:

- The Account Code and Workgroup drop-down lists default to the last values used in this dialog box.
- If Account Codes are enabled in Interaction Administrator and the **Advanced Dialing Options** dialog box appears, an account code is required.

  Note: There is no blank or <none> account code as there is in the **Workgroup** drop-down list. Your administrator can create a dummy account code for situations where a real account code does not apply; for example, a personal call. Contact your CIC administrator if you have questions about which account code to use.

- Your CIC administrator controls the order of the account codes in the **Advanced Dialing Options** dialog box. The CIC client can sort account codes either by code (number) or description. For more information, see Numerically Sort Account Codes.
- A workgroup code enables you to associate an outbound call with your workgroup. Primarily used for administrative and reporting purposes, this feature enables the call to count toward an agent's and the workgroup's statistics. For more information, see Dial on Behalf of Workgroup.

- The Workgroup drop-down list contains the names of the ACD workgroups in which you are **currently active**. For more information about setting your status to active, see Change Your Workgroup Activation Status.
- You can set the workgroup code to <None> for calls not made on behalf of a workgroup.
- You can only associate a call with a workgroup at the time the call is started.
- After you dial on behalf of a workgroup, you cannot associate the call with another workgroup.
- Even if Advanced Dialing Options are appropriately configured, if you don't have access to account codes and you deactivate your workgroup status, the Advanced Dialing Options dialog box doesn't appear.
- If you enable **Advanced Dialing Options** and the CIC administrator enables single click dialing, you don't have to confirm you want to dial selected number. The Advanced Dialing Options dialog box takes the place of the Confirm Dial dialog box. Clicking **Make Call** in the Advanced Dialing Options dialog box is the same as clicking **Yes** in the confirmation dialog box.

Related Topics

Assign Codes to an Outgoing Interaction
Calls Configuration

Assign Codes to an Incoming Interaction

Requirements: See Working with Account and Wrap-Up Codes.

You can assign Account codes and Wrap-Up codes in the Interaction Properties dialog box.

To assign an account code to an incoming interaction:

1. Select the incoming interaction and click the **Pickup** button, or pick up your telephone handset.
2. Click the Properties button.

   Result: The Interaction Properties dialog box appears.
3. In the Interaction Properties dialog box, click the arrow at the end of the **Account Code** field and select the account code you want to assign to this interaction.
4. Optionally, if your CIC administrator configured Wrap-Up codes, you can assign a **Wrap-Up Code** in a similar fashion.

   Note: If you don't assign a code during an interaction on a queue configured for Wrap-Up codes, you can be prompted to assign one when your part of the interaction ends. For more information, see Understanding Wrap-Up Codes.
5. Click the **Close** button in the upper right corner of the Interaction Properties dialog box.

Related Topics

Assign Codes to an Interaction
Understanding Account Codes
Understanding Wrap-Up Codes

Assign Codes to an Outgoing Interaction

Requirements: See Working with Account and Wrap-Up Codes.

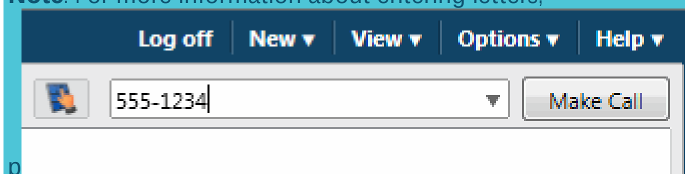
If your company uses account codes or tracks calls by workgroup, then you can be prompted to assign an account code or ACD workgroup every time you make a call. Your system must be appropriately configured in order for you to be prompted. For more information, see Advanced Dialing Options.

To assign an account code or a workgroup to an outgoing interaction:

1. Do one of the following:

   - Enter a telephone number in the **Number** field.

     Note: For more information about entering letters, p

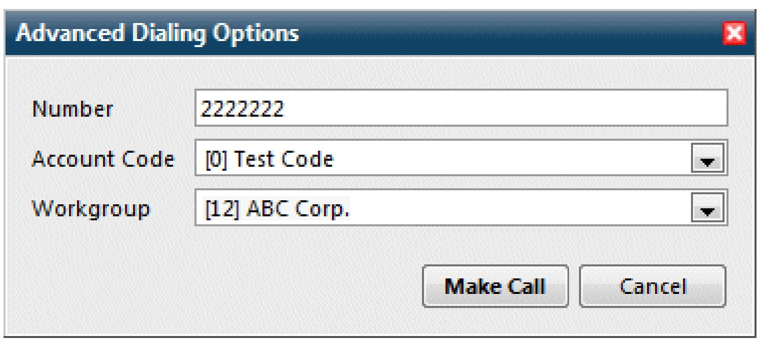
     

     arentheses or other special characters, see Entering Telephone Numbers.

   - Click the down arrow to the right of the Number field and select one of your **recently dialed number**s from the drop-down list.

2. Click the **Make Call** button or press **Enter**.

   Result: The Advanced Dialing Options dialog box appears.

3. Click the arrows at the end of the **Account Code** or **Workgroup Code** drop-down lists and select the codes you want to assign to this interaction and click **OK.**

   Result: The call is started.

   Note: If your CIC administrator has configured and enabled account codes, an account code is required. A workgroup code signifies that the call was made on behalf of a workgroup. You can select <None> for calls not made for a workgroup.

   Tip: For more information, see Advanced Dialing Options.

You can use the Properties window to set an account code for any incoming or outgoing interaction. A workgroup code can only be assigned when you start the interaction, not after it has started.

To assign an account code to an outgoing interaction using the Interaction Properties dialog box:

1. During an outgoing interaction, right-click the interaction and choose **Properties** from the menu that appears.

   Result: The Interaction Properties dialog box appears.

2. In the Interaction Properties dialog box, click the arrow at the end of the **Account Code** field and select the account code you want to assign to this interaction.
3. Optionally, if your CIC administrator configured Wrap-Up codes, you can assign a **Wrap-Up Code** in a similar fashion.
4. Click the **Close** button in the upper right corner of the Interaction Properties dialog box.

   Result: The account code you assigned to the interaction appears in the Account Code column of your queue.

Related Topics

Advanced Dialing Options
Understanding Account Codes
Understanding Wrap-Up Codes

Numerically Sort Account Codes

Your CIC administrator can configure whether your list of available account codes is sorted numerically. Contact your CIC administrator if you have questions about how this option is set.

Note: There are several places in the CIC client where you can assign an account code to an interaction. For more information, see Working with Account and Wrap-Up Codes.

Related Topics

Understanding Account Codes

Understanding Account Codes

Requirements: See Working with Account and Wrap-Up Codes.

In the CIC client, you can use account codes to organize interactions by customer. You may find this feature useful for customer billing purposes, or if you process interactions through Customer Interaction Center for more than one company. Your system administrator can generate reports to categorize call details by account codes.

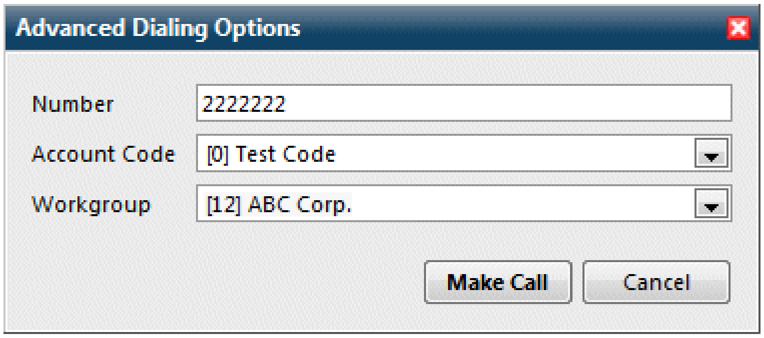
You can assign account codes to incoming and outgoing interactions or from any Interaction Object (such as calls, email messages, or chat sessions).

Account Code Restrictions

When working with account codes, it is important to note the following restrictions:

- You cannot split an interaction between account codes.
- You can only assign one account code per interaction.
- You cannot assign, change, or delete an account code after it disappears from your queue unless you have permission to modify the queue to which the interaction transfers.
- Account codes can be sorted numerically. When you type the first few numbers of the account code, the CIC client jumps ahead to the first match, speeding up the process of selecting the appropriate code for your interaction.
- You can use the Interaction Properties Dialog Box to set an account code for any incoming or outgoing interaction.

- You are prompted to assign account codes to outgoing interactions in the Advanced Dialing Options dialog box only if your company uses account codes and your system is appropriately configured. For more information, see Advanced Dialing Options.



Related Topics

Working with Account and Wrap-Up Codes
Assign Codes to an Incoming Interaction
Assign Codes to Outgoing Interaction

Understanding Wrap-Up Codes

Your CIC administrator can associate Wrap-Up codes with any workgroup queue. Wrap-Up codes indicate the nature of an interaction; for example, a billing problem, a new order, or a service request. Your CIC administrator can generate reports to categorize call details by Wrap-Up codes.

You must be a member of a workgroup for which Wrap-Up codes are configured in order to assign a Wrap-Up code. If you have questions about your Wrap-Up code permissions, contact your CIC system administrator.

If you take part in an interaction on a queue where Wrap-Up codes are configured and activated, you can enter a Wrap-Up code during the interaction or wait to be prompted to enter a Wrap-Up code when you complete your part of the interaction. A phone-only agent can enter the digits for the Wrap-Up code from the phone keypad after he or she completes their part of the interaction. Your part of an interaction is ended when you disconnect, or transfer an internal or external interaction to another person, park the interaction, or send it to voice mail.

You can also be prompted to enter a Wrap-Up code when an external call is brought into a conference call. The agent who first answered the call is prompted for a Wrap-Up code when the external party disconnects or the agent disconnects from the conference.

Assigning a Wrap-Up Code

The following rules apply to Wrap-Up codes:

- You can assign Wrap-Up codes to all **incoming** interactions and to **outgoing** interactions that are dialed on behalf of a workgroup.
- You can assign or change a Wrap-Up code any time **during** an interaction.
- If a Wrap-Up code is required and you have not already assigned one, you are prompted to assign a Wrap-Up code **after your part in the interaction ends.**
- You cannot assign, change, or delete a Wrap-Up code **after the interaction disappears** from your My Interactions queue.
- Wrap-Up codes do not have a default value. If you do not select one of the pre-defined Wrap-Up codes, no code is assigned.

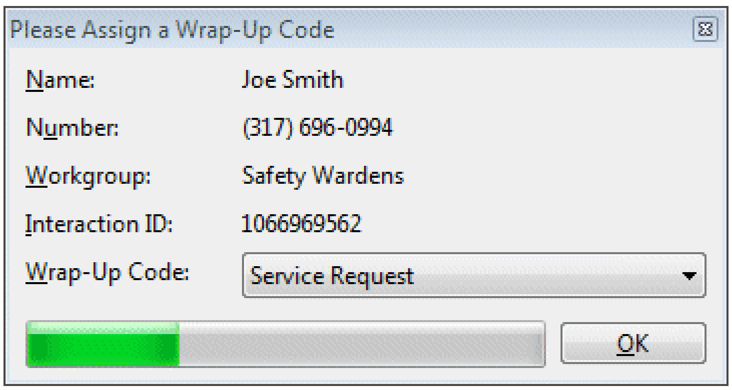
- Wrap-Up codes can be used for inbound email messages. Wrap-Up codes are **not used** for email message replies or forwarded email messages.

Wrap-Up Code Prompt

If you do not assign a Wrap-Up code during an interaction on a queue configured for Wrap-Up codes, a dialog box may appear to prompt you to enter a Wrap-Up code. An Interaction Administrator configuration setting controls whether dialog box appears. Your administrator can also configure the length of time the dialog remains active before automatically closing. However, this cannot exceed the amount of time disconnected interactions remain in My Interactions. If you have questions about this feature, see your CIC administrator.

Note: If a supervisor assigns a Wrap-Up code for the interaction while the Wrap-Up code prompt is being displayed, the newly selected code appears in the **Wrap-Up Code** drop-down list. You cannot change this code from the prompt. However, you can change it, if needed, in the Interaction Properties dialog box. You can then close the Please Assign a Wrap-Up Code dialog box or wait for the dialog box to close automatically when the Wrap-Up time limit is reached.

- When you type the first few characters of the Wrap-Up code or name, the CIC client jumps ahead to the first match, allowing you to select the appropriate Wrap-Up code quickly.
- You cannot sort Wrap-Up codes by code or name; they are automatically sorted alphabetically by description.



Related Topics

Working with Account and Wrap-Up Codes

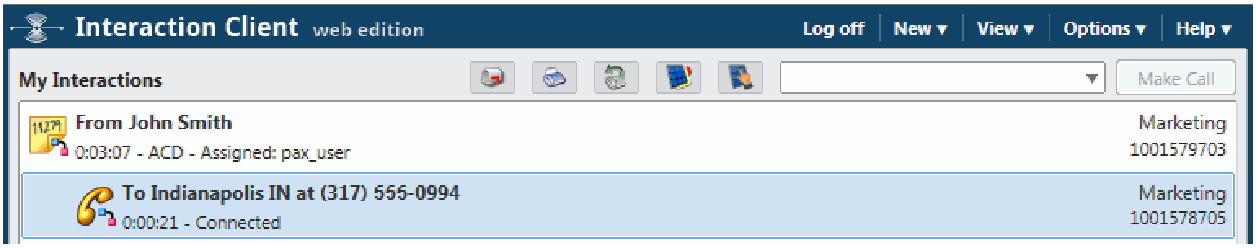
Working with Callback Requests

Working with Callback Requests

Using the Callback feature, visitors to your company's website can leave a request for an agent to call them back. A visitor starts the Callback process by clicking the appropriate button on a web page and completing information in a Callback dialog box. Customer Interaction Center routes the request as a callback interaction and it appears in the appropriate queue.

Note: In addition to calling the visitor back, you can assign an account code and a Wrap-Up code per call. You can also add notes related to the callback.

Callback Interaction



- When you pick up a callback request interaction, it appears in the **Callback** window.
- When you pick up a callback request, its state changes to ACD Assigned: (Agent name), and other agents are not able to respond to this request. However, if the callback request is transferred to you, or if you pick it up even though you are a not a member of the workgroup to which it was routed, its state changes to Connected.
- When you make a call in response to a callback request, the new call is associated with the Callback request as a child item. It is indented under the original callback request.
- As with all interactions, a callback request remains in the workgroup queue unless a non-member of the workgroup picks it up. If a non-member of the workgroup picks it up, it disappears from the workgroup queue.

Related Topics

Callback Window
Respond to a Callback Request

Callback Window

The Callback window appears when you pick up a callback request.

Tip: If you prefer not to see the sidebar view, click the splitter bar to collapse that portion of the Callback window.

Respond to a Callback Request

Requirements: See Pickup.

To respond to a Callback request:

1. Double-click the Callback interaction, or select it and click the Pickup button.

   Result: The Callback window opens.

   Tip: If you prefer not to see the sidebar view, click the splitter (to the left of the Notes tab) to collapse that portion of the Callback window.

2. Click the **Make Call** button to return the call.

   Result: This creates a call that is associated with the callback request. For more information, see Callback Interaction.

3. If prompted, in the Advanced Dialing Options dialog box, assign an **Account Code** to the **call** and click **OK.**

   Note: The Account Code in the Advanced Dialing Options dialog box applies to the **call**. The Account Code and Wrap-Up Code drop-down lists in the Callback window apply to the **callback request**.

4. When the call is ended, in the Callback window, do any of the following:
   - Click **Properties** and assign an Account Code and Wrap-Up code for the callback request.
   - Click **Add Note** and add a note to the callback request.
5. In the Callback window, click one of the following buttons, depending on the result of your callback session:

Callback Complete	Click this button to indicate you reached the requester and completed the callback interaction.
Retry Later	The **Retry Later** button appears only if your CIC administrator has enabled this feature. The CIC administrator also configures the maximum number of times agents can retry a callback request. Click this button to remove the callback request from your queue and place it back on the workgroup queue in a "System" state. After the Snooze Time elapses, CIC transfers the callback request back to the workgroup queue. After this transfer, server parameters and handler customization can affect how the snoozed callback request is reprocessed. For more information, contact your CIC Administrator.
Attempt Failed	Click this button to indicate that you cannot complete the callback request. It could be that the phone number is incorrect or that no one answered after the last allowed attempt. **Tip**: If your CIC system is appropriately configured, you may be able to select a Wrap-Up code that explains the reason for this failure.

6. Close the Callback window.

Related Topics

Assign Codes to an Interaction
Callbacks and the Current Interaction View

Manage Callback Requests

Add Notes to an Interaction

Use the **Notes** section in the appropriate interaction window to add notes or comments about the interaction.

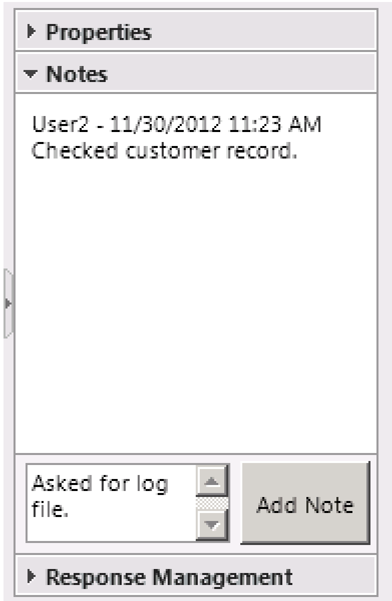
Note: If you add notes to a chat, the other chat participants do not see these notes. However, these notes are visible to other CIC client users who are "Listening to" (monitoring) the interaction. Monitor a Chat

Tip: For information about adding notes to a Call, see View and Edit Interaction Properties.

To add notes to an interaction:

1. In the Callback window, Chat window, Email window for Incoming Messages, or E-mail Window for Outgoing Messages, expand the **Notes** sidebar.
2. In the text box, type your observations or comments and click **Add Note**.

   Result: Your notes appear in the **Notes** sidebar in the interaction window.



Related Topics

Respond to a Callback Request
Manage a Chat Session
Working with Chat Sessions

Assign Codes to an Interaction

Requirements: See Working with Account and Wrap-Up Codes.

You can assign an Account Code or Wrap-Up Code to an interaction. The Account Code and Wrap-Up Codes drop-down lists contain the codes defined in Interaction Administrator.

To assign codes to an interaction, do one of the following:

- For an incoming email message, select the appropriate codes in the **Email Window for Incoming Messages**.
- For an outgoing email message, select the appropriate Account code in the **E-mail Window for Outgoing Messages**.
- When responding to a callback request, select the appropriate codes in the Callback Window.
- During a chat session, select the appropriate codes in the Chat window.

Note: If Wrap-Up codes are available and you don't assign one during a chat or to an incoming email message, you are prompted to assign the appropriate code when you end your part of the interaction. Wrap-Up codes are not used for email message replies or forwarded email messages.

Related Topics

Assign Codes to an Incoming Interaction
Assign Codes to an Outgoing Interaction
Email Editor
Email Preview
Email Window for Incoming Messages
Email Window for Outgoing Messages

Manage a Chat Session
Understanding Account Codes
Understanding Wrap-Up Codes

Use Response Management for an Incoming Interaction

Requirements: See Using Response Management for information about required rights.

When you respond to a callback request, you can use Response Management to look up information and then relay it verbally. When you evaluate a callback request or read an ACD-routed email message, you can incorporate stored text in the Notes section.

To use Response Management in an incoming interaction:

1. Do one of the following:
    - In the E-mail Window for Incoming Messages, expand the **Responses** section and search for an appropriate system-wide response.
    - In the My Responses Window, use the Navigation Pane or other navigation aids to locate a personal response or system-wide response.

Tip: For more information, see Search for a Response.

2. Do one of the following:
    - View the information in the response and use it indirectly when researching your reply to an email message.
    - Copy and paste the information from the response to the **Notes** section of the E-mail window for Incoming Messages.

Related Topics

Search for a Response
Use Response Management in an Email Message

Working with Calls

Working with Calls

The CIC client provides many ways to handle or manage calls. This section describes the following call features:

- Making Calls
- Picking Up Calls
- Transferring Calls
- Forwarding Calls
- Making Conference Calls
- Using Other Call Features

Call Security

Customer Interaction Center provides call security that prevents others from listening in on a call or even determining which internal parties are involved in a conversation.

CIC administrators can configure the use of two encryption protocols to support encryption of call audio (SRTP) and call control information (TLS). This provides confidentiality and flexibility for security-sensitive organizations. Your CIC administrator can use Interaction Administrator to configure your station to use SRTP for all your calls. When SRTP is not configured for a station, the calls are “non-encrypted” or not secure from network interception.

Call Security Icons and Alerts

When the CIC administrator configures your station to request that all calls are secure or if you are involved in a call where one of the parties has requested a secure call, the CIC client monitors a call’s security level to determine if it is secure and remains secure. A call can begin as a secure (SRTP) call and later be downgraded to a non-secure state. This can occur if the secure call is transferred to, or made part of a conference with, a non-secure party.

Note: If your station is not configured to have secure calls, you do not see a lock icon at all.

- Secure calls

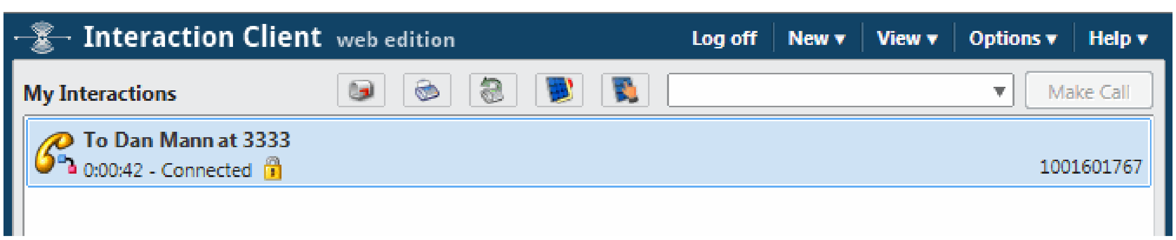
  

  A closed lock icon indicates that a call is secure within the environment controlled by CIC. It appears only if your station is configured to have secure calls and *end-to-edge* security

  A call can be comprised of multiple audio legs. When your station is configured to have secure calls (SRTP is configured in Interaction Administrator), the call is encrypted/secured as far as possible (e.g., within the environment controlled by CIC). If all the audio legs of the call are secure to the edge of network (to another SRTP phone or to an SRTP gateway) then the closed lock icon appears, indicating a secure call. The lock does not display on an RTP station since the RTP station always has at least one non-secure audio leg (the RTP leg to the phone itself).

  Note: The Secure Call icon indicates only *end-to-edge* security; i.e. security from a device configured to use TLS/SRTP and controlled by CIC (such as your phone) to the point where CIC passes the call to an outside agency or a device that is not configured for TLS/SRTP.

  Outside agencies can include a PSTN (Public Switched Telephone Network) or other service provider outside the control of CIC. Devices that might not be configured for TLS/SRTP can include other telephones or a gateway between CIC and a PSTN.

- Non-secure calls

  An open lock icon indicates that at least one leg of a call is not secure. It appears only if your station is configured to have secure calls and *end-to-edge* security.

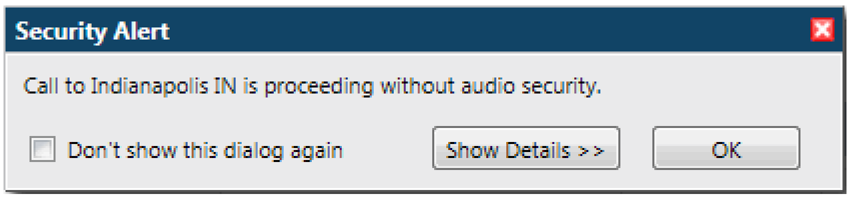
  If your station is configured to have secure calls (SRTP is configured in Interaction Administrator), but the call cannot be made completely secure from the station to the destination (e.g., only one leg of the call is secure), and the station security level is configured for *end-to-edge* security, then the open lock icon appears. This means that security has been downgraded because some portion of the call cannot be encrypted, or secured. The open lock does not imply someone is listening to a call, but only that part of the call cannot be secured to prevent it from being intercepted. The open lock does not display on an RTP station, or on an SRTP station that has its security level configured as *minimal*. The open lock displays only on an SRTP station that has its security level configured as *end-to-edge*.

Note: If you point to the non-secure call icon, it displays a tooltip that explains the cause of the security alert.

- A Security Alert dialog box can also appear to alert you that the previously secure call is no longer secure.

Tip: For more information about why the call is no longer secure, click **Show Details >>**.

Note: If your CIC administrator grants you the right to configure your CIC client alerts, you can control whether this Security Alert dialog box appears. For more information, see Calls Configuration. When a call goes from a non-secure state to a secure state, the icon in the user's queue changes to indicate that the previously non-secure call is now secure. You do not see a Security Alert.



Related Topics

Calls Configuration

Making Calls

Making Calls

There are a number of ways to make a call in the CIC client. You can enter a number in the **Number** field, use your telephone, double-click a directory entry, or use the directory toolbar after selecting a directory entry.

The call appears in **My Interactions**, where you can watch the status of the call. For more information, see one of the following topics:

- Advanced Dialing Options
- Call an Operator
- Click to Dial a Directory Contact
- Call Back a Disconnected Call
- Dial a Long-Distance Number
- Dial a Number Inside the Organization
- Dial a Number Outside the Organization
- Dial a Number Using Speed Dial
- Dial a Recently Dialed Number

- Dial on Behalf of a Workgroup
- Disconnect a Call
- Entering Telephone Numbers
- Make a Call Using the Dial Button
- Make a Call Using the Number Field
- Using Call History to Make Calls
- Using the Dial Pad

Call an Operator

You can use the CIC client to call an operator within your company, or to call an external telephone operator.

Note: You can also dial the operator directly from your telephone handset.

To call an internal operator:

- Type **0** or the internal operator number in the **Number** text box and click **Make Call.**

To call an external (phone company) operator:

- Type **00** or the external operator number in the **Number** text and click **Make Call**.

  Note: The default setting for dialing an external operator in the United States is 00. If this does not work, contact your CIC administrator to verify the number to dial and to check that you have sufficient dialing privileges to dial the external operator.

Related Topics

Making Calls

Call Back a Disconnected Call

The **Call Back** option enables you to call back to the phone number for a disconnected call in My Interactions.

To call back a disconnected call:

- Double-click the disconnected call.

  Result: The **Call Back** option dials the number of the selected call if the number is valid.

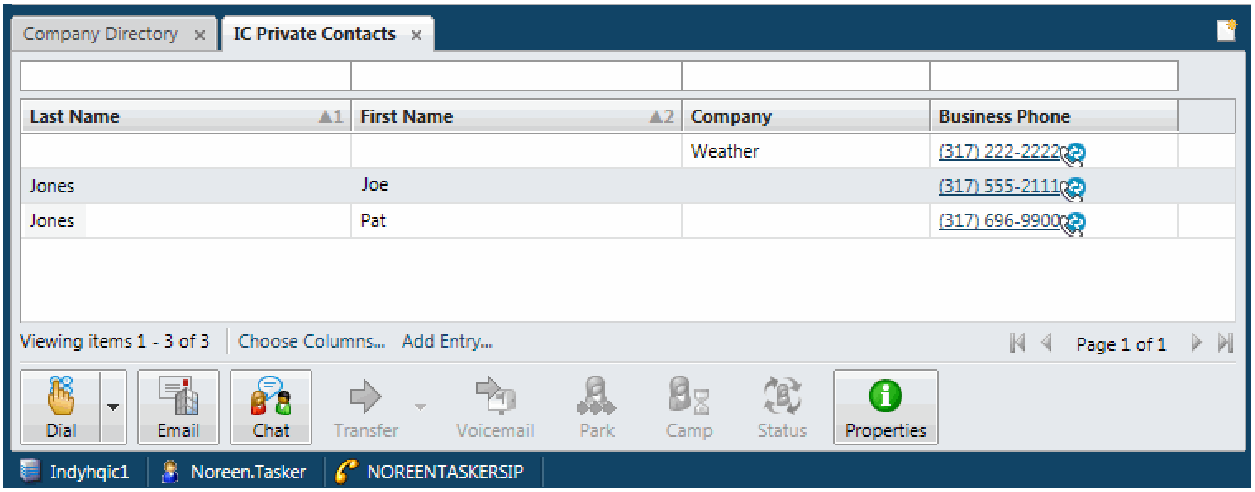
Related Topics

Dial a Recently Dialed Number
Making Calls

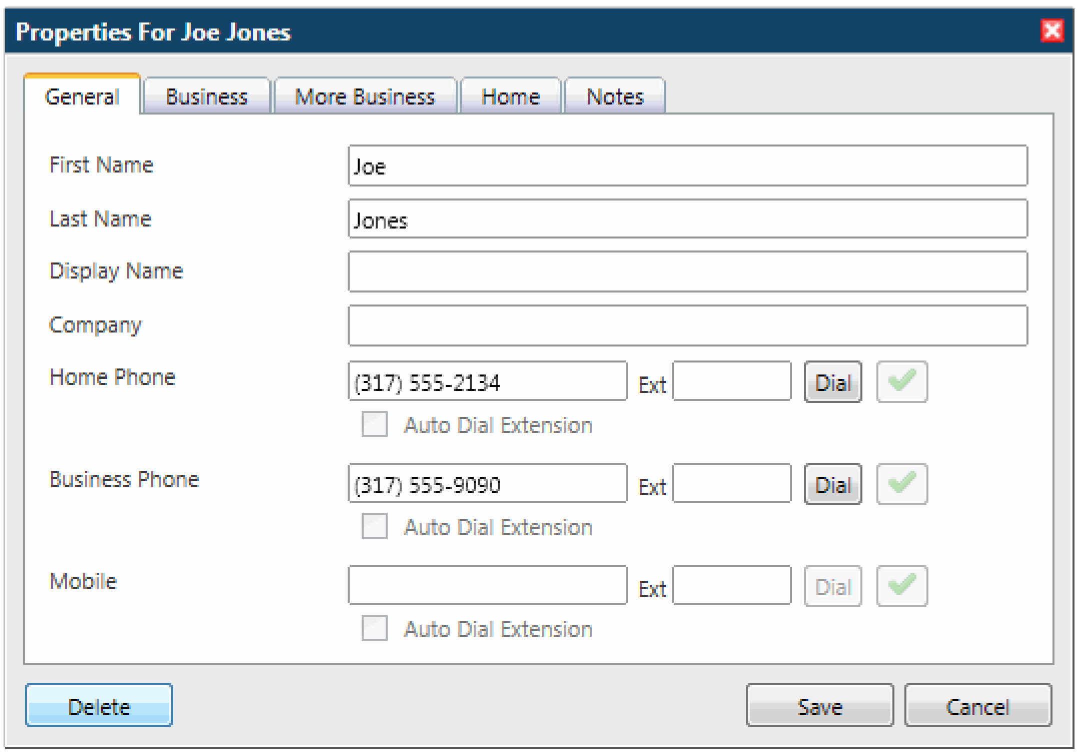
Click to Dial a Directory Contact

You can click any of the phone number hyperlinks in the CIC client to dial a contact. Phone number hyperlinks appear in directory views and in the contact **Properties** dialog box.

If **Auto Dial Extension** is enabled for a contact's phone number, the CIC client automatically dials the extension after the call connects.



You can also dial a phone number and extension by clicking the corresponding **Dial** button in the **Properties** dialog box.



Related Topics

Making Calls
View and Edit Directory Entries

Dial a Long-Distance Number

Requirements: You need the necessary call privileges to make long-distance calls. Your CIC administrator controls whether you are able to dial long-distance numbers. Also, your CIC administrator may assign you the Require Forced Authorization Code Security right. This right requires you to enter an authorization code before toll numbers can be dialed from your station. This prevents someone from using your phone to make a toll call while you are logged on, but away from your desk.

Dial long-distance numbers just as you would dial a number outside your organization. Include the area code.

If you have problems, ask your CIC administrator if you should prefix outgoing calls with a nine or one. Also confirm that you have the necessary call privileges.

Related Topics

Dial a Number Inside the Organization
Dial a Number Outside the Organization
Make a Call Using the Number Field

Dial a Number Inside the Organization

You can use the CIC client to dial the extension of someone within your organization. The extension for a user is listed in the Company Directory. You can watch the status of the call in My Interactions.

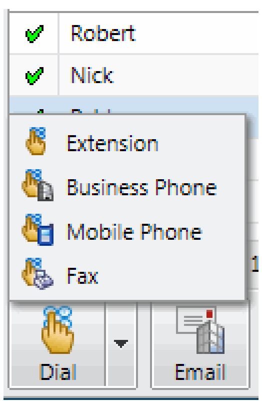
To dial a number inside the organization:

1. Find the extension you want to call in the directory.

   Tip: To locate an entry, start typing in the filter boxes. Enter the first few letters of an entry (if it's an alphabetical column), or enter the first few numbers of an entry (if it's a numerical column). For more information, see Working with the Company Directory.

2. Do one of the following:

   - Double-click a row in the directory list to dial the default number for that person.
   - Single-click any of the hyper-linked phone numbers displayed in the row.
   - Select a directory entry and click the Dial button to dial the default number.
   - Select a directory entry and click the arrow on the **Dial** button. Click one of the displayed "Dial" entries.



Related Topics

Dial a Long-Distance Number
Dial a Number Outside the Organization
Dial Button
Make a Call Using the Number Field

Dial a Number Outside the Organization

You can watch the status of your call in My Interactions. Check with your CIC administrator to see if you have sufficient privileges to make toll calls.

To dial a number outside the organization:

- Type a number in the **Number** text box and click **Make Call**.

Tip: For more information, see Entering Telephone Numbers.

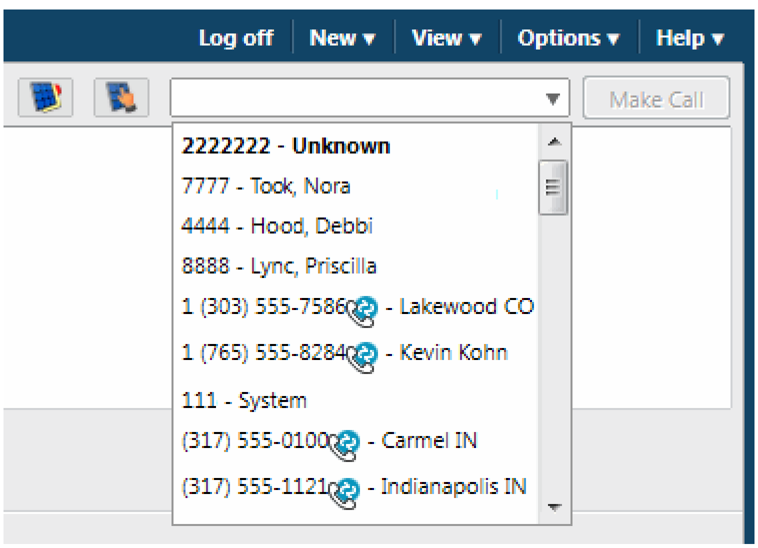
Related Topics

Dial a Long-Distance Number
Dial a Number Inside the Organization
Dial a Number Using Speed Dial
Make a Call Using the Number Field

Dial a Recently Dialed Number

To dial a recently dialed number, do one of the following:

- Click the down arrow to the right of the **Number** field and select a **recently dialed number** from the drop-down list, then click **Make Call**.



- In the Call History dialog box, click a phone number hyperlink.
- Double-click a disconnected call in My Interactions.

Note: A disconnected call remains in My Interactions for a short time and is then moved to Call History.

Related Topics

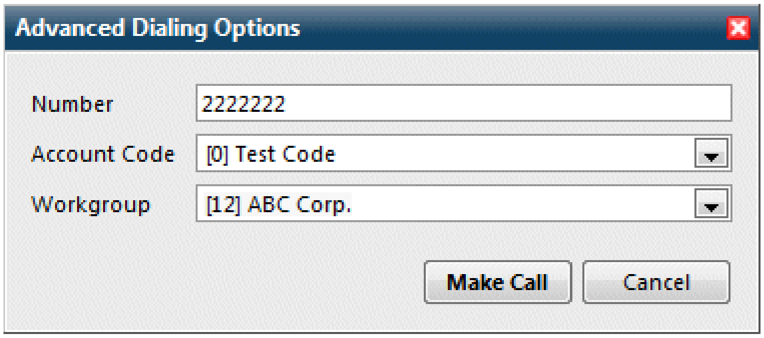
Call History
Making Calls

Dial on Behalf of a Workgroup

Designating a workgroup when you make a call enables you to associate an outbound call with your workgroup. Primarily used for administrative and reporting purposes, this **Dial on Behalf of a Workgroup** feature enables the call to count towards an agent's and the workgroup's statistics.

If you or your CIC administrator enables Advanced Dialing Options and you are a member of at least one workgroup or have at least one account code to select, the **Advanced Dialing Options** dialog box appears every time you start a call and prompts you to assign the appropriate Account Code and/or designate a Workgroup.

Note: You can only dial on behalf of a workgroup in which your status is **Active**. For more information, see Change Your Workgroup Activation Status.



Related Topics

Making Calls

Disconnect a Call

Requirements: See Disconnect.

To disconnect a call, do one of the following:

- Using your handset, simply hang up the telephone.
- Select the call you want to disconnect and click the **Disconnect** button.

Related Topics

Disconnect Button

Entering Telephone Numbers

Here are some pointers on entering telephone numbers:

- You do not have to type **parentheses** or other special characters.

  Note: Special characters are optional. For example, you can type 3175551212 or (317) 555-1212.

- You can also type **letters** that are translated into the corresponding numbers from a telephone keypad. For example, **Q** is a seven and **Z** is a nine.
- You can type both **commas** (,) and **slashes** (/) with the number you type. A comma causes a two-second delay. Numbers typed after the slash are dialed only after a connection is made.

  For example, if you type the number **555-1212 / 101, 2222**, the first seven digits are dialed. After a connection is made, the digits 101 are dialed, and after two seconds, the digits 2222 are dialed.

Related Topics

Dial a Number Outside the Organization

Make a Call Using the Dial Button

You can make a call by selecting a directory entry and clicking the Dial button.

Or, if you want to make a call without using the CIC client, simply dial the number from your telephone. The call appears in My Interactions where you can watch the status of the call.

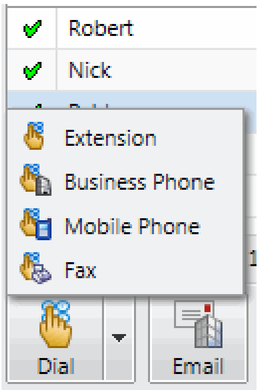
Note: To find out if you have toll call privileges, contact your CIC administrator.

To make a call:

- Select an entry in the Company Directory and then click the **Dial** button on the Directory toolbar.

  Result: This dials the default number for the selected entry.

- Select an entry in the Company Directory and then click the arrow on the **Dial** button. Click one of the displayed "Dial" entries to dial the associated number.



Related Topics

Dial Button

Make a Call Using the Number Field

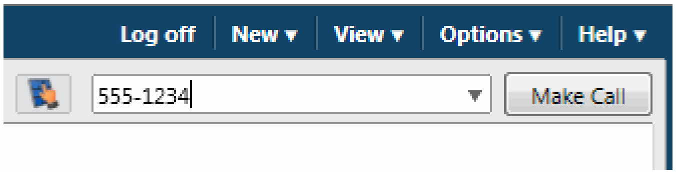
You can make a call from the CIC client by typing the phone number from your computer keyboard instead of dialing it on your telephone. If you want to make a call without using the CIC client, simply dial the number from your telephone. The call appears in My Interactions where you can watch its status.

Note: To find out if you have privileges to make toll calls, see your CIC administrator.

To make a call:

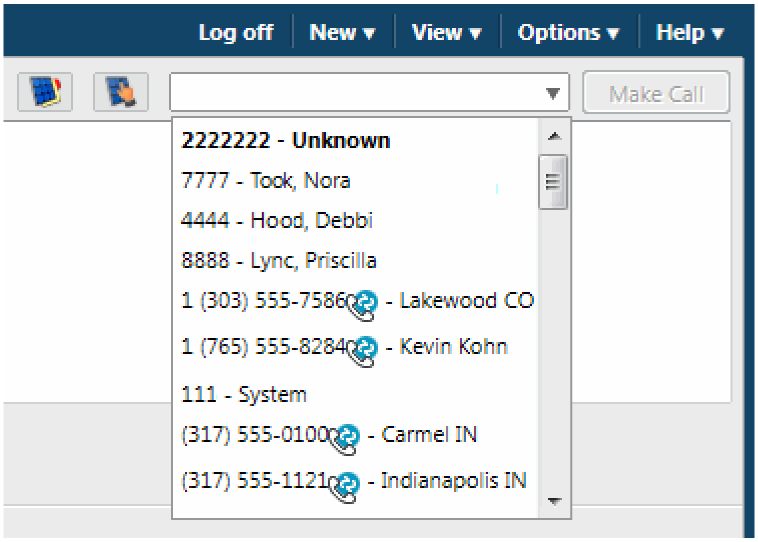
1. Do one of the following:

   - Enter a telephone number in the **Number** field.



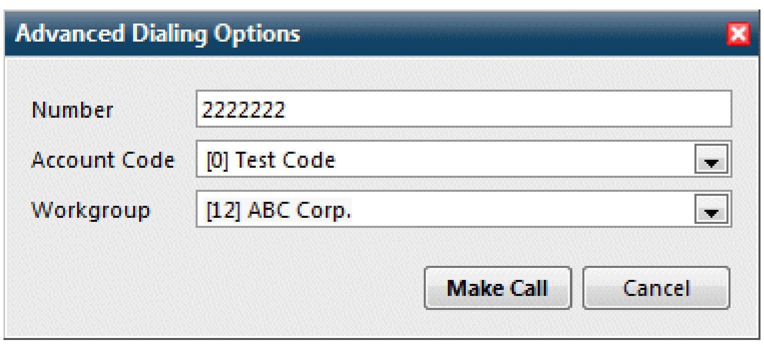
Note: For more information about entering letters, parentheses or other special characters, see Entering Telephone Numbers.

- Click the down arrow to the right of the Number field and select one of your **recently dialed number**s from the drop-down list.



2. Click the **Make Call** button or press **Enter** and one of the following happens:

- If you are using Advanced Dialing Options and you need to assign an Account Code and/or a Workgroup, the Advanced Dialing Options dialog box appears. Select the appropriate Account Code and Workgroup name from the drop-down lists and then click **Make Call** to place the call.



- If you do not need to assign an Account Code, click **Make Call** or press the **Enter** button on your keyboard to place the call.

Related Topics

Dial a Long-Distance Number
Dial a Number Inside the Organization
Dial a Number Outside the Organization
Dial a Number Using Speed Dial
Dial a Recently-Dialed Number

Place a Call on Hold

You can place any connected call on hold. Depending on the hold behavior your CIC administrator configures, callers on hold hear a combination of music and messages. If on-hold music is enabled (the default behavior), you can eliminate on-hold music by clicking the Mute button. This is particularly important when you are a party in a conference call hosted by someone who is not on your IC server and wish to put the call on hold without disrupting the call with hold music. By default, Conference calls hosted on your **local** IC server do not play on-hold music when a conference party clicks the Hold button.

Note: Your CIC administrator can also configure whether you can receive another call when you place one on hold.

To place a call on hold:

1. If the call is not already selected, click the call to select it.

   Note: If the **Hold** button is unavailable, the interaction is not in a state that can be placed on hold.

2. Click the Hold button.

   Result: The **Hold** button appears pressed and the call's state changes to **Held**.

3. To suppress on-hold music for the other party (or parties in a remote server hosted conference), click the Mute button before or after clicking the **Hold** button.

4. To take the call off hold, select the call and click **Hold** again.

   Result: The **Hold** button is no longer selected and the call's state changes to **Connected**.

Tip: Your CIC administrator can configure a maximum hold time for interactions. By default, interactions on hold for longer than fifteen minutes are disconnected. Your administrator can change the amount of time an interaction can remain on hold and the behavior that occurs once the hold time is exceeded. For example, your administrator may choose to transfer interactions on hold longer than twenty minutes to another queue. For more information, see your CIC administrator.

Related Topics

Hold Button

Understanding an Interaction's State

An interaction's state describes its current condition. The following list describes the states that appear by default. The list includes descriptions of each state an interaction may be in during the life of the interaction.

Note: Your CIC administrator or application developer can modify or customize these state strings if desired.

State	Interaction Type	Description
ACD – Alerting: [Agent's Name]	Inbound	CIC placed the call into a queue, and sent it to an available agent.
ACD – Assigned: [Agent's Name]	Inbound	CIC placed a call into a queue, sent it to an available agent, and the agent picked up the call.
ACD – Wait Agent	Inbound	CIC placed a call into a queue, but all agents were busy and CIC was unable to alert an agent.
ACD – Wait Agent -> Last Attempted: [Agent's Name]	Inbound	CIC placed a call into a queue, sent it to an available agent, but the agent did not pick up the call and CIC placed it back into the queue.
Alerting	Inbound	A user is being notified that he or she has an incoming interaction.
Connected	Outbound	The interaction was connected to a user or a station. If call

	or Inbound	analysis was not enabled, Connected means the same as Proceeding.
Dialing	Outbound	CIC is dialing the outbound proceeding call.
Disconnected	Outbound or Inbound	The call is no longer active.
Disconnected (Local Disconnect)	Outbound or Inbound	Seen for both outbound and inbound interactions. The interaction was disconnected locally and is no longer active.
Disconnected (Remote Disconnect)	Outbound or Inbound	The interaction was disconnected by the remote party and is no longer active.
Held	Outbound or Inbound	The interaction is on hold.
Manual Dialing	Outbound	A telephone handset has been picked up and a dial tone was generated.
Offering	Inbound	CIC placed the interaction in a queue, but the interaction was not alerting. CIC is determining if the called party is available to take the interaction.
Operator Escape		The caller pressed zero to reach an operator from any queue.
Parked		The interaction is waiting on a User, Workgroup, or Station queue.
Proceeding	Outbound	The interaction proceeded through the outside telephone network and is waiting to be answered. "Proceeding" is used if a user has enabled call analysis. Calls "Proceeding" eventually time out if the call is not answered.
Queue Timeout	Inbound	The call waited in a time-out queue and timed out. The caller was presented with prompts to determine how he or she wanted the CIC client to proceed with the call (send to voice mail, try another extension, etc.)
Remote Transfer		CIC sent an interaction to a user whose status was set to "Available, Forward," and CIC forwarded the interaction based on the user’s call coverage settings.
Ring No Answer	Inbound	The call was sent to an agent who did not pick up the call. The call timed out, and the caller was presented with prompts to determine how he or she wants the CIC client to proceed with the call (send to voice mail, try another extension, etc.).
System		The interaction underwent processing by handlers or other server components of the CIC system.
Voice Mail		The caller left a voice mail message.

Picking Up Calls

Picking Up Calls

Requirements: See Pickup.

There are many different ways to pick up calls in the CIC client. This section describes the following methods:

- Answer an Incoming Interaction
- Caller Name
- Place a Call on Hold

Related Topics

Answer an Incoming Interaction

These instructions assume that you are answering an interaction in **My Interactions**.

The CIC client can notify you of incoming interactions by:

- Ringing your telephone (if your CIC administrator has configured calls to ring on your desktop telephone).
- Emitting a ring through your computer's speakers.
- Appearing on top of any applications you are working on.
- Automatically selecting an interaction.

Note: If your user information in Interaction Administrator is configured to **Auto-Answer ACD Interactions** or **Auto-Answer non-ACD Interactions**, incoming interactions can be automatically picked up. Another Interaction Administrator configuration option can enable or disable Auto-Answer for incoming calls on a SIP station. When Auto-Answer is correctly configured, you are automatically connected to incoming interactions. Popup blockers can prevent auto-answer email windows from opening. If you want to use the Auto-Answer feature, you may need to configure your browser or popup blocker software to allow popup windows in the CIC client.

To pick up your call:

- If you are not connected to another call, do one of the following:
  - Pick up your telephone handset and the call automatically connects, and you can begin speaking.
  - Click the **Pickup** button on the Queue Control toolbar.
  - Double-click the interaction in the My Interactions view.
- If you are currently connected to another call, click the **Pickup** button.

  Result: This action connects you to the call and places on hold any other calls to which you are connected.

Caller Name

Customer Interaction Center (CIC) uses several different methods to identify a caller. If CIC cannot automatically determine the name of the caller and handlers or other applications do not identify the caller or provide something to be displayed instead of a caller name, CIC displays a locally defined phrase such as "Unknown Caller."

CIC uses these methods in the following order to identify a caller.

Note: Any name CIC finds is replaced by a name found by a subsequent method. For example, a caller name provided by the PSTN (Public Switched Telephone Network) is replaced by a caller name found in the Company Directory.

1. Caller name provided by the PSTN, SIP signaling, or Web Interaction registration information.
2. Caller name located by an RWP (Reverse White Pages) lookup using the caller's telephone number to locate a name in the RWP database.

   Result: If no name is found and the origin of the call can be determined, the City and State of the call are used as the caller name.
3. Caller name located by an RWP lookup in the Company Directory or a Personal Directory (such as Outlook Private Contacts.)
4. Caller name located by a telephone number lookup in Interaction Tracker.
5. A locally defined phrase such as "Unknown Caller."

   Note: This is used if none of the preceding methods have identified the caller, usually because the PSTN did not provide the caller's telephone number.
6. A value provided by CIC handlers as part of customer customization.

   For example, information gathered from an IVR menu selection such as a product catalog name could be used as the caller name.

Pick Up a Call from Voice Mail

Requirements: See Pickup.

You can pick up a call when the caller is in the middle of leaving a voice mail message. When a call is transferred to voice mail, its state changes to "Voice Mail."

To pick up a call from voice mail:

1. If the telephone call is not selected, select the call you want to pick up.
2. Click the **Pickup** button.

   Result: The call's state changes from "Voice Mail" to "Connected" and you can begin speaking with the caller.

Related Topics

Listen to someone leave a voice mail message
Listen to your voice mail
Pickup Button

Place a Call on Hold

You can place any connected call on hold. Depending on the hold behavior your CIC administrator configures, callers on hold hear a combination of music and messages. If on-hold music is enabled (the default behavior), you can eliminate on-hold music by clicking the Mute button. This is particularly important when you are a party in a conference call hosted by someone who is not on your IC server and wish to put the call on hold without disrupting the call with hold music. By default, Conference calls hosted on your **local** IC server do not play on-hold music when a conference party clicks the Hold button.

Note: Your CIC administrator can also configure whether you can receive another call when you place one on hold.

To place a call on hold:

1. If the call is not already selected, click the call to select it.

   Note: If the **Hold** button is unavailable, the interaction is not in a state that can be placed on hold.

2. Click the Hold button.

   Result: The **Hold** button appears pressed and the call's state changes to **Held**.

3. To suppress on-hold music for the other party (or parties in a remote server hosted conference), click the Mute button before or after clicking the **Hold** button.

4. To take the call off hold, select the call and click **Hold** again.

   Result: The **Hold** button is no longer selected and the call's state changes to **Connected**.

Tip: Your CIC administrator can configure a maximum hold time for interactions. By default, interactions on hold for longer than fifteen minutes are disconnected. Your administrator can change the amount of time an interaction can remain on hold and the behavior that occurs once the hold time is exceeded. For example, your administrator may choose to transfer interactions on hold longer than twenty minutes to another queue. For more information, see your CIC administrator.

Related Topics

Hold Button

Transferring Calls

Transferring Calls

There are many different ways to transfer calls in the CIC client. This section describes the following methods:

- Park a Call on Another Person's Extension
- Transfer a Call After Consulting the Recipient
- Transfer a Call to a Directory Entry
- Transfer a Call to a Workgroup
- Transfer a Call to an Attendant Profile
- Transfer a Call to Another Person's Voicemail
- Transfer a Call to Your Voicemail
- Transfer a Call Using a Transfer Button
- Transfer a Call Using the Queue Control Toolbar
- Transfer a Call Using the Directory Toolbar
- Transfer a Call Without Consulting the Recipient

Park a Call on Another Person's Extension

You can park a call directly on another CIC client user's extension. This places the call on hold on the recipient's **My Interactions** queue. You might want to use this feature, for example, if a caller wants to speak to another person who is currently unable to take a call, but will probably be available in a few minutes.

Call Parking Tips

- Your CIC administrator can set up calls to automatically transfer to another extension after being parked for a certain length of time. For more information, see your CIC administrator.
- If you park a call on a **phone-only station** (standalone phone), the CIC user is **not alerted** when a call is parked on that extension.

To park a call using the Park on Queue button:

- Select the call. Select a directory entry and then, on the Directory toolbar, click the Park on Queue button.

  Result: The interaction is immediately removed from My Interactions or any other queue you are monitoring and appears in the selected user’s queue.

To park a call on another person’s extension using the Transfer dialog box:

1. Select the call and inform the caller that he or she is going to be transferred and put on hold.
2. On the Queue Control toolbar, click the Transfer button.

   Result: The **Transfer dialog box** appears.
3. In the **Transfer To:** field, type all or part of the recipient’s name or number.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the contact you expected, check the search criteria selected in the **Options** drop-down list and adjust them if necessary.
4. From the drop-down list, do one of the following:
   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
   - Select the appropriate contact name and associated extension or phone number.

   Result: If the designated transfer recipient is a CIC user, status information appears. It shows whether the transfer recipient is logged onto the CIC client and is able to accept the transferred call. This can help you decide what kind of call transfer to use.
5. Click the **Park** button.

   Result: The call disappears from **My Interactions** and is placed on hold in the recipient’s **My Interactions** so the recipient can select it later. Until the recipient picks up the call, callers hear the company’s hold message.

   appears. It shows whether the transfer recipient is logged onto the CIC client and is able to accept the transferred call. This can help you decide what kind of call transfer to use.

Related Topics

Call Coverage Options
Set Status Details
Transfer a Call to a Directory Entry
Transfer a Call to a Workgroup
Transfer a Call to Another Person’s Voicemail
Transfer Button

Transfer a Call After Consulting the Recipient

Transferring an interaction after speaking with the intended recipient is called a **consult transfer**. If the intended recipient does not answer the phone, you can resume your conversation with the caller, park the call on the intended recipient's extension, transfer the call to the intended recipient's voice mail, or try transferring to another person.

Warning: Perform a consult transfer only when you need to speak with both parties before completing the transfer. If this is not necessary, perform a **blind transfer**. Do not use a consult transfer or a conference call to transfer a call to an attendant profile, workgroup queue, or to an agent's voice mail. These are **not supported features** and may result in the original call being sent to the default attendant profile. For more information about blind transfers, see Transfer a Call Without Consulting the Recipient.

To perform a consult transfer:

1. While the call is selected in My Interactions, inform the caller that he or she is going to be transferred.
2. On the Queue Control toolbar, click the **Transfer** button.

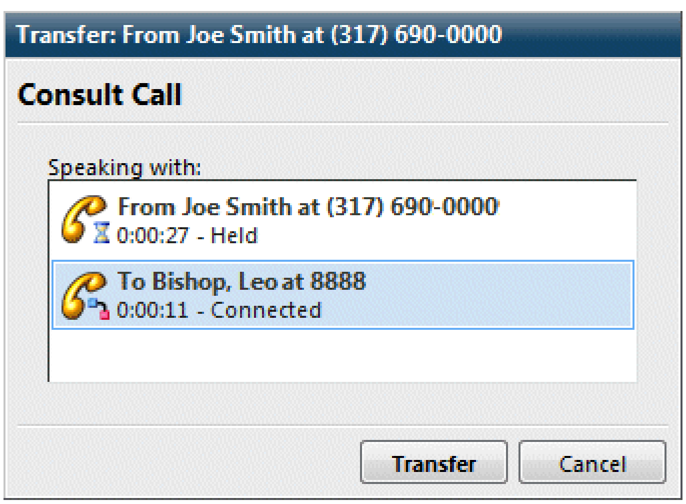
   Result: The Transfer dialog box appears.
3. In the **Transfer To:** field, type all or part of the recipient's name or number.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the contact you expected, check the search criteria selected in the **Options** drop-down list and adjust them if necessary.
4. From the drop-down list, do one of the following:
   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
   - Select the appropriate contact name and associated extension or phone number.

   Result: If the intended recipient is a CIC user, status information for the selected CIC user appears. It shows whether the transfer recipient is logged onto a CIC Client and is able to accept the transferred call. This can help you decide what kind of call transfer to use.
5. Click the **Consult** button. This enables you to speak with the transfer recipient while your original caller stays on hold.

   Result: The Consult Call dialog box appears. Notice that the name of the transfer recipient is selected. If the status of the call is "Connected," you can talk to that party.



6. Do one of the following:

- If the intended recipient answers his or her phone, and agrees to the transfer, click **Transfer**.

  Result: The call is transferred to the intended recipient and disappears from **My Interactions**.

- To speak to the caller without exiting the transfer operation, click the name of the **caller**.

  Note: You might use this feature if the recipient is unavailable to take the interaction and you want to see if the caller would like to be transferred to someone else. If you want to return to speaking to the transfer recipient, click the name of that party.

- If the transfer recipient does not answer the phone or does not agree to the transfer, click **Cancel**.

  Result: The Consult Call dialog box closes and the Transfer dialog box reappears. The call is taken off hold, and you are reconnected to it.

Tip: If for some reason you can't perform a consult transfer, you can use the Transfer dialog box to choose another way to handle this call. You can transfer a call to another person's voicemail, park a call on another person's extension, or transfer a call without consulting the recipient.

Related Topics

Call Coverage Options
Park a Call on Another Person's Extension
Set Status Details
Transfer a Call to a Directory Entry
Transfer a Call to a Workgroup
Transfer a Call to Another Person's Voicemail
Transfer a Call to Your Voicemail
Transfer a Call Using a Transfer Button
Transfer a Call Without Consulting the Recipient
Transfer Button

Transfer a Call to a Directory Entry

You can transfer a call to a selected directory entry.

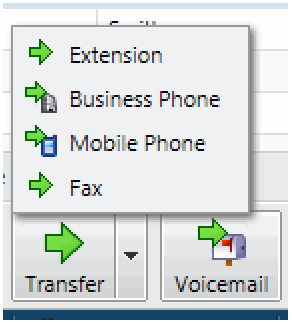
To transfer a call:

1. While the call is selected in My Interactions, inform the caller that he or she is going to be transferred.
2. Click the **Hold** button.
3. Locate and select the directory entry to which you want to transfer the call.
4. Do one of the following:
   - In the Directory toolbar, click the Transfer button.

     Result: This transfers the call to the default number for the selected entry.

   - In the Directory toolbar, click the arrow on the **Transfer** button and then click one of the displayed "Transfer" entries to dial the associated number.

     Result: This transfers the call to the selected number for the selected entry.



Related Topics

Transfer a Call Using a Transfer Button
Transfer a Call Using the Directory Toolbar
Transfer Button

Transfer a Call to a Workgroup

Requirements: You need the Search Workgroup Queues Access Control right to a specific workgroup queue in order to transfer an interaction to that workgroup queue.

You can transfer a call directly to a workgroup listed in the Workgroup and Profile directory. This type of call transfer is similar to a blind transfer because you do not speak to the transfer recipient. My Interactionsqueue

The CIC administrator creates workgroups in Interaction Administrator. Workgroups are logical groups of users (e.g., departments) that can function as a group in the CIC system. Workgroups can have extensions and queues that enable all members of a workgroup to receive calls notifying the workgroup. In addition, workgroups can receive regular calls and ACD calls that are routed to specific workgroups and agents. Workgroups can also serve as distribution lists (to the members) of voice mail, email messages, and faxes from within CIC.

Note: Before you can transfer a call to a workgroup, you need the appropriate right assigned in Interaction Administrator to view the workgroup.

To transfer a call to a workgroup:

1. Inform the caller that he or she is going to be transferred.
2. On the Queue Control toolbar, click the **Transfer** button.

   Result: The **Transfer dialog box** appears.
3. In the **Transfer To:** text box, type all or part of the Workgroup's name or number.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the workgroup you expected, check the search criteria selected in the **Options** drop-down list and make sure **Workgroups** is selected.
4. From the **Transfer To** drop-down list, do one of the following:
   - Select the appropriate workgroup name and associated extension number.
   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
5. Click the **Transfer** button.

Result: The transferred call disappears from My Interactions or other queue and is routed to the selected CIC Workgroup.

Using the Workgroups and Profiles Directory to Transfer a Call

Note: Before you can transfer a call to a workgroup using this method, you must Display the Workgroup and Profile View. You also need the appropriate user rights to view the name of the workgroup in the Workgroup and Profiles directory.

To transfer a call to a Workgroup in the Workgroups and Profiles directory:

1. Tell the caller that he or she is going to be transferred.
2. Select a workgroup name in the Workgroups and Profiles directory view and then click the Transfer button.

   Result: The call disappears from **My Interactions** and is transferred to the appropriate Workgroup queue.

   Tip: For information about displaying the Workgroups and Profiles view, see Add or Close Views.

Related Topics

My Interactions
Transferring Calls

Transfer a Call to an Attendant Profile

Requirements: You need the E-mail Profiles, Inbound Profiles, Operator Profiles, or Outgoing Profiles rights to transfer a call to an Attendant Profile.

You can transfer a call directly to an Attendant profile selected in the Transfer dialog box or to an Attendant Profile listed in the Workgroup and Profile directory. This enables you to send calls into queues using Attendant, ensuring that both inbound callers and callers transferred into a queue have the same in-queue experience.

For example, if there are customer service menus in Interaction Attendant that a customer must navigate before a call is sent to that workgroup's queue, you can transfer callers to the Customer Service Profile rather than directly into the queue. The transferred call is processed according to the profile's settings. This way, callers hear the same prompts and menus as other callers for that group.

Note: The Workgroup and Profile directory lists only **inbound call profiles** that are configured in Interaction Attendant to **allow calls to be transferred to them**.

Transferring a Call to an Interaction Attendant Profile

1. Inform the caller that he or she is going to be transferred.
2. On the Queue Control toolbar, click the **Transfer** button.

   Result: The **Transfer dialog box** appears.

3. In the **Transfer To:** field, type all or part of the Attendant Profile's name.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the Attendant Profile you expected, check the search criteria selected in the **Options** drop-down list and make sure **Attendant Profiles** is selected. Remember also that you can transfer calls only to **inbound call profiles** that are configured in Interaction Attendant to **allow calls to be transferred to them**.

4. From the **Transfer To** drop-down list, select the name of the profile.

5. Click the **Transfer** button.

> **Warning**: Do not attempt a **Consult Transfer**. Using Consult to transfer a call to an attendant profile is **not a supported feature**. This may result in the original caller being sent to the default attendant profile, the main IVR menu, rather than the selected profile.

Result: The transferred call disappears from My Interactions or other queue and is routed to the selected Interaction Attendant Profile where it is processed like any other call routed to that Attendant Profile.

Using the Workgroups and Profiles Directory to Transfer a Call

This type of call transfer is similar to a blind transfer because you do not speak to the transfer recipient. This procedure assumes you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring.

Note: Before you can transfer a call to an Attendant Profile using this method, you must Display the Workgroup and Profile View.

To transfer a call to an Attendant Profile:

1. Tell the caller that he or she is going to be transferred.
2. Select an Attendant profile name in the Workgroups and Profiles directory view and then click the Transfer button.

   Result: The call disappears from **My Interactions** and is processed according to the settings on the Attendant profile.

Related Topics

Introduction to Queues
My Interactions
Transferring Calls

Transfer a Call to Another Person's Voice Mail

You can transfer a call directly to another CIC client user's voice mail. You might want to use this feature if the caller wants to communicate with another person who is unavailable to take the call.

Note: The **Voice Mail** button may be disabled in the Transfer dialog box if you do not have the appropriate rights. You must have the right to use voice mail features in the CIC client t in order to transfer a call to another user's voice mail. Also, you may not be able to transfer a call to another person's voice mail if you do not have the right to send calls to your own voice mail. If you have questions about rights or voice mail options, see your CIC administrator

To transfer a call to another person's voice mail using a directory:

1. While the call is selected in My Interactions, inform the caller that he or she is going to be transferred to another person's voice mail.
2. Locate and select the directory entry to which you want to transfer the call.
3. On the Directory toolbar, click the Voicemail button.

   Result: The call is transferred to the recipient's voice mail and its status changes to Disconnected in My Interactions.

To transfer a call to another person's voice mail using the Transfer dialog box:

1. Select the call and inform the caller that he or she is going to be transferred to another person's voice mail.

2. On the Queue Control toolbar, click the Transfer button.

   Result: The Transfer dialog box appears.

3. In the **Transfer To**: field, type all or part of the recipient's name or number.

   Result: A >drop-down list of choices appears.

   Tip: If the drop-down list does not contain the contact you expected, check the search criteria selected in the Options drop-down list and adjust them if necessary.

4. From the drop-down list, do one of the following:

   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
   - Select the appropriate contact name and associated extension or phone number.

   Result: If the designated transfer recipient is a CIC user, status information appears. It shows whether the transfer recipient is logged onto a CIC client and is able to accept the transferred call. This can help you decide what kind of call transfer to use.

5. Click the **Voice Mail** button.

   Result: The call is transferred to the recipient's voice mail and its status changes to Disconnected in My Interactions.

Related Topics

Transfer a Call After Consulting the Recipient
Transfer a Call Using a Transfer Button
Transfer a Call Without Consulting the Recipient
Transfer Button
Voicemail Button

Transfer a Call to Your Voice Mail

Rather than answer an incoming (alerting) call, you can transfer it to your voice mail. You can also send a call to which you are connected to your voice mail.

To transfer a call to your voice mail:

- Select the call, if it is not already selected, then on the Queue Control toolbar, click the Voicemail button.

  Result: The call is transferred to your voice mail. When a caller has finished leaving a message, the voice mail is saved as a file, attached to an email message and sent to you. You can also listen in on the call as the caller leaves a message, and then decide whether or not to pick up that call from voice mail.

Related Topics

Transfer a Call to Another Person's Voice Mail
Voicemail Button

Transfer a Call Using a Transfer Button

In the CIC client, you can transfer a connected call or other interaction by using the **Transfer** button on the Queue Control toolbar or the Directory toolbar.

For more information, see:

- Transfer a Call Using the Queue Control toolbar
- Transfer a Call Using the Directory Toolbar
- Transfer a Call to a Directory Entry

Related Topics

Park a Call on Another Person's Extension
Transfer a Call After Consulting the Recipient
Transfer a Call to a Directory Entry
Transfer a Call to a Workgroup
Transfer a Call to Another Person's Voicemail
Transfer a Call to Your Voice Mail
Transfer a Call Without Consulting the Recipient

Transfer a Call Using the Queue Control Toolbar

You can transfer the currently selected interaction by using the Transfer button on the Queue Control toolbar.

To transfer a call using the Transfer button:

1. Inform the caller that he or she is going to be transferred.
2. On the Queue Control toolbar, click the **Transfer** button.

   Result: The Transfer dialog box appears.
3. In the **Transfer To:** text box, type all of part of the recipient's name or number.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the recipient you expected, check the search criteria selected in the **Options** drop-down list and adjust them if necessary.
4. From the drop-down list, do one of the following:
   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
   - Select the appropriate name and associated extension number.

   Result: If the intended recipient is a CIC user, status information for the selected CIC user appears. It shows whether the transfer recipient is logged onto a CIC client and is able to accept the transferred call. This can help you decide what kind of call transfer to use.
5. Do one of the following:
   - To transfer the call without consulting the recipient, click the **Transfer** button.
   - To speak with the transfer recipient before transferring the call, click the **Consult** button. For more information, see Transfer a Call After Consulting the Recipient.
   - To send the call to the intended recipient's voice mail, click the **Voice Mail** button. You can send a call to another person's voice mail only if that person is another CIC client user. For more information, see Transfer a Call to Another Person's Voicemail.
   - To park the call on the intended recipient's extension until the recipient becomes available, click the **Park** button. This places the call in the recipient's **My Interactions** queue so the recipient can select it later. You can park a call on a person's extension only if that person is another CIC client user. For more information, see Park a Call on Another Person's Extension.

Result: The transferred call disappears from My Interactions and is routed to the selected recipient.

Related Topics

Call Coverage Options
Set Status Details
Transfer a Call Using the Directory Toolbar
Transfer a Call to a Directory Entry

Transfer a Call Using the Directory Toolbar

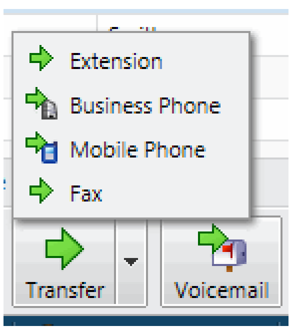
To transfer a call using the Transfer button:

1. While the call is selected in My Interactions, inform the caller that he or she is going to be transferred.
2. Click the **Hold** button.
3. Locate and select the directory entry to which you want to transfer the call.
4. Do one of two things:
    - In the Directory toolbar, click the Transfer button.

    Result: This transfers the call to the default number for the selected entry.

    - In the Directory toolbar, click the arrow on the **Transfer** button and then click one of the displayed "Transfer" entries to dial the associated number.

    Result: This transfers the call to the selected number for the selected entry.



Related Topics

Directory Toolbar Buttons
Transfer a Call Using the Queue Control Toolbar
Using the Directory Toolbar

Transfer a Call Without Consulting the Recipient

Transferring a call without speaking to the intended recipient is called a **blind transfer**. Use a blind transfer if you do not need to speak with the recipient before transferring an interaction. If the intended recipient does not answer, the call is sent to the recipient's voice mail.

To blind transfer from My Interactions:

1. Inform the caller that he or she is going to be transferred.
2. On the Queue Control toolbar, click the **Transfer** button.

Result: The Transfer dialog box appears.

3. In the **Transfer To:** text box, type all of part of the recipient's name or number.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the recipient you expected, check the search criteria selected in the **Options** drop-down list and adjust them if necessary.

4. From the drop-down list, do one of the following:

   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
   - Select the appropriate name and associated extension number.

   Result: If the intended recipient is a CIC user, status information for the selected CIC user appears. It shows whether the transfer recipient is logged onto a CIC client and is able to accept the transferred call. This can help you decide what kind of call transfer to use.

5. Click the **Transfer** button.

   Result: The transferred call disappears from My Interactions and is routed to the selected recipient.

Tip: Transferring a call directly to a contact's phone number is another method of making a blind transfer. For more information, see Transfer a Call to a Directory Entry.

Related Topics

Call Coverage Options
Set Status Details
Transfer a Call After Consulting the Recipient
Transfer a Call to a Directory Entry
Transfer a Call to Another Person's Voicemail
Transfer a Call Using the Directory Toolbar
Transfer a Call Using a Transfer Button
Transfer Button

Forwarding Calls

Forwarding Calls

You can arrange to forward your calls to a remote number when your status is **Available, Forward**. Your CIC administrator can also configure the CIC client to forward your calls if your status is **Available, Forward** or forward your calls regardless of your status.

Related Topics

Call Coverage
Forward Calls to Your Remote Telephone Number
Understanding Follow-me Routing

Call Coverage Options

Your CIC administrator can use Interaction Administrator to configure how the CIC client works. Contact your CIC administrator if you have questions on how any of these options are set on your system.

Among the call coverage options that can be set by your CIC administrator are:

- The internal number or CIC extension designated as your call coverage number.
- Whether forwarded callers leave voice mail in the mailbox for the designated call coverage number or your regular voice mailbox.
- The types of calls that are forwarded to a designated call coverage number.
    - **All Calls**.
    - **Internal Calls**. This includes calls from internal numbers or extensions on the CIC system.
    - **External Calls**. This includes calls from outside the CIC system (calls from public service telephone networks).
    - **Unknown Calls**. This includes calls from outside the CIC system that do not have caller ID.
- Whether calls are forwarded to a call coverage number when your status is Do Not Disturb (DND), including not being logged onto the CIC client.
- Whether calls are forwarded to a call coverage number when you are on the phone.
- Whether calls are forwarded to a call coverage number when you do not answer.

Forward Calls to Your Remote Telephone Number

Requirements: Your Phone Number Classifications-Forward Access Control rights determine which phone numbers you can use as forwarding numbers.

If you will be away from your desk but accessible at another telephone number, you can forward your calls. You can forward calls to an internal extension, a local number, a cellular telephone, or even a long-distance number (if you have the appropriate rights.)

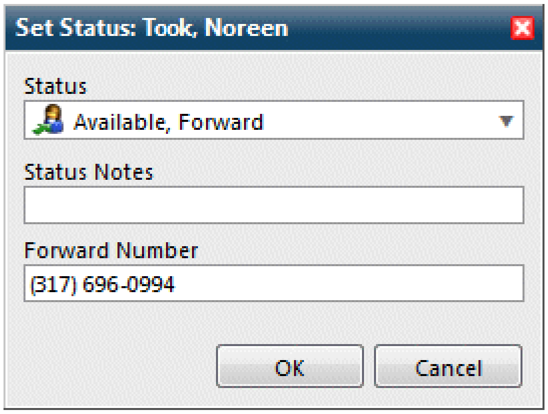
- When you choose to forward calls to a remote telephone number, you must set your status to **Available, Forward**. The IC server redirects all calls originally targeted at your local extension to the remote number.

  Or your CIC administrator can create multiple **Forwarding** statuses if your site requires it. For example, you could have **Available Forward, Home** and **Available Forward, Mobile**.

- If you can't normally make long-distance calls from the CIC client, you can't forward your calls to a long-distance number. If you have questions about your call privileges, see your CIC administrator.

To forward your calls to your remote location:

1. From the **My Status** drop-down list, select **Available, Forward**.
2. Do one of the following:
    - If you have **previously** set your status to Available, Forward and entered the correct forwarding telephone number, you are finished. All calls are now forwarded to the remote number.
    - If you have **never** before set your status to Available, Forward, you are prompted to "Please provide a forward number." Enter your remote telephone number and click **OK**. You are finished.
    - If you have previously set your status to Available, Forward but want to **change the forwarding telephone number**, click **Set status details** and go to the next step.
3. In **Forward Number**, enter the remote telephone number for forwarded calls.



4. Click **OK**.

Result: Your status is set to Available. Forward and all calls are forwarded to the remote number.

Related Topics

Set Status Details

Follow-me Routing

Understanding Follow-me Routing

Requirements: You need the Security right to use Follow-me routing in the CIC client.

If someone calls you when you're away from your office, you can set up the CIC client to search for you at different telephone numbers. After locating you, the CIC client transfers the call to you at that location.

With follow-me routing, a caller dials one number to reach you and then the CIC client consecutively calls the telephone numbers you set up to find you and connect you to the caller.

Follow-me routing can transfer calls to several locations, including:

- Your home
- Your cell phone
- An extension at another location
- Any long-distance or international numbers, if you have permission from your CIC administrator

Note: The CIC client can send a message to your pager or an email address when someone leaves a message for you. For more information, see Voice Mail / Fax Paging. In addition, your administrator can configure Interaction Center to send you an email notification when internal and/or external calls are routed to you when you are in a forwarding status.

Follow-me routing configuration settings also determine how many seconds the CIC client rings a telephone number before it calls the next number on the follow-me list or transfers the call to your voice mail. These configuration settings can also require the person who answers the call to enter your CIC password. For more information, see Set Up Follow-me Routing.

How Follow-me Routing Works

To start follow-me routing, set your status to **Available, Follow-Me**. Then, when someone calls you, the caller can choose to leave a voice mail message or have CIC find you. If the caller wants CIC to find you, CIC records his or her name and places the caller on hold while it begins the follow-me routing process.

If CIC cannot locate you at any of the numbers in your follow-me routing list, it transfers the caller to your voice mail.

If call screening is enabled, when you answer the call and enter your password (if the follow-me routing number requires a password), CIC announces the caller's name and you can choose to accept the call, transfer it to another number, or forward it to your voice mail.

Note: If someone else answers your call and follow-me routing requires a password, he or she must enter the password before CIC transfers the call. If no one enters the required password within a few seconds, CIC transfers the call to your voice mail.

Related Topics

Follow Me Routing Options
Set Up Follow-Me Routing
Start follow-me routing

Set Up Follow-me Routing

Requirements: You need the Follow Me Security right to use Follow-me routing in the CIC client. Your Phone Number Classifications-Follow Me Access Control rights determine which phone numbers you can use as Follow-me numbers.

To handle calls when you are away from the office, the CIC client can search for you at different telephone numbers. The client consecutively calls the telephone numbers in a follow-me routing list. After locating you, the client can transfer the call to you at that location.

You can set up follow-me routing in the CIC client. You can also use the Telephone User Interface to turn Follow-me on or off and configure Follow-me phone numbers. For information about setting up Follow-me numbers via the TUI, see the *Telephone User Interface User's Guide* or **Quick Reference Card** in the CIC Documentation Library.

To add a follow-me phone number:

1. Set your status to **Available, Follow-Me**.
2. Click the **Set status details** link next to the My Status drop-down list.
3. In the **Set Status** dialog box, complete the fields as described below:

Status Notes	Enter any additional information on your current status. As a convenience, the notes from the last time you selected this status appear in Status Notes. You can make any necessary changes to these notes. **Requirements**: You need the Status Notes right in order to create or modify Status Notes.
Until Date **Until Time**	**Do any of the following:** · Select the **Until Date** or **Until Time** check box to use the default date and time. **Result**: The current date appears in the **Until Date** field. The CIC client automatically rounds the current time to the next half hour, and sets that time in the **Until Time** field. · To change the **Until Date**, select the check box and click in the text box. Select a date from the displayed calendar.

	• To change the **Until Time**, select the check box, and click the drop-down list arrow to select a different time. **Note**: The date and time you select are played for your incoming calls.

4. Click **Configure Follow Me Numbers**.
5. To prompt callers for their name, select the **Screen Calls** check box.

Note: If **Screen Calls** is selected and you answer a follow-me call, you hear a recorded segment from the caller before you accept the call. You can either accept the call or send it to voice mail.

6. In the **Follow Me Numbers** dialog box, click the **Add** button (plus sign).
7. Complete the fields as described below.

Number	Enter a telephone number you want the CIC client to call if you are not available. Click the **Validate** button to check your phone number entry against the requirements of the dial plan for your organization or region. **Note**: For information about entering, editing and verifying phone numbers, see Phone Number Controls. **Dialing Pause** You can use both commas (,) and slashes (/) with the number. A comma causes a two-second delay and numbers typed after the slash are dialed only after a connection is made. For example, if you typed the number "555-1212 / 101, 2222", the first seven digits are dialed. After a connection is made, the digits 101 are dialed, and after two seconds, the digits 2222 are dialed. **Note**: Use of the comma (,) to create a two-second delay is not supported in all platforms. This issue will be resolved in a future release.
Extension	Enter an extension number. This number is dialed after a connection is made.
Timeout	Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds. **Note**: If the forwarding number is an internal station extension, this timeout value is ignored and the station is alerted for 45 seconds.
Use Pin	Select this check box to require that anyone who answers a follow-me router call to enter your CIC client password to accept the call. **Note**: This feature can prevent someone else from answering your calls through the follow-me routing process.

8. To add another number, repeat steps 4 and 5.
9. Click **OK** to save your settings and close the **Follow Me Numbers** dialog box.

To change your follow me settings:

1. Perform any of the following actions to update your follow me settings:
   - To change the order of your follow-me numbers, select a number and click **up** or **down arrows** above the number list**.**
   - To delete a number, select a number and click the **Remove** button **(red X)**.

- To change the settings for a number, double-click the number and type new values in the **Number**, **Extension**, and **Timeout** text boxes and select or clear the **Use Pin** check box.

2. Click the **OK** button to save your settings and close the Follow Me Numbers dialog box.

Related Topics

Understanding Follow-me Routing
Start Follow-Me Routing

Start Follow-me Routing

Requirements: You need the Follow Me Security right to use Follow-me routing in the CIC client.

After you have set up your follow-me routing numbers, you can start follow-me routing by changing your status to **Available, Follow-Me**. This causes the CIC client to search for you at different telephone numbers. After locating you, the CIC client transfers the call to you at that location.

Note: The CIC client consecutively calls the telephone numbers in the follow-me routing list in ascending order.

To start follow-me routing:

- Set Your Status to **Available, Follow-Me**.

Related Topics

Set Up Follow-Me Routing
Set Your Status
Understanding Follow-me Routing

Making Conference Calls

Making Conference Calls

Requirements: You need the Conference Calls Security right to create a conference call.

Creating a conference call is as easy as making or receiving several individual calls, then dragging and dropping each call to connect the participants.

Warning: Do not use a consult transfer or a conference call to transfer a call to an attendant profile, workgroup queue or an agent's voicemail. If you call into a workgroup queue and are put on hold and then conference the original call with your workgroup call and then disconnect from the resulting conference, the original call is removed from the workgroup queue. It is put on hold and remains on hold. Use a **blind transfer** to transfer a call to an attendant profile, workgroup queue or an agent's voicemail. For more information, see Transfer a Call Without Consulting the Recipient.

Note: You must wait until a call connects before you can add it to a conference.

Tip: You can put a conference on Hold by selecting the conference and clicking the **Hold** button. You can click the **Pickup** or **Hold** buttons to reconnect to a held conference. For more information, see Place a Call on Hold.

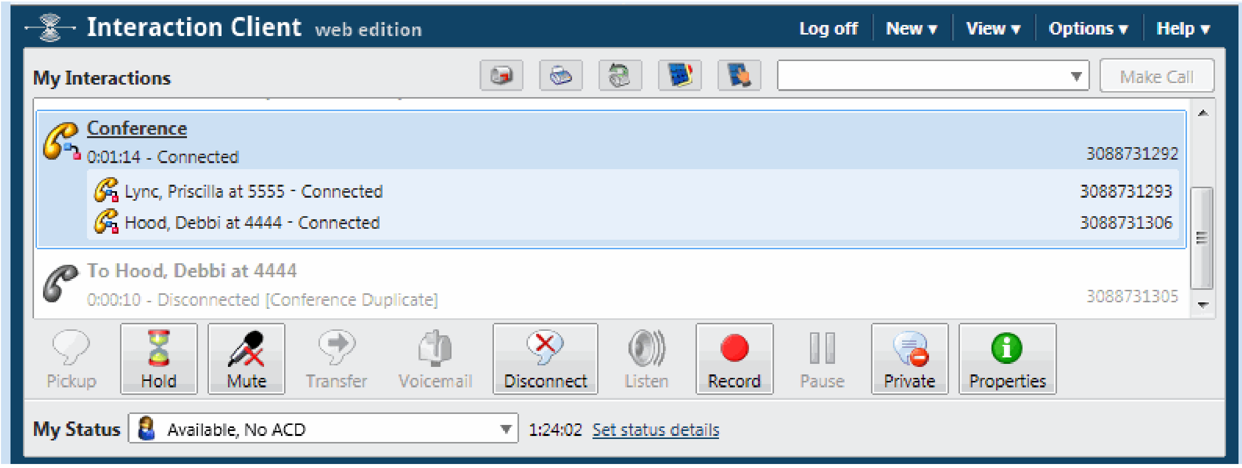
Related Topics

Conferencing Features

Create a Conference Call Using Drag and Drop

Conferencing Features

Conference calls show up in My Interactions in a tree fashion. You can click the Conference link to expand or collapse the conference display.



- To create a conference, just drag and drop a call on another call .

  Result: You see a new interaction with the name "Conference." The connected interactions are displayed under this Conference interaction.

- To add parties to a conference, drag a connected call and drop it on the Conference interaction.

Related Topics

Drag and Drop a Call on Another Call
Making Conference Calls

Drag and Drop a Call on Another Call

Requirements: You need the Conference Calls Security right to create a conference call.

You can create a conference call in My Interactions by dragging and dropping a call on another call in My Interactions.

To create a conference call:

1. Dial the number of a participant in the conference call.

   Result: The interaction appears in My Interactions.

2. Click the Hold button to put the call on hold.

3. Repeat steps 1 and 2 for each participant.

4. Select one of the calls you want to conference, and while holding down the mouse button, drag that call to another call in My Interactions and release.

5. After you drag and drop a call to create a conference, a confirmation dialog box may appear asking you if you are sure you want to join. Click **OK**.

Note: Your CIC administrator controls whether you see this confirmation dialog box. The CIC administrator sets the Confirm drag and drop operations configuration option for you.

Result: The calls are now connected to each other and a conference call is created. For more information, see Conferencing Features.

Related Topics

Conferencing Features

Using Other Call Features

Using Other Call Features

This section describes how to use other call features including:

- Camp on an Internal Extension
- Determine if Someone is Listening to or Recording Your Interactions
- Listen to a Call
- Record a Call
- Request Assistance from Your Supervisor
- View and Edit Interaction Properties

Camp on an Internal Extension

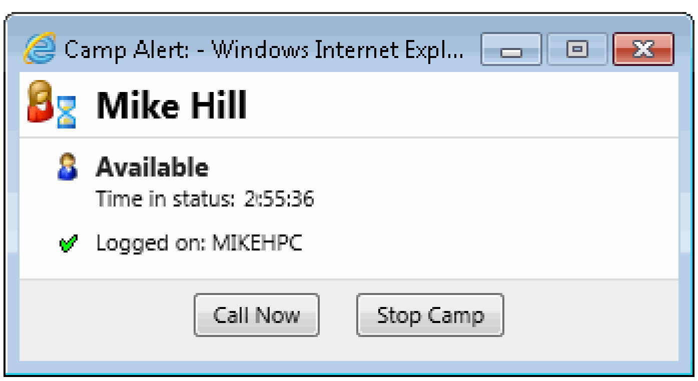
Camp is a function that can watch another user's status and alert you when that status changes. When another CIC client user in your organization is currently unable to take your call, you can camp on that person's extension until that person becomes available.

Tip: You must disable popup blocking for the Interaction Client Web Edition site in order for the camping alert to "pop" when designated user's status changes. See the help for your browser, if you do not know how to disable popup blocking for a designated site.

To camp on an internal extension:

1. Select a directory entry and click the Camp button in the Directory toolbar.

   Result: This displays the Camp desktop alert with the selected person's current status and corresponding status icon.



Note: You can click **Stop Camp** on any Camp desktop alert to cancel camping on that user.

2. When the person's status changes to an available type, the Camp desktop alert reappears. The **Call Now** button is enabled. Click it to call the user.

Note: As soon as you start a call by clicking **Call Now**, the camp is stopped on the person you are calling. However, the other may be unable to take your call, even if that person's status is set to an **Available** type.

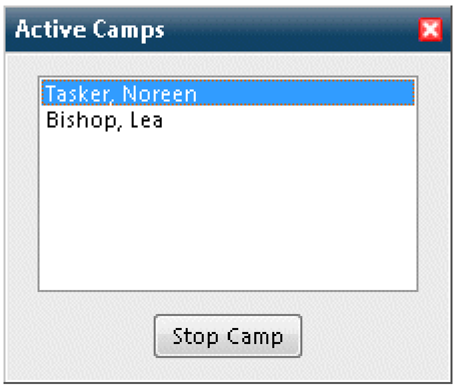
Camping on Multiple Extensions

You can camp on any number of CIC client user extensions individually. If you want to see all the camps you have activated, use the Active Camps dialog box.

To manage your current camps:

1. From the **View** menu, select **Active Camps**.

Result: The Active Camps dialog box displays the names of the people on whose extensions you are camped.



2. Do one of the following:
    - Select a name and click **Stop Camp** to stop camping on the selected person's extension.
    - Click **Close** to exit the Active Camps dialog box.
    - Double-click on an entry to re-display the Camp desktop alert.

Stopping Camping

You can terminate camping alerts in several ways.

To stop camping, do one of the following:

- Log off Interaction Client Web Edition.
- Select a name and click **Stop Camp** in the Active Camps dialog box.
- Click **Stop Camp** in a Camp desktop alert.

Related Topics

Camp Button
Camp Desktop Alert

Determine if Someone is Listening to or Recording Your Interactions

Requirements: The Monitor Columns Security right, the Supervisor Monitoring feature, and your role as Supervisor or Agent determine whether the **Listen** and **Record** icons are visible for some monitored interactions.

A supervisor or other user with the appropriate rights can "listen to" (monitor) any interaction type. For example, a supervisor may decide to listen to or record an interaction in your ACD workgroup queue. In addition, multiple supervisors can listen or record a single interaction.

Note: Any user can record any interaction on any queue that the user has permission to modify, except for interactions marked **Private**. Also, depending on settings established by your CIC administrator in Interaction Administrator, supervisors who listen to or record your calls may not be indicated by record or listen icons. For more information, see Settings affecting Record and Listen indicators.

Record Icon

Listen Icon

If someone is listening to or monitoring your interaction, the Listen icon appears at the far left or right of the appropriate line in My Interactions.

Record Icon

When you record an interaction, two interactions appear in your queue view. The Record icon appears at the far left or right of the appropriate line in My Interactions.

- A Record icon on the **right** of the selected interaction indicates that someone is recording the interaction.
- A Record icon at the **left** side of the queue view indicates you are recording the interaction. In this position it indicates interaction type and appears next to the interaction that represents the recording you are making.

If someone else is recording your call:

- A Record icon on the **right** side of the selected interaction indicates someone is recording the interaction.
- The absence of an accompanying recording object with a Record icon on the **left** indicates someone else is making the recording.
- You can determine how many CIC users are recording the interaction by pointing to the Record icon on the right of the connected call line. This displays the number of users who are recording the interaction.

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Related Topics

Listen Button
Listen to a Call
Record a Call
Record Button
Settings affecting Record and Listen indicators
Working with Calls

Settings affecting Record and Listen indicators

Whether or not you can see if another user or a supervisor is monitoring an interaction is governed by several factors:

- Are you a Supervisor of any workgroups to which the interaction was routed?

- Is Interaction Recorder automatically recording the interaction?
- Did the CIC administrator enable Supervisory Monitoring on the IC server?

Note: Enabling the Supervisory Monitoring feature **changes** the behavior for supervisors. They can no longer see Interaction Recorder system recordings.

Behavior

This table summarizes the circumstances under which you can see if someone is recording or listening to an interaction. It applies to IC 4.0 SU 6, CIC 2015 R1 P2, CIC 2015 R2 and subsequent releases.

Under these conditions			You can see			
You have Monitor Columns right *	**Supervisory Monitoring is enabled**	**You are a Supervisor**	**Your recording**	**Supervisor's recording**	**Non-supervisor's recording**	**Interaction Recorder system recording**
No	(Any)	(Any)	**Yes**	No	No	No
Yes	No	(Any)	**Yes**	**Yes**	**Yes**	**Yes**
Yes	**Yes**	No	**Yes**	No	No	No
Yes	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	No

* The Monitor Columns Security right does not apply to Interaction Client Web Edition users. The **Record** and **Listen** icons appear when appropriate but are not displayed in columns.

Related Topics

Determine if Someone is Listening to or Recording Your Interactions

Listen to a Call

You can listen to a call on hold in My Interactions or a call that has been transferred to voice mail.

To listen to a call:

§ Select a call and then click the Listen button.

Note: When you listen to a call, the Listen icon appears on the call line in My Interactions.

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Related Topics

Determine if Someone is Listening to or Recording Your Interactions
Listen Button
Listen to Someone Leave a Voicemail Message

Record a Call

Requirements: See Record.

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If you have the appropriate security rights, you can record a call. Ad hoc recordings made using the **Record** button are stored in files that your CIC administrator can arrange for you to receive in your email inbox as WAV files attached to email messages.

Note: You cannot record an interaction that another CIC client user has marked as Private. The following procedure assumes that you are currently connected to a call.

To record a call:

1. Select an interaction and click Record.

   Result: The **Record** button appears pressed, and the call is recorded as a. wav file.

2. To pause the recording, click **Pause**.

   Result: The **Pause** button appears pressed, and recording is suspended.

   Note: This pause affects only your recording of the interaction. Recordings made by other monitors of this interaction are not affected. If available, use the **Secure Pause** button to pause **all** recordings. For more information, see Secure Pause a Recording.

3. To stop recording, click **Record** again.

   Result: The **Record** button becomes un-pressed, and the recording stops.

Note: You can press the **Record** button more than once to stop or continue recording your call. The CIC client stores each part of the recorded conversation in separate. wav files, and sends them to you in email message attachments after you end the call.

Related Topics

Record Button
Secure Record Pause Button

Report a Problem

You can create an email message and automatically include all of an interaction's critical information when reporting a problem with the CIC client to your support representative.

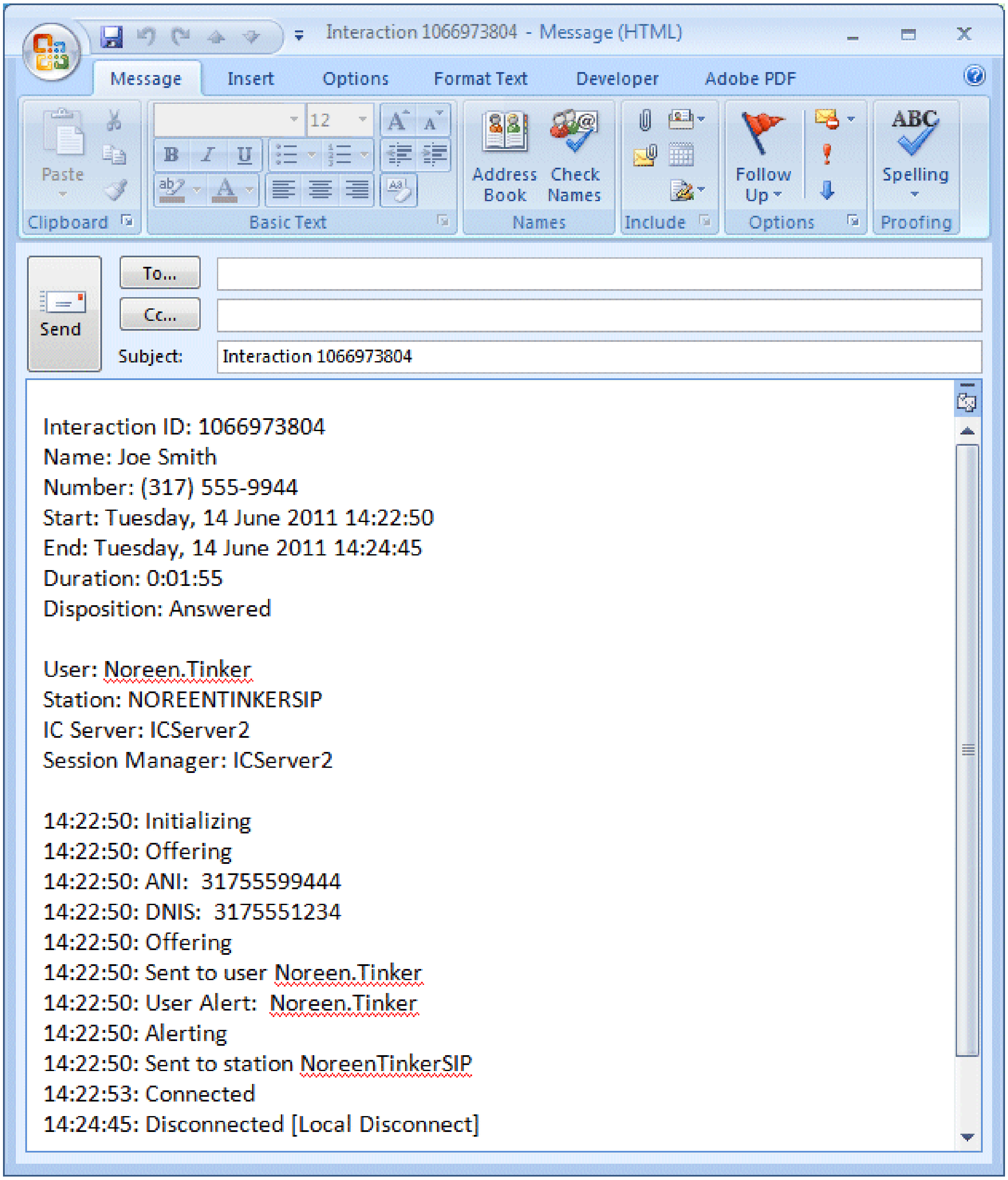
Tip: For more information about accessing technical support, submitting product or documentation feedback, or request enhancements, see Feedback and Access Support.

To report a problem:

1. In the Interaction Properties Dialog Box, click the **Interaction ID** hyperlink.

   Tip: This hyperlink is the number preceded by the envelope icon in the bottom border of the Interaction Properties dialog box.

   Result: A new email message window opens in your default email program.



Note: Complete details of the selected interaction automatically appear in the email message.

2. Supply any other useful information or comments in the email message.

3. Address the email message.

Note: Contact your CIC administrator for the email address for all of your company's problem reports.

4. Send the email message to your support representative or other designated person.

Request Assistance from Your Supervisor

Requirements: For more information about the rights required to use the Assistance button, see Assistance. The Assistance button is enabled only for **ACD-routed interactions**. Also, if the interaction is not in a state in which this action can be performed, the Assistance button is dimmed.

Sometimes you encounter an interaction for which you need assistance. For example, a caller could ask a question that you cannot answer. Or you are in the middle of a web chat when you need help from your supervisor. Or you want to ask a question before you respond to an ACD-routed email.

- You can request assistance only for ACD-routed interactions.
- You can have one active assistance request for each interaction.
- You can request assistance multiple times for the same interaction as long as any previous assistance requests are completed before you make a new request.

Workgroup Supervisors

Workgroup supervisors are configured in Interaction Administrator. Also, supervisors receive assistance requests only if they are running **Interaction Supervisor** or **IC Business Manager**. If supervisors are running only the CIC client, they do not receive assistance requests.

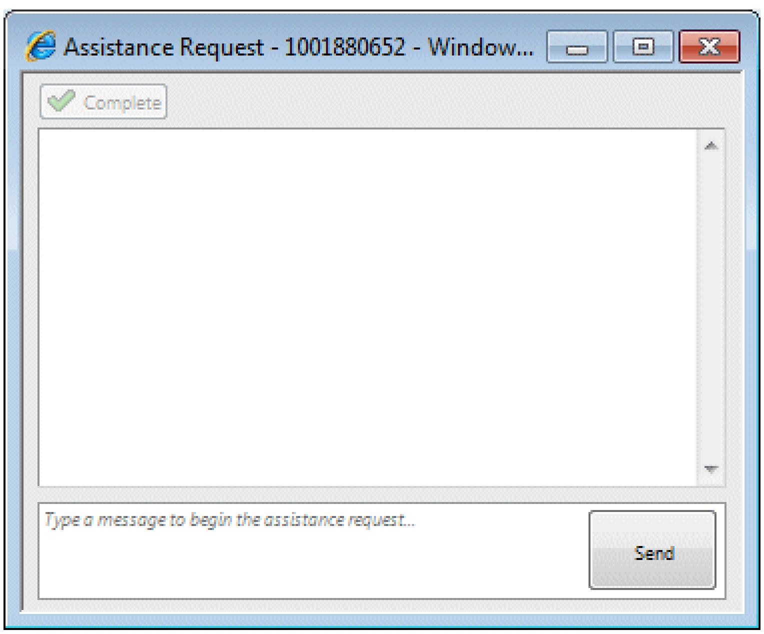
Note: At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

Requesting Assistance

To request assistance:

1. In My Interactions, select the ACD-routed interaction for which you need help.
2. On the Queue Control toolbar, click the Assistance button.

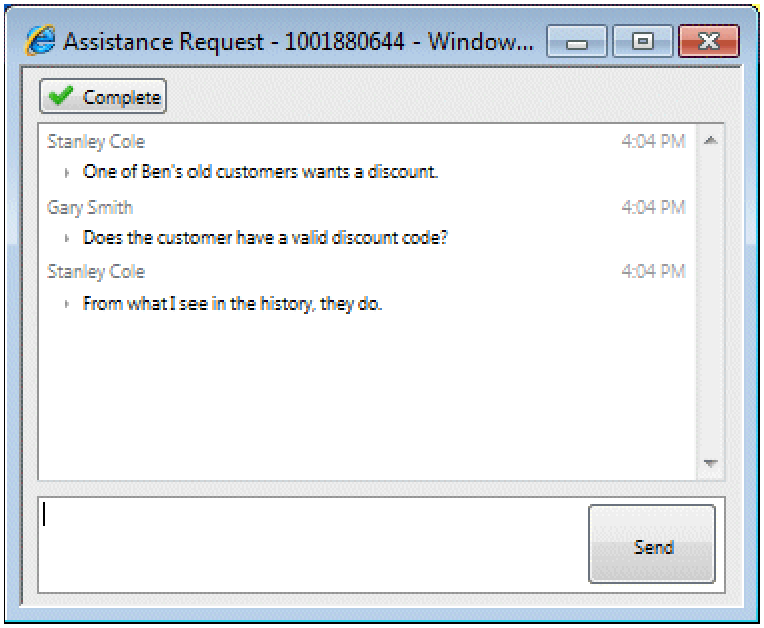
   Result: The **Assistance Request** dialog box appears.



3. In the "**Type a message to begin the assistance request...**" text box, type a brief explanation of why you need assistance from your supervisor.

4. Do one of the following:
   - To cancel the request, close the Assistance Request dialog box.
   - To send the help request to your supervisor, click the **Send** button.

   Result: The workgroup supervisor receives an assistance request in Interaction Supervisor. Also, all supervisors on the same IC server see a pop-up toast assistance request. You can chat with your supervisor in the Request Assistance dialog box.

5. When you no longer need assistance and have finished your conversation with your supervisor, click **Complete**.

   Result: This action ends and closes the assistance request.

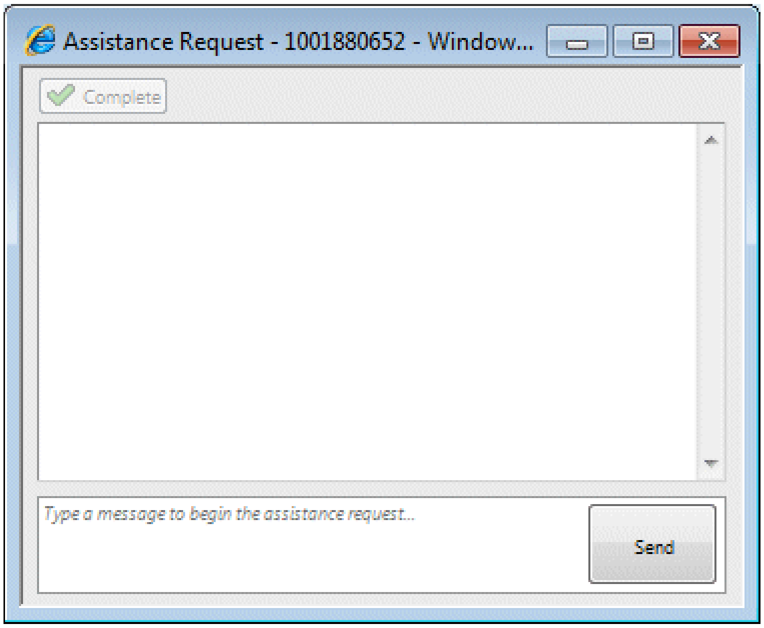
   Note: Only the person who begins the Assistance Request process can end the request and the resulting conversation by clicking **Complete**.

Related Topics

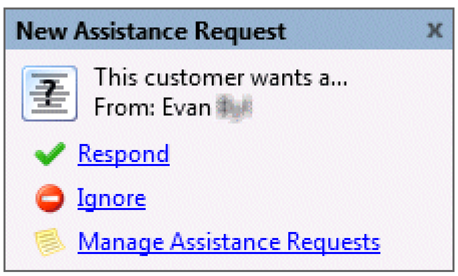
Assistance Button
Assistance Process

Assistance Process

When you click the Assistance button in My Interactions, the Assistance Request dialog box appears. You enter a problem description and click **Send**.



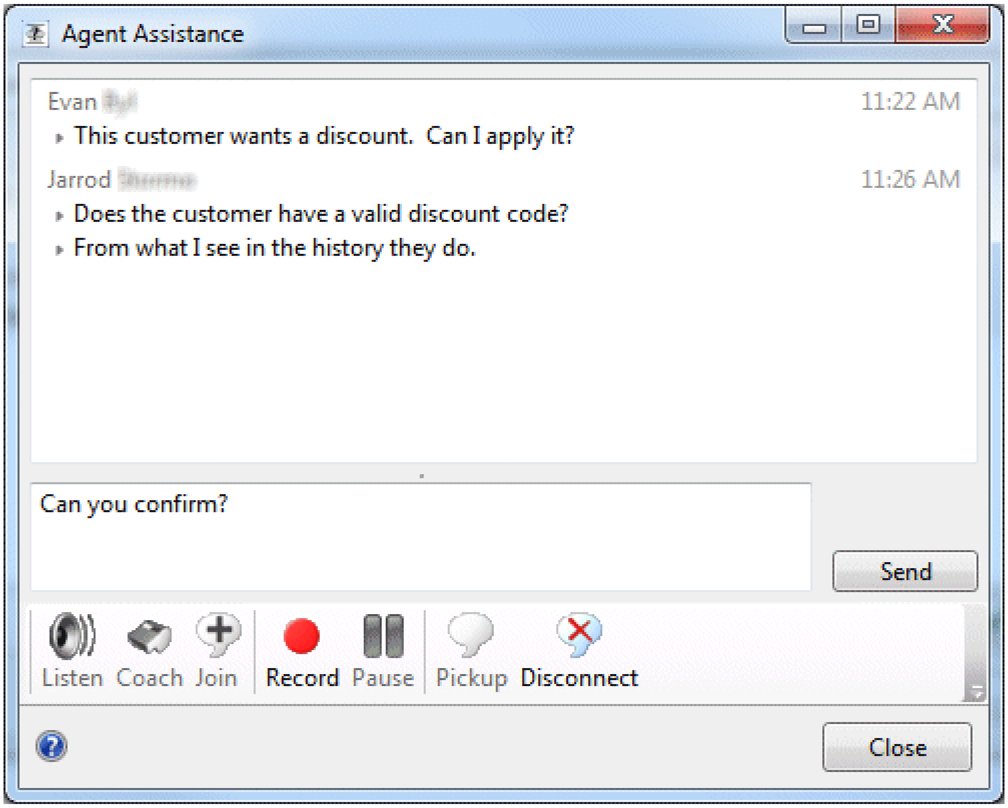
All of the workgroup supervisors on the same IC server see this assistance request. If a supervisor responds to the request, the toast notification closes automatically for all supervisors.



Note: Workgroup supervisors are configured in Interaction Administrator. Also, supervisors receive assistance requests only if they are running **Interaction Supervisor** or **IC Business Manager**. If they are running only a CIC client, they do not receive assistance requests. At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

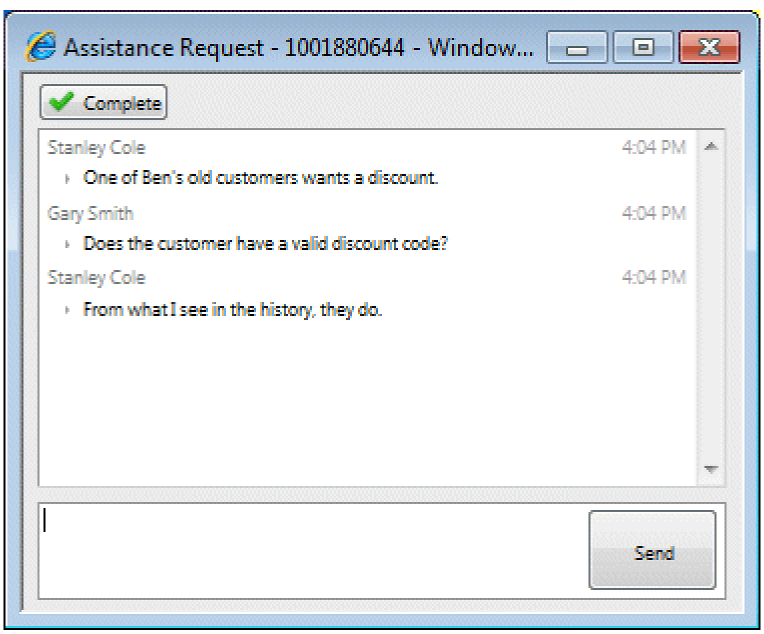
The supervisor responds to the notification by clicking a link:

- **Respond** opens the Respond to Assistance Request dialog, to give immediate assistance and feedback to the user. The supervisor can text chat with the agent, and use call action controls to listen, coach, join, record, pause, pickup, or disconnect the interaction.



- **Ignore** disregards the message and dismisses the assistant request toast.
- **Manage Assistance Requests** opens the Agent Assistance dialog box, which displays all assistance requests from agents in workgroups for which the supervisor has responsibility. The supervisor can select a request to answer, and assist multiple agents at the same time.

You can chat with your supervisor in the Request Assistance dialog box.



Related Topics

Assistance Button
Request Assistance From Your Supervisor

Secure Pause a Recording

Requirements: See Secure Record Pause.

You can use Secure Pause to avoid recording sensitive information, such as a Social Security number or credit card number, during a call. This procedure assumes you are currently connected to a call. You do not have to be currently recording the call interaction.

Note: The **Secure Pause** button is enabled when you select the parent interaction (call), not the recording.

To secure pause a recording:

- Select a call interaction and click Secure Record Pause.

  Result: Your recording of the interaction (and all recordings by any other monitors of this interaction) are paused for a configured period of time. The Secure Pause button displays a countdown timer of how long **all recordings** will continue to be paused. **The Secure Pause does not end until the timer reaches zero.**

- You can press **Secure Pause** again during a pause to reset the countdown timer to the maximum duration of a pause.

  Tip: Pressing **Secure Pause** multiple times during a pause does not increase the duration beyond the maximum time limit. The maximum duration of a Secure Pause is configured in Interaction Administrator. Contact your CIC administrator if you have questions about the length of a Secure Pause.

Note: The final recording contains a beep to indicate secure (non-recorded) segments. The recording does not play silence during the secure pause segment. These segments are omitted from the recording.

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Related Topics

Secure Pause Button

View and Edit Interaction Properties

You can view extended information for a completed interaction or make notes during the interaction.

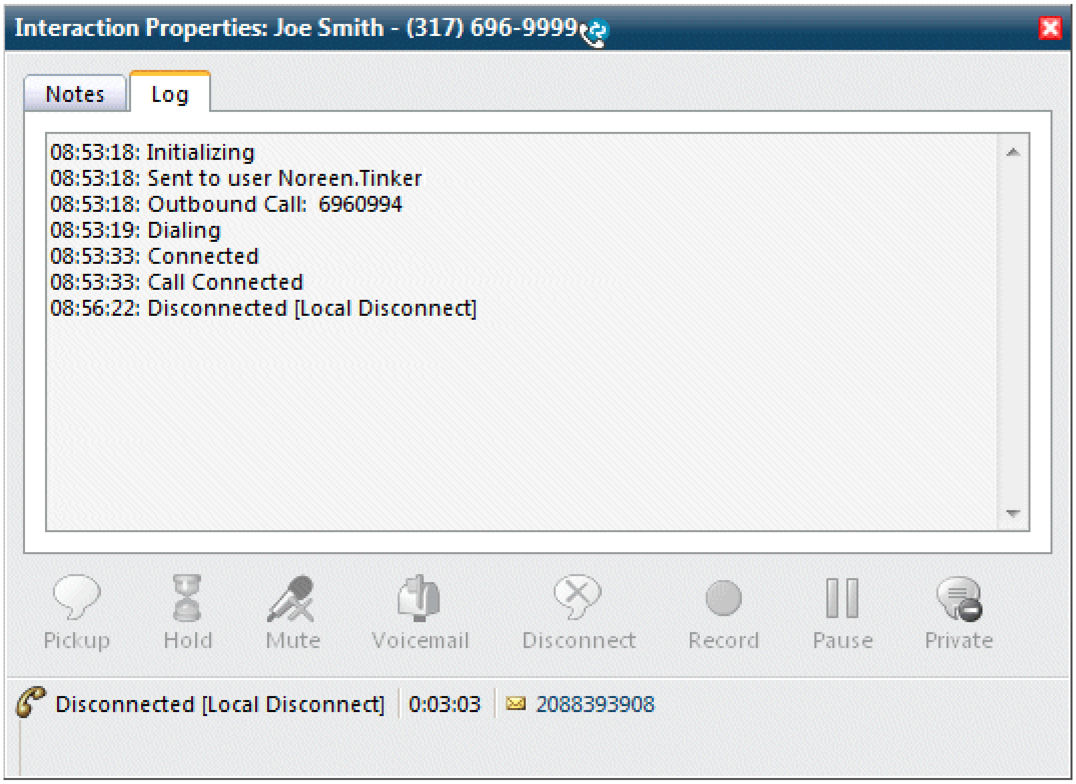
To view interaction details, do one of the following:

- In My Interactions, select an interaction and click the Properties button.
- In Call History, select an interaction and click the Properties button on the dialog box.

Result: The Interaction Properties dialog box appears.

Log

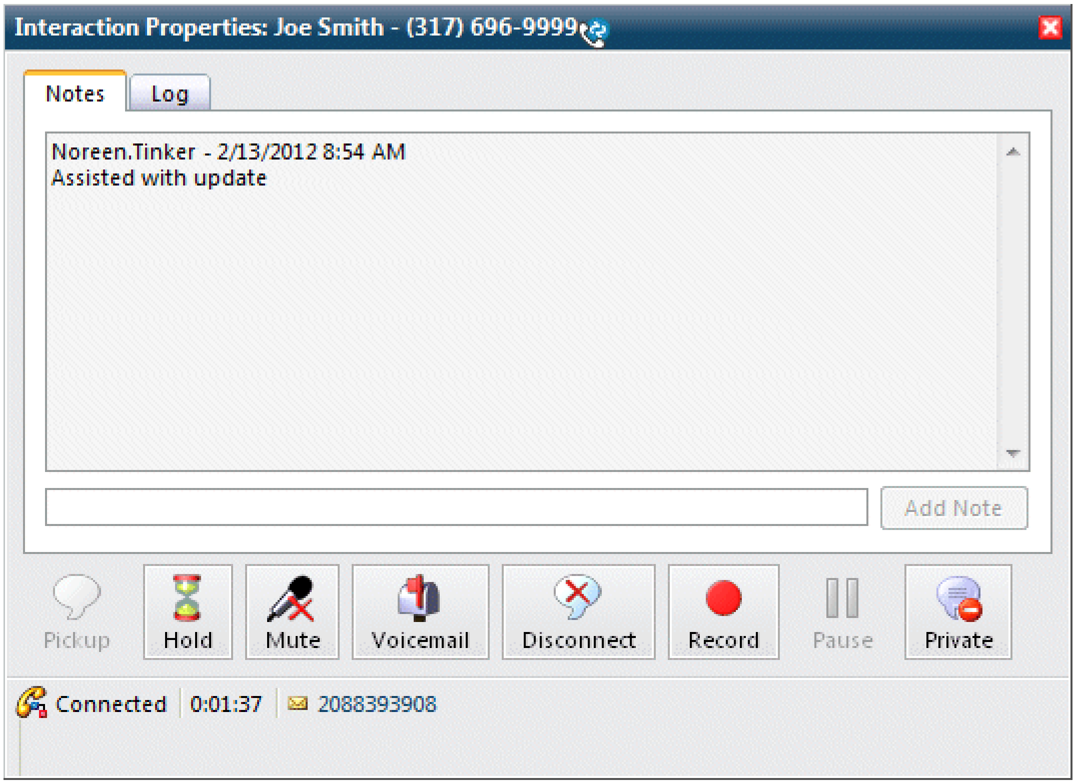
The **Log** describes changes in the interaction's state. This information goes into a log file and is used for reporting purposes.



Notes

Notes record information typed by an agent about an interaction.

Note: You can take notes on an interaction only while the interaction is selected and active, during a call, for example. You can also use the Notes section in the appropriate interaction window to add notes or comments about an Interaction. For more information, see Add Notes to an Interaction.

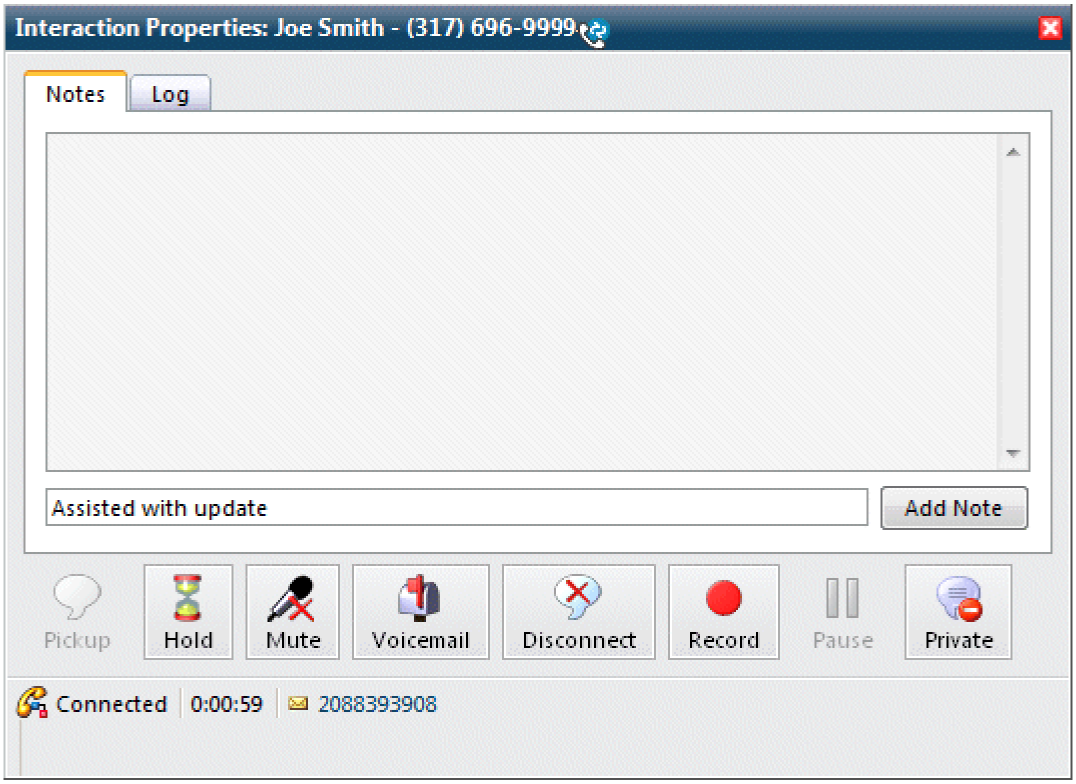


To take notes on an interaction:

1. In My Interactions, select an interaction and click the Properties button.

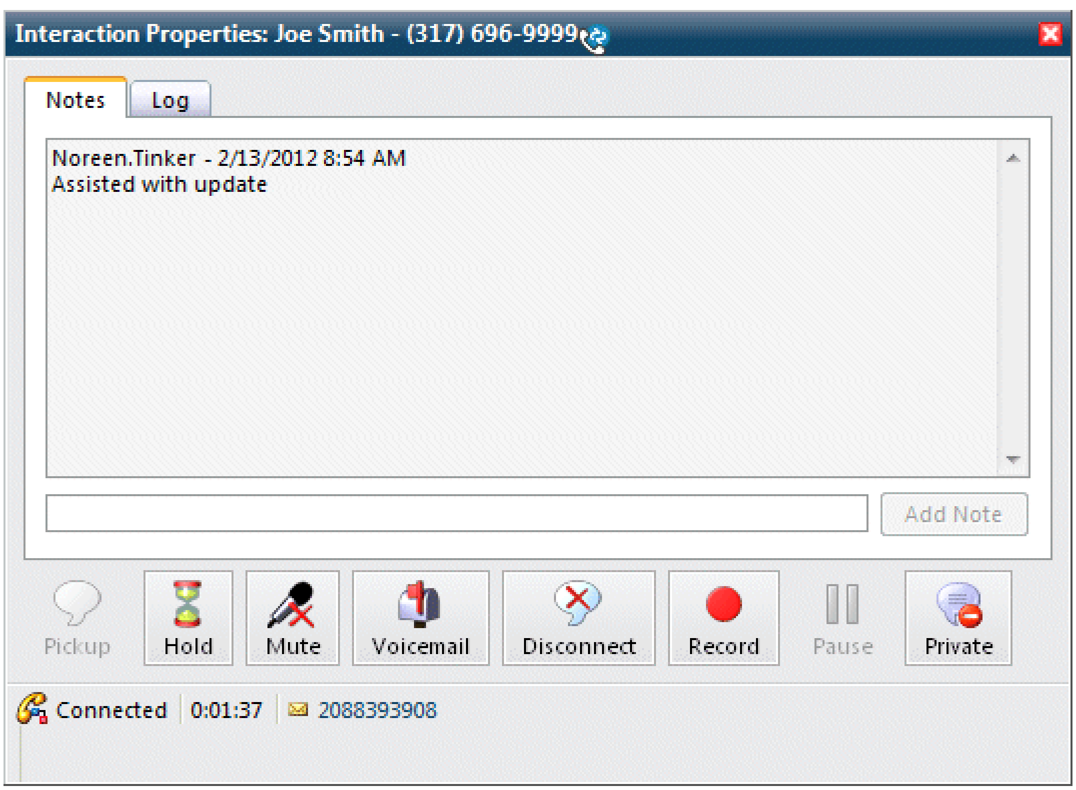
   Result: The Interaction Properties dialog box appears.

2. Click the **Notes** tab.
3. In the text box to the left of the **Add Note** button, type the notes.



4. Click the **Add Note** button.

Result: The text appears in the **Notes** tab.



Related Topics

Add Notes to an Interaction
Assign Codes to an Incoming Interaction
Assign Codes to Outgoing Interaction
Properties Button on the Queue Control Toolbar
View and Edit Directory Entries
View Directory Entries

Working with Chat Sessions

Working with Chat Sessions

In the CIC client, chat sessions are online, real-time, typed conversations between CIC client users or between a CIC client user and a remote chat participant browsing your website. If Interaction Center is configured to receive chat sessions, then you are alerted to a chat session, just as you are alerted to other incoming interactions such as calls.

Tip: Pick up an alerting chat request in My Interactions. Or, a chat can open automatically, if your user information in Interaction Administrator is configured to **Auto-Answer non-ACD Interactions**. Popup blockers can prevent auto-answer windows from opening. If you want to use the Auto-Answer feature, you may need to configure your browser or popup block software to allow popup windows in the CIC client.

There are two types of chat sessions:

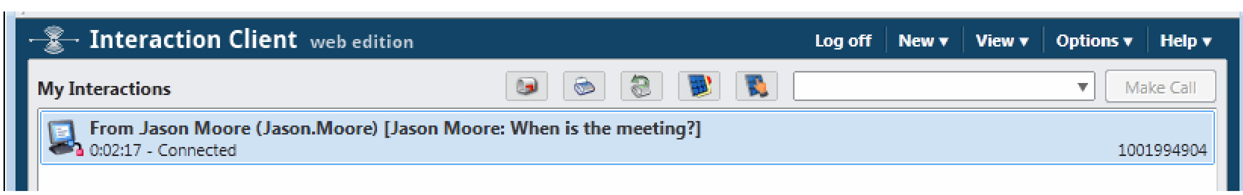
- A CIC user to CIC user chat is an **Intercom chat**. These internal chats can take place only between CIC users on the same IC server. Intercom chats are not limited to two participants and can include several CIC users. Use Intercom chats to get a quick answer to a question or to pull a team together to work together on a problem. For more information, see Initiate a Chat Session.

  Requirements: You need the Intercom Chat Security Right before you can participate in an intercom chat. Intercom chats can take place only between users on the same IC server. You cannot start a chat session with a user on a peer server.

- An CIC user to remote participant chat is a **web chat**. A remote user can start the chat by clicking a link on your company's website. Chat requests can be ACD-routed to your queue, much like an incoming call. You then pick up the chat request in a similar manner to answering an incoming call.

Chat Interactions

A connected computer icon identifies a chat interaction in My Interactions. The chat interaction displays the name of the last participant to type during this chat and part of the text typed.



Related Topics

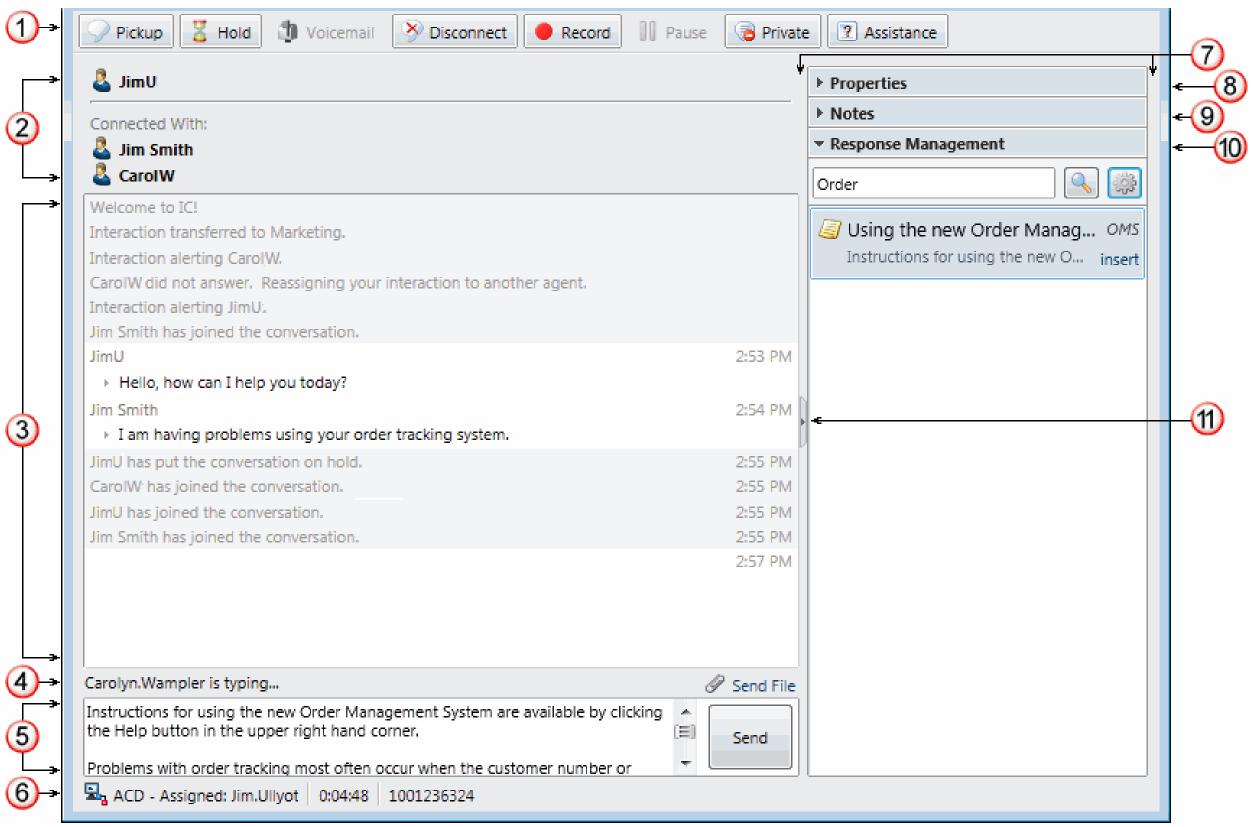
Add Notes to an Interaction
Assign Codes to an Interaction
Chat Window
Conference Two or More Chat Sessions
Copy and Paste Text during a Chat Session
Determine if Someone is Listening to or Recording Your Interactions
Disconnect a Chat Session

- Initiate a Chat Session
- Manage a Chat Session
- Mark a Chat Session as Private
- Pick Up a Chat Request
- Place a Chat Session on Hold
- Record a Chat Session
- Request Assistance from Your Supervisor
- Send a Chat Session Request to Voicemail
- Transfer a Chat Session

Chat Window

Chat Window

The Chat window provides the necessary tools for participating in a chat interaction.



1	**Toolbar**	The toolbar contains buttons for most of the functions for managing a chat session. For more information, see Manage a Chat Session.
2	**Chat Members**	This section displays the names of the chat participants. The person who initiates the chat is listed above the separator line. The other chat participants are listed in the **Connected With** section, in the order in which they entered the chat session.
3	**Conversation**	The conversation area displays the pre-configured automatic messages that sends when the chat begins, plus all chat text from all participants.
4	**Alert**	You are alerted when a chat participant is typing a response that hasn't yet appeared in the conversation area.

5	**Composition area**	Compose your reply to an ongoing chat, then click **Send** or press **Enter**. You can: · Type a response. · Click the **Send file** icon (paperclip) to locate a file on your workstation and send it to other chat participants. **Note**: You can send a file to a visitor who starts a chat session from your company's website (web chat). This function is not available when you are chatting with other CIC users (intercom chat). However, you can send text containing the file path to other CIC users. · Locate and insert a Favorite Response or a system-wide response in the composition area. For more information, see Use Response Management During a Chat Session. · Copy and paste text to or from a Windows application.
6	**Status bar**	The Status bar displays the state, duration and ID number of the interaction.
7	**Sidebar area**	The appearance of the sidebar area can vary based on your user rights. It contains controls and information that are related to the chat.
8	**Properties**	The Properties section contains the interaction log. Optionally, the Account Code and Wrap-Up Code drop down lists also appear in this section. Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to an incoming email message. If you are a member of a workgroup for which Wrap-Up codes are configured, you can use this drop-down list to assign the code.
9	**Notes**	Use the Notes section to add notes or comments about the ongoing chat. Other chat participants do not see these notes. **Note**: These notes are visible to supervisors who are "Listening to" (monitoring) this chat.
10	**Responses**	Select a pre-defined response. For more information, see Use Response Management During a Chat Session.
11	**Splitter Bar**	If you prefer not to see the sidebar area, click the splitter to hide that part of the Chat window. Click the splitter again to restore the sidebar area.

Related Topics

Add Notes to an Interaction
Assign Codes to an Interaction
Manage a Chat Session
Understanding Account Codes
Understanding Wrap-Up Codes
Working with Chat Sessions

Manage a Chat Session

Manage a Chat Session

CIC client users can participate in intercom chats or web chats. Chat sessions can include two or more users. You can use the toolbar or menus in the Chat Window to manage a chat.

Chat Window Toolbar

The Chat Window toolbar contains buttons for most of the functions for managing a chat session.

Button	Description
	Click **Pickup** to connect to the current chat session. For more information, see Pickup a Chat Request.
	Click **Hold** to place the chat session on hold and free you to work with other interactions. When you place a chat session on hold, the CIC client can send you another phone call, email message, or chat session. For more information, see Place a Chat Session On Hold.
	Click **Voice Mail** to Send a Chat Session Request to Voice Mail.
	Click **Disconnect** to disconnect the current chat session. For more information, see Disconnect a Chat Session.
	Click **Record** to record the current chat session. This recording is saved and sent to you as an email message attachment after you end the chat session. Clicking **Record** the first time starts the recording session for an interaction. Clicking **Record** again stops the recording session for an interaction. For more information, see Record a Chat Session.
	Click **Pause** to pause the recording session. Click it again to resume the recording session. This button is unavailable if the interaction is not in a state in which this action can be performed. For more information, see Record a Chat Session.
	Click **Private** to prevent other CIC client users from recording this chat session. This button is unavailable if the interaction is not in a state in which this action can be performed. For more information, see Mark a Chat Session as Private. **Warning**: Use of the Private feature may be subject to your company's policies and should only be used in accordance with those policies. CIC handler customization can be used to track the use of the Private feature to ensure compliance with such policies.
	If you're in a workgroup and you need help with a chat session from your workgroup queue, click **Assistance** to request assistance from your supervisor. For more information, see Request Assistance from Your Supervisor.

Related Topics

Add Notes to an Interaction
Assign Codes to an Interaction
Conference Two or More Chat Sessions
Determine if Someone is Listening to or Recording Your Interactions
Disconnect a Chat Session
Copy and Past Text During a Chat
Initiate a Chat Session
Mark a Chat Session as Private
Pick Up a Chat Request
Place a Chat Session on Hold
Print a Chat Session
Record a Chat Session
Request Assistance from Your Supervisor
Send a Chat Session Request to Voice Mail
Transfer a Chat Session
Using Response Management
Working with Chat Sessions

Add Notes to an Interaction

Use the **Notes** section in the appropriate interaction window to add notes or comments about the interaction.

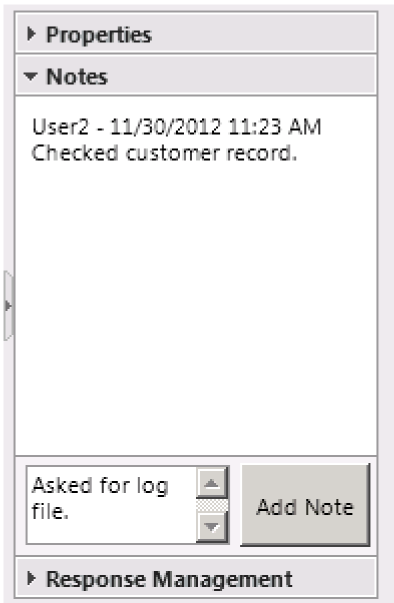
Note: If you add notes to a chat, the other chat participants do not see these notes. However, these notes are visible to other CIC client users who are "Listening to" (monitoring) the interaction. Monitor a Chat

Tip: For information about adding notes to a Call, see View and Edit Interaction Properties.

To add notes to an interaction:

1. In the Callback window, Chat window, Email window for Incoming Messages, or E-mail Window for Outgoing Messages, expand the **Notes** sidebar.
2. In the text box, type your observations or comments and click **Add Note**.

   Result: Your notes appear in the **Notes** sidebar in the interaction window.



Related Topics

Respond to a Callback Request
Manage a Chat Session
Working with Chat Sessions

Assign Codes to an Interaction

Requirements: See Working with Account and Wrap-Up Codes.

You can assign an Account Code or Wrap-Up Code to an interaction. The Account Code and Wrap-Up Codes drop-down lists contain the codes defined in Interaction Administrator.

To assign codes to an interaction, do one of the following:

- For an incoming email message, select the appropriate codes in the **Email Window for Incoming Messages**.

- For an outgoing email message, select the appropriate Account code in the **E-mail Window for Outgoing Messages**.
- When responding to a callback request, select the appropriate codes in the Callback Window.
- During a chat session, select the appropriate codes in the Chat window.

Note: If Wrap-Up codes are available and you don't assign one during a chat or to an incoming email message, you are prompted to assign the appropriate code when you end your part of the interaction. Wrap-Up codes are not used for email message replies or forwarded email messages.

Related Topics

Assign Codes to an Incoming Interaction
Assign Codes to an Outgoing Interaction
Email Editor
Email Preview
Email Window for Incoming Messages
Email Window for Outgoing Messages
Manage a Chat Session
Understanding Account Codes
Understanding Wrap-Up Codes

Conference Two or More Chat Sessions

You can create conference chats by bringing members from two or more separate chat sessions into a single chat session. Before you begin, you should have two or more connected chat sessions in your My Interactions view.

To conference two or more chat sessions:

1. Initiate a chat session.
2. Initiate a second chat session with a different CIC client user.
3. In your My Interactions view, click and drag one connected chat session onto another connected chat session.

   Result: In your My Interactions view, the two chats are placed under a single Chat Conference call object that is identified by the name "Conference."

4. Repeat steps 2 and 3 for any additional participants you want to add to the chat conference.

   Note: The name of each chat participant appears in the Chat Members section of the Chat Window.

5. When the session is complete, click the **Disconnect** button in the Chat window, or on the My Interactions view to end the chat conference.

Related Topics

Manage a Chat Session
Working with Chat Sessions

Copy and Paste Text During a Chat

You can use the Windows clipboard to copy all or part of a chat session to a text-based Windows application such as Microsoft Word or Notepad. You can also copy text from files open in Windows applications to the chat session.

Use Windows **Copy** and **Paste** operations to copy the text from an open file to the composition area of the Chat window. Then click **Send**, just as if you'd typed the response.

Related Topics

Manage a Chat Session
Working with Chat Sessions

Disconnect a Chat Session

Requirements: See Disconnect.

To disconnect a chat session, do one of the following:

- Close the **Chat Window** by clicking the Windows control in the upper right corner.
- In the Chat Window, click the **Disconnect** button.
- In **My Interactions**, select the chat interaction and click the **Disconnect** button.

Related Topics

Chat Window
Manage a Chat Session
My Interactions
Working with Chat Sessions

Initiate a Chat Session

Requirements: You need the Intercom Chat Security right to start or participate in intercom chats with other CIC client users.

Intercom chats, or chat sessions between CIC client users, can include two or more users. To start intercom chats with two or more other users, you can conference two or more chat Sessions

Note: Intercom chats can take place only between users on the same IC server. You cannot start a chat session with a user on a peer server.

To start a chat session with another CIC client user:

1. In the **Company Directory**, select the name of the person with whom you wish to chat.
2. Click the Chat button in the Company Directory.

   Result: The chat appears in the Chat window.

   Note: If the **Logged On** column appears in this directory view, the Chat button is enabled or disabled depending on whether the user is currently logged on. However, if the Logged On column does not appear, the Chat button is always enabled. If the user you select for a Chat is not available or does not respond, you can leave a Chat mail in the Chat window. Press **Disconnect** in the Queue Control toolbar or in the Chat window after typing the message.

   Result: The chat appears in the Current Interaction view.

Related Topics

Conference Two or More Chat Sessions
Manage Chat Session
Working with Chat Sessions

Mark a Chat Session as Private

You can mark a chat session as private. This option prevents other CIC client users from recording this chat session,

Warning: Use of the Private feature may be subject to your company's policies and should only be used in accordance with those policies. CIC handler customization can be used to track the use of the Private feature to ensure compliance with such policies.

To mark a chat session as private, do one of the following:

- Select a chat and then in the queue control toolbar, click the **Private** button.
- In the **Chat** window, click the **Private** button.

Note: This button is unavailable if the chat is not in a state in which this action can be performed.

Related Topics

Chat Window
Manage a Chat Session
Private Button
Working with Chat Sessions

Pick Up a Chat Request

Requirements: See Pickup.

When someone sends a chat request to you, the CIC client sends a message to your email account and the chat request appears in your My Interactions queue. To join the chat session, select the chat request and click the **Pickup** button.

Note: The chat may open automatically, if the CIC administrator enables your CIC client to **Auto-Answer non-ACD Interactions**. Popup blockers can prevent auto-answer windows from opening. If you want to use the Auto-Answer feature, configure your browser or popup blocking software to allow popup windows.

Related Topics

Manage a Chat Session
Working with Chat Sessions

Place a Chat Session on Hold

You can place a chat on hold to free yourself up for other interactions. When you place a chat session on hold, the CIC client may send you another phone call, email message, or chat session. While a chat session is on hold, you are free to accept or start another interactions. Other chat participants can continue to type and send text while you have your part of the Chat Session on hold.

To place a chat session on hold, do one of the following:

- In the Chat Window, click the Hold button.
- In My Interactions, select the chat and click the **Hold** button.

  Result: In the queue view, the chat's state changes to "Held." To return to the chat session, click the **Pickup** button.

Note: The **Hold** button is selected while the chat session is on hold.

Related Topics

Manage a Chat Session
Working with Chat Sessions

Record a Chat Session

Requirements: This feature may or may not be available to you, depending on the rights assigned to you in Interaction Administrator. See Record.

You can record a chat session between other CIC client users (intercom chat) or between you and remote chat participants (web chat). Recording a chat session creates a transcript of the chat that is e-mailed to you after the chat session ends.

Warning: Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record, Snip, or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

Recording a Chat Session

To record a chat session, do one of the following:

- In the Chat Window, click the Record button.
- In **My Interactions**, select the chat and click the **Record** button.
- In the Interaction Properties Dialog Box, click the **Record** button.

Result: The recording starts. A recording interaction appears in the queue view.

Note: The **Record** button is unavailable if the chat is not in a state in which this action can be performed, or if you do not have rights to record interactions.

After you start a recording:

- Click the **Record** button again to stop the recording session for a chat.
- You can press the **Record** button more than once to stop or continue recording your chat.

Pausing a recording

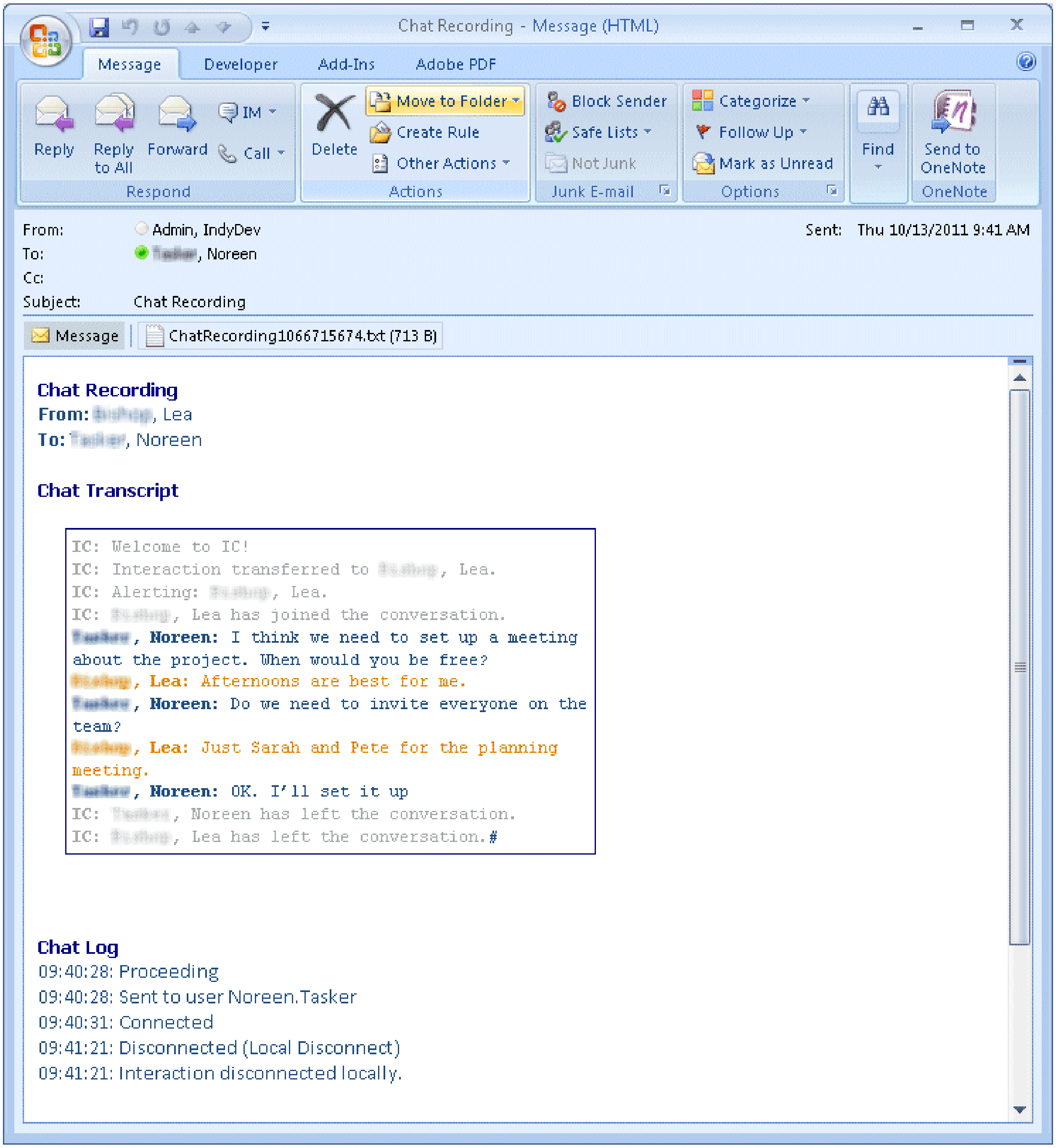
Note: **Pause** is not available if the interaction is not in a state in which this action can be performed.

- While recording a chat, click the **Pause** button to temporarily stop the recording.
- When a recording is paused, click the **Pause** button again to resume the recording session.

Note: The **Record** and **Snip** buttons are unavailable if the chat is not in a state in which this action can be performed, or if you do not have rights to record interactions.

After the chat session ends

The Record feature saves only the text entered in a chat session while you have the **Record** button pressed. The CIC administrator can arrange for you to receive these recordings as email message attachments.



Related Topics

Determine if Someone is Listening to or Recording Your Interactions
Manage a Chat Session
Working with Chat Sessions

Request Assistance from Your Supervisor

Requirements: For more information about the rights required to use the Assistance button, see Assistance. The Assistance button is enabled only for **ACD-routed interactions**. Also, if the interaction is not in a state in which this action can be performed, the Assistance button is dimmed.

Sometimes you encounter an interaction for which you need assistance. For example, a caller could ask a question that you cannot answer. Or you are in the middle of a web chat when you need help from your supervisor. Or you want to ask a question before you respond to an ACD-routed email.

- You can request assistance only for ACD-routed interactions.
- You can have one active assistance request for each interaction.
- You can request assistance multiple times for the same interaction as long as any previous assistance requests are completed before you make a new request.

Workgroup Supervisors

Workgroup supervisors are configured in Interaction Administrator. Also, supervisors receive assistance requests only if they are running **Interaction Supervisor** or **IC Business Manager**. If supervisors are running only the CIC client, they do not receive assistance requests.

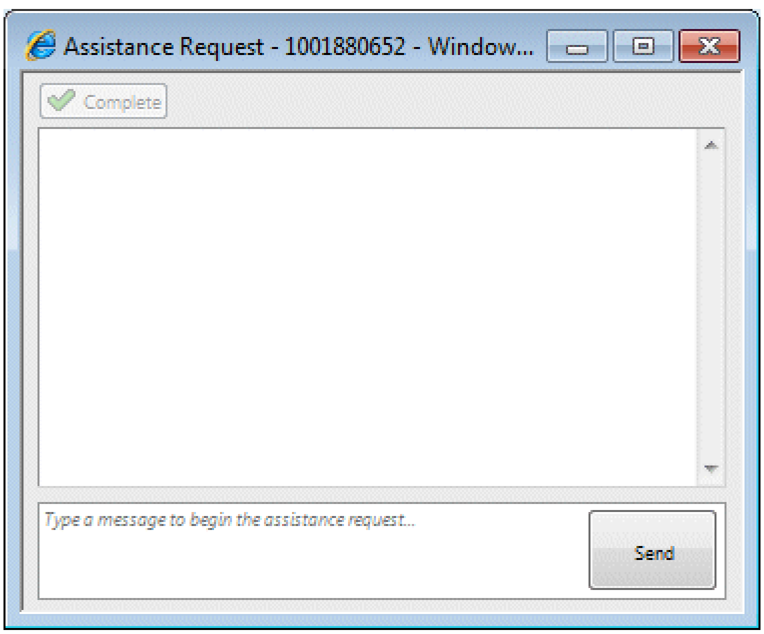
Note: At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

Requesting Assistance

To request assistance:

1. In My Interactions, select the ACD-routed interaction for which you need help.
2. On the Queue Control toolbar, click the Assistance button.

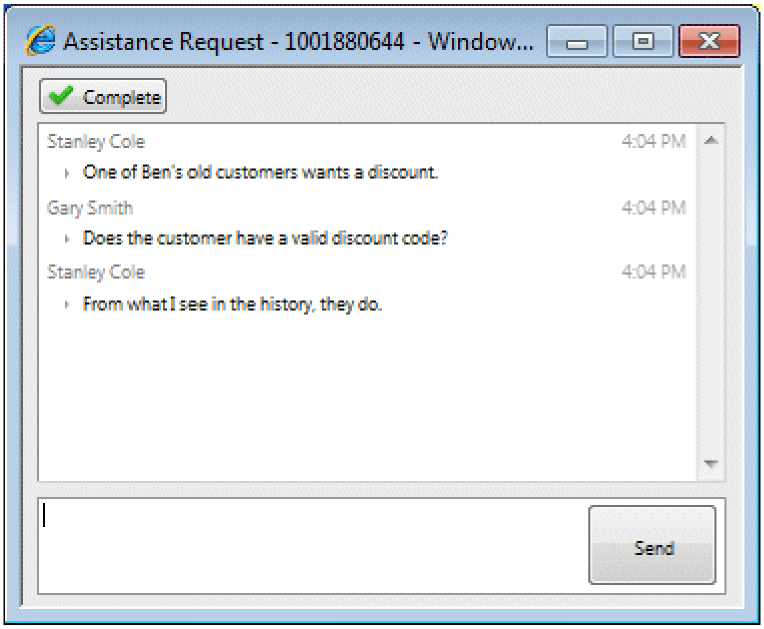
   Result: The **Assistance Request** dialog box appears.

3. In the "**Type a message to begin the assistance request...**" text box, type a brief explanation of why you need assistance from your supervisor.
4. Do one of the following:

- To cancel the request, close the Assistance Request dialog box.
- To send the help request to your supervisor, click the **Send** button.

Result: The workgroup supervisor receives an assistance request in Interaction Supervisor. Also, all supervisors on the same IC server see a pop-up toast assistance request. You can chat with your supervisor in the Request Assistance dialog box.



5. When you no longer need assistance and have finished your conversation with your supervisor, click **Complete**.

Result: This action ends and closes the assistance request.

Note: Only the person who begins the Assistance Request process can end the request and the resulting conversation by clicking **Complete**.

Related Topics

Assistance Button
Assistance Process

Send a Chat Session Request to Voicemail

Rather than answer an incoming (alerting) chat session request, you can send that request to your voice mail. You can also send a chat participant with whom you are connected to your voice mail.

To send an alerting or connected chat to voice mail, do one of the following:

- From the appropriate queue view, select the chat session, if it is not already selected, and in the Queue Control toolbar, click the Voicemail button.
- In the Chat window, click the **Voicemail** button.

Result: The chat session requester or participant is prompted to type a message. When the requester or participant has finished leaving a message and exits or disconnects the chat session, you receive the message by e-mail.

Related Topics

Manage a Chat Session
Working with Chat Sessions

Transfer a Chat Session

You can transfer a chat session to another CIC client user or to a workgroup. Use this option, for example, if you want a more experienced agent to handle the chat request.

To transfer a chat session:

1. Pick up the chat request,
2. On the Queue Control toolbar, click the **Transfer** button.
3. In the **Transfer** dialog box, in the **Transfer To:** text box, type all of part of the recipient's name or number.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the recipient you expected, check the search criteria selected in the **Options** drop-down list and adjust them if necessary.

4. From the drop-down list, select the appropriate name and associated extension number.

   Result: If the intended recipient is a CIC user, status information for the selected CIC user appears. It shows whether the transfer recipient is logged onto the CIC client and is able to accept the transferred email message.

5. Click the **Transfer** button.

   Result: The transferred chat request disappears from **My Interactions** and is routed to the selected recipient.

Related Topics

Manage a Chat Session
Transfer Button
Transfer Dialog Box
Using the Queue Control Toolbar
Working with Chat Sessions

Transfer a File During a Web Chat

You can send a file to a visitor who starts a chat session from your company's website (web chat). This function is not available when you are chatting with other CIC users (intercom chat). However, you can send text containing the file path to other CIC users.

Note: The visitor must **turn off pop-up blocking** in their web browser to enable the file transfer.

To transfer a file during a web chat, do one of the following:

- Use Response Management to send a file. For more information, see Use Response Management During a Chat Session.
- n the Chat window, click the **Send file** icon (paperclip) and then, in the Open dialog box, locate the appropriate file and click **Open**.

  Result: The visitor is notified of the file name. The visitor's system is sent a link to the file which has been copied to a temporary directory on the IC server. The visitor can use this link to open a compatible file in a browser window on the visitor's system. The visitor can also save the file to a location on the visitor's system.

Related Topics

Manage a Chat Session
Working with Chat Sessions

Use Response Management During a Chat Session

Requirements: You need the Response Management Security right to use Response Management.

You use stored responses to avoid typing the same information over and over again. You can select a response and include it in a chat.

There are some limits to the use of stored responses in chats. Chat interactions are conducted in plain text. Stored responses that contain formatted text are converted to plain text when used in a chat. Hyperlinks and images in a stored response are not sent as part of a chat reply. However, you can use responses containing macros in a chat. You cannot transfer a file during an internal chat with other CIC client users. However, you can send text containing the file path to other CIC client users. You **can** send a file to a visitor who starts a chat session from your company's website. For more information, see Transfer a File During a Web Chat.

To use a stored response when participating in a chat:

1. Do one of the following:
   - In the Chat window, expand the **Responses** section, search for and then select an appropriate response. Click **Insert**.

     Tip: You can use full-text searching by entering terms in the Search text box in the Responses section. A context-based search occurs automatically, based on the last five words you typed in the chat. For more information, see Search for a Response.

   - In the Composition area of the Chat window, type the response Shortcut and press **Ctrl**+**Space**.

   Result: The response appears in the Composition area of the selected Chat. You can edit the response before it is included the Chat.

2. Make any necessary changes to the response and then click **Send**.

   Result: The response appears in the Conversation area of the Chat window The other chat participants see your response. When a hyperlink is included in a Response Management item and then added to a Chat session, the hyperlink appears as a clickable link. If the response is a file, external Chat participants see a link to the file which has been copied to a temporary directory on the IC server.

Related Topics

Manage a Chat Session
Working with Chat Sessions

Working with Directories

Working with Directories

Requirements: The View General Directories Access Control right determines which General Directories you can display. The Directory Administrator Security right enables you to edit all public directories. You need the View

Directory Status Columns Access Control right to all or selected Status columns to enable you to add Status columns to a directory view.

CIC client directories contain contact information such as names, telephone numbers and extension, email address. They can also display CIC client user status information. You can use the information in these directories to make and manage interactions. You can configure which available directory views appear in the CIC client. For more information, see Working with the Company Directory and Working with Other Directories.

Each directory contains a list of names. You can:

- Call the default number associated with a contact by double-clicking a name.
- Click a phone number hyperlink to dial a directory contact.
- Send an email message.
- Initiate a Chat Session.
- Transfer a connected call.
- View the contact's properties such as addresses and additional phone numbers.
- Edit a directory entry if you have the appropriate permission as assigned to you in Interaction Administrator.
- View another user's status or change another user's status.
- Camp on another user's extension.
- Search for a contact.
- View a status summary for all users.

You control the appearance of your directories. You can:

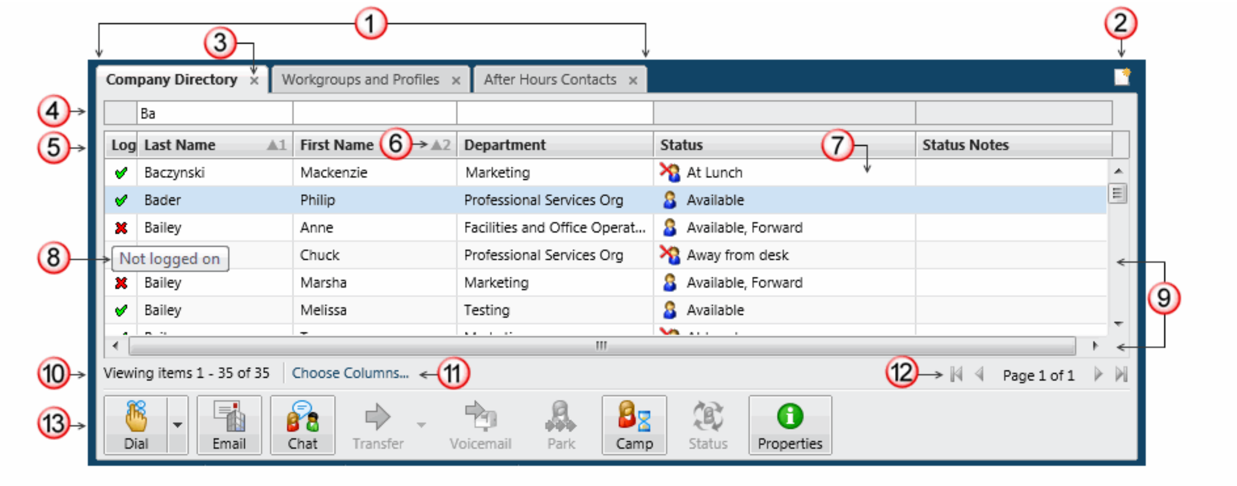
- Add or remove directory views
- Add or remove columns from a directory view.

  Note: Your CIC administrator must grant you the View Status Columns access control right to all or selected Status columns to enable you to add Status columns to a directory view.

- Reorder or resize columns.
- Sort a directory.

Note: Interaction Client Web Edition preserves all your directory settings when you log on again to the same IC server. You can use different workstations or different browsers. Interaction Client Web Edition directory settings do not affect your directory settings in other CIC clients such as Interaction Desktop. Directory settings include the last selected tab, sort order, selected columns, column widths and order, and filters.

This diagram shows multiple directory views. Each directory view appears on a separate tab.



1	**Directory tabs**	The three tabs represent three different directories. Each is labeled with the name of the directory.
2	**New Tab button**	Click the **New Tab** button to display a list of available directories. Select a directory to display it in the CIC client. For more information, see Add or Close Views.
3	**Close button**	Select a directory tab and click the **Close button** to stop displaying the directory view. It is not removed and can be added back to the CIC client interface.
4	**Search fields**	Use the search fields to locate a specific directory entry or group of entries. For more information, see Search a Directory.
5	**Column heading**	You can drag and drop a column heading to move a column to a different position. For more information, see Customize Columns.
6	**Sort Direction and Sort Order indicators**	Triangles indicate whether the contents of a column are sorted in ascending or descending order. If the contents of a directory are sorted by more than one column, a number indicates the sort order. For more information, see Sort a Directory.
7	**Status**	Use the default **Status** or the **Status Summary** column to determine if a contact is available to take a call. Several other status columns are available, including **Status Notes** and **Time in Status**. For more information, see Customize Columns.
8	**Content tooltip**	Some columns enable you to display a content tooltip for more information than can appear in a narrow column. A tooltip can also provide additional information. **Logged On tooltip**: In this example, the tooltip for the Logged On column explains the icon. When a user is logged on the **name of the station** where the user is logged on. The station name appears if that user is logged on to the same IC server as you. If the selected user is logged on to a different IC server, the tooltip shows the **name of the IC server**.
9	**Horizontal and Vertical scroll bars**	A horizontal scroll bar appears if the total width of the columns exceeds the space available in the browser window. A vertical scroll bar appears if all the entries in a single view cannot be displayed in the space available.
10	**View**	This section describes the contents of the current view and lists the total

	description	number of entries in the directory or search results. In this example, entries 1 through 15 appear in the current view and there are a total of 27 entries in these search results.
11	**Choose Columns control**	Use the Choose Columns control to add or remove view columns from the current directory.
12	**Paging controls**	A large directory or set of entries is displayed in a paged format. The **First**, **Previous**, **Next**, and **Last Page** controls enable you to navigate from one page to another in the directory. **Note**: By default, directories with more than 100 contacts appear in a paged format. Your CIC administrator determines how large a directory must be before it appears in a paged format and how many contacts appear on a single page.
13	**Directory toolbar**	Use the Directory toolbar to manage your contacts and interactions with those contacts. For more information, see Using the Directory Toolbar.

Related Topics

Add or Remove View Columns
Click to Dial a Directory Contact
Customize Columns
Display a Speed Dial View
Directory Properties Dialog Box
Search a Directory
Transfer a Call to a Directory Entry
Working with Other Directories
Working with the Company Directory

Search a Directory

The CIC client uses a paged format to display large directories. Paging controls enable you to navigate from one page to another in the directory and locate a specific directory entry.

Note: By default, directories with more than 100 contacts appear in a paged format. However, your CIC administrator determines how large a directory must be before it appears in a paged format and how many contacts appear on a single page.

To search for a directory entry:

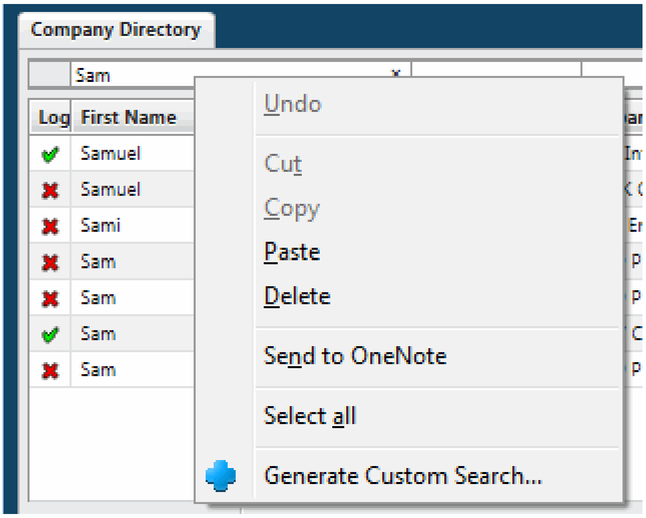
- Enter the first few letters of the column entry (if it's alphabetical), or enter the first few numbers (if it's numerical) in a search field. Columns that you cannot use for searches are indicated by "grayed out" search fields.
- Search for all combinations of specific letters by using * for a wildcard match. For example, use ***ob** to find all entries containing, but not necessarily beginning with, **ob**.

  Note: Searches in Directory columns that contain comma-separated values, like Workgroups, automatically use a "contains" filter. The asterisk is not necessary.

- Use the question mark (?) to represent one unknown character. For example, use **?ng** to locate all entries beginning with any character where the second character is **n** and the third character is **g**.
- Press **Esc** to clear all entries from the search fields.

Search Fields Context Menu

The context menu enables you to use the Windows clipboard to copy and paste text in the search fields. You can also send directory contact information to Microsoft One Note. Or you can create a Google toolbar button for the CIC client.



Related Topics

View and Edit Directory Entries
Working with Directories

Sort a Directory

You can sort a directory by clicking on almost any column heading. An ascending sort is indicated by an upward-pointing triangle in the column heading. A descending sort is indicated by a downward-pointing triangle in the column heading. Sort order is indicated by a number next to the triangle in the column heading. For more information, see Sort Direction and Sort Order indicators.

- Click a column heading once to sort the directory in ascending order.
- Click again to sort the directory in descending order.
- To sort by multiple columns, press and hold SHIFT and then click selected column headings to add them to the sort.

Related Topics

Add or Remove View Columns
Search a Directory
Working with Directories

Insert and Delete Directory Entries

Requirements: The Directory Administrator Security right enables you to edit public directories belonging to other users.

When you have the appropriate rights, as in the IC Private Contacts directory, you can insert and delete directory entries.

View and Edit Directory Entries

The several tabs of the Properties dialog box can contain:

- Name, title, department and company
- Home, business, cell phone, pager and fax numbers
- Home and business street addresses
- Home and business email addresses
- Business website address
- Assistant's name and phone number
- Notes

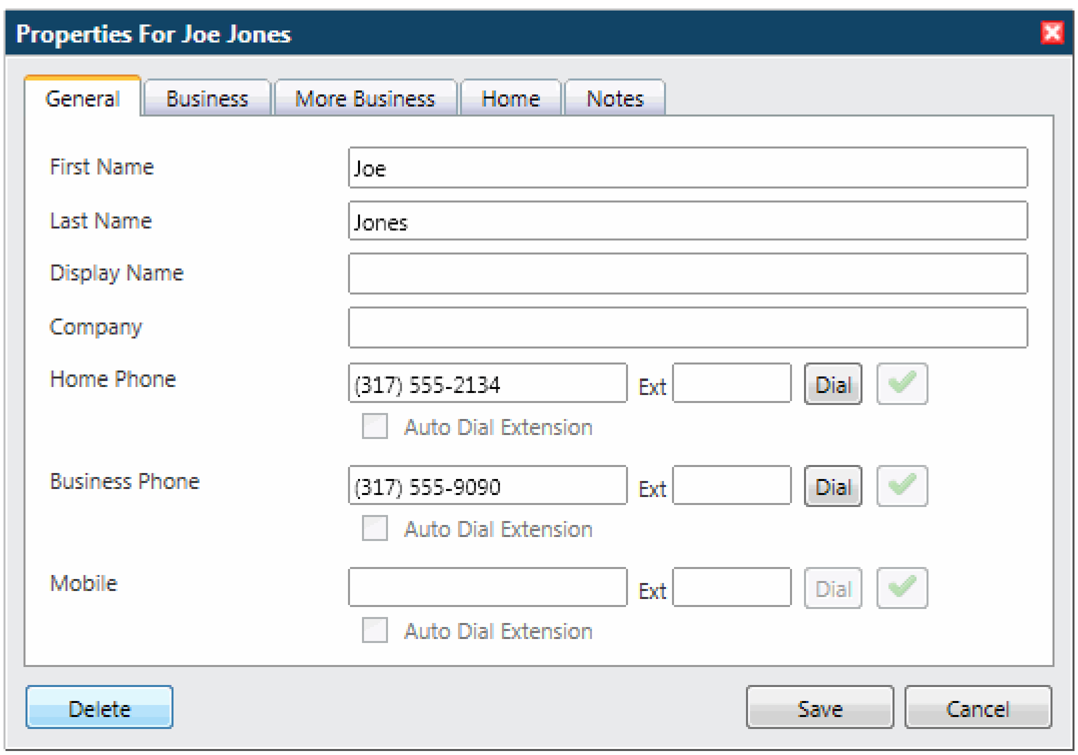
1.

In some cases, where you have sufficient rights, as in the IC Private Contacts directory, you can edit directory entries.

To view or edit directory entries:

1. Select a directory entry.
2. On the Directory toolbar, click the Properties button.

   Result: The Properties dialog box appears.



3. Make any necessary changes and click **Save**.

   Phone Numbers

1.

- You can precede a phone number with a comma to create a 2-second pause before the number is dialed when you click the phone number hyperlink. Also, the 2-second pause occurs when you "blind transfer" a call by dragging and dropping a call on a name in a directory.
- If you select **Auto Dial Extension**, when you click to dial this phone number in a directory view, it automatically dials the extension too. For more information, see Click to Dial a Directory Contact.

  Note: The **Auto Dial Extension** check box is available only when the corresponding phone number and extension have values.

- If you want to auto dial both the phone number and extension in this Properties dialog box, click the **Ext.** hyperlink.

Related Topics

Insert and Delete Directory Entries
Properties Button on the Directory Toolbar
View and Edit Interaction Properties

Working with Other Directories

Requirements: The View General Directories Access Control right determines which General Directories you can display. The View Workgroups Access Control right determines which Workgroup Directories you can display.

Directories other than the Company Directory also can be viewed in the CIC client. These directories include general (public and private contacts in address books) and workgroup directories. To display additional directories, see Add or Close Views.

Related Topics

Camp on an internal extension
Change User's Status button
Make a Call Using a Dial Button
Search a Directory
Transfer a Call to a Directory Entry
Transfer a Call Using the Directory Toolbar
View and Edit Directory Entries

Working with the Company Directory

The Company Directory contains contact information for every person in your company. For more information about using directory entries to make managing your interactions easier, see Working with Directories.

Note: Your CIC administrator enables CIC client users to view the company directory. The CIC administrator also controls which names appear in the company directory. If the company directory does not appear in the CIC client or if you have questions about the names available, see your CIC administrator.

Related Topics

Add or Close Views
Camp on an Internal Extension
Customize Columns
Set Another User's Status
Transfer a Call to a Directory Entry

View and Edit Directory Entries
Working with Directories

Working with Email Messages

Working with Email Messages

Requirements: To work with email messages, you or the workstation you select when you log on need an **ACD Access License** associated with the **Email interaction type.** To pick-up and read ACD-routed email messages, you must belong to a **workgroup** configured in Interaction Administrator to **receive email messages.** To create an outbound email interaction, you also need the View User Queues or Modify User Queues right to your own user queue. To create an outbound email interaction, you also must be a member of a **workgroup** configured with an **outbound email mailbox**. If you have any questions about licensing and workgroup configuration, see your CIC administrator.

You can use the CIC client to read and respond to ACD-routed email messages or to send email messages on behalf of a workgroup. You can also use a directory entry to address an email message and then send it using your own email program. There are several different types of **email messages** associated with the CIC client:

- **ACD-routed email message**

  An ACD-routed email message is sent to a mailbox associated with a workgroup. This message is then routed to the workgroup members as an interaction. Like any other **interaction**, an ACD-routed email message can be included in Customer Interaction Center reports and statistics. You can pick up an ACD-routed email message from My Interactions.

  Note: An email message sent to your work email address appears in your email program Inbox as usual.

- **Reply to an ACD-routed email message**

  A reply to an ACD-routed email message is an **interaction** that is processed and sent from the CIC client. Like any other interaction, these email message replies can be included in Customer Interaction Center reports and statistics.

- **Email message sent on behalf of a workgroup**

  You can create and send an email message on behalf of a workgroup to which you belong. This interaction can be included in Customer Interaction Center reports and statistics.

  Sending an email interaction is not the same as replying to an ACD-routed email message, in that you begin the interaction. Nor is it the same as using a CIC directory entry to address an email message that you send using your default email program.

- **Email message addressed by using a CIC directory entry**

  You can use a directory entry to address an email message, but send the message **using your default email program**. This feature makes it convenient to send email messages to people and businesses represented by directory entries. It requires that you have a correctly configured email program installed on your system. This email message is **not an interaction** and is not counted or tracked in Customer Interaction Center reports and statistics.

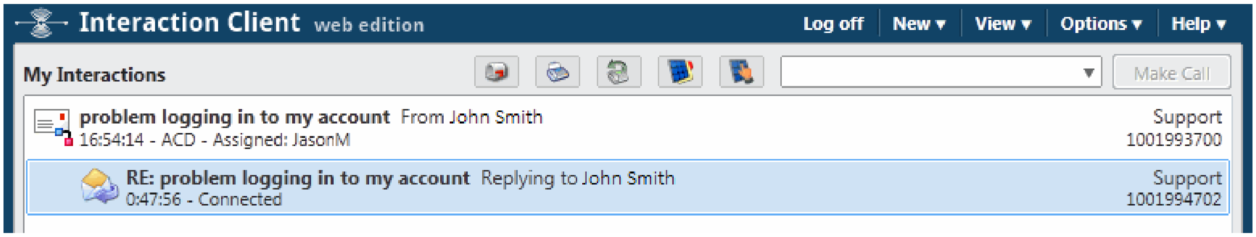
Related Topics

Email Configuration
Email Interactions

Email Interactions

An email icon identifies an email **interaction** in My Interactions. The reply to an ACD-routed interaction appears below the original interaction. The information includes the:

- Email message subject
- Name of the sender
- How long the interaction has been in the queue
- Name of the Workgroup queue to which it is assigned
- Interaction ID



- When you pick up an email interaction, its state changes to **ACD Assigned: (Agent name)**, and other agents are not able to respond to the message. However, if the email interaction is transferred to you, or if you pick it up even though you are a not a member of the workgroup to which the email interaction was routed, its state changes to **Connected**.
- As with all interactions, an email interaction remains in the workgroup queue unless a non-member of the workgroup picks it up. If a non-member of the workgroup picks it up, it disappears from the workgroup queue.

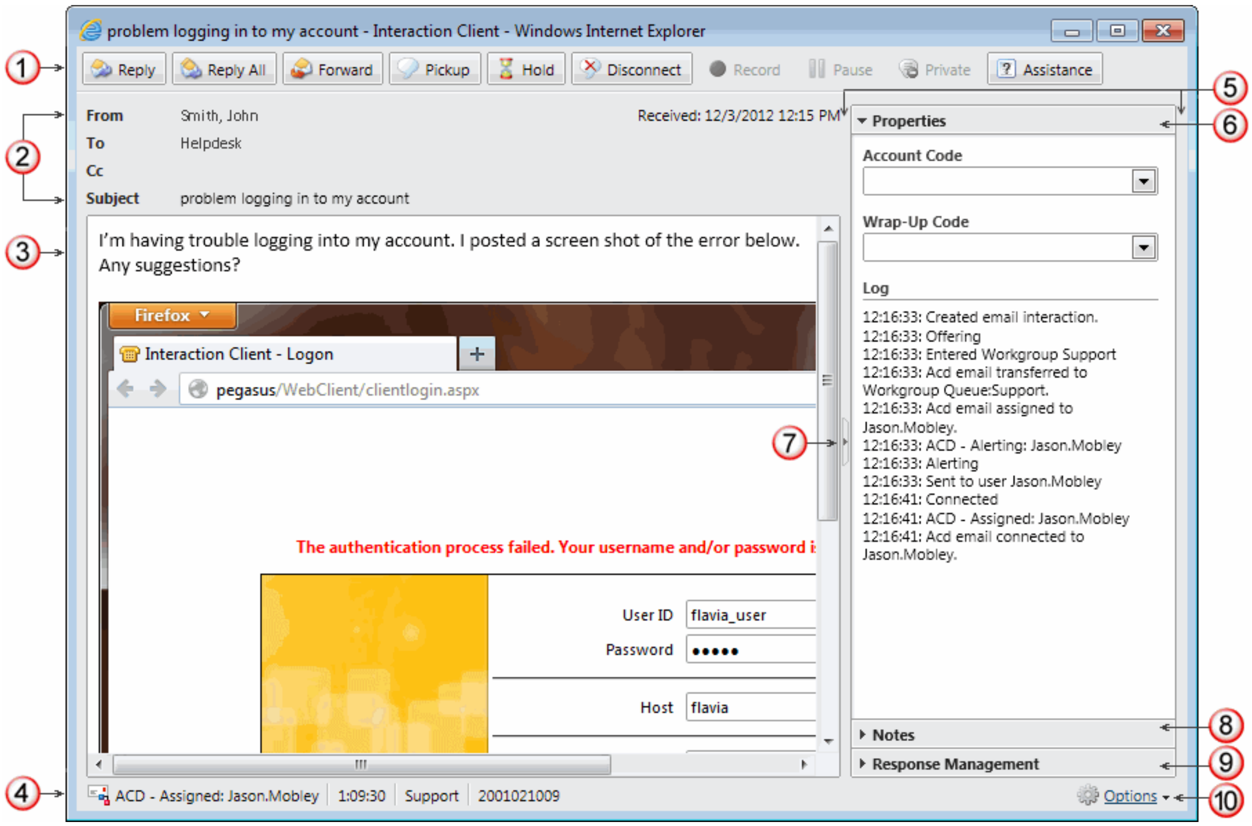
Related Topics

Working with Email Messages

Email Window for Incoming Messages

When you view an ACD-routed email interaction, this Email window provides the necessary tools for managing the interaction.

Note: If your CIC administrator enables text filtering, certain sensitive information such as credit card numbers or Social Security numbers is blocked from view. You see only some replacement text such as ########## instead of the numbers.



1	**Toolbar**	The toolbar contains buttons for most of the functions for managing an incoming email message.
2	**From** **To** **Subject** **Attached**	This area contains information from the incoming email message address fields. An **Attached list** appears here if any files are attached to the original ACD-routed email message. Click the attachment file name to download or view the file. **Note**: A .msg attachment cannot be downloaded to your hard drive, it can only be viewed within the CIC client.
3	**Email Text**	The text of the incoming email message.
4	**Status bar**	The Status bar displays the ID number, duration and state of the incoming email interaction.
5	**Sidebar area**	The appearance of the sidebar area can vary based on your user rights. It contains controls and information that are related to managing the incoming email message.
6	**Properties**	The Properties section contains the interaction log. Optionally, the Account Code and Wrap-Up Code drop down lists also appear in this section. Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to an incoming email message. If you are a member of a workgroup for which Wrap-Up codes are configured, you can use this drop-down list to assign the code.
7	**Splitter Bar**	If you prefer not to see the sidebar area, click the splitter to hide that part of the Email window. Click the splitter again to restore the sidebar area.

8	**Notes**	Use the Notes section to add notes or comments about the incoming email message. **Note**: These notes are visible to supervisors who are "Listening to" (monitoring) this email reply.
9	**Response Management**	Use the Responses section to search for and view both system-wide responses and personal responses. **Note**: None of the responses you find can be used in an **incoming** email message, but they can be used in a reply. Here the Responses section is for information only. Response Management is not available in the Interactive Intelligence Oracle Service Cloud Integration.
10	**Options**	Click this link to configure the default behavior of the Email window for incoming messages. This includes options for automatically closing the window and displaying the Cc and Bcc fields. See Email Configuration.

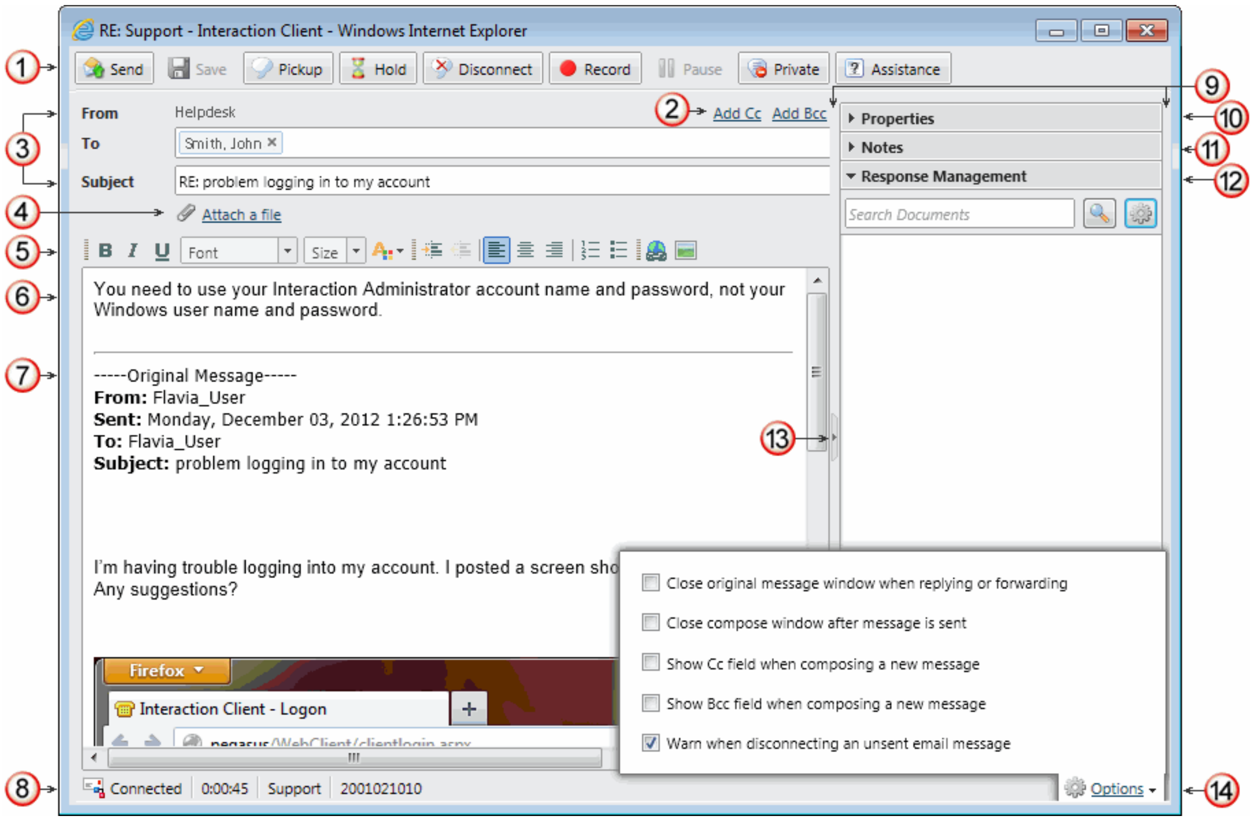
Related Topics

Add Notes to an Interaction
Assign Codes to an Interaction
Email Configuration
Email Window for Outgoing Messages
Understanding Account Codes
Understanding Wrap-Up Codes
Working with Email Messages

Email Window for Outgoing Messages

You use this Email window to either respond to an ACD-routed email message or start an email interaction on behalf of a workgroup.

Note: The Email window used to view an ACD-routed email message provides some different tools and options. See also Email Window for Incoming Messages.



1	**Toolbar**	The toolbar contains buttons for most of the functions for managing an email reply.
2	**Add Cc** **Add Bcc**	Click these links to add **Cc** (Carbon copy) and **Bcc** (Blind carbon copy) address text boxes to your email reply.
3	**From** **To** **Subject**	This area contains the standard email message address fields. · In a reply, the **To** field defaults to the sender of the original email message. Click the **x** at the end of the defaulted name to remove this name and then type in a new name. **Tip**: You can type in a partial name and then search for matching entries. **Note:** Responses to messages sent with an alternate "Reply-To" address are delivered to that address. If you selected **Reply All**, replies are delivered to the "Reply-To" address and all of the original recipients, but not to the sender's original address. · **Subject** defaults to the subject of the original email message. **Note**: Subject is limited to 1024 characters in the CIC client. However, many email clients have much smaller limits so the recipient may see a truncated subject line.
4	**Attach a file**	Click the **Attach a file** link to find and attach a file to your email reply. These documents, images or other files can be located on your workstation or network. **Note**: Your system administrator configures the size limit for files you attach to an outgoing email message.

5	**Formatting toolbar**	The text formatting toolbar appears in the E-mail Reply window under certain conditions: · If the original ACD-routed email message is formatted using **HTML**, you have the option of using text formatting tools in your email reply. For a description of the available tools, see Reply to an HTML Email Message. · If you are creating an email message to send on behalf of a workgroup, the text formatting tools are always available to you. · If the original email message was sent in **plain text** (no formatting), the Email Reply window does not include a text formatting bar. Your email reply is sent in plain text.
6	**Reply**	Compose your reply to the email message here. You can: · Type a response. · Copy and paste text to or from a Windows application. · Locate and insert a Favorite Response or a system-wide response in your reply. For more information, see Use Response Management in an Email Message.
7	**Original Email**	The original ACD-routed email message appears here.
8	**Status bar**	The Status bar displays the ID number, duration and state of the interaction.
9	**Sidebar area**	The appearance of the sidebar area can vary based on your user rights. It contains controls and information that are related to the email reply.
10	**Properties**	The Properties section contains the interaction log. Optionally, the Account Code drop down list also appears in this section. Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to an incoming email message. If you are a member of a workgroup for which Wrap-Up codes are configured, you can use this drop-down list to assign the code.
11	**Notes**	Use the Notes section to add notes or comments about your email reply. The recipients of the email reply message do not see these notes. **Note**: These notes are visible to supervisors who are "Listening to" (monitoring) this email reply.
12	**Response Management**	Locate and use a pre-defined system-wide or personal response. For more information, see Use Response Management in an Email Message.
13	**Splitter Bar**	If you prefer not to see the sidebar area, click the splitter to hide that part of the email reply window. Click the splitter again to restore the sidebar area.
14	**Options**	Click this link to configure the default behavior of the Email window for incoming messages. This includes options for automatically closing the window and displaying the Cc and Bcc fields. See Email Configuration.

Related Topics

Add Notes to an Interaction
Assign Codes to an Interaction
Email Configuration

Email Window for Incoming Messages
Start an Email Interaction
Understanding Account Codes
Understanding Wrap-Up Codes
Working with Email Messages

Manage Email Messages

Add Notes to an Interaction

Use the **Notes** section in the appropriate interaction window to add notes or comments about the interaction.

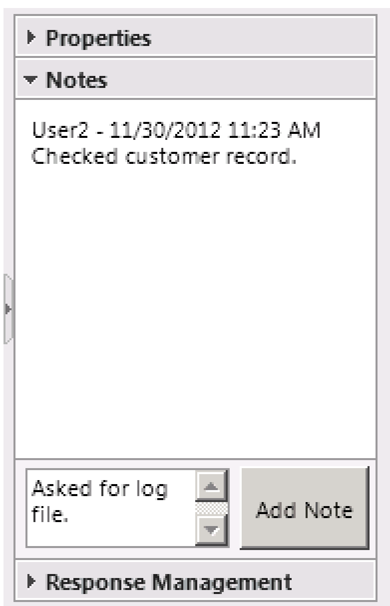
Note: If you add notes to a chat, the other chat participants do not see these notes. However, these notes are visible to other CIC client users who are "Listening to" (monitoring) the interaction. Monitor a Chat

Tip: For information about adding notes to a Call, see View and Edit Interaction Properties.

To add notes to an interaction:

1. In the Callback window, Chat window, Email window for Incoming Messages, or E-mail Window for Outgoing Messages, expand the **Notes** sidebar.
2. In the text box, type your observations or comments and click **Add Note**.

   Result: Your notes appear in the **Notes** sidebar in the interaction window.



Related Topics

Respond to a Callback Request
Manage a Chat Session
Working with Chat Sessions

Assign Codes to an Interaction

Requirements: See Working with Account and Wrap-Up Codes.

You can assign an Account Code or Wrap-Up Code to an interaction. The Account Code and Wrap-Up Codes drop-down lists contain the codes defined in Interaction Administrator.

To assign codes to an interaction, do one of the following:

- For an incoming email message, select the appropriate codes in the **Email Window for Incoming Messages**.
- For an outgoing email message, select the appropriate Account code in the **E-mail Window for Outgoing Messages**.
- When responding to a callback request, select the appropriate codes in the Callback Window.
- During a chat session, select the appropriate codes in the Chat window.

Note: If Wrap-Up codes are available and you don't assign one during a chat or to an incoming email message, you are prompted to assign the appropriate code when you end your part of the interaction. Wrap-Up codes are not used for email message replies or forwarded email messages.

Related Topics

Assign Codes to an Incoming Interaction
Assign Codes to an Outgoing Interaction
Email Editor
Email Preview
Email Window for Incoming Messages
Email Window for Outgoing Messages
Manage a Chat Session
Understanding Account Codes
Understanding Wrap-Up Codes

Forward an Email Message

ACD-routed email messages appear in **My Interactions**. You can forward these ACD-routed email messages to another CIC user or workgroup. If the designated transfer recipient does not pick it up, the CIC server returns the email message to your user queue and places it on hold.

Note: If the original email message contains an attachment, it automatically remains attached to the email message if you forward it. However, you can delete the original attachments before forwarding the email message.

Tip: You cannot forward an incoming email interaction until you send or disconnect all the email reply interactions that are associated with the original email interaction in an E-mail conversation.

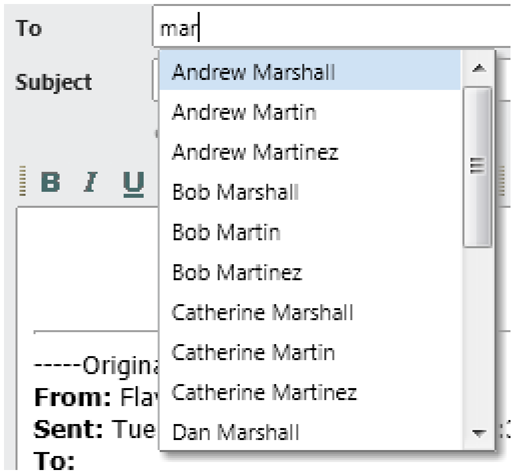
To forward an email message:

1. Pick up or reopen an email message.
2. In the E-mail Window for Incoming Messages, click the **Forward** button.

   Result: The Email Window for Outgoing Messages appears. Also, this new email interaction is associated with the original message and appears in My Interactions.
3. Address the email message by doing one of the following:

   Tip: Click **Add Cc** or **Add Bcc** to add carbon copy or blind carbon copy address text boxes to the email message.

- In an address text box, type the addresses of the email message recipients, separating each address with a semi-colon (;).
- In an address text box, type all of part of the recipient’s name. Click the "Search for" prompt. Select a name from the list of matching names.



Note: This list contains matching email addresses that are configured on your Exchange server — typically, your company’s employee email addresses.

4. Optionally, do one of the following:
   - If you do not want to forward files attached to the original email message, in **Attached**, click the **x** next to any file name.
   - Click the **Attach a file** link to attach a file to the forwarded email message.
5. In the reply area, type any text you want to add to this forwarded email message.

Tip: Use Response Management to insert a stored response. For more information, see Use Response Management in an Email Message. You can also use any of the available tools to format your message. For a description of these tools, see Reply to an HTML Email Message.

6. Optionally, expand the **Properties** section and assign an Account code.

Tip: For more information, see Assign Codes to an Interaction.

7. Optionally, expand the **Notes** section and add notes or comments about this interaction.

Note: For more information, see Add Notes to an Interaction.

8. Do one of the following:
   - To send this email to the addressed recipients, click **Send**.
   - To save this email message as a connected interaction, click **Save**.

   Result: The email message is not sent. You can pick up this interaction later, make any necessary changes or additions and then send it.
9. If necessary, close the Email windows for the forwarded email message and the original email message and then disconnect the original email message.

Note: You can set your Email Configuration to perform these actions automatically.

Related Topics

Working with E-mail Messages

Park an Email Message on Another Person's Queue

You can park an ACD-routed email message directly on another CIC client user's extension. This places the email message on hold on the recipient's **My Interactions** queue.

To park an email message using the Park on Queue button:

- Select the email message. Select a directory entry and then, on the Directory toolbar, click the Park on Queue button.

  Result: The interaction is immediately removed from My Interactions or any other queue you are monitoring and appears in the selected user's queue.

To park an email message using the Transfer dialog box:

1. Select the email message and, on the Queue Control toolbar, click the Transfer button.

   Result: The **Transfer dialog box** appears.

2. In the **Transfer To:** field, type all or part of the recipient's name or number.

   Result: A drop-down list of choices appears.

   Tip: If the drop-down list does not contain the contact you expected, check the search criteria selected in the **Options** drop-down list and adjust them if necessary.

3. From the drop-down list, select the appropriate contact name and associated extension or phone number.

   Result: If the designated transfer recipient is a CIC user, status information appears. It shows whether the transfer recipient is logged onto the CIC client and is able to accept the transferred email message.

4. Click the **Park** button.

   Result: The call disappears from **My Interactions** and is placed on hold in the recipient's **My Interactions** queue so the recipient can select it later.

Related Topics

Park a Call on Another Person's Extension
Park on Queue Button

Pick Up or Reopen an Email Message

Requirements: See Pickup.

You pick up or reopen an ACD-routed email message from My Interactions. Also, an ACD-routed email message may open automatically, if your user information in Interaction Administrator is configured to Auto-Answer ACD Interactions.

Note: Popup blockers can prevent auto-answer email windows from opening. If you want to use the Auto-Answer feature, you may need to configure your browser or popup block software to allow popup windows in Interaction Client Web Edition.

To pick up or reopen an ACD-routed email message, do one of the following:

- Double-click the email message.
- Select the email message and click the Pickup button in the Queue Control toolbar.

Related Topics

Assign Codes to an Interaction
Forward an Email Message
Reply to an E-mail Message
Transfer an E-mail Message
Working with E-mail Messages

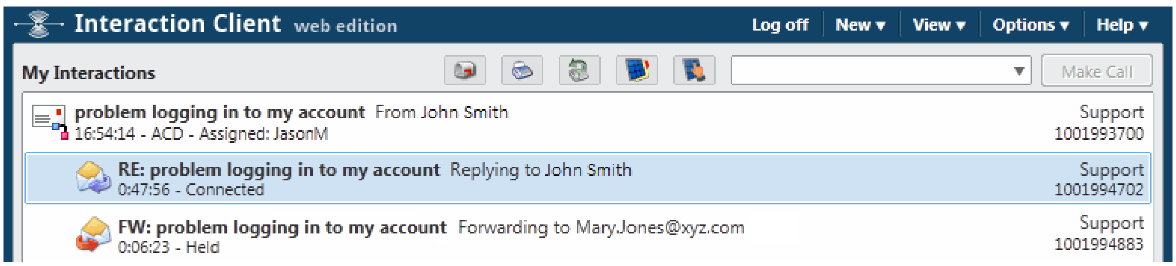
Reply to an Email Message

The tools available to you when replying to an ACD-routed email message depend on the format of the original email. The instructions in this topic apply to all email message replies. If the original ACD-routed email message is formatted using HTML, additional tools are available to you when composing your reply. For more information, see Reply to an HTML E-Mail Message.

An email reply interaction can be associated with the original incoming email interaction in an Email Conversation. These associated interactions appear indented below the original interaction.

Some important things about this relationship include:

- More than one email interaction can be associated with the original incoming email interaction.



- You must disconnect the original incoming email interaction manually.

Tip: All of the associated **outgoing** email interactions must be disconnected, transferred or forwarded before you can disconnect the original incoming email interaction.

To reply to an email message:

1. Pick up or reopen an email message.
2. In the E-mail Window for Incoming Messages, click the **Reply** or **Reply All** button.

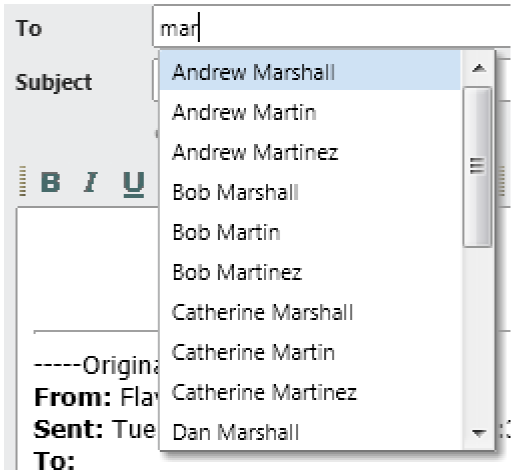
   Result: The Email Window for Outgoing Messages appears. Also, this new email interaction is associated with the original message and appears in My Interactions.

   Note: Responses to messages sent with an alternate "Reply-To" address are delivered to that address. If you selected **Reply All**, replies are delivered to the "Reply-To" address and all of the original recipients, but not to the sender’s original address.

3. Optionally, add addresses to the email reply by doing one of the following:

   Tip: Click **Add Cc** or **Add Bcc** to add carbon copy or blind carbon copy address text boxes to the email message.

- In an address text box, type the addresses of the email message recipients, separating each address with a semi-colon (;).
- In an address text box, type all of part of the recipient's name. Click the "Search for" prompt. Select a name from the list of matching names.



Note: This list contains matching email addresses that are configured on your Exchange server — typically, your company's employee email addresses.

4. Optionally, click the **Attach a file** link to attach a file to your reply.

Note: Files attached to the original email message are not included in your reply. Your system administrator configures the size limit for files you attach to an outgoing email message.

5. In the reply area, type your reply message.

Tip: Use Response Management to insert a stored response. For more information, see Use Response Management in an Email Message. If the original email interaction was formatted in HTML, you can also use any of the available tools to format your reply. For a description of these tools, see Reply to an HTML Email Message.

6. Optionally, expand the **Properties** section and assign an Account code.

Tip: For more information, see Assign Codes to an Interaction.

7. Optionally, expand the **Notes** section and add notes or comments about this interaction.

Note: For more information, see Add Notes to an Interaction.

8. Optionally, do one of the following to save the email message without sending it:
   - Click **Save** to save this email message as a **connected** interaction.
   - Close the email window to save this email message as a **held** interaction.

Result: The email message is not sent. You can pick up this interaction later, make any necessary changes or additions and then send it.

9. To send this email message, click **Send**.
10. If necessary, close the Email windows for this reply email message and the original email message and then disconnect the original email message.

Note: You can set your Email Configuration to perform these actions automatically.

Related Topics

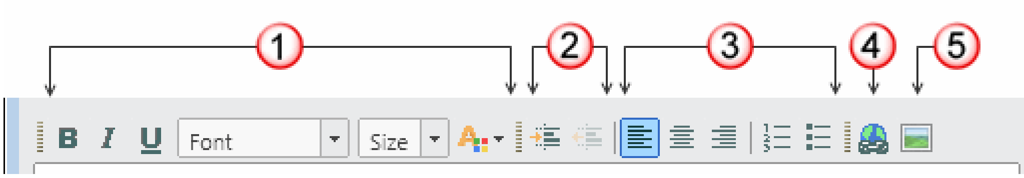
Reply to an HTML E-Mail Message
Working with E-mail Messages

Reply to an HTML Email Message

If the ACD-routed email message you received was formatted using **HTML**, you have the option of using text formatting tools in your email reply. You can also embed an image or include a hyperlink in your reply. In every other way, replying to an HTML email message is the same as replying to a plain text email message.

Format Text

The HTML version of the Email Window for Outgoing Messages includes a text formatting toolbar.



Tip: Point to any button to display a tooltip containing the name of the button.

1	**Font**	Use the font controls to bold, underline or italicize selected text. You can also select text color, font and size. **Note**: You can define a custom text color. This custom color is saved for future HTML email replies.
2	**Text Indent**	Use text indent controls to increase or decrease the space between the selected text and the left margin.
3	**Paragraph**	Use the paragraph controls to set left, right and center text alignment. You can also create bulleted or numbered lists.
4	**Hyperlink**	Use the hyperlink control to create a working hyperlink in your email reply.
5	**Image**	Use the Image control to insert a picture in your email reply.

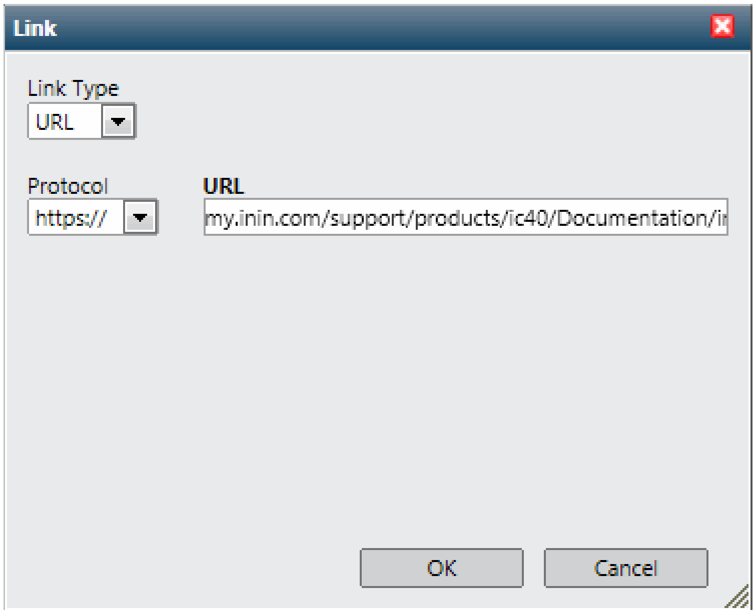
Create a Hyperlink

You can include a working hyperlink to a webpage in your email reply. Or you can create a link that automatically generates an addressed email message in the recipient's default email program.

To create a link to a webpage:

1. Do one of the following:
   - Select the text you want to display as the hyperlink and click the **Link** toolbar button.
   - Click the **Link** toolbar button.
2. In the Link dialog box, in **Link Type**, select **URL.**
3. In **Protocol**, select http or https, as appropriate.

4. Type the address in the **URL** text box.

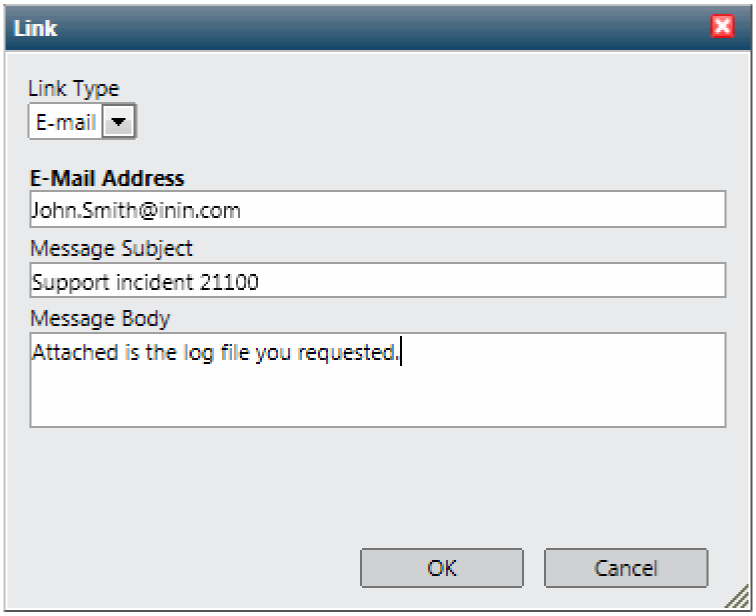


5. Click **OK**.

   Result: This creates a clickable link in your email message that automatically opens a web browser to the selected address.

To create a link that generates an email message:

1. Select the text you want to use as a link and then click the **Link** toolbar button.
2. In the Link dialog box, in **Link Type**, select **Email**.
3. In **E-Mail Address**, type the address where you want the email message to be sent.
4. In **Message Subject**, type a subject that identifies the content or purpose of the email message.
5. In **Message Body**, type any text needed to further explain the content or purpose of this message.



6. Click **OK**.

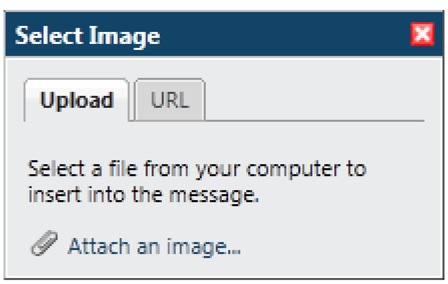
   Result: This creates a clickable link that generates an addressed email message in the default email program on the recipient's system.

Insert an Image

To insert an image:

1. Place your cursor in the email reply at the point where you want the image to appear.
2. Click the **Select an image to insert** toolbar button.

   Result: The **Select Image** dialog box appears.



3. Do one of the following:

   - Select the **Upload** tab and click **Attach an image**. Locate an image on your workstation and click **Open**.
   - Select the **URL** tab. In the text box, type the URL for the image and click **Insert**.

   Result: The selected image appears in the email reply message.

Related Topics

Assign Codes to an Interaction
Email Window for Outgoing Messages
Pick Up or Reopen an Email Message
Reply to an Email Message

Use Response Management in an Email Message
Working with Email Messages

Send an Email Message

There are two ways you can send email messages to addresses associated with your directory entries.

Note: This feature makes it convenient to send email messages to people and businesses represented by directory entries. It requires that you have a correctly-configured email program installed on your system. This feature is completely separate from the management of ACD-routed mail. E-mail messages sent using your default email program are not considered interactions and are not counted in Customer Interaction Center reports and statistics. For information about sending an email message that is counted as an interaction, see Start an E-mail Interaction.

To send an email message:

- Click any available email address hyperlink in a directory entry
- Select a directory entry and click the **Send email** button on the Directory toolbar.

  Result: An email address for the selected directory entry appears in the "To" line of a new email window in your default email program.

Related Topics

Start an E-mail Interaction
Using the Directory Toolbar
View and Edit Directory Entries

Start an Email Interaction

Requirements: You need an ACD Access License associated with the E-mail interaction type in order to work with email messages. Also, in order to send an email *interaction*, you must be a member of a workgroup configured with an outbound email mailbox. You also need the View User Queues or Modify User Queues right to your own user queue. For more information about licensing and workgroup configuration, see your CIC administrator.

An outbound email interaction is an email message you send **on behalf of a workgroup**. It can be included in Customer Interaction Center reports and statistics. Additionally, as an interaction, it could be processed by any custom email handlers that are added to your Customer Interaction Center installation.

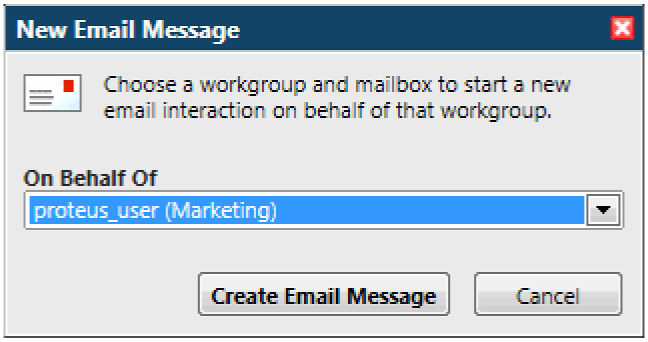
Important points to consider:

- Sending an outbound email interaction is not the same as **replying** to an ACD-routed email message sent to a workgroup mailbox. You are **initiating** the interaction, not responding. For more information about responding to an ACD-routed email, see Reply to an E-mail Message.
- A reply to an outbound email interaction is addressed to the appropriate workgroup mailbox and is routed as an ACD interaction. A reply would first appear in the appropriate workgroup queue and then be ACD-routed to My Interactions.
- You can use a CIC client directory entry to address an email message, but send the message using **your default email program**. This is not an email interaction and is not counted in Interaction Center reports and statistics. For more information, see Send an E-mail Message.

To start an email interaction:

1. From the **New** menu, select **Email Message**.

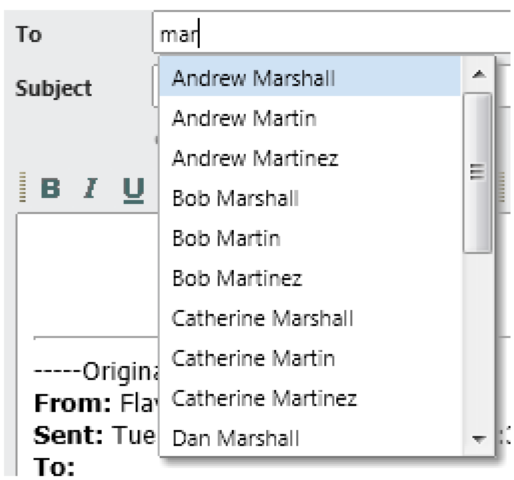
2. If you belong to more than one workgroup or a workgroup configured with one or more outbound mailboxes, select the appropriate workgroup and mailbox in the **New Email Message** dialog box. Click **Create Email Message**.



3. In the Email Window for Outgoing Messages, address the email message by doing one of the following.

Tip: Click **Add Cc** or **Add Bcc** to add carbon copy or blind carbon copy address text boxes to the email message.

- In an address text box, type the addresses of the email message recipients, separating each address with a semi-colon (;).
- In an address text box, type all of part of the recipient's name. Click the "Search for" prompt. Select a name from the list of matching names.



Note: This list contains matching email addresses that are configured on your Exchange server — typically, your company's employee email addresses.

4. Optionally, type a message description in the **Subject** text box.

Note: Subject is limited to 1024 characters in the CIC client. However, many email clients have much smaller limits so the recipient may see a truncated subject line.

5. Optionally, click the **Attach a file** link to locate and attach a file to this email message.

Note: Your system administrator configures the size limit for files you attach to an outgoing email message.

6. In the reply area, type your message.

> **Tip**: Use Response Management to insert a stored response. For more information, see Use Response Management in an Email Message. You can also use any of the available tools to format your message. For a description of these tools, see Reply to an HTML Email Message.

7. Optionally, expand the **Properties** section and assign an Account code.

> **Tip**: For more information, see Assign Codes to an Interaction.

8. Optionally, expand the **Notes** section and add notes or comments about this interaction.

> **Note**: For more information, see Add Notes to an Interaction.

9. Optionally, do one of the following to save the email message without sending it:
   - Click **Save** to save this email message as a **connected** interaction.
   - Close the email window to save this email message as a **held** interaction.

   Result: The email message is not sent. You can pick up this interaction later, make any necessary changes or additions and then send it.

10. To send this email message, click **Send**.
11. If necessary, close the Email window for this interaction.

> **Note**: You can set your Email Configuration to perform this action automatically.

Related Topics

Reply to an E-mail Message

Transfer an Email Message

ACD-routed email messages appear in My Interactions. You can transfer these ACD-routed email messages to another user or workgroup. If the designated transfer recipient does not pick it up, the CIC client returns the email message to the workgroup queue.

> **Tip**: You cannot transfer an incoming email interaction until you send or disconnect all the email reply interactions that are associated with the original email interaction in an E-mail conversation.

> **Note**: If the original email message contains an attachment, it automatically remains attached to the email message if you transfer it. You cannot delete original email message attachments.

> **Note**: You can set your Email Configuration to perform this action automatically.

To transfer an email message:

1. Pick up or reopen an email message.
2. On the Queue Control toolbar, click the **Transfer** button.

   Result: The Transfer dialog box appears.

3. In the **Transfer To:** text box, type all of part of the recipient's name or number.

   Result: A drop-down list of choices appears.

> **Tip**: If the drop-down list does not contain the intended recipient, check the search criteria selected in the **Options** drop-down list and adjust them if necessary.

4. From the drop-down list, select the appropriate name and associated extension number.

   Result: If the intended recipient is a CIC user, status information for the selected CIC user appears. It shows whether the transfer recipient is logged onto the CIC client and is able to accept the transferred email message.

5. Click the **Transfer** button.

   Result: The transferred email message disappears from My Interactions and is routed to the selected recipient.

Related Topics

Working with E-mail Messages

Use Response Management in an Email Message

Requirements: See Working with Response Management for information about required rights.

You use stored responses to avoid typing the same information over and over again. You can search for a stored response and insert it in an email reply or a forwarded email message.

To use a stored response when replying to or forwarding an email message:

1. In the E-mail Window for Outgoing Messages, do one of the following:

   - Expand the **Response Management** section, search for and then double-click an appropriate response.

     Tip: You can use full-text searching by entering terms in the **Search Documents** text box in the Response Management section. For more information, see Search for a Response. Also, you can single-click the response to preview it in the reply area.

   - In the reply area, type the response shortcut and press **Ctrl+Space**.

   Result: The response is inserted in the email message.

   - If the response is a file, an **Attached** box appears and displays the name of the attached file. A progress bar appears while a large file is being attached.
   - If the response is a message, the text appears in the email response section. When you use a stored response created with the **Inherited** font, it adopts the font and font characteristics (size, color, and so on) of the text immediately preceding it in your email message. However, when you insert a response that has a selected font and other font characteristics, then the stored response appears as originally formatted. For more information, see Create Personal Responses.

2. Make any necessary changes or additions and then click **Send**.

   Note: For more information about replying to ACD-routed email messages, see Reply to an E-mail Message and Send an E-mail Message.

Related Topics

Search for a Response
Use Response Management for an Incoming Interaction
Working with E-mail Messages

Use Response Management for an Incoming Interaction

Requirements: See Using Response Management for information about required rights.

When you respond to a callback request, you can use Response Management to look up information and then relay it verbally. When you evaluate a callback request or read an ACD-routed email message, you can incorporate stored text in the Notes section.

To use Response Management in an incoming interaction:

1. Do one of the following:

    - In the E-mail Window for Incoming Messages, expand the **Responses** section and search for an appropriate system-wide response.
    - In the My Responses Window, use the Navigation Pane or other navigation aids to locate a personal response or system-wide response.

    Tip: For more information, see Search for a Response.

2. Do one of the following:

    - View the information in the response and use it indirectly when researching your reply to an email message.
    - Copy and paste the information from the response to the **Notes** section of the E-mail window for Incoming Messages.

Related Topics

Search for a Response
Use Response Management in an Email Message

Working with Faxes

Working with Faxes

Requirements: You need the TIFF Faxes Security right to receive faxes as TIF files attached to email messages. The **Web Client fax format** option on your user account determines if you can select a fax from the Fax Viewer and view it in a browser window.

With the CIC client, you receive faxes in the same place you receive email messages. Any time a caller sends a fax to you, the fax is attached to an email message and sent to your email account.

Faxes are managed in one of these ways in the CIC client:

- If Interaction Fax is installed on your workstation, you use the Interaction Fax viewer to view, edit, print, compose and send fax documents. You receive faxes as **I3F files**.
- If Interaction Fax is not installed on your workstation, you can receive faxes as TIF files and use the default application set up in Windows for **TIF files** to view and print faxes.

  Note: Contact your CIC administrator if you do not have Interaction Fax installed and your faxes are not being attached to email messages as TIF files
- If you display the Fax Viewer, you can view or download faxes and save them as files.

Related Topics

Download a Fax
Fax Viewer
Open a Fax From Your Inbox
Send a fax
Use the Fax Viewer
View a Fax

Download a Fax

Requirements: The TIFF Faxes Security right and the **Web Client fax format** option on your user account determine which file formats are available when you download a fax.

The Fax Viewer displays a list of your current faxes. You can use the Fax Viewer to save a fax to a file.

To download a fax:

1. Do one of the following:
   - From the My Interactions toolbar, click the **Faxes** button.
   - From the **View** menu, select **Faxes**.

   Result: The **Fax Viewer** appears and displays the Faxes List.
2. Select a fax.
3. Click the **Download** button in the Fax Viewer.
4. If more than one file format is available, select one.

   Result: The File Download dialog box appears.
5. Click **Save**.

   Result: The **Save As** dialog box appears.

   Note: If you select **Open** instead of **Save**, the fax appears in the appropriate application for the selected format and you can view the fax.
6. In the **Save As** dialog box, browse to a selected directory, accept or change the fax **File name,** then click **Save**.

   Result: The **Save As** dialog box closes and the file is saved in the selected directory.
7. Do one of the following:
   - Return to step 2 and select another fax.
   - Click the Fax Viewer **Close** button.
   - Click the **Delete** button in the Fax Viewer to delete the fax from both the Fax Viewer list and from your email Inbox.

Related Topics

Fax Viewer
Use the Fax Viewer
View a Fax
Working with Faxes

Open a Fax From Your Inbox

You can open a fax from your email program Inbox. You can forward the fax to another person, just as you would any other email message. You can also set alerts for new fax messages.

Faxes can be managed in one of two ways depending on whether Interaction Fax is installed on your workstation. For more information, see Working with Faxes.

To open a fax from your Inbox:

1. Open your email Inbox.
2. Open the email message containing the fax message.
3. Double-click the attached fax.

   Result: If Interaction Fax is installed on your workstation, it opens and displays the fax.

   Note: Use Interaction Fax to view, edit, export, annotate or print the fax. For more information, see the *Interaction Fax Help*.

Related Topics

Working with Faxes

Send a Fax

If Interaction Fax is installed on your workstation, you can send a fax from any Windows application that allows printing.

Note: Your call privileges determine whether you have adequate permission to send a fax, not the fax station's call privileges. For example, if FaxStation 1 has long-distance privileges, but you do not, you would be unable to send a long-distance fax using FaxStation 1. The CIC administrator determines call privileges. If you have questions regarding your call privileges, contact the CIC administrator.

To send a fax:

1. Open the Windows application and create the fax.
2. From the Windows application, print the fax.
3. Select **Interaction Fax** as the printer and click **OK** to print the fax.

   Tip: If you are printing a **PDF** to Interaction Fax, be sure the option, **Print to File**, is **not** selected.

   Result: The document is converted to a fax and appears in Interaction Fax.
4. Do one of the following:
   - In the Interaction Fax toolbar, click the **Send Fax** icon.
   - From the **File** menu, click **Send Fax.**

   Note: You may be prompted to log on the first time you send a fax during each session. If so, just enter your logon password and click **OK**.
5. In the Send Fax dialog box, fill in the appropriate **Recipients** fields and click **Send**.

   Note: Consult the *Interaction Fax Help* which contains complete instructions for sending faxes.

6. After sending the fax, from the **File** menu, click **Exit**.

Related Topics

Open a Fax From Your Inbox
Working with Faxes

Fax Viewer

The Fax Viewer displays a list of your current faxes. It enables you to view or download faxes and save them as files.

To display the Fax Viewer:

1. Do one of the following:
    - Click the **Faxes** button.
    - From the **View** menu, select **Faxes**.

   Result: The Fax Viewer appears and displays the Faxes List.

2. Click **Refresh** to display any new faxes received since you started the CIC client and also to update the viewed/not viewed status of your faxes.

   Note: The Faxes List does not automatically update as you receive new faxes or view faxes in your email application Inbox. It also does not automatically update if you delete a fax from your email Inbox.

Related Topics

Download a Fax
Use the Fax Viewer
View a Fax
Working with Faxes

Use the Fax Viewer

Requirements: You need the TIFF Faxes Security right to receive faxes as TIF files attached to email messages. The **Web Client fax format** option on your user account determines if you can select a fax from the Fax Viewer and view it in a browser window.

Use the Fax Viewer to view a list of your received faxes and view or download the fax document.

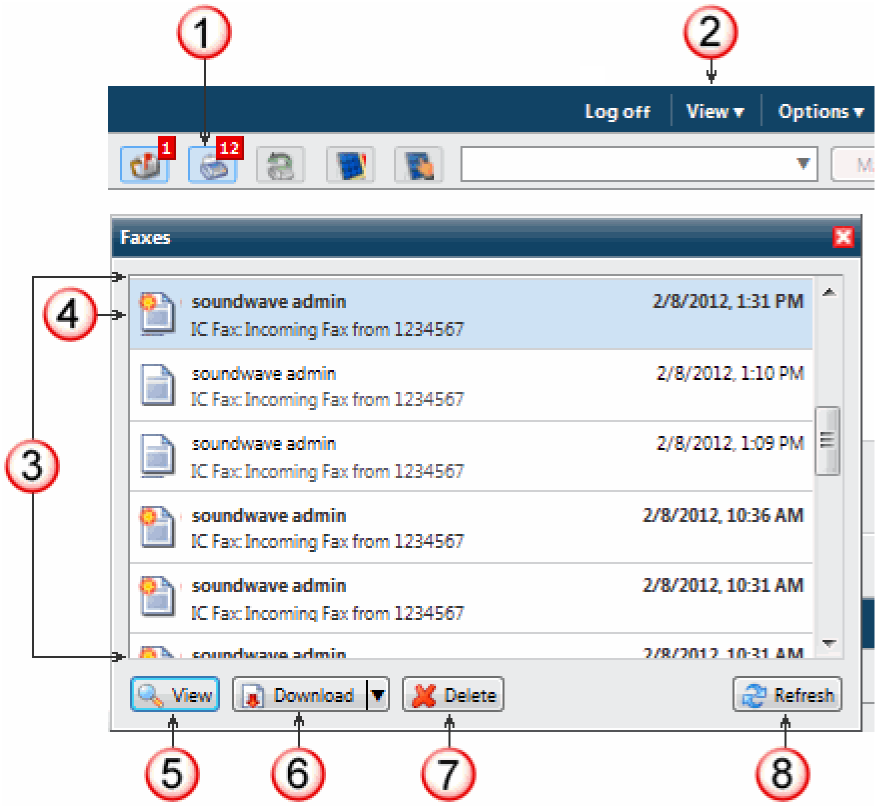
Fax Formats

Your CIC administrator determines the format in which you receive or view faxes.

- Faxes appear as **email attachments** in your email Inbox. These attachments can be in either the proprietary **I3F** format or in the **TIF** image format.
- Regardless of the format in which a fax arrives, your CIC administrator can enable you to view faxes in a browser window in either **PDF** or **PNG** format.

Fax Viewer Features

This diagram illustrates the main features of the Fax Viewer.



1	Click the **Faxes** button to display the Fax Viewer. **Note**: The total number of your faxes (both viewed and unviewed) is indicated on the button icon.
2	You can also select **Faxes** from the **View** menu to display the Fax Viewer.
3	The Fax Viewer contains the **Faxes List.** It contains the faxes you have not yet deleted, including both previously viewed and unviewed faxes.
4	The currently selected fax. **Tip:** In this example, the bright symbol on the opened envelope icon indicates a fax you have not yet viewed.
5	Select a fax and click **View** to display the fax in a browser window without having to switch to your email application to find and view the fax. **Note**: The **View** button is enabled if your CIC administrator granted you the **Web Client fax format** option before the selected fax was received.
6	Select a fax and click **Download** to open or save the fax. **Note**: A down arrow on the button indicates that you have a choice of formats. You can select either the format in which the fax was received (I3F or TIF) or a browser-compatible format (PDF or PNG).
7	Click **Delete**
8	Click **Refresh** to display any new faxes in the Faxes List and also to update the viewed/not viewed status of your faxes.

Note: The Faxes List does not automatically update as you receive new faxes or view faxes in your email application Inbox. It also does not automatically update if you delete a fax from your email Inbox.

Related Topics

Download a Fax
Fax Viewer
View a Fax
Working with Faxes

View a Fax

Requirements: The **Web Client fax format** option on your user account determines if you can select a fax from the Fax Viewer and view it in a browser window. Contact your CIC administrator.

The Fax Viewer displays a list of your current faxes. If your user account is appropriately configured, you can view faxes from inside the CIC client.

Note: You can always view faxes from your email account by clicking on the fax attachment to an email message.

To view a fax using the Fax Viewer:

1. Do one of the following:
    - In the My Interactions toolbar, click the **Faxes** button.
    - From the **View** menu, select **Faxes**.

    Result: The **Fax Viewer** appears and displays the Faxes List.
2. Select a fax.
3. Click the **View** button in the Fax Viewer.

    Result: The fax appears in a new browser window.

    Tip: If the View button is not available, then the **Web Client fax format** option is not enabled on your user account or it was not enabled at the time you received the fax.
4. Close the browser window containing the fax.
5. Do one of the following:
    - Return to step 2 and select another fax.
    - Click the Fax Viewer **Close** button.
    - Click the **Delete** button in the Fax Viewer to delete the fax from both the Fax Viewer list and from your email Inbox.

Related Topics

Download a Fax
Fax Viewer
Use the Fax Viewer
Working with Faxes

Working with Generic Objects

Understanding Generic Object Routing

Some companies may incorporate tasks specific to their organization into the CIC client, and may implement the ability to route these ACD queue objects to agents or users within a workgroup. While most interactions (phone calls, emails, chat sessions, and so on) generally involve communication between two or more people, generic objects are more task-based, unlike interactions that require some type of contact with another person.

For example, a generic object may include a request to author a knowledge base entry, a loan application for processing, a CRM ticket, and more. Just as with any other interaction, you can pick up, transfer, disconnect, request assistance with, or place on hold generic objects. Supervisors may view the status of individual tasks and team members through Interaction Supervisor.

Note: Your company may or may not implement this feature. If you have questions about sending and receiving generic objects, or tasks other than working with interactions within the CIC client, see your system administrator for details.

Working with Screen Pops

Site-Specific Screen Pops

Screen pops can open your browser to a specific URL when a specific event occurs. Let’s assume your CIC administrator wants Internet Explorer to automatically launch one of your company’s web pages when you receive an interaction in your ACD queue. If your administrator has configured the proper settings, including assigning the website popup to various states of the interaction, such as ‘alerting’ in Interaction Administrator, then the appropriate web page opens in a new browser window when the defined interaction enters your queue.

Note: Screen pop functions are defined in as alerting actions in Interaction Administrator. This feature may or may not be available to you, depending on the rights assigned to you by your system administrator. If you have any questions about using this screen pop feature, see your administrator. Also, you must configure your browser to allow popups from the appropriate site.

Working with Response Management

Working with Response Management

Requirements: To create and manage personal responses or to search for and use personal and system-wide responses, you need the Response Management Security right. To use all or selected libraries of the system-wide responses, you need the appropriate Response Management View Access Control Right. To use an interaction attribute in a Response Macro, you need the Substitute Queue Columns Access Control Right.

In systems that were upgraded from previous releases, you can also see an older system-wide response library named "Interactions" in the CIC client. Using responses from this older library requires specific Access Control Rights; see View Interaction Files, View Interaction Messages, and View Interaction URLs.

Response Management enables you to use pre-defined items such as messages and stored files to handle interactions more quickly. Your CIC administrator can create system-wide response items and organize them into categories. Your CIC administrator can then grant the necessary rights for all or selected users to use a particular library of response items. You can also create your own personal responses for information you type over and over again in interactions with customers or for files you often send to customers.

You can:

- View, select, and use a stored response during a chat session or in a reply to an ACD-routed email message. For more information, see Using Response Management.
- Create your own stored responses for the information that you need most often. For more information, see Create Personal Responses.

Response Organization

The organization of responses has three levels:

- **Library**: A library (also called a server document) is the top-level collection of related response items. A library contains individual response items (such as a standard greeting or statement of your typical business hours) which can be organized into categories. There are two types of response libraries:
    - **System-wide**: The CIC administrator can create response libraries that are available to CIC client users with the appropriate Response Management View Access Control Right. For example, your CIC administrator could create a system-wide response library for Support representatives and a general-purpose response library for all users. If you have the appropriate rights, these libraries appear in the My Responses window.

    Note: Your CIC administrator configures these system-wide response libraries in the Response Management container in Interaction Administrator. For more information, see the *Interaction Administrator Help*.

    - **Personal**: You can also create a library of your own responses for the information that you use most often in your job. These responses appear under the **My Responses** folder in the My Responses window. For more information, see Create Personal Responses.
- **Category**: A category is a folder in a response library. Categories are a way to organize individual response items in a library. Categories are optional.
- **Item**: An item is a single response. There are two types of response items:
    - **Messages**: Message items are stored text messages which can contain greetings, closings, and standard responses to common questions.

    Note: A stored text message can contain a working URL hyperlink.

    - **Files**: File items are computer files that you can attach to an email message or send to external chat participants.

Related Topics

Creating Personal Responses
My Responses Window
Organize Personal Responses
Using Response Management

Using Response Management

Requirements: See Working with Response Management.

You use stored responses to avoid typing the same information over and over again. You can insert a response from a system-wide or personal library of response items into certain types of interactions or view the information in a response item during other interactions.

For more information about using Response Management in particular situations, see:

- Use Response Management During a Chat Session

- Use Response Management for an Incoming Interaction
- Use Response Management in an Email Message

Related Topics

Create Personal Responses
Organize Personal Responses
Search for a Response
Working with Response Management

Create Personal Responses

Requirements: See Working with Response Management.

You can create personal response items that contain information you often need when handling interactions. These personal responses appear in the **My Responses** folder in the My Responses Window. You can arrange personal responses in subfolders (categories). For more information, see Organize Personal Responses.

Note: Personal responses are private and are not available to other CIC client users.

You can create two kinds of personal responses:

- Message
- File

Personal Messages

Use messages to save standard text responses that you often use when interacting with customers. For example, you can save a message that contains your typical office hours, phone number, and email address. You can then use this response in a Chat or Email message and never have to type this information again.

Note: A stored message can contain a working URL hyperlink or an email message address.

To create a response message:

1. From the **View** menu, select **Response Management Editor**.

   Result: The My Responses window appears.

2. Click the **My Responses** folder or any of the folders under **My Responses**.
3. Click the **Create new item** toolbar button.

   Result: The My Responses Editor appears.

4. In the composition area, do one of the following:
   - Type the text of the message.
   - Import an existing HTML file by clicking the **Select HTML To Insert** toolbar button. In the **HTML Import** dialog box, locate an HTML file and click **Open**.

     Tip: By default, the Open dialog box lists all the files in a directory. You can import only files with an HTM or HTML extension.

5. Optionally, do any of the following in the My Responses Editor:

   Note: There are some limits to the use of stored responses in chats. Chat interactions are conducted in plain text. Stored responses that contain formatted text are converted to plain text when used in a chat. Hyperlinks and images in a stored response are not sent as part of a chat reply. However, you can use responses containing macros in a chat.

- **Format the text**: Use any of the text formatting tools.

Tip: The **Font Name** drop-down list defaults to **Inherited**. When you use a stored response created with the **Inherited** font, it adopts the font and font characteristics (size, color, and so on) of the text immediately preceding it in your email message. However, when you insert a response that has a **selected font** and other font characteristics, then the stored response appears as originally formatted.

- **Add a link**: You can create a clickable link to a URL or an email message address: Select some text in your message and click the **Link** tool. In the Link dialog box, from the **Link Type** drop down list, select **URL** or **E-mail**. Supply the necessary address and other information, as prompted.

Tip: If a URL is the only text in the message, it converts automatically to a hyperlink. The icon for this stored response becomes the logo for the browser you are currently using.

- **Add an image**: Select a place in your message and click the **Image** tool. Supply a URL ending in the image file name. This URL must be accessible to your browser. Click **OK**.

Example: https://xyzcorp.com/Support/help/setup.gif

- **Add a Response Macro**: Response macros automatically insert a constant like today’s date, an interaction attribute such as the customer’s name, or another response item into your response at the time you use it. See Create Response Macros for more details.

6. In the **Name** text box, type a name for this stored message.

Note: Response Management provides a full-text search tool that uses the information in **Name**, **Shortcut**, and **Labels** along with the response item’s content to find a response. For more information, see Search for a Response.

Tip: Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to **New Item**.

7. In the **Shortcut** text box, type a short name, abbreviation, or code.

Tip: To insert a response item where needed, type the shortcut and then press **Ctrl+Space**. The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting.

Note: Do not use any of these restricted characters in your shortcut: ~ ! ? * ^ \ . These special characters prevent the shortcut from working.

8. In the **Labels** text box, type a space-separated list of words that identify or classify this response item.

9. Click **Save.**

Result: The new response item appears in the selected folder in the My Responses Window.

Personal Files

Personal files are pointers to files in a shared directory that is **accessible to your web server**.

To create a file response item:

1. From the **View** menu, select **Response Management Editor**.

   Result: The My Responses window appears.

2. Click the **My Responses** folder or any of the folders (categories) under this folder.
3. Click the **Create new item** toolbar button.

   Result: The My Responses Editor appears.

4. Click **Change to File**.
5. In the **Path** text box, type the complete directory path and file name.

   Note: This file must be in a shared directory in a path that the web server can access at the moment when you use the stored file. The file can be, but does not have to be, in a shared directory on the web server which is running Interaction Client Web Edition.

   Result: The directory path and file name appear in the text box next to the **Verify** button.

6. Click **Verify**.

   Result: This action verifies that web server can locate and access the file. One of two things happens:

   - If verification is successful, a green check mark appears next to the **Verify** button.
   - If it fails, the yellow warning triangle remains next to the **Verify** button. Confirm that the path is correctly typed. Check with your CIC administrator that the file is in place in an appropriate directory accessible to the web server.

7. In the **Name** text box, type a name for this file.

   Note: Response Management provides a full-text search tool that uses the information in **Name**, **Shortcut**, and **Labels** along with the response item's content to find a response. For more information, see Search for a Response.

   Tip: Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to **New Item**.

8. In the **Shortcut** text box, type a short name, abbreviation, or code for this response.

   Tip: To insert a response item where needed, type the shortcut and then press **Ctrl+Space**. The shortcut does not have to be unique. For example, you could use the shortcut "TS" for all your files containing troubleshooting tips.

9. In the **Labels** text box, type a space-separated list of words that identify or classify this response item.

10. Click **Save.**

    Result: The new response item appears in the selected folder in the My Responses Window.

Related Topics

Organize Personal Responses
Using Response Management
Working with Response Management

Create Response Macros

Requirements: See Working with Response Management.

You can insert placeholder fields in a response item that are replaced when the response is used. Placeholder fields can be replaced with a constant, interaction attribute or another stored response.

Macros take this form [field:data]. Field identifies the response macro type. Data is optional. There are three types of macros: constant, attribute, and response.

Constant

Constant macros do not depend on the dynamic context of the interaction into which you are inserting it. Here are the currently supported constants:

Field	Value
User Name	The display name of the logged on user, most likely your display name.
Date	The short form of the current date based on the language used in your country or region.
Time	The short form of the current time based on the language used in your country or region.

Example

Macro: My name is [UserName]. Today is [Date], how can I help you?

Result: My name is Mary Jones. Today is 9/15/2015, how can I help you?

Attribute

Attribute macros substitute a value of an attribute based on your current interaction. In the response item, Attribute macros must have a field name of Attribute; data is the attribute name.

Note: To use an interaction attribute in a Response Macro, you need the Substitute Queue Columns Access Control right for the interaction. If you do not have the appropriate right, the value does not replace the attribute.

Example

Macro: Hello, [Attribute:Eic_RemoteName]. How can I help you?

Result: Hello, John Smith. How can I help you?

Response

Response macros insert another response item into your response. If the substituted response contains macros, the substituted response contains the appropriate values. Response macros must have a field name of Response. The data is the Shortcut name for the specified response item.

Note: Response substitution is not supported if you drag and drop the response item to an interaction. Also, if there is more than one response item with the same Shortcut name, the first one located is used; you do not get to select one.

Example

Shortcut for the inserted response item: signoff

Inserted response item: Again, my name is [UserName]. Thanks for chatting!

Macro: Glad to help. [Response:signoff]

Result: Glad to help. Again, my name is Mary Jones. Thanks for chatting!

To create a response macro:

1. From the **View** menu, select **Response Management Editor**.

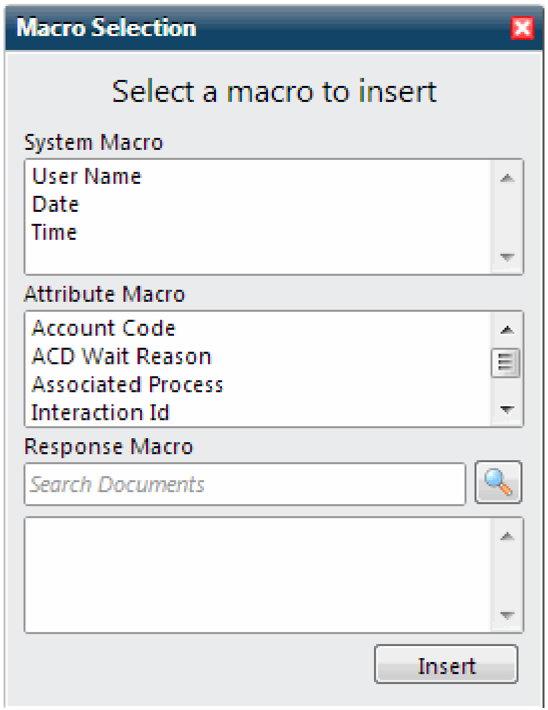
   Result: The My Responses window appears.

2. Click the folder labeled with your name or any of the folders (categories) under this folder.
3. Click the **Create new item** toolbar button.

   Result: The My Responses Editor appears.

4. With your cursor In the composition area, click the **Select Macro To Insert** toolbar button.

   Result: The **Macro Selection** dialog box appears.



5. Do one of the following:
   - To insert a **constant**, from the **System Macro** list, select a macro.
   - To insert an **interaction attribute**, from the **Attributes** list, select a macro.
   - To insert a **stored response**, in the **Response Macro** text box, type the name of a stored response and press **Enter**.
6. Click **Insert**.

   Result: The macro appears in the composition area of the **My Responses Editor**.

7. Optionally, insert more macros in the response item.
8. When finished, in the **Macro Selection** dialog box, click the **Close** icon.

Related Topics

Create Personal Responses

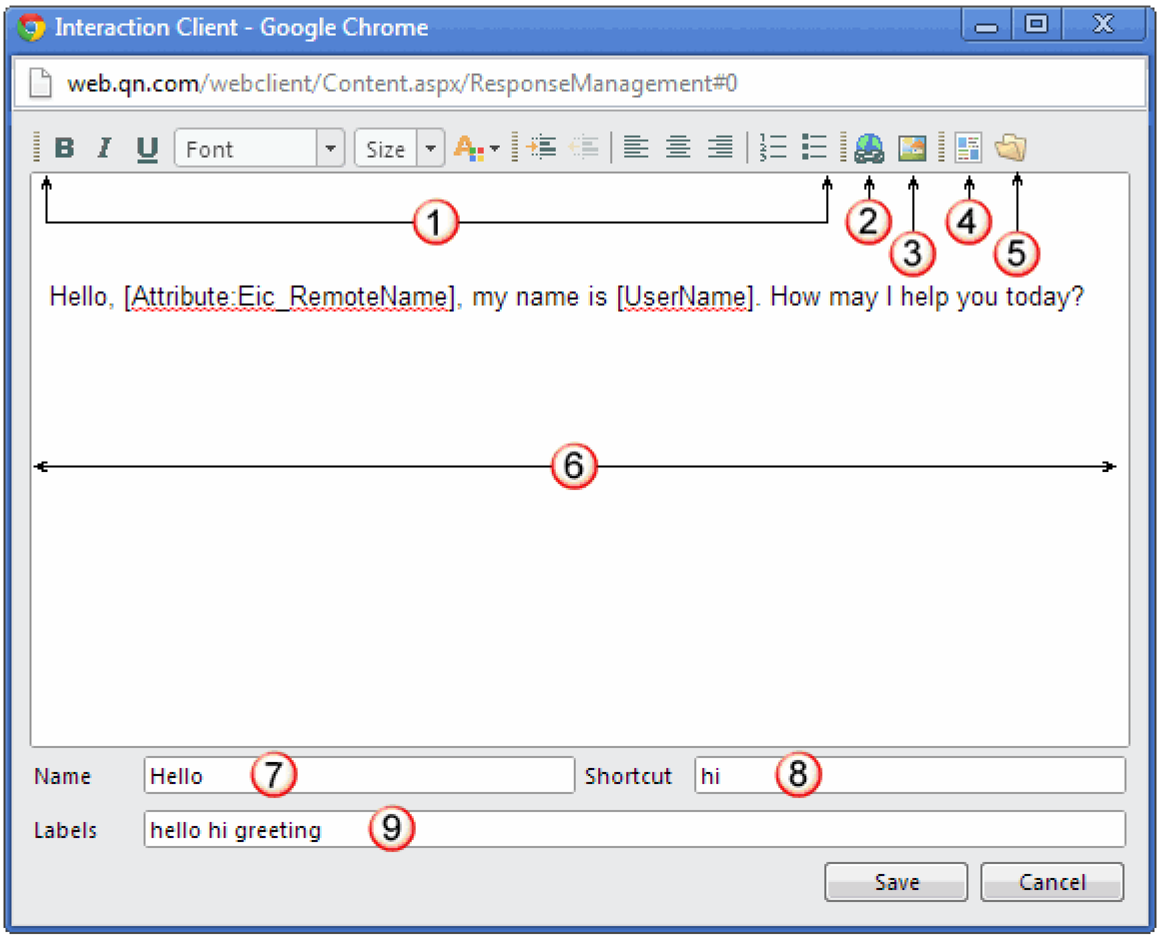
My Responses Editor

Requirements: See Working with Response Management.

To create and edit response items, use the Response Management Editor. It is a full-featured HTML editor with text formatting tools for messages. You can import HTML files, insert Response Macros, create hyperlinks, and add images.

To access the Response Management Editor, in the My Responses window, select the My Responses folder and do one of the following:

- Click the **Create new item** (plus sign) toolbar button.
- Navigate to an existing item and then click the **Edit item** (notepad) toolbar button.



For more information about creating or editing personal responses, see Create Personal Responses.

1	**Text formatting tools**	The editor includes a full range of text formatting tools. Tooltips identify each of the tools.
2	**Link**	Turn a selected word or phrase into a clickable hyperlink. You can create two types of links: · **URL**: a link to an Internet address. · **E-mail**: A link that creates an addressed email message in the default email program on the customer's system. Optionally, you can supply

		the subject and standard text for this message.
3	**Image**	Insert images in any of the standard Windows formats, including JPEG, GIF, and PNG. You control the image alignment within the message.
4	**Select Macro To Insert**	Insert placeholder fields that are replaced when the response is used with a constant, interaction attribute or another stored response. For more information, see Create Response Macros.
5	**Select HTML to Insert**	Import an HTML formatted file into your response. You can import files with either an HTM or HTML extension.
6	**Editing pane**	Type, format, and edit your message here. **Note**: If you select the **File** response item type, the editing area is unavailable.
7	**Name**	Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to New Item. **Note**: Response Management provides a full-text search tool that uses the information in **Name**, **Shortcut**, and **Labels** along with the response item's content to find a response.
8	**Shortcut**	You can type the shortcut and press **Ctrl+Space** to insert the response item in a chat or email reply.
9	**Labels**	Labels provide more search terms.

Related Topics

Create Response Macros
Create Personal Responses
My Responses Window
Search for a Response
Using Response Management
Working with Response Management

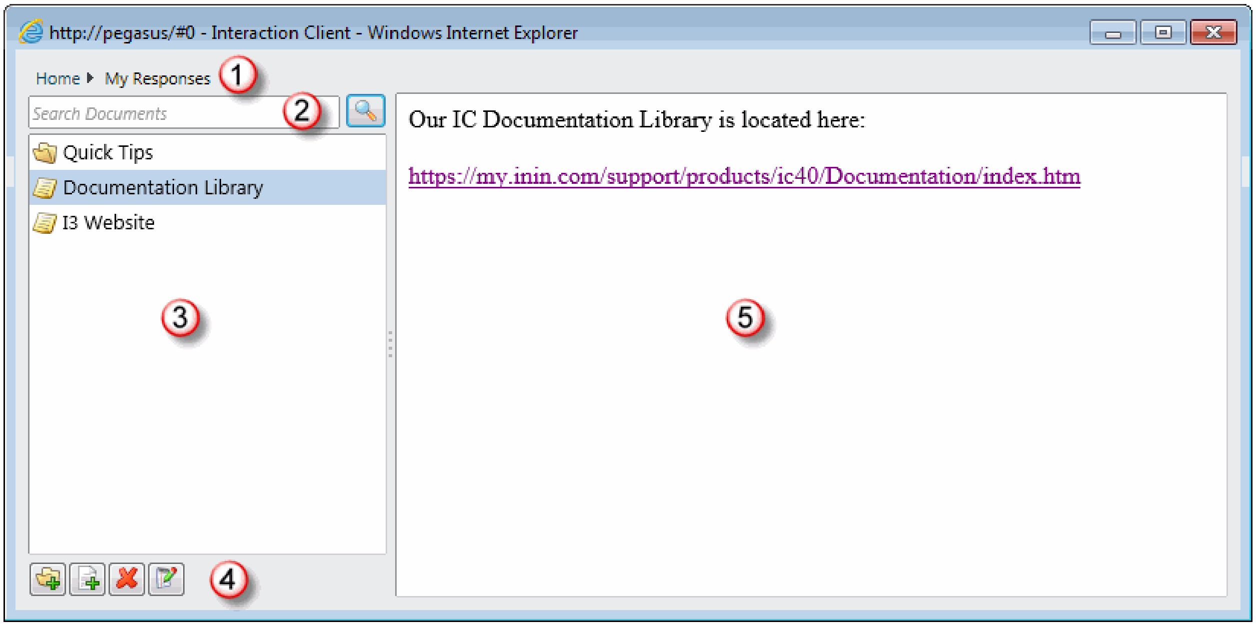
My Responses Window

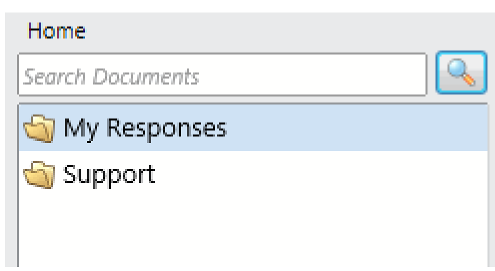
Requirements: See Working with Response Management.

To create, edit, organize, and view response items and categories, use the My Responses window. It contains a navigation pane and a preview pane.

To access the My Responses window:

- From the **View** menu, select **Response Management Editor**.



1	**Breadcrumb Bar**	Navigate the hierarchy of response categories and locate a response or view the items in a category.
2	**Search Documents**	To locate a specific response, use this full-text search box. For more information, see Search for a Response.
3	**Navigation Pane**	To locate a particular response, click anywhere in this hierarchical view, expanding folders as needed. Both your personal and system-wide response categories appear as folders in this tree view. Individual responses appear as items in the folders. **Note**: Your CIC administrator can create libraries of standard responses that all or selected CIC client users can use. These response management libraries appear as categories in the Home directory. Your personal responses appear under the **My Responses** category.  **Requirement**: You need the appropriate Response Management View Access Control Right to use any of the system-wide response items.
4	**Toolbar**	Create and manage your stored responses. For more information, see Create Personal Responses, and Organize Personal Responses.

5	**Preview Pane**	The preview pane displays an HTML preview of a selected text message or the directory path and file name of a selected file.

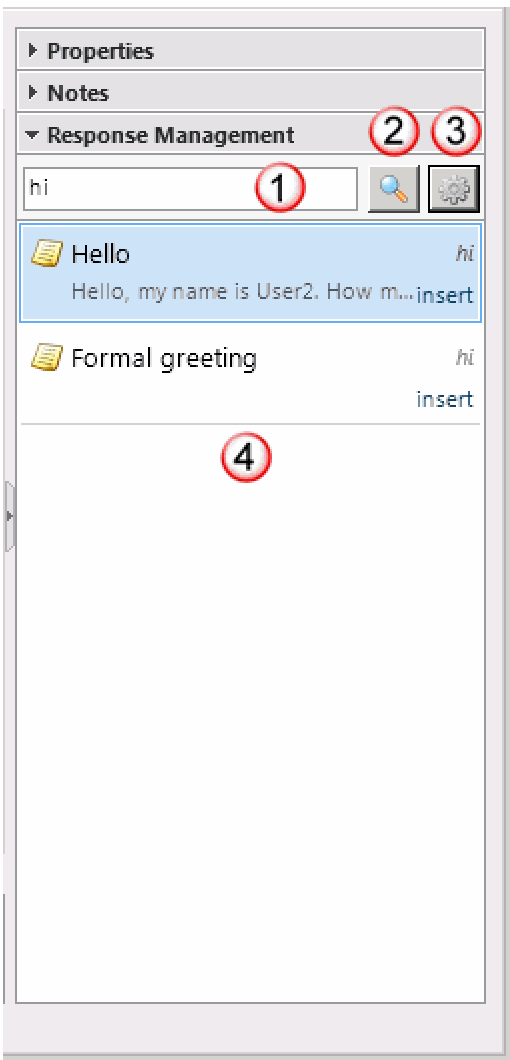
Related Topics

Working with Response Management

Responses Sidebar

The Response Management drop-down section appears in the sidebar area of the Chat window and the Email Window for Outgoing Messages. For more information, see Use Response Management During a Chat Session or Use Response Management in an Message.

To expand or collapse the Responses section, click the arrow on the section control. This section provides full-text search capabilities for your personal responses and the system-wide responses to which you have the appropriate Response Management View Access Control Right. Responses which match your search criteria appear here. For more information, see Search for a Response.



Related Topics

Use Response Management During a Chat Session
Use Response Management in an Email Message

Organize Personal Responses

Requirements: See Working with Response Management.

You can make your personal responses easier to locate by storing them in folders. You can nest these folders inside each other to whatever level suits your purpose.

To create a personal folder:

1. From the **View** menu, select **Response Management Editor**.

   Result: The My Responses window appears.

2. Click the **My Responses** folder.
3. Navigate to the level where you want to create the folder (category).
4. Click the **Create new category** toolbar button.

   Result: A new folder appears at the level you selected in the navigation pane.

5. Type a name for the folder in the **New Category** text box.

Working with Response Folders

You can perform any of the following actions when working with your personal folders in the Response Management window.

§ Rename a folder by selecting the folder in the navigation pane and then clicking the **Edit item** toolbar button. Type a new name for the folder.

§ Delete a folder along with any personal responses it contains by selecting the folder and then clicking the **Delete item** toolbar button. Click **OK** in the "Are you sure you want to delete "*folder name*"? dialog box.

Note: In a similar fashion, you can also delete a selected response by selecting the response item and clicking the **Delete Item** toolbar button. Click OK in the "Are you sure you want to delete "*item name*"? dialog box.

§ View the contents of a personal response by clicking the response item. Check the contents in the Preview pane of the **My Responses window**.

Related Topics

Create Personal Responses
My Responses Window
Using Response Management
Working with Response Management

Search for a Response

Requirements: See Working with Response Management.

You can locate and use any personal response item or any system-wide response item to which you have rights in an interaction.

Full-Text Search

You can use full-text searching to locate a needed response item. Full-text searching looks for matching text in the **Name**, **Label**, **Shortcut**, and text content of a response item. Full-text searching is available in:

- The Responses sidebar in the Chat window and Email Window for Outgoing Messages.
- The My Responses window.

To search for a response item:

1. In the **Search Documents** text box, type all or the first part of the word or words that identify the response item and then click the **Search** button.

   Tip: See Search Language for tips on constructing a multi-term search.

   Result: Matching response items appear.

2. Do one of the following:
   - In the **Responses** sidebar in the Chat window, double-click a response item from the search results.

     Result: The response item appears in the composition area. You can preview this content before clicking **Send**.

   - In the **My Responses** window, select an item from the **Search Results**.

     Result: The response item appears in the Preview pane.

Search Language

The Response Management search language is similar to that used in most common Internet search engines. Use this search language in any Response Management **Search** text box.

Boolean Operators

You can use **AND**, **OR**, and **NOT** Boolean operators.

Note: A plus sign (+) is the same as **AND**. A space is the same as **OR**. A minus sign (-) is the same as **NOT**.

- **Foot OR Hand** searches for items containing either of these words.
- **Foot AND Hand** searches for items containing both words.
- **Foot NOT Hand** searches for items containing foot, but not hand.

Exact Phrase

Enclose an exact phrase searches in quotation marks.

- **"Foot and Hand"** searches for items containing that exact phrase.

Grouping

Enclose a grouped search in parentheses.

- **(Jack AND Jill) hill fell** searches for items containing both Jack and Jill or the word hill or the word fell.

Fields

You can confine your search to the Name, Shortcut, or Labels fields on a response item.

- **Shortcut:update** searches only for items with a shortcut field containing the word update or beginning with update.

Related Topics

Using Response Management

Use a Response Shortcut

Requirements: See Working with Response Management.

You can use a response shortcut to insert a stored response when you are participating in a Chat Session or composing an Email Reply. Response shortcuts are available in the composition areas of the Email Window for Outgoing Messages or Chat Window. Both system-wide and personal responses can have shortcuts.

Tip: You can assign a shortcut when you create or edit a personal response. For more information, see Create Personal Responses.

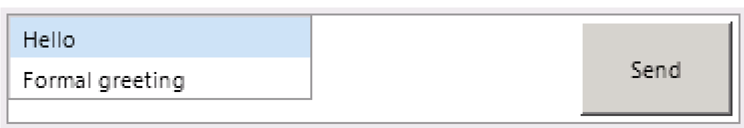
To use a shortcut:

1. Type all or part of the shortcut and press **Ctrl+Space**.

   Result: If there is only one matching response item, it is automatically inserted in the composition area of the Chat window or the reply area of the Email Window for Outgoing Messages.

2. If there are multiple matching response items, do one of the following:

   - Select the appropriate response from the drop-down list that appears automatically.
   - Continue typing to narrow the search further and then select the appropriate response.
   - Press **Esc** to close the selection drop-down list.



Related Topics

Using Response Management

Working with Speed Dial

Dial a Number Using Speed Dial

You can use the CIC client speed dial features to dial frequently used numbers. You can watch the status of your call in My Interactions.

To dial a number using speed dial:

1. Display a Speed Dial View.
2. Do one of the following:

   - To call the default number associated with the speed dial entry, click the phone number.
   - To dial a number other than the default number for a speed dial entry, click the down arrow next to the displayed phone number. Select and click a number in the list of other available numbers for this speed dial entry.

Tip: If you have more speed dial entries than can appear at one time on your speed dial view, use the scroll bar to find the entry.

Related Topics

Create a Speed Dial View
Create a New Directory Entry in Speed Dials
Display a Speed Dial View

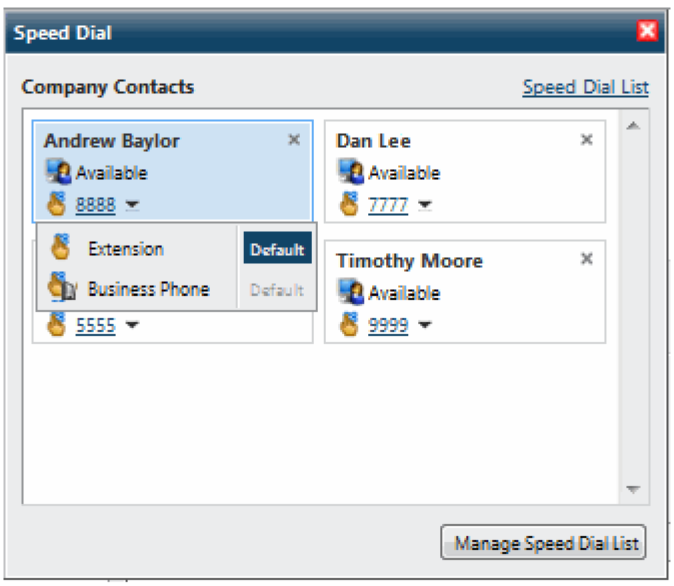
Working with Speed Dial Views

Working with Speed Dial Views

Requirements: You need the Can Create Speed Dials Security right to enable you to Create a Speed Dial View.

Speed dial views provide a quick way to dial frequently called contacts. The entries within a speed dial view show the name, user status, and the default number for each contact.

Click the down arrow next to the default phone number for a contact. The list contains all the phone numbers available for the selected contact. Click any of these numbers to dial.



Note: A Speed Dial view appears only as long as you need it to make a call. You can also display a Speed Dial Directory as part of the CIC client interface. Click the **New Tab** button, select **Speed Dial** and then select the name of the Speed Dial directory you want to display.

When you create a speed dial view, you determine whether the view is private or public. Private speed dial views are visible only to the person who creates the view. Public speed dial views are visible to everyone who uses a CIC client.

Related Topics

Create a Speed Dial View
Delete a Speed Dial View
Rename a Speed Dial View
Working with Speed Dial Entries

Close a Speed Dial View

You can close a Speed Dial view at any time. Or you can keep it open and move it out of the way while you work in the CIC client.

To close a speed dial view:

- Click the **X** in the upper right corner of the Speed Dial view.

  Result: The Speed Dial view no longer appears in your CIC client, but remains available for future use. Other people who are displaying this Speed Dial view are unaffected.

Related Topics

Display a Speed Dial View
Working with Speed Dial Views

Create a Speed Dial View

Requirements: Your CIC administrator must create the appropriate Contact List Source before you can create a Speed Dial view. Also you need the Can Create Speed Dials Security right to create a Speed Dial view.

A Speed dial view provides a quick way to dial frequently called contacts.

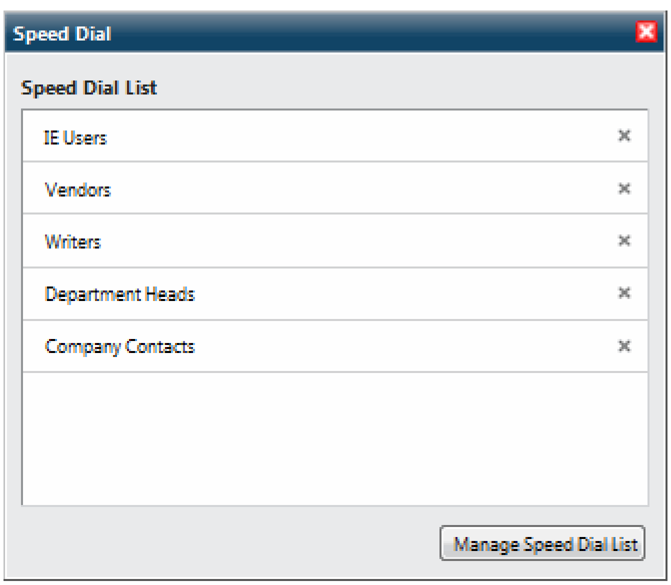
Warning: Once a Speed Dial view is created, its settings cannot be changed.

To create a Speed Dial view:

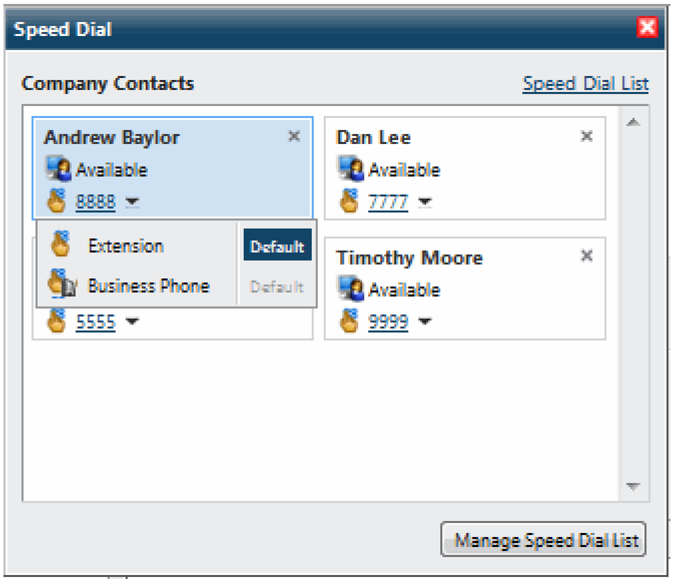
1. From the **View** menu, select **Speed Dial**.

   Result: One of the following occurs, depending on whether you last displayed a list of all your Speed Dial views or a selected Speed Dial view.

   - The **Speed Dial List** appears. It contains the names of your currently selected Speed Dial views.

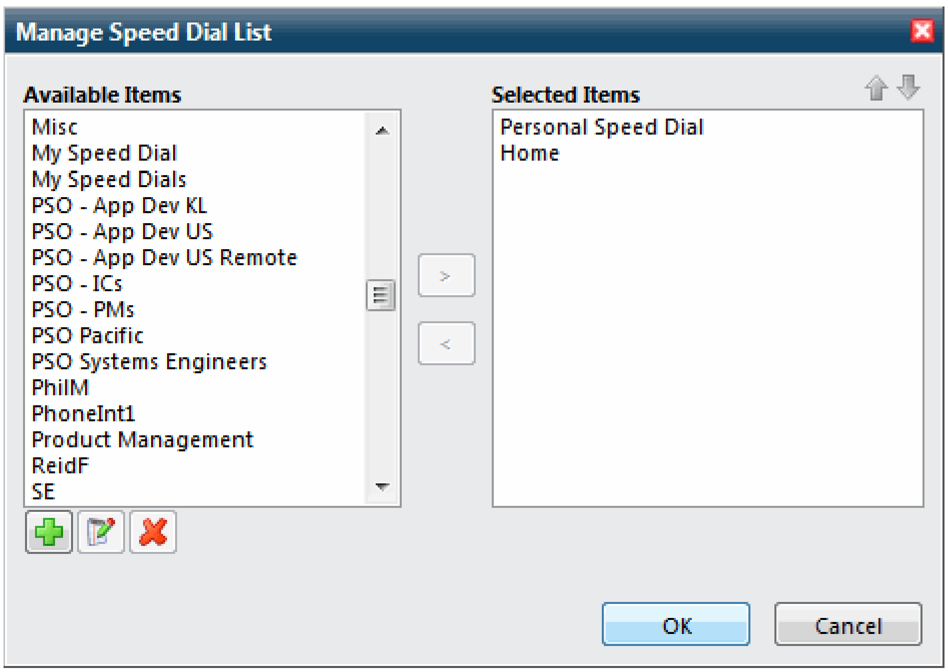


   - A **Speed Dial view** appears.



2. Click **Manage Speed Dial List**.

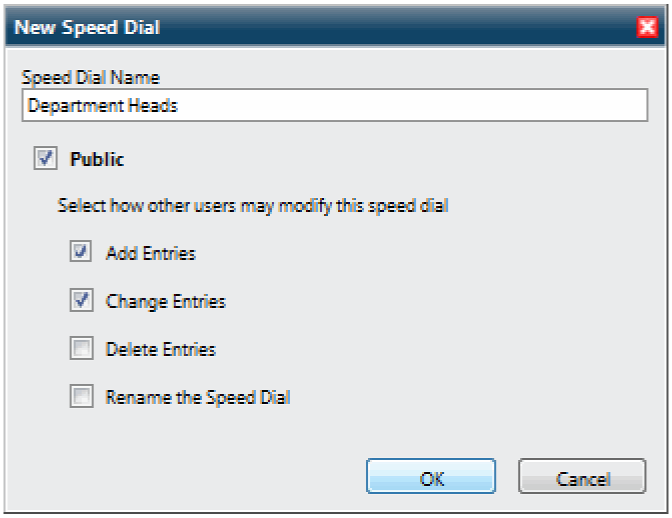
   Result: The **Manage Speed Dial List** dialog box appears. The names of all the current Speed Dial views appear in this dialog box.



Note: **Create**, **Rename**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip.

3. Click the **Create** button.

   Result: The New Speed Dial dialog box appears.



4. In the **Name:** field, enter a unique name for your new speed dial directory.
5. If you want other users to be able to add your Speed Dial view to their CIC client interface, select **Public**.
6. If you decide to make the new Speed Dial view public, select the options you want to grant other users for this Speed Dial view:
   - To enable other users to add additional entries to the Speed Dial view, select **Add Entries**.
   - To enable other users to edit the default number assigned to entries on this Speed Dial view, select **Change Entries**.
   - To enable other users to remove entries from this Speed Dial view, select **Delete Entries**.

   Tip: Use caution when granting others the ability to delete speed dial entries. Once someone removes the last speed dial entry from a Speed Dial view, the system permanently deletes the Speed Dial view and it cannot be recovered.

   Note: A user with Directory Administrator user rights assigned in Interaction Administrator can delete or add contacts from a public Speed Dial view. They can also delete or rename the Speed Dial view even if they did not create the view.

   - To enable other users to change the name of this Speed Dial view, check **Rename the Speed Dial**.
7. To create the Speed Dial view, click **OK**.

   Result: The new view is added to the **Selected Items** list in the Manage Speed Dial List dialog box.
8. In the Manage Speed Dial List dialog box, click **OK**.
9. Do one of the following:
   - If an existing Speed Dial view appears, click **Speed Dial List**.
   - If the Speed Dial List appears, go to the next step.
10. In the Speed Dial List, select the name of the new Speed Dial view.

    Result: The new Speed Dial view appears. It is empty.

Tip: For more information about adding Speed Dial entries to this new view, see Add a Directory Contact to a Speed Dial View.

Related Topics

Create a New Entry in a Speed Dial View
Display a Speed Dial View

Delete a Speed Dial View

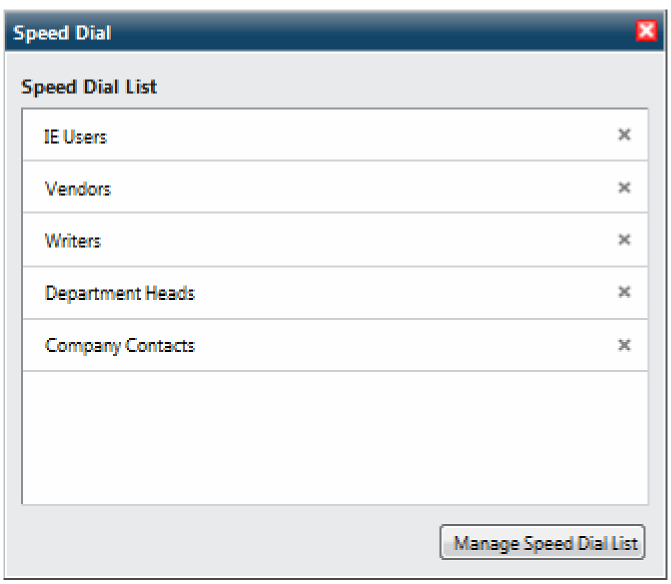
Requirements: You can delete your own Speed Dial views. If the owner granted other users the "Delete Entries" right, you can also delete a "Public" Speed Dial view. If you have Directory Administrator rights, you can delete any Speed Dial view. For more information, see Create a Speed Dial View.

To delete a Speed Dial view:

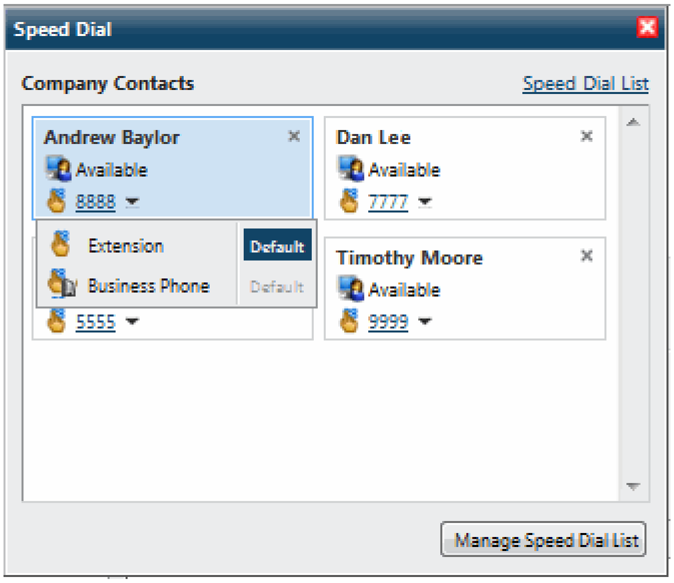
1. Do one of the following:
   - In the My Interactions toolbar, click the **Speed Dial** button.
   - From the View menu, select **Speed Dial**.

   Result: One of the following occurs, depending on whether you last displayed a list of all your Speed Dial views or a selected Speed Dial view.

   - The **Speed Dial List** appears. It contains the names of your currently selected Speed Dial views.

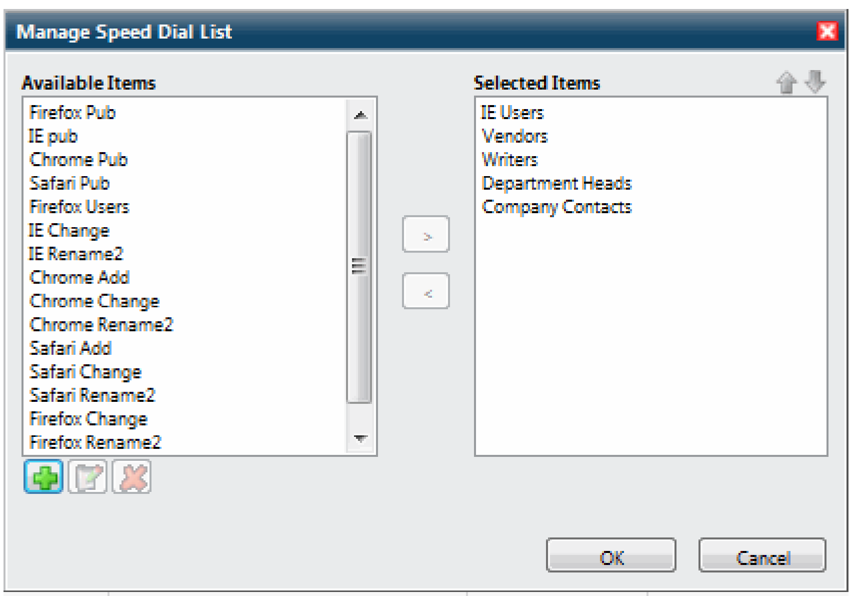


   - A **Speed Dial view** appears.



2. Click **Manage Speed Dial List**.

   Result: The **Manage Speed Dial List** dialog box appears. The names of all the current Speed Dial views appear in this dialog box.



Note: **Create**, **Rename**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip.

3. Select the name of a Speed Dial view from either the Available Items list or Selected Items list and click the **Delete** button.

Note: The Delete button is available only if you select a view that you own or have permission to delete. For more information, see Create a Speed Dial View.

4. To confirm that you want to delete the selected view, click **OK**.

   Result: The Speed Dial view is no longer available for any CIC client user.

Related Topics

Working with Speed Dial Views

Display a Speed Dial View

Requirements: You can display any Speed Dial view you create. You can also display any "Public" Speed Dial view. For example, your CIC administrator or other co-worker could create a speed dial view for emergency numbers and make it available for all CIC client users. For more information, see Create a Speed Dial View.

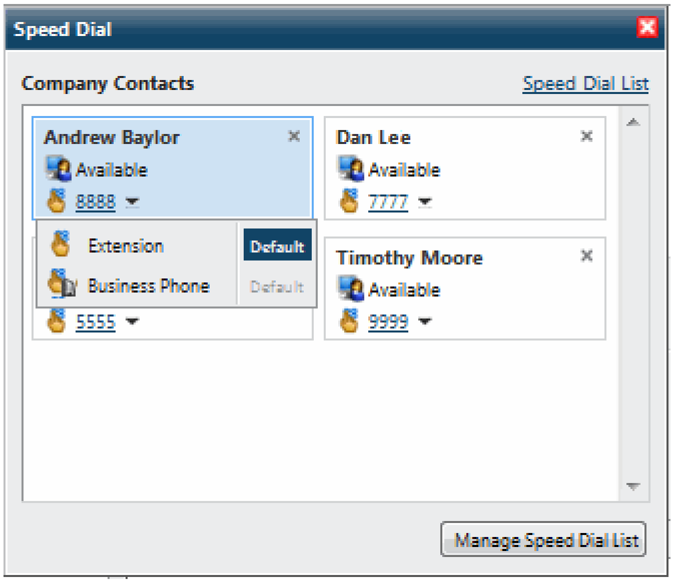
To display a Speed Dial view:

1. Do one of the following:
    - From the **View** menu, select **Speed Dial**.
    - Click the **Speed Dial** button.

   Result: One of the following occurs, depending on whether you last displayed a list of all your Speed Dial views or a selected Speed Dial view.

    - The correct Speed Dial view appears. You are finished.
    - The wrong Speed Dial view appears. Click **Manage Speed Dial List** and go to the next step.
    - The **Speed Dial List** appears. It contains the names of your currently selected Speed Dial views. Do one of the following:
        - Click the name of the view you want to display. The view appears and you are finished.
        - If the name of the view you want to display does not appear here, click **Manage Speed Dial List**. Go to the next step.
2. In the **Manage Speed Dial List** dialog box, do one of the following:
    - If the name of the view you want to display appears in the **Selected Items** list, select it and click **OK**.
    - Select the name of the view from the **Available Items** list, click **>** to add it to the list of **Selected Items**, and then click **OK**.
3. In the **Speed Dial List** dialog box, click the name of the view you want to display.

   Result: The selected Speed Dial view appears.



Related Topics

Create a Speed Dial View
Close a Speed Dial View

Rename a Speed Dial View

Requirements: You can rename your own Speed Dial views. If the owner granted other users the "Rename the Speed Dial" right, you can also rename a "Public" Speed Dial view. If you have Directory Administrator rights, you can rename any Speed Dial view. For more information, see Create a Speed Dial View.

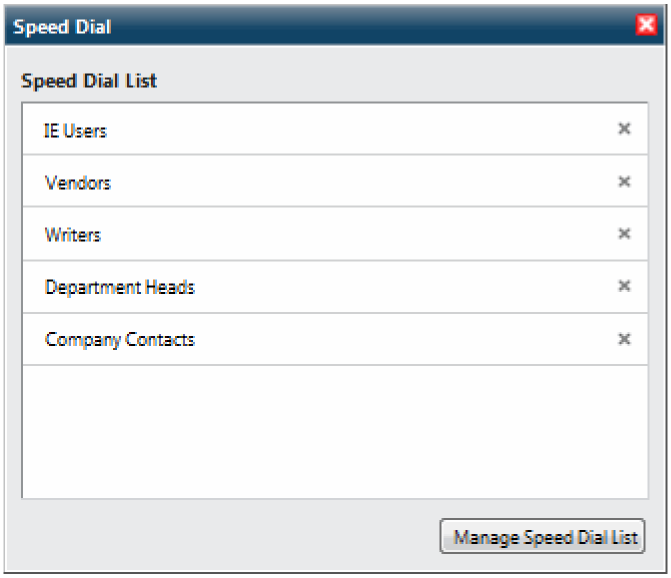
To rename a Speed Dial view:

1. Do one of the following:

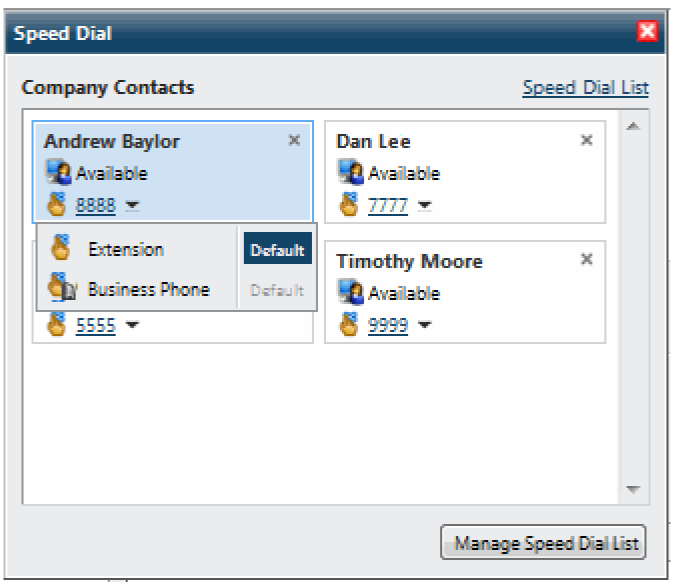
   - In the My Interactions toolbar, click the **Speed Dial** button.
   - From the View menu, select **Speed Dial**.

   Result: One of the following occurs, depending on whether you last displayed a list of all your Speed Dial views or a selected Speed Dial view.

   - The **Speed Dial List** appears. It contains the names of your currently selected Speed Dial views.

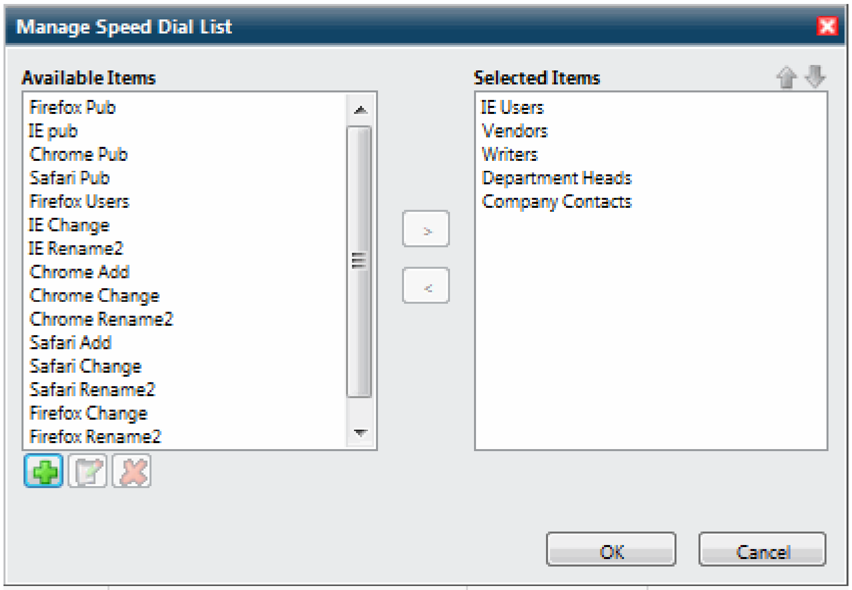


- A **Speed Dial view** appears.



2. Click **Manage Speed Dial List**.

   Result: The **Manage Speed Dial List** dialog box appears. The names of all the current Speed Dial views appear in this dialog box.



Note: **Create**, **Rename**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip.

3. Select the name of a Speed Dial view from either the Available Items list or Selected Items list and click the **Rename** button.

Note: The Rename button is available only if you select a view that you own or have permission to rename. For more information, see Create a Speed Dial View.

Result: The **Rename Speed Dial** dialog box appears.

4. In the Speed Dial Name text box, type the new view name and click **Rename**.

Result: The name of the Speed Dial view is changed in the Manage Speed Dial list for all CIC client users.

Related Topics

Working with Speed Dial Views

Working with Speed Dial Entries

Working with Speed Dial Entries

After you have established your speed dial view or views, you can add or delete entries. You can also change the default number for an entry.

Related Topics

Add a Directory Contact to a Speed Dial View
Change a Speed Dial Entry Default Number
Delete a Speed Dial Entry

Add a Directory Contact to a Speed Dial View

Requirements: You can add contacts to your own Speed Dial views. If the owner granted other users the "Add Entries" right, you can also add contacts to any "Public" Speed Dial view. If you have Directory Administrator rights, you can add entries to any Speed Dial view. For more information, see Create a Speed Dial View.

To add a contact to a Speed Dial view, select the contact on a directory view, then drag and drop it onto the Speed Dial view.

Note: You can add only Company Directory or general directory contacts to a speed dial view. You cannot add a contact from a **private** mail directory such as Outlook Private Contacts to a **public** speed dial view.

Related Topics

Display a Speed Dial View
Working with Speed Dial Views

Change a Speed Dial Entry's Default Number

Requirements: You change a contact's default number in your own Speed Dial views. If the owner granted other users the "Change Entries" right, you can change default numbers for contacts in any "Public" Speed Dial view. If you have Directory Administrator rights, you can change a contact's default number in any Speed Dial view. For more information, see Create a Speed Dial View.

Note: To edit any other information about the speed dial entry, change it in the contact's primary source directory. For example, let's assume you created a speed dial view and added a contact from your IC Private Contacts directory. To update the contact's business phone number, change it on the IC Private Contacts view and not from the actual speed dial entry. For more information, see View and Edit Directory Entries.

To change a speed dial contact's default number:

1. Display a Speed Dial View.
2. In a selected Speed Dial Entry, click the down arrow next to the displayed phone number.

3. Click **Default** next to one of the available phone numbers.

   Result: The selected phone number becomes the new default Speed Dial number and appears on the Speed Dial entry. The icon on the speed dial entry changes to reflect the newly selected default number.

Related Topics

Working with Speed Dial Views

Delete a Speed Dial Entry

Requirements: You can delete entries from your own Speed Dial views. If the owner granted other users the "Delete Entries" right, you can also delete contacts from any "Public" Speed Dial view. If you have Directory Administrator rights, you can delete entries from any Speed Dial view. For more information, see Create a Speed Dial View.

Note: This permission is granted when the speed view is created.

To remove a speed dial entry from a speed dial view:

- Click the **X** in the upper right corner of the Speed Dial entry.

Related Topics

Working with Speed Dial Views

Speed Dial Features

Speed Dial entries for the CIC client users display these additional features:

- **Status Icon and label**: A CIC client user's status appears as an icon on the Speed Dial entry. The accompanying label and a tooltip explain the user's status.

- **Default number icon and link:** Click this link to dial the default number for a contact. The icon identifies the type of phone number. For more information, see **Dial Buttons.**
- **Other available numbers:** Click the down arrow next to the default phone number for a contact to display all the phone numbers available for the selected contact. Click the number icon or label for any of these other numbers to call it.

Related Topics

Working with Speed Dial Entries

Working with Speed Dial Views

Working with Status Settings

Setting Status

In the CIC client, you can set your status, set another user’s status, set status details and view another user’s status.

- Set Your Status
- Set Another User’s status
- Set Status Details
- View Another User’s Status

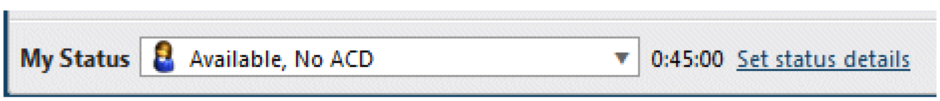
Note: Any status other than **Available** or **Available, Forward** or **Available, No ACD** sends an incoming call to your voice mail. Depending upon the status you select, you may want to set status details to indicate when you will be available again.

Related Topics

Possible Status Values
Set DND Status with Your Phone

My Status

The CIC client has a My Status section that enables you to set your current status and view or specify status details:



My Status drop-down list	The My Status drop-down list displays your current status and enables you to change your status. For more information, see Set Your Status.
Time in current status	The time (hh:mm:ss) indicates how long you have spent in your currently selected status. This can help you monitor how long you have been in a not-available status such as "At Lunch," "Away from Desk," or "In a Meeting."
Set status details	This displays any additional information you entered in Status Notes when you set your current status. These status details can be viewed by other users in the Company Directory or other directories that are set to display the Status column. Or, if you did not specify any status details, a **Set status details** link appears.

Related Topics

Set Your Status
Set Status Details
Workgroup Statistics View

Possible Status Values

Requirements: The View Status Message right controls which statuses can be employed by users in specific workgroups, users assigned certain roles, or even individual users. These status filters determine the status settings available when you Set Your Status or Set Another User’s Status.

The icons that appear for each status are configured in Interaction Administrator and may have been changed by your CIC administrator.

Note: Interaction Center can automatically assign some status settings, such as "Available, Not Answering Calls." You cannot select one of these automatic statuses; they do not appear in the My Status drop-down list.

The default status values are:

 ACD - Agent Not Answering

 At a Training Session

 At Lunch

 Available

 Available, Follow-Me

This person is available at one of the numbers on a follow-me list. The caller can leave a message or use follow-me routing to find the person and transfer the call.

 Available, Forward

This person is available at a designated remote number.

 Available, No ACD

This person is available for all non-ACD interactions.

 Away From Desk

 Do Not Disturb

 Follow Up

 Gone Home

 In a Meeting

 On Vacation

 Out of the Office

 Out of Town

 Working at Home

Related Topics

Set DND Status with Your Phone
Set Your Status
Set Another User's status
Set Status Details
Setting Status
View Another User's Status

Set Another User's Status

Requirements: You need the Change Status Users Access Control right for a specific user to be able to change that user's status.

You can set another user's status in the Company Directory or other directory view.

To set another user's status:

1. Select a user in the Company Directory and click the Change User's Status button in the Directory toolbar.

   Result: The Set Status dialog box appears.

2. Select a status from the drop-down list and enter other status information that is applicable.

3. Click **OK**.

Note: If you have questions about setting another user's status, contact your CIC administrator.

Related Topics

Possible Status Values
Set Status Details
Set Your Status
Setting Status
View Another User's Status

Set DND Status with Your Phone

If you have a Managed IP Phone, you may be able to use the DND button on the phone to set your CIC user status to "Do Not Disturb" or another selected status. Your CIC administrator must first enable DND Synchronization for you in Interaction Administrator.

Depending on the type of IP phone you are using, the DND button can be either a named function key or a soft key accessed through the phone's menu. Check your phone's user guide or see the Polycom Quick Reference Cards available in the Quick Reference Materials section of the CIC Documentation Library.

In general, you press the DND button or soft key to activate Do Not Disturb status. Later, you can press the DND button or soft key again to reset your CIC client status to your last available status or some other pre-configured CIC status.

Related Topics

Managed IP Phone

Set Status Details

Depending on the status you select, you can set status details including status notes, forward number, and date and time you will become available. The date and time information you enter is played for all your incoming calls while in this status.

You can view other user's Status Notes by adding this column to your Company Directory. For more information, see Customize Columns.

Note: Status detail information is required only for a Forward status which must have a Forward Number. If you do not enter status details, no dates or times are played for your incoming calls.

To set status details:

1. Click the **Set status details** link next to the My Status drop-down list.

   Result: The Set Status dialog box appears.

   Note: Selecting certain statuses from the My Status drop-down list can display the Set Details dialog box automatically.

2. Complete the fields as described below:

Status	Select a status, if necessary, in the Status drop-down list. **Tip**: For more information, see Possible Status Values.
Status Notes	Enter any additional information on your current status. As a convenience, the notes from the last time you selected this status appear in Status Notes. You can make any necessary changes to these notes. **Requirements**: You need the Status Notes right in order to create or modify Status Notes.
Forward Number	This is enabled only for selected statuses such as **Available, Forward**. Enter a telephone number to which calls can be forwarded. **Note**: The last forwarding number you used for this status defaults to the Forward Number box.
Until Date **Until Time**	**Do any of the following:** · Depending on the selected status, you may select the **Until Date** or **Until Time** check box to use the default date and time. **Result**: The current date appears in the **Until Date** field. The CIC client automatically rounds the current time to the next whole hour, and sets that time in the **Until Time** field. · To change the **Until Date**, select the check box and click in the text box. Select a date from the displayed calendar. · To change the **Until Time**, select the check box, and click the drop-down list arrow to select a different time. **Note**: Until Date and Until Time are displayed only for selected statuses. The date and time you select are played for your incoming calls.

3. Click the **OK** button

Related Topics

Possible Status Values
Set Your Status
Setting Status
View Another User's Status

Set Your Status

Status controls the announcement of your availability to people who call you. When your status is one of the "do not disturb" statuses, callers hear your status, such as "Bob Jones is out of town." Then they are directed to your voice mail to leave a message. Other CIC client users can view your status in Status column of the Company Directory.

To set your status:

1. Click the **My Status** drop-down list.
2. Select a status from the Status list.

   Note: The Status list displays up to 10 of your most-recently-used statuses at the top of the list, except for any status that you cannot select for yourself. Your current status appears first, followed by the next most recently used statuses in order. A line visually separates the most-recently-used statuses from a list of all selectable statuses. The list also displays the icon assigned to each status. For more information, see Possible Status Values.

3. Optionally, enter status details by clicking **Set status details.**

Related Topics

My Status
Possible Status Values
Set Another User's status
Set DND Status with Your Phone
Set Status Details
Setting Status
View Another User's Status

Status Notes

Requirements: You need the Status Notes Security right to create status notes.

Status notes provide additional information on a user's status. You can create status notes when you set status details. Also, you can add a column to display Status Notes in the Company Directory.

Related Topics

Customize Columns
Possible Status Values
Set Another User's Status
Set Status Details
Set Your Status
Setting Status
View Another User's Status

Status Summary

Requirements: You need the View Directory Status Columns Access Control right to all or selected Status columns to enable you to add Status columns to a directory view. View Directory Status Columns

You can add a Status Summary column to your Company Directory view. The Status Summary column displays icons that enable you to tell at a glance if someone is available, logged onto the CIC client, and if they are on the phone. For more information about adding a column to a directory, see Customize Columns.

The Status Summary column uses these icons:

- The first icon corresponds to the user's current status. For more information, see Possible Status Values.
- The second icon indicates whether the user is logged onto the CIC client. A check mark means the user is logged on; an X means that the user is not logged on.
- A phone receiver icon appears in the third position if the user is currently on the telephone. If the user is not on the phone, the third position is blank.

Related Topics

Possible Status Values

View Another User's Status

Requirements: You need the View Directory Status Columns Access Control right to all or selected Status columns to enable you to add Status columns to a directory view. View Directory Status Columns

You can determine if a person is available to take a call by checking that user's status. Status information appears in the Status column of the Company Directory or workgroup directory.

Tip: You can add the Status or Status Summary columns to your Company Directory view.

Related Topics

Add or Remove View Columns
Camp on an Internal Extension
Possible Status Values
Set Another User's Status
Set Status Details
Set Your Status
Setting Status

Working with Voicemail

Working with Voice Mail

Requirements: If you are assigned the Receive Voicemail Security right, callers are sent to voice mail when you are in a DND status (Gone Home, Out of the Office, or some other "not available" status) or when you do not answer your phone.

With the CIC client, you receive voice mail in the same place you receive email messages. Any time a caller leaves a voice mail message for you, the voice mail message is attached to an email message and sent to you. You can open your voice mail messages as email message attachments or you can listen to voice mail from the Voicemail Viewer in the CIC client.

Voice mail is managed in one of these ways in the CIC client:

- If Interaction Voicemail Player is installed on your workstation, when you open an email message that has a voice mail attachment, the CIC voice mail form opens and begins playing your voice mail message.

Note: For more information about configuration settings that affect this automatic playback, see Configuring Interaction Voicemail Player.

- If Interaction Voicemail Player is not installed on your workstation, you open the email message and double-click the voice mail attachment, then your designated audio player (for example, Microsoft Media Player) opens and begins playing your voice mail message.

Note: If your designated audio player does not play the voice mail message then it is likely that the required codec (software that compresses and decompresses digital audio) is not installed on your computer. Some recent operating systems no longer include the TrueSpeech codec. For more information, contact your CIC administrator.

- You can use the Voicemail Viewer to display and listen to voice mail messages.
- You can listen to and manage your voicemail messages by using the voice mail features on your telephone.

Note: For more information about the default TUI (Telephone User Interface), see the *Telephone User Interface User's Guide* and the *Telephone User Interface Quick Reference* available in the IC Documentation Library.

Related Topics

Interaction Voicemail Player Controls
Listen to Someone Leave a Voice Mail Message
Open a Voice Mail Message From Your Inbox
Overview of Interaction Voicemail Player
Pick Up a Call From Voice Mail
Transfer a Call to Another Person’s Voice Mail
Transfer a Call to Your Voice Mail
Voicemail Viewer

Overview of Interaction Voicemail Player

When a caller leaves a voice mail, it is stored as a .wav file. You can access this voice mail message:

- From the Voicemail Viewer
- From the telephone user interface (TUI)
- By playing the.wav file with Interaction Voicemail Player

Installing Interaction Voicemail Player

The Interaction Voicemail Player is an optional feature. You install Interaction Voicemail Player as part of the Interaction Center User Applications Setup. For more information, see the *IC Installation and Configuration Guide*.

Configuring Interaction Voicemail Player

You determine if Interaction Voicemail Player is your preferred application for playing back voice mail messages. You can also configure several options that control what this form does.

- To configure voice mail playback, in Interaction Voicemail Player, from the **Tools** menu, select **Options**.

Tip: For more information about other configuration options, see the *Interaction Voicemail Player Help*.

Using Interaction Voicemail Player

When someone leaves a voice mail for you, CIC sends an email message to you with the voice mail.wav file attached to it. This message appears in your email client (e.g., Microsoft Outlook, Microsoft Outlook Express, Lotus Notes, etc.) with an attached.wav file. When you play this attached file, by double-clicking it or downloading it and then opening it, the voice mail message plays in the Interaction Voicemail Player. If you are using the Interaction Message Store, just double-click the voice mail.wav and the Interaction Voicemail Player plays the message.

The Interaction Voicemail Player not only plays voice mail messages but also allows you to control the playback of the message and your indicator light. It also allows you to play voice mail messages back to devices such as PC speakers, a station phone on your desk or to a remote telephone number.

Note: DirectX 9.0 is required to play voice mails through your PC speakers. If needed, install Microsoft DirectX from the IC_CLIENTPREREQS share on the IC server, after the IC server installation.

Interaction Voicemail Player and .wav files

Each voice mail .wav file has information embedded in it signifying it is a voice mail message. When you open a voice mail file, Interaction Voicemail Player reads this information, determines it is a voice mail message and plays the file. When you open any other .wav files on your computer, the file does not have the voice mail designation. It opens in your default .wav player (e.g., Microsoft Media Player).

Interaction Voicemail Player allows you to:

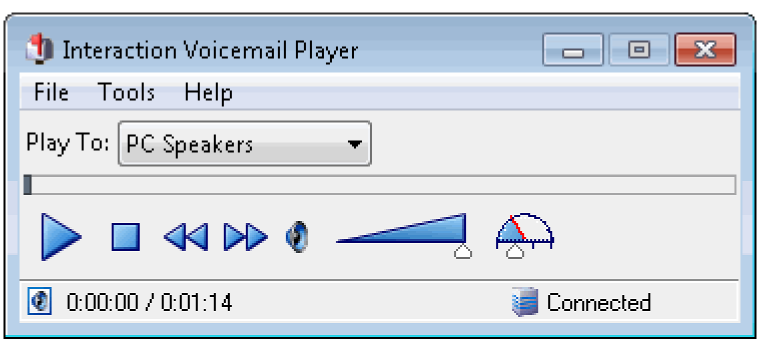
- Play voice mail messages directly from electronic mail.
- Control the playback of voice mail messages.
- Clear a message waiting indicator light

Tip: For more information, see the *Interaction Voicemail Player Help*.

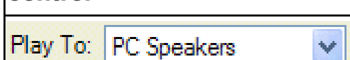
Related Topics

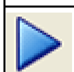
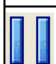
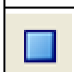
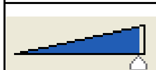
Interaction Voicemail Player Controls
Open a Voice Mail Message From Your Inbox

Interaction Voicemail Player Controls



The Voicemail Player controls function like MP3 or tape player controls for voice mail playback.

Control	Definition
	Select the device to play your voice mail.

	Note: If you restart the CIC client, this defaults to the device you selected for your last voice mail. **PC Speakers** Selecting a playback other than PC Speakers may result in slower startup times. **Remote Telephone** Selecting this device causes CIC to dial the specified number and play the voice mail. **Tip**: If the remote telephone is a DID phone number enabled for fax detection, CIC plays the voice mail immediately after calling the number and does not wait until you pick up and answer. If you miss the beginning of voice mail playback, you can use the Voicemail Player controls to stop and restart the voice mail playback from the beginning. Or you can ask your IA administrator to disable fax capability on your User record. **Note**: A DID (Direct Inward Dial) phone number is one that an external caller can reach by dialing a 7-digit phone number.
	Click to play the voice mail.
	Click to pause playback.
	Click to stop playing the voice mail.
	Click to rewind 5 seconds.
	Click to fast forward 5 seconds.
	Click to mute playback.
	Set the slider to the desired volume.
	Set the slider to the desired playback speed. The speeds available are half speed (0.5), normal speed (1.0), one and half times speed (1.5), and double speed (2.0).

Related Topics

Use the Telephone Dial Pad to Control Playback

Listen to Someone Leave a Voice Mail Message

Requirements: See Listen.

You can listen to someone leaving a message before deciding if you want to pick up a call. The person leaving the message does not know that you can hear them.

To listen to someone leave a voice mail message:

1. Select a call from My Interactions that is in a state of ‘Voice Mail’.
2. On the toolbar, click the Listen button.

   Result: Through your telephone handset you can now hear the person leaving a voice mail message. If you want to talk with the caller, click the Pickup button.

Warning: Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record, Snip, or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

Related Topics

Listen Button
Listen to Your Voice Mail
Pick Up a Call From Voice Mail
Transfer a Call to Someone Else’s Voice Mail
Transfer a Call to Your Voice Mail

Open a Voice Mail Message From Your Inbox

You can play, replay, rewind, fast forward, save, and change the volume of the message by opening your voice mail message in your email program Inbox. You can forward the message to another person, just as you would any other email message.

Tips

- By default, voice mail messages begin to play automatically through the device you selected for your last voice mail. If you want the voice mail messages to play only when you click the Play button, in the Interaction Voicemail Player application, from the **Tools** menu, select **Options** and clear the **Play voice mail automatically on open** check box**.**
- DirectX is required to play voice mail messages through your PC speakers.
- You can configure the alerts you receive for new voice mail messages. For more information, see Voice Mail / Fax Paging.
- You can listen to and manage your voice mail messages by using the voice mail features on your telephone in addition to features in the Interaction Voicemail Player.
- Your Customer Interaction Center system may be integrated with the Yap® voice mail preview service. In this configuration, a voice mail-to-text version of the message appears in the email to which it is attached. This provides a convenient approximation of the voice mail message content, but is not a replacement for listening to the message.

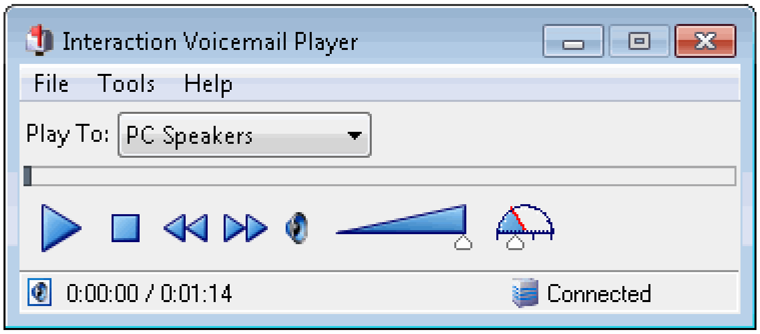
To listen to your voice mail through your Inbox:

1. Open your email program Inbox.
2. Open the email message containing the voice mail message.

   Note: You may be prompted to log on if you haven't logged on to the CIC client or your Windows logon account isn't associated with your CIC client user (i.e., you don't log on to the CIC client using your Windows logon credentials). If so, just enter your CIC client logon password and click **OK**.

3. Double-click the voice mail message.

   Result: You use either the Interaction Voicemail Player or your selected media player to play back your message.



Note: For more information about using this player, see the *Interaction Voicemail Player Help*.

Related Topics

Interaction Voicemail Player Controls

Pick Up a Call from Voice Mail

Requirements: See Pickup.

You can pick up a call when the caller is in the middle of leaving a voice mail message. When a call is transferred to voice mail, its state changes to "Voice Mail."

To pick up a call from voice mail:

1. If the telephone call is not selected, select the call you want to pick up.
2. Click the **Pickup** button.

   Result: The call's state changes from "Voice Mail" to "Connected" and you can begin speaking with the caller.

Related Topics

Listen to someone leave a voice mail message
Listen to your voice mail
Pickup Button

Transfer a Call to Another Person's Voice Mail

You can transfer a call directly to another CIC client user's voice mail. You might want to use this feature if the caller wants to communicate with another person who is unavailable to take the call.

Note: The **Voice Mail** button may be disabled in the Transfer dialog box if you do not have the appropriate rights. You must have the right to use voice mail features in the CIC client t in order to transfer a call to another user's voice mail. Also, you may not be able to transfer a call to another person's voice mail if you do not have the right to send calls to your own voice mail. If you have questions about rights or voice mail options, see your CIC administrator

To transfer a call to another person's voice mail using a directory:

1. While the call is selected in My Interactions, inform the caller that he or she is going to be transferred to another person's voice mail.

2. Locate and select the directory entry to which you want to transfer the call.
3. On the Directory toolbar, click the Voicemail button.

   Result: The call is transferred to the recipient's voice mail and its status changes to Disconnected in My Interactions.

To transfer a call to another person's voice mail using the Transfer dialog box:

1. Select the call and inform the caller that he or she is going to be transferred to another person's voice mail.
2. On the Queue Control toolbar, click the Transfer button.

   Result: The Transfer dialog box appears.

3. In the **Transfer To**: field, type all or part of the recipient's name or number.

   Result: A >drop-down list of choices appears.

   Tip: If the drop-down list does not contain the contact you expected, check the search criteria selected in the Options drop-down list and adjust them if necessary.

4. From the drop-down list, do one of the following:
   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
   - Select the appropriate contact name and associated extension or phone number.

   Result: If the designated transfer recipient is a CIC user, status information appears. It shows whether the transfer recipient is logged onto a CIC client and is able to accept the transferred call. This can help you decide what kind of call transfer to use.

5. Click the **Voice Mail** button.

   Result: The call is transferred to the recipient's voice mail and its status changes to Disconnected in My Interactions.

Related Topics

Transfer a Call After Consulting the Recipient
Transfer a Call Using a Transfer Button
Transfer a Call Without Consulting the Recipient
Transfer Button
Voicemail Button

Transfer a Call to Your Voice Mail

Rather than answer an incoming (alerting) call, you can transfer it to your voice mail. You can also send a call to which you are connected to your voice mail.

To transfer a call to your voice mail:

- Select the call, if it is not already selected, then on the Queue Control toolbar, click the Voicemail button.

  Result: The call is transferred to your voice mail. When a caller has finished leaving a message, the voice mail is saved as a file, attached to an email message and sent to you. You can also listen in on the call as the caller leaves a message, and then decide whether or not to pick up that call from voice mail.

Related Topics

Transfer a Call to Another Person's Voice Mail

Voicemail Button

Voicemail Viewer

The Voicemail Viewer displays a list of your current voice mail messages. It includes a playback interface that enables you to listen to your voice mail messages on your phone. For more information, see Use the Voicemail Viewer.

To display the Voicemail Viewer:

1. Do one of the following:
   - Click the **Voice mail** button.
   - From the **View** menu, select **Voicemails**.

   Result: The Voicemail Viewer appears and displays the Voicemails List.
2. Click **Refresh** to display any new voice mail messages received since you started the CIC client.

Related Topics

Use the Voicemail Viewer
Working with Voicemail

Use the Telephone Dial Pad to Control Playback

You can use the telephone dial pad to control voice mail playback if you are playing a voice mail to your telephone handset or to a remote number. You can use these keys in place of the controls available in the Interaction Voice Mail Player or the Voicemail Viewer.

Note: The slow down and speed up playback functions require that your Customer Interaction Center system include a Media Server. Contact your CIC administrator if you have any questions.

Press	To
2	Slow down playback.
3	Speed up playback.
5	Rewind message 6 seconds.
6	Fast forward message 6 seconds.
8	Decrease volume.
9	Increase volume.

Related Topics

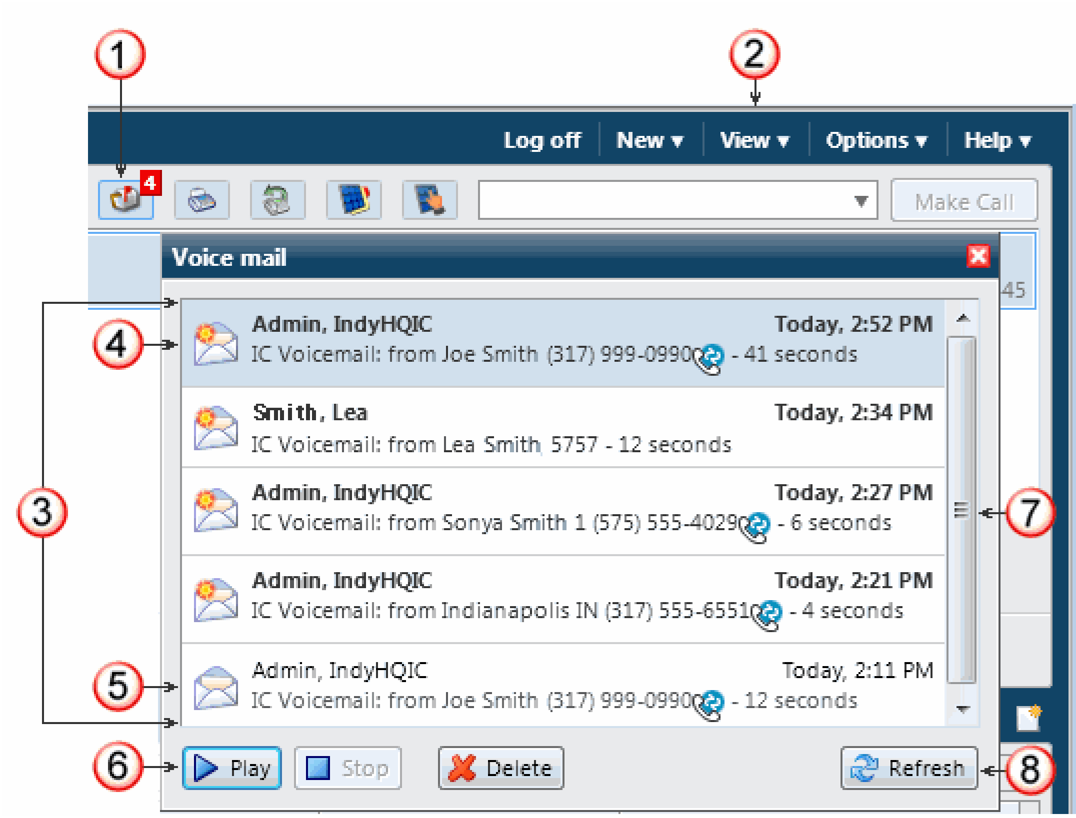
Interaction Voicemail Player Controls
Use the Voicemail Viewer

Use the Voicemail Viewer

Use the Voicemail Viewer to display a list of your current voice mail messages. You can use the integrated voice mail player to play back voice mail messages to your phone or delete old voice mail messages.

Voicemail Viewer Features

This diagram illustrates the main features of the Voicemail Viewer.



1	Select the **Voicemail button** to display the Voicemail Viewer. **Note**: The total number of your **unheard** voice mail messages is indicated on the button icon.
2	You can also select **Voicemails** from the **View** menu to display the Voicemail Viewer.
3	The Voicemail Viewer contains the **Voicemails List.** It contains the voice mail messages you have not yet deleted, including both previously played and unheard voice mail messages. **Note**: If your CIC administrator configures your user account to receive an email alert whenever you receive a voice mail message, then two entries appear for each voice mail message: a voice mail notification and the voice mail. You can select either the notification or the voice mail and click **Play** to listen to the voice mail.
4	The currently selected voice mail message appears shaded. You can use the Voicemail Player controls to **Play** or **Delete** the currently selected voice mail message. **Tip:** In this example, the bright symbol on the opened envelope icon indicates an unheard voice mail message.
5	A plain opened envelope icon indicates that you have already listened to this voice mail message.
6	Use the **Voicemail controls** to start voice mail message playback, stop playback or delete the selected voice mail message or voice mail notification.

7	A vertical scroll bar appears if you have more voice mail messages than can be displayed at one time.
8	Click the **Refresh** button to display any new voice mail messages in the Voicemails List and also to update the status of your voice mail messages. **Note**: The Voicemails List does not automatically update as you receive new voice mail messages or listen to messages. It also does not automatically update if you delete voice mail messages from the TUI or your email program Inbox.

To play back voice mail messages using the Voicemail Viewer:

1. Do one of the following:
   - From the My Interactions toolbar, click the **Voicemail** button.
   - From the **View** menu, select **Voicemails**.
2. Select a voice mail message.
3. Click the **Play** button in the integrated voice mail player.

   Result: The voice mail message plays back through your telephone.

   Tip: You can click the **Stop** button at any time to stop playback.
4. *Optional*: Click the **Delete** button in the integrated voice mail player to delete the currently selected voice mail message.
5. Do one of the following:
   - Return to step 2 and select another voice mail message.
   - Click the Viewer Close button.

Related Topics

Open a Voicemail Message From Your Inbox
Use the Telephone Dial Pad to Control Playback
Voicemail Viewer

Working with Workgroups

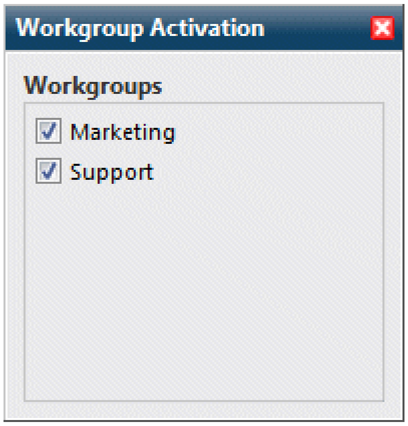
Change Your Workgroup Activation Status

Requirements: You need the Activate self Access Control right for the selected **workgroup** to change your workgroup activation status. You also need to be a member of that workgroup. Finally, the workgroup must be configured as **Active** and also have an **ACD queue**.

In order to receive an ACD workgroup call, you must be logged onto the CIC client, have your workgroup activation status set to **Active**, and set your status to an "Available" type.

To change your workgroup status:

- From the **View** menu, select **Workgroup Activation**. Select the appropriate check box to activate your workgroup status or clear the check box to deactivate it.



- In the Workgroup Statistics View, click **Activate** or **Deactivate** link to change your status for the currently selected workgroup.

Display the Workgroup and Profiles View

Requirements: The Workgroup / Profiles Tab Security right enables you to display the Workgroup and Profiles view.

The Workgroup and Profiles view lists workgroups and Attendant Profiles by name. Some special conditions control what you see in the Workgroup and Profiles view.

- It does not list individual members of a workgroup, as in a Workgroup directory. It lists only Workgroups.
- It lists only **inbound call profiles** that are configured in Interaction Attendant to **allow calls to be transferred to them**. It does not list operator profiles or outbound call profiles.

To display the Workgroup and Profiles view:

1. Click the **New Tab** button.

   Result: A drop-down list of types of directories appears.

2. Click the **Group and Profile** directory type.

   Result: The drop-down list expands to show the names of each directory in this type.

3. Click **Workgroups and Profiles**.

   Result: The Workgroup and Profiles view appears in the CIC client.

   Tip: You can move this view to another part of the CIC client interface. For more information, see Customizing the Interface.

Related Topics

Transfer a Call to a Workgroup
Transfer a Call to an Attendant Profile

Display and Configure the Workgroup Statistics View

Requirements: You need the Customize Client Security right to add views. In addition, the Workgroup Statistics Security right enables you to display the Workgroup Statistics view. The Statistics Workgroups Access Control right determines which workgroups can be included in the Workgroup Statistics view. Membership in a workgroup does not confer the right to view statistics for that workgroup.

To display and configure the Workgroup Statistics view:

1. Select **Workgroup Statistics** from the **View** menu.

   Result: The Workgroup Statistics dialog box appears.

2. Do one of the following:

   - To select the workgroups in this view, click **Choose Workgroups** or click **New set of workgroups**.
   - To display statistics for all workgroups, click **All available workgroups**.

3. To select workgroups, in the **Choose Workgroups** dialog box, do one of the following:

   - To add a workgroup to the view, select a workgroup name and click **>** to move it to the **Selected Workgroups** list.
   - To remove a workgroup from the view, select a workgroup name and click **<** to move it to the **Available Workgroups** list.

4. When finished selecting workgroups, click **OK**.

   Result: The Workgroup Statistics view of the selected workgroups appears in the CIC client.

Related Topics

Workgroup Statistics View

Transfer a Call to a Workgroup

Requirements: You need the Search Workgroup Queues Access Control right to a specific workgroup queue in order to transfer an interaction to that workgroup queue.

You can transfer a call directly to a workgroup listed in the Workgroup and Profile directory. This type of call transfer is similar to a blind transfer because you do not speak to the transfer recipient. My Interactionsqueue

The CIC administrator creates workgroups in Interaction Administrator. Workgroups are logical groups of users (e.g., departments) that can function as a group in the CIC system. Workgroups can have extensions and queues that enable all members of a workgroup to receive calls notifying the workgroup. In addition, workgroups can receive regular calls and ACD calls that are routed to specific workgroups and agents. Workgroups can also serve as distribution lists (to the members) of voice mail, email messages, and faxes from within CIC.

Note: Before you can transfer a call to a workgroup, you need the appropriate right assigned in Interaction Administrator to view the workgroup.

To transfer a call to a workgroup:

1. Inform the caller that he or she is going to be transferred.
2. On the Queue Control toolbar, click the **Transfer** button.

   Result: The **Transfer dialog box** appears.

3. In the **Transfer To:** text box, type all or part of the Workgroup’s name or number.

   Result: A drop-down list of choices appears.

Tip: If the drop-down list does not contain the workgroup you expected, check the search criteria selected in the **Options** drop-down list and make sure **Workgroups** is selected.

4. From the **Transfer To** drop-down list, do one of the following:
   - Select the appropriate workgroup name and associated extension number.
   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
5. Click the **Transfer** button.

   Result: The transferred call disappears from My Interactions or other queue and is routed to the selected CIC Workgroup.

Using the Workgroups and Profiles Directory to Transfer a Call

Note: Before you can transfer a call to a workgroup using this method, you must Display the Workgroup and Profile View. You also need the appropriate user rights to view the name of the workgroup in the Workgroup and Profiles directory.

To transfer a call to a Workgroup in the Workgroups and Profiles directory:

1. Tell the caller that he or she is going to be transferred.
2. Select a workgroup name in the Workgroups and Profiles directory view and then click the Transfer button.

   Result: The call disappears from **My Interactions** and is transferred to the appropriate Workgroup queue.

   Tip: For information about displaying the Workgroups and Profiles view, see Add or Close Views.

Related Topics

My Interactions
Transferring Calls

View Members of a Workgroup

You can view the members of a workgroup and their statuses.

Note: For information on adding a workgroup directory view to your CIC client interface, see Add or Close Views.

To view the members of a workgroup:

- Click a Workgroup directory tab.

  Result: The members of the workgroup directory and their statuses are displayed.

To call a workgroup member:

- Double-click the member’s name.
- Click any phone number in the row for the member.

Related Topics

Add or Close Views
Working with Other Directories

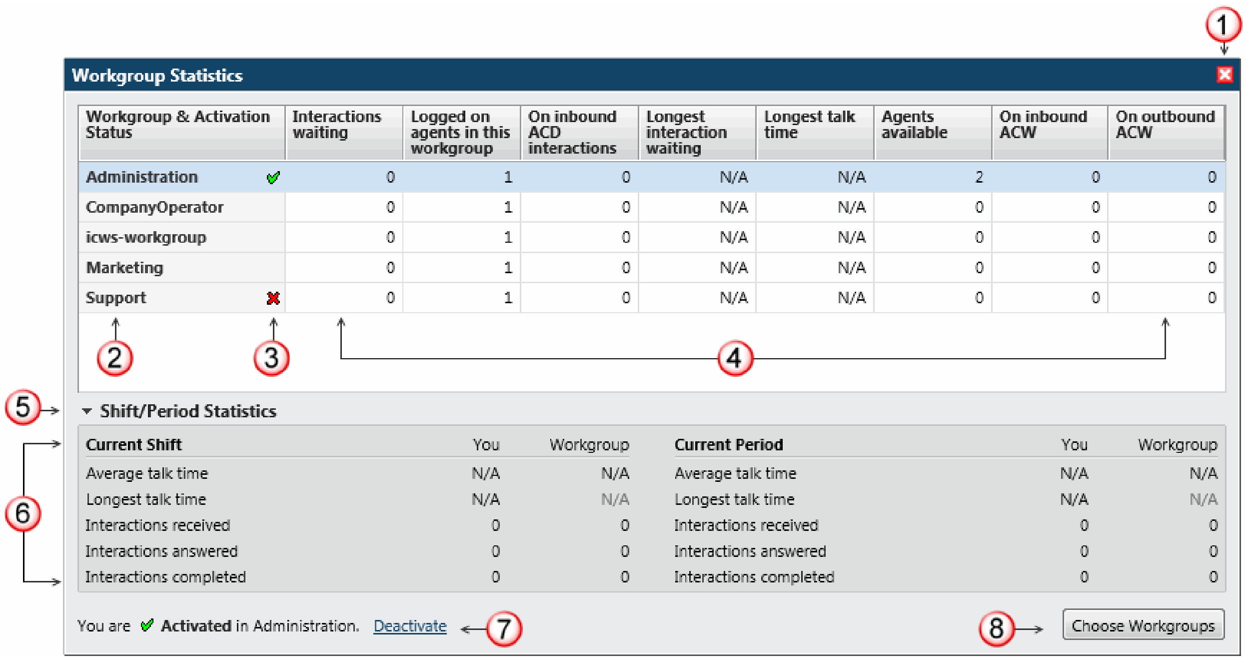
Workgroup Statistics View

Requirements: The Workgroup Statistics Security right enables you to display the Workgroup Statistics view. The Statistics Workgroups Access Control right determines which workgroups can be included in the Workgroup Statistics view. Membership in a workgroup does not confer the right to view statistics for that workgroup.

You can view basic statistics for selected workgroup queues. Shift/Period statistics can help you monitor your performance and compare it to that of a selected workgroup.

Workgroup Statistics

Note: If the Workgroup Statistics tab is not visible (hidden behind another tab), after 30 seconds, the tab "hibernates" by clearing all of its items and remaining inactive until you select it again. When you select the Workgroup Statistics tab, it "wakes up" and re-populates the statistics panels.



1	**Close**	Click this control to close the Workgroup Statistics view.
2	**Workgroup Name**	The name of the workgroup as defined in Interaction Administrator.
3	**Workgroup Activation Status**	A green check mark indicates that your status is "Activated." A red X indicates your status is "Deactivated." For more information, see Change Your Workgroup Activation Status.
4	**Workgroup Statistics**	These statistics appear for each workgroup: · **Interactions waiting**: Number of interactions waiting on this workgroup queue. · **Logged on agents in this workgroup**: Total number of agents in this workgroup who are logged in, regardless of their status. · **On inbound ACD interactions**: Total number of agents working on inbound ACD interactions in this workgroup queue. · **Longest interaction waiting**: The longest connection time of any of the currently connected interactions. "N/A" indicates no interactions are currently connected.

		· **Longest talk time**: The longest amount of time any currently connected call has been connected. · **Agents available**: The number of agents in this workgroup who are logged in, have an "Available" status, and are activated. · **On inbound ACW**: Total number of agents performing after call Wrap-Up work to conclude an inbound ACD interaction on this workgroup queue. · **On outbound ACW**: Total number of agents performing after call Wrap-Up work to conclude an outbound ACD interaction on this workgroup queue.
5	**Shift/Period Statistics control**	Click this control to display or hide a statistical summary of the **current** shift and period for the **currently selected workgroup**.
6	**Shift/Period Statistics**	For more information, see Shift\Period Statistics.
7	**Activate or Deactivate**	Click this link to activate or deactivate your status for the currently selected workgroup. For more information, see Change Your Workgroup Activation Status.
8	**Choose Workgroups**	Click the **Choose Workgroups** button to add or remove workgroups from this view.

Shift\Period Statistics

Shift/Period Statistics contain a statistical summary. Separate columns display statistics for the currently selected workgroup and your personal statistics as a member of that workgroup.

Your CIC administrator defines start and end times for each shift and also defines the number of minutes in each period (starting at midnight) for each workgroup. For more information about shift and period definitions, see the *Interaction Administrator Help*.

- **Average Talk Time**: Average connection time for all currently connected calls.

  Note: If there are no currently connected calls, Average Talk Time is set to N/A.

- **Longest Talk Time**: The longest amount of time any currently connected call has been connected.

  Note: Longest Talk Time is not calculated at the workgroup level for the current Shift or Period.

- **Interactions Received**: Number of interactions that have alerted in the workgroup queue or My Interactions.
- **Interactions Answered**: Number of interactions that have been picked up.
- **Interactions Completed:** Number of interactions that have been picked up and disconnected, sent to voice mail, parked on orbit, or transferred.

Related Topics

Display and Configure the Workgroup Statistics View

Interaction Client Systems and Subsystems

Managed IP Phone

An IP phone uses Voice over IP technologies that enable you to make telephone calls over an IP network such as the Internet instead of the ordinary public switched telephone network (PSTN) system.

A Managed IP Phone is set up, configured, and managed in Interaction Administrator. Your CIC administrator can manage the CIC features available on your IP phone, update firmware and reset your phone from Interaction Administrator.

Your CIC administrator can:

- Enable you to use the Do Not Disturb button or soft key on your phone to set your CIC status to DND.
- Configure distinctive ring tones for incoming Internal, External, and Direct Dialed calls.

Related Topics

Set DND Status with Your Phone

About Session Manager

A subsystem component called Session Manager acts as a “traffic cop” or “broker” between the web Server and the IC server.

Session Manager can run on the IC server in smaller implementations or on a stand-alone server in larger environments. Multiple Session Manager servers can even be clustered to run large systems.

Switchover

Customer Interaction Center (CIC) supports an automated switchover system. If an IC server ever fails, in less than 30 seconds the server can switch control to another mirror image IC server with minimal phone disruption. In addition, administrators can manually switch the “active” IC server with no phone disruption. It takes from 90 to 150 seconds for the CIC client to reconnect.

If a switchover occurs, you see a dialog box that informs you a switchover and reconnect is in progress. However you do not need to log on again after a switchover occurs.

Note: CIC may disconnect your current call during a switchover.

Related Topics

Auto Reconnect

General Information

Copyright and Trademark Information

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