PureConnect®

2023 R3

Generated:

09-November-2023

Content last updated:

16-October-2023

See Change Log for summary of changes.

GENESYS™

# Interaction Connect

## Printed Help


### Abstract

This document contains the application help for CIC Client.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.



For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

# Table of Contents

# Features

Here are some of the most frequently used CIC client features.

### Configuration

- Configuration Options
- Customize Columns
- Customize Queue Control Toolbars
- Change View Layout

### Ease of Use

- Auto Reconnect
- Desktop Alerts
- Save Logs
- Shortcut Keys

### Information Organization

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

### Interaction Management

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

### SIP Audio

- Dial Pad

### Status Management

- Status Notes

### Supervisor Features

- Agent Statistics
- Coach an Interaction
- Display and Configure Agent Statistics
- Display and Configure the Workgroup Overview
- Display and Configure the Workgroup Statistics view
- Enable Supervisor Features
- Filter a Queue View

# 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 you can assign an account code to an interaction. 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 destinations 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. |

## Client Buttons

Your CIC administrator can create custom buttons for the Queue Control toolbar. This toolbar appears on the My Interactions view and other queue management views.

| Access Control Right | Description |
|---|---|
| **View Client Buttons** | Determines which custom buttons appear by default on the Queue Control toolbar. For more information, see Custom Buttons. |

## 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.

## 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. |

## 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.<br><br>**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 PureConnect 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.<br><br>**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 PureConnect 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. |

## Plug-ins

| Access Control Right | Description |
|---|---|
| **View Plug-ins** | Determines which plug-ins you can add to the CIC client. |

## Processes

These rights apply to Interaction Process Automation and control which IPA functions you can use. They are independent of each other, not cumulative like IPA licenses.

| Access Control Right | Description |
|---|---|
| **Launch Processes** | Enables you to Start a Process. |
| **Manage Processes** | Enables you to manage and modify processes in the IPA Monitor. Managing a process includes canceling or retrying a process, changing data elements in a process, and so on.<br>**Note**: IPA Monitor is a separate application and is not part of the CIC client. It is an IC Business Manager module that an administrator can use to monitor, track, or interact with running process instances. For more information, see the *Interaction Process Automation Monitor Help*. |

## Queue Columns

Queue Column rights determine which columns you can display in a queue view.

| | |
|---|---|
| • Account Code<br>• ACD Wait Reason<br>• Agent Score<br>• Associated Process<br>• Attachments<br>• Chat Response Time<br>• Customer Score<br>• Details<br>• Duration<br>• Importance<br>• Interaction ID<br>• Line<br>• Lstns | • Name<br>• Number<br>• Queue<br>• Recs<br>• Security<br>• State<br>• Station<br>• Subject<br>• Time in Status<br>• Time in Workgroup Queue<br>• User<br>• Wrap-Up Code |

| Access Control Right | Description |
|---|---|
| **View Queue Columns** | Determines which columns you can add to a queue view. Rights to each column can be separately assigned. For more information, see Add or Remove View Columns and Queue Contents. |
| **Substitute Queue Columns** | Determines which interaction attributes you can use in a Response Macro. For more information, see Create Response Macros. |

## 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. |

## Shift Trading

This right determines whether you can display the My Shift Trading view in Interaction Connect.

| 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

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

| Access Control Right | Description |
|---|---|
| **View Station Queues** | Determines which Station Queue views you can display in the CIC client. |
| **Modify Station Queues** | Determines which *modify* actions you can perform on interactions in a selected Station Queue. *Modify* actions include **Disconnect**, **Hold**, **Mute**, **Pickup** or **Transfer** interactions. |
| Monitor Station Queues | Determines which *monitor* actions you can perform on interactions in a selected Station Queue. *Monitor* actions include **Coach**, **Join**, **Listen** or **Record** interactions. |
| **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.

**Note**: My Interaction Rights determine your ability to *modify* and *monitor* interactions in My Interactions.

| 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. |
| **Monitor User Queues** | Determines which *monitor* actions you can perform on interactions in a selected User Queue. *Monitor* actions include **Coach**, **Join**, **Listen**, **Preview**, **Record**, or **Snip** interactions. |

## Users

These rights control whether you can Set Another User's Status or whether you can display interactions belonging to all or selected users.

| 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. |
| **View History Users** | Determines whose interactions can appear in the Journey Map view. Or you can display other users' interactions if you have the Tracker Administrator Security right. |

## 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.<br>Other *Modify* actions include the ability to **Activate Self.** For more information, see Change Your Workgroup Activation Status.<br>Also, *Modify* actions include the ability to **Activate Others**. For more information see Change a User's Activated Workgroups and Change a Workgroup's Activated Users. |
| **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.<br>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

| 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 and the Agent Statistics view. This right can be granted for 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. |
| **Can Create Speed Dials** | Enables you to create a Speed Dial view. |
| **Conference Calls** | Enables you to create a Conference call. |
| **Customize Client** | Enables you to:<br>• Customize Configuration settings in the CIC client.<br>• Add Views. However, displaying certain views can require additional Access Control Rights. For more information, see Configuration Options.<br>• Change the columns in a queue view. See Add or Remove View Columns or Customize Columns.<br>• Change the buttons in a queue view. See Customizing Queue Control Toolbars |
| **Manage Client Templates** | Enables you to create and edit client templates. For more information, see Manage Templates. |
| **Monitor Columns** | Enables you to add the **Lstns** column and **Recs** column to a queue view. The Lstns column shows a speaker icon when someone is listening to the conversation. The Recs column shows a red dot icon to indicate that the conversation is being recorded. For more information, see Determine if Someone is Listening to or Recording Your Interactions. |
| **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."<br><br>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.<br><br>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.<br><br>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.<br><br>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, callback requests, or text messages. Typical stored responses include a standard greeting or your company's support website address. This right also enables you to create, organize and manage Personal Responses. For more information, see Create Personal Responses and 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.<br><br>**Note:** This right is also required for you to log on to a web-based phone. |
| **Workgroup Statistics** | Enables you to display the Workgroup Statistics view, Workgroup Overview, and Agent Statistics. |
| **Workgroup/Profiles Tab** | Enables you to display the Workgroup and Profiles view. This view lists workgroups and Attendant Profiles by name. |

## Interaction Command Rights

The Assistance right determines if the Request Assistance sidebar is available. The remainder of these Interaction Command rights determine which buttons appear on the My Interactions and other Queue Control Toolbars.

| This security right | Description |
|---|---|
| Assistance | Displays the Request Assistance sidebar. |
| Coach | Displays the Coach button or Whisper Button and the Coach or Whisper command. |
| Disconnect | Displays the Disconnect button and the Disconnect command. |
| Hold | Displays the Hold button and the Hold command. |
| Join | Displays the Join button and the Join command. |
| Listen | Displays the Listen button and the Listen In command. |
| Mute | Displays the Mute button and the Mute Call command. |
| Park | Controls whether the Park button appears on the Transfer dialog box. |
| 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. |
| Snip | Displays the Snip button and the Snip command. For more information, see Recording Types. |
| Transfer | Displays the Transfer button and the Transfer command. |
| Secure Input | Displays the Secure Input button and the Secure Input 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.

Access Control rights determine which actions you can perform on **other queues** you have the rights to display:

- To **Disconnect**, **Hold**, **Mute**, **Pickup** or **Transfer** interactions, you need the appropriate Modify Station Queues, Modify User Queues, or Modify Workgroup Queues Access Control rights.
- To **Coach**, **Join**, **Listen** or **Record** interactions, you need the appropriate Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues, Access Control rights.

| This security right | Description |
|---|---|
| **Coach Interactions** | Enables you to coach an interaction by adding yourself to another agent's interaction. |
| **Disconnect Interactions** | Enables you to disconnect an interaction using the CIC client instead of hanging up the telephone. |
| **Join Interactions** | Enables you to join an interaction, thus creating a conference call. |
| **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. |
| **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. |
| **Request Assistance from Supervisors** | Enables you to request assistance from your supervisor. |
| **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. |
| **Initiate Secure Input Interactions** | Enables you to access secure input and process the secure input. |
| **Snip Interactions** | Enables you to record an interaction and store this recording in the CIC database. Administrators can use Interaction Recorder to find and play back these secured recordings. For more information, see Recording Types. |
| **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. |

## Interaction Optimizer Rights

| This security right | Description |
|---|---|
| **Agent can submit time off** | Enables you to submit a time off request. For more information, see Submit a Time Off Request. |
| Agent can trade shifts | Enables you to trade a shift with another agent. |

## Tracker Policy Rights

**Note: Tracker Policy rights apply to the Journey Map feature in Interaction Connect.**

| This security right | Description |
|---|---|
| Add Individuals | Enables you to add a Journey Map contact or Quick add a contact. |
| Add Organizations | Enables you to add a JourneyMap organization. |
| Have Private Contacts | Enables you to designate a Journey Map contact as private and prevent other users from viewing or using information for this contact. For more information, see the Allow others access to this Contact setting in the Add Contact dialog box. |
| Modify Individuals | Enables you to modify Journey Map contact information. |
| Modify Organizations | Enables you to modify Journey Map organization information. |
| Related Interactions Page | Enables you to Use the Journey Map View. |
| Tracker Administrator | Grants you all the Journey Map Policy Rights (called Tracker Policy Rights in Interaction Administrator), enabling you to perform all the Journey Map functions that require any Tracker Policy Right. |
| View Other People’s Private Interactions | Enables you to view other users' private interactions in the Related Items view. A user can indicate that an interaction is "Private" to prevent other users from recording or listening to it. |

## 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. |
| **Follow Me** | Determines whether you can use Follow-Me Routing to set up the CIC client to search for you at different telephone numbers. For more information, see Set Up Follow-me Routing. |
| **Intercom Chat** | Enables you to start intercom chats with other CIC client users on the **same** CIC server. |
| **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** | Enables you to receive faxes as TIF files attached to email messages. For more information, see Working with Faxes. |

## Widgets Configuration Master

| This security right | Description |
|---|---|
| **Widgets Configuration Master** | Enables you to create widgets and configure every widget property. For more information, see Configure a Widget.<br>Enables an administrator to permit and configure inbound file transfers from website visitors using the Web Chat widget to Interaction Connect users. For more information, see Configure Inbound File Transfer Settings. |

## Bots Configuration Master

| This security right | Description |
|---|---|
| **Bots Configuration Master** | Enables you to create Bot configurations and update every bot configurations field. For more information, see Configure a Bot. |

**Related Topics**

Access Control Rights

# What's New in Interaction Connect

Genesys introduced the following changes and enhancements in Interaction Connect releases.

## 2021 R4

- **Secure Input**

  To access secure input and process the secure input. For more information, see Secure Input.

## 2021 R3

- **Consult button**

  To consult with other Agent during a call by dialing a specific number associated with a selected directory entry. For more information, see Consult.

## 2021 R1

- **Sorting and searching Status columns in directories**
  You can now use status-related columns to sort and search in the Company directory and Workgroup directories. For more information, see Sort by status-related columns and Search in status-related columns.
- **Refresh button in directories**

  To get the latest status of the directory use Refresh button in directories.

## 2020 R4

- **Agent Statistics**
  You no longer need the Interaction Supervisor Plug-In: Workgroups license to monitor your statistics in the Agent Statistics view. You can see your current or previous shift or period interaction statistics for any workgroup to which you belong. For more information, see Display and Configure Agent Statistics.

## Widget Updates

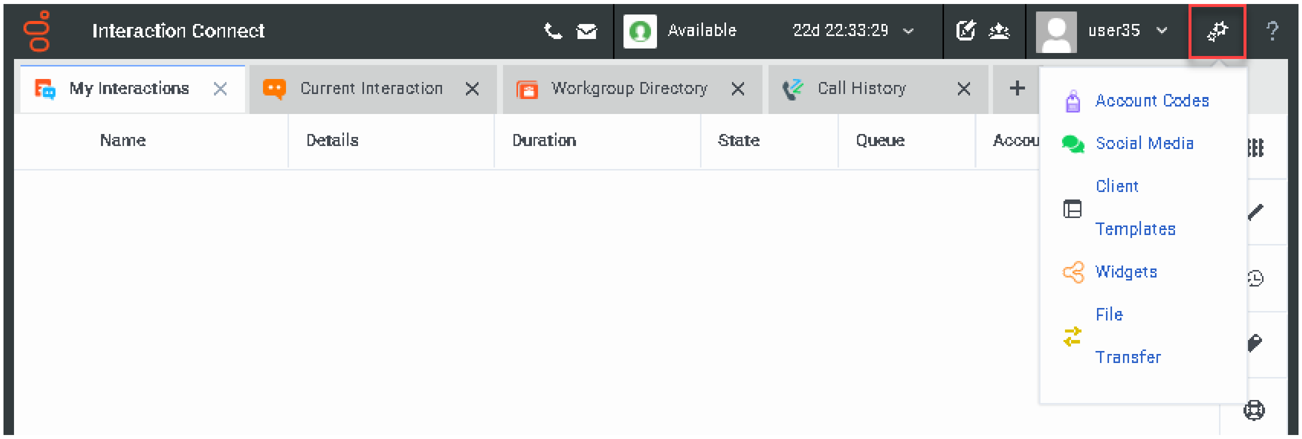
Some widget updates occur outside the CIC release cycle. These updates do not depend on the CIC version number.

- **WebChatService.setBotName** (May 2020)
  This new widget extension provides an API to allow the customization of the bot name. For more information, see PureConnect Widget Extensions.

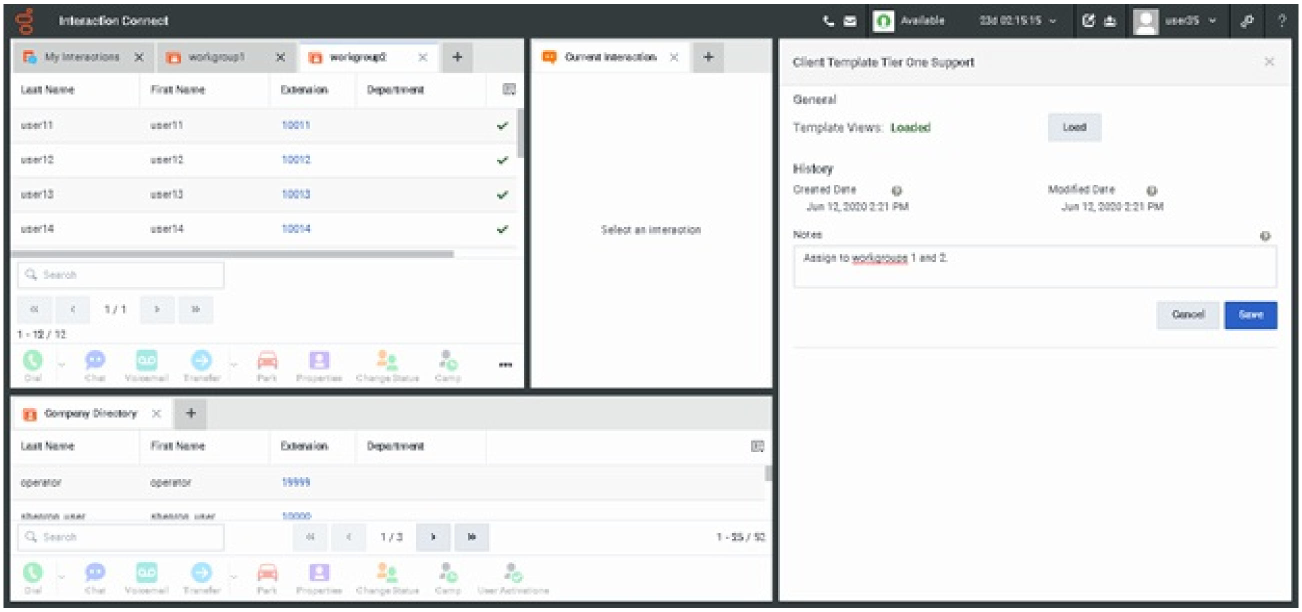
## 2020 R3

- **Two-way file transfers**
  Interaction Connect users can send files to website visitors who use the **Web Chat widget**. A new **Attach a file** icon appears in the Current Interaction view. Administrators can also enable Interaction Connect users to receive files from these website visitors. When an administrator enables inbound file transfers, an icon for **Accept file transfers** appears in the Current Interaction view.
  Administrators can limit the types, number, and size of files a website visitor can send. An Interaction Connect user must invite the website visitor to send a file. For more information, see Configure Inbound File Transfer Settings, Accept and Send Files During a Chat, and Chats and the Current Interaction view.

- **Administrator Views button**
  Administrators with the appropriate rights now have a quick access button for the administrator views. These include shortcuts for the Account Codes view, Social Media view, Widgets view, and the Inbound File Transfer Settings dialog box. For more information, see Administrator Views.




- **Client Templates**
  Administrators can create and manage client templates in Interaction Connect. Interaction Connect client templates display selected views in pre-determined locations. CIC administrators use Interaction Administrator to apply these templates views to user, roles, and workgroups.  For more information, see Client Templates.




- **Response Management and File Uploads**
  Interaction Connect users cannot include the following types of executable files (exe, .sh, and .js) when creating Personal Responses or using Response Management in an email interaction. For more information, see Create Personal Responses.

# 2020 R2

- **Accessibility Enhancements**
  As part of a continuing program to provide accessibility enhancements based on WCAG 2.0 (Web Content Accessibility Guidelines), this release includes:

  **Favorite Status:** You can now use the keyboard to select favorite statuses and have them appear as Fast Status buttons in the My Status section. For more information, see Set Status in Accessibility Mode.

  **View Navigation:** You can navigate from view to view using the keyboard. **Ctrl+Shift+.**(period) moves to the next view. **Ctrl+Shift+,**(comma) moves to the previous view. For more information, see Keyboard Navigation.

  **My Interaction Keyboard Shortcuts**: Keyboard shortcuts are now available for My Interactions commands like Pickup and Transfer. For more information, see My Interactions Shortcuts.

  **Keyboard creation of Conference Calls and Chats**: Use the Command Palette and the keyboard to create conference calls and conference chats. For more information, see Create a Conference Call in Accessibility Mode and Create a Conference Chat in Accessibility Mode.

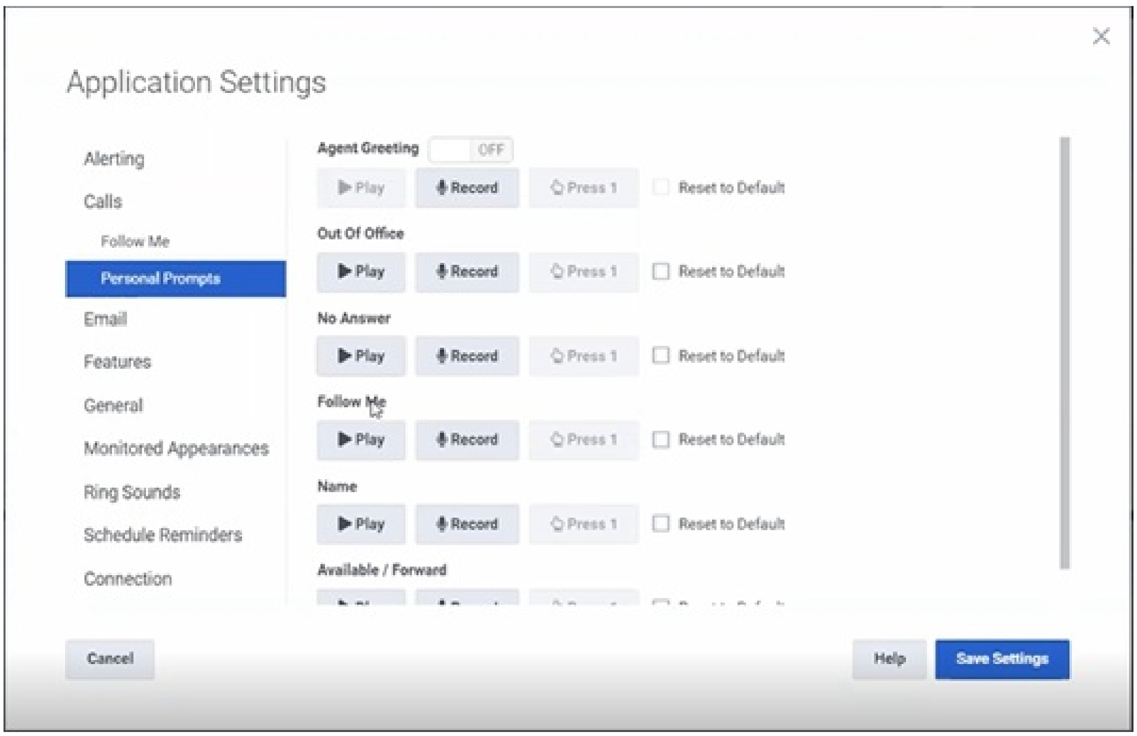
**Improved keyboard navigation:**

**Tip**: See Keyboard Navigation for more information about these and other navigation options.

- When you work with Chat messages in the Current Interaction view, you can now tab to the Quote icon (reply). This icon is now highlighted on hover or select. JAWS reads out a "Do you want to reply to this message?" prompt.
- Focus now switches automatically to the Current Interaction view when you pick up a Callback interaction. Until you pick up a Callback interaction, the focus is on the **Pickup** button.
- You can tab to the various elements of an email message in the Current Interaction view when composing a reply and then tab to the **Send** button. JAWS will read out all elements of an email message except for the body of the message. When viewing a sent or received email message, you can tab to the subject and address fields.
- Use **Tab** to navigate to all the fields and controls in the Advanced Dialing Options and Transfer dialog boxes. JAWS also reads out the contents of all fields.
- In the Applications Settings dialog, use the **Up** and **Down** arrows to select a setting type in the left side panel. Press **Spacebar** or **Enter** to move to the right-side settings panel. Focus moves to the first element in the panel.

**Streamlined Personal Prompts configuration**: When you configure personal prompts, you no longer have to expand sections one at a time for each type of personal prompt. You can now just tab to the **Record** and **Play** options for each type of prompt. For more information, see Personal Prompts.

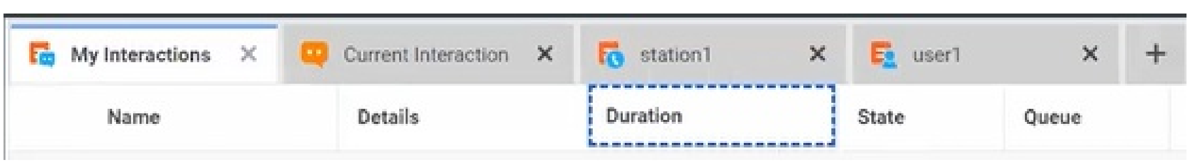
**Note**: This enhancement applies to all users.



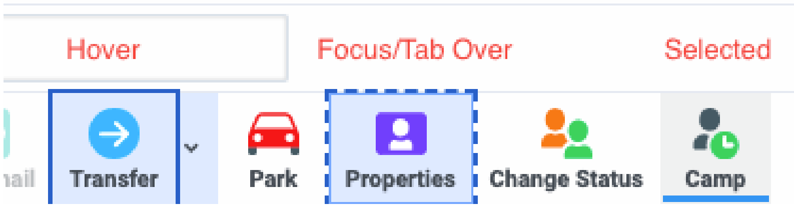

**Improved contrast in the user interface:**

**Note**: To see these enhancements, you must enable Accessibility Mode.

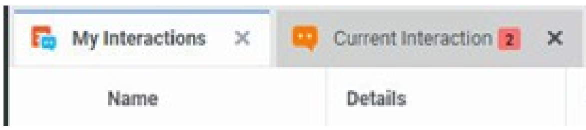
- Outlines with dashes provide better contrast for the currently selected column heads, table cells, and toolbar buttons.




- A solid border indicates your cursor is **hovering** over a toolbar button. A **focused or tabbed over** toolbar button has an outline with dashes. A **selected** button has a solid line.




- Black numbers on badges make them easier to read.




- WhatsApp Direct Messages

- **WhatsApp Direct Messages**

  > **Note**: The 2020 R2 release Early Access Program introduced support for receiving and replying to inbound WhatsApp direct messages. WhatsApp support will be available in patches for the 2020 R2, 2020 R1, and 2019 R4 releases. Contact your sales representative for more information about the Early Access Program.

  WhatsApp is the most popular instant messaging app worldwide, with over 1.5 billion users from 180 countries. Interaction Connect now supports WhatsApp as a Direct Messaging Social Media channel. Social Media administrators can configure one or more WhatsApp channels in the Social Media view. A WhatsApp channel routes WhatsApp direct messages to a designated workgroup.

  With this integration with WhatsApp and its direct messaging capabilities, we continue to expand the messaging channels supported within PureConnect (Facebook and Twitter messaging are already supported) so that customers and agents can communicate using the channels they already prefer.

  To manage WhatsApp direct messages, agents require an ACD WhatsApp license. For more information about requirements for administrators and agents, see Managing Social Media. For more information about WhatsApp and Interaction Connect, see Configure Social Media, Configure WhatsApp Channels, and WhatsApp Direct Messages.

# 2020 R1

- **Accessibility Enhancements**

  Interaction Connect includes accessibility enhancements based on WCAG 2.0 (Web Content Accessibility Guidelines). This includes screen reader support, keyboard navigation, and a new Command Palette for command shortcuts. For the visually impaired, there are improved contrast ratios for text and links and support for content resizing up to 200%.

- **E911 Emergency Calls**

  Interaction Connect supports E911 (Enhanced 911) for emergency calls. E911 provides a caller's location information to 911 dispatchers. The E911 service provider, West Corporation, validates and provisions this emergency location information.

  > **Warning**: West stores the user's or station's extension in a database and maps this extension to the physical address. If your PureConnect administrator does not enable the Enhanced 911 feature, changes to these extension numbers are not updated in the West database.

  PureConnect routes 911 calls to the nearest 911 service provider (West) who forwards the exact location to nearest PSAP (Public Safety Answering Point). The PSAP can then quickly dispatch emergency services to your exact location.

  Agents can dial 911 from any client including Interaction Desktop, PureConnect for Salesforce, or Interaction Connect. But agents can update their emergency details for managed and non-managed stations only from Interaction Connect or Interaction Administrator. Agents who logon through WebRTC or who use a remote number can update emergency information only through Interaction Connect.

  > **Note**: If you log on without a station or use a remote station, the Enhanced 911 feature is not available. For more information, see Stationless Logon and Remote Station Types.

- **Web Chat Enhancements**

  Use these new features when participating in a chat.

  - Insert an Emoji in a reply.
  - Quote an earlier message in a chat conversation when replying.
  - Use multimedia in your replies. Insert an https link to a video, an audio file, or an image. Interaction Connect embeds a video or audio file player or displays the image in your view of the chat.

> **Note**: The links are transmitted to chat participants. Visitors using the Interaction Web Tools chat or chat widget on your company website can click the link and open it in a separate browser tab.

**Example**: An embedded video player appears in the **Current Interaction** view for supported formats like YouTube, Vimeo, and Imgur.


We have improved the chat interface in the Current Interaction view in other ways.

- Chat messages and replies appear in chat bubbles.
- Icons indicate if you are talking with a customer or another agent.
- Message indicators appear on the **My Interactions** and **Current Interactions** tab alerting you to new or unread chat message needing a response.
- The typing indicator is now text instead of an icon.

## 2019 R4

- **Genesys Cloud Bridge Replacement**
  Beginning with CIC 2019 R4, the PureCloud for CIC integration was renamed to Genesys Cloud for PureConnect. The new Cloud Bridge subsystem is a replacement for the Bridge Server platform previously used for integration with Genesys Cloud. For more information, see the configuration details in the Interaction Administrator help and the Genesys Cloud for PureConnect Administrator's Guide in the PureConnect documentation library.

- **WhatsApp Direct Messages**
  Interaction Connect now supports WhatsApp as a Direct Messaging Social Media channel. Social Media administrators can configure one or more WhatsApp channels in the Social Media view. A WhatsApp channel routes WhatsApp direct messages to a designated workgroup. For more information, see Configure Social Media and Configure WhatsApp Channels.

## 2019 R3

- **Journey Map**
  Journey Mapping is a new Interaction Connect feature. Journey Mapping is a history of interactions between PureConnect client users and outside contacts. It tracks various types of interactions (phone, fax, email, web chat.) For more information, see Journey Map.

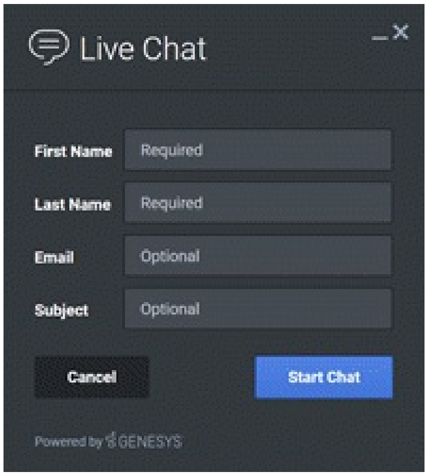
  > Requirements: Customers who have Tracker licenses need not buy any new licenses to use this feature. For more information, see Journey Map Licensing and Rights.

- **PureCloud Directory view**
  This is no longer supported as of 2019 R3.
- **Support for Arabic**
  Arabic is now available as a language selection for Interaction Connect. You can change the language used in the interface when you log on to Interaction Connect. For more information, see Logging On.

## 2019 R2

- **Auto select interactions after disconnect**
  When you enable this new alerting option Interaction Connect automatically selects the oldest interaction that is not disconnected when you disconnect your current interaction. See Alerting Options.

- **Genesys Altocloud**
  Altocloud Chat interactions are now indicated by a standard Chat icon with an Altocloud badge.
- **Web Chat Widget Subject**
  The information entered in the **Subject** field on new chats created by the Web Chat widget now appears in the **Notes** property on Chat interactions. For more information, see Web Chat in Widgets Plugins Configuration.




## 2019 R1

- **Altocloud**
  Altocloud is a customer journey analytics platform that analyzes all kinds of visitor journey behavior and data. Your organization can use it to observe and analyze visitors on your digital properties, such as websites. Altocloud can predict what it will take for visitors to achieve a desirable business outcome, and then acts to offer the most appropriate and effective channel to assist them in completing their journey.
  The Altocloud view displays a visitor's journey on your company's website. It gives you a real-time visualization of their experience and enables you to assist them in achieving their goal, whether it is ordering a product, requesting a quote, or some other specific milestone.

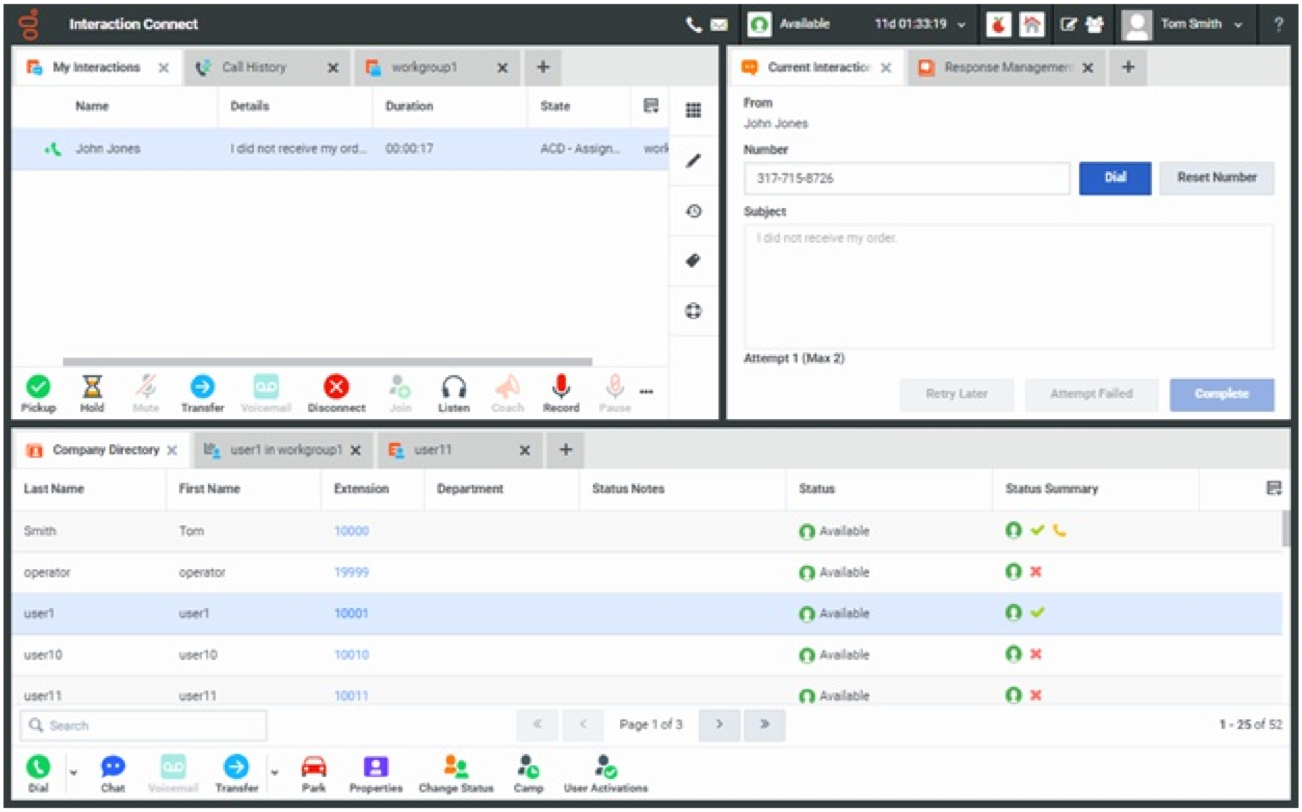
- **New Genesys Widgets**
  Interaction Connect supports the configuration of more Genesys Widget types for use in your company's website. For more information, see Widgets Plugins Configuration.
  - **Callback**: Website visitors can request a call from one of your support agents. PureConnect routes this as a Callback request interaction to a designated queue.
  - **Call Us**: Website visitors can call selected phone number displayed on the Call Us widget.
  - **Offers**: Use the Offers widget to display a product or promotion along with an image or a video. You can select from Toaster or Overlay mode.
  - **Sidebar**: The Sidebar widget displays icons, titles, and command shortcuts for the widgets available on your website.

- **Third-Party Chatbot Support**

  > **Requirements**: For third-party Chatbot support, the IC Server must be running CIC 2019 R1 Patch 5 version or later. Alternatively, you can apply a gap ES to an IC Server running CIC 2019 R1 Patch 4. Chat Bot support also requires Interaction Connect version 2019 R1 Patch 5 or later.

  Support for Google DialogFlow, Amazon Lex, and IBM Watson is included in this release. Support for other third-party chatbots will follow. You configure any of these third-party chatbots in the Interaction Connect Widgets view. For more information, see Widgets Plugins Configuration.
  This release also provides the ability for widgets to use websockets when talking to chatbots. It also enables an optional server parameter, webhook, within the ICWS web chat API that eliminates polling the server.

- **Rebranding**
  We updated the look and feel of the PureConnect browser-based applications to match Genesys User Experience guidelines. There were no changes in functionality. Interaction Connect is one of these rebranded applications.




# 2018 R5

- **Social Media Direct Messages**
  Social Direct Message is a **new interaction type** that enables agents to respond to private messages sent to your corporate Facebook page or directed to your corporate Twitter account. Interaction Connect users can now receive and reply to these ACD-routed social media interactions in the familiar Current Interactions view. For more information, see Social Media.
  Administrators can configure **different ACD workgroups** for Social Media Conversations and Direct Messages. For more information, see Configure Facebook channels and Configure Twitter Channels.
  Agents can review and acknowledge **scorecards** or review **recordings** of their Direct Message interactions in the My Quality Results view. See Social Direct Message Scorecard.

> **Special Notice**: PureConnect does not support secure input in Social Media Conversations or Direct Messages. Do not include credit card numbers or other sensitive information in your replies and discourage your customers from doing so.

- **Social Media and Response Management**
  You can use stored responses in both Social Media Conversations and Social Media Direct Messages. For more information, see Use Response Management in a Social Media Interaction.

# 2018 R4

- **Account Codes Configuration**
  Administrators with the appropriate rights can configure account codes in the new Account Codes view. Account Code configuration was formerly available only in Interaction Administrator. For more information, see Configure Account Codes.

- **Alert Configuration**
  Supervisors can configure their own alerts in Interaction Connect. Previously, supervisors could configure alerts only in Interaction Supervisor in ICBM. An alert appears when a statistic enters a user-defined threshold, is within bounds, or is no

longer within a range of values. For example, you can base alerts for telephone calls on calls longer than a specific duration, average hold time greater than a specific value, and many other metrics.

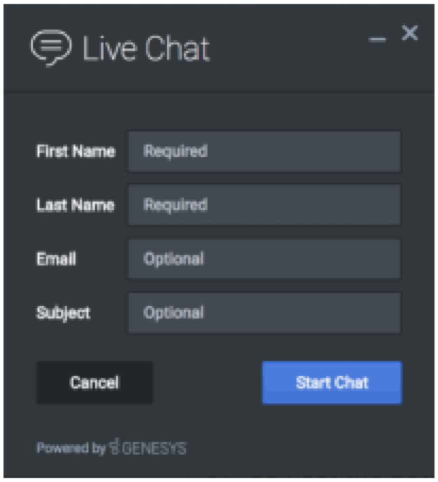
**Requirements**: To configure alerts, you need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features. You can view your active alerts in the Active Alerts view. To add views, you need the Customize Client Security right. For more information, see Manage Alerts.

**Warning**: PureConnect does not support simultaneously logging into Interaction Connect and ICBM to manage alerts.

- **Email Scorecard**
  You can now review and acknowledge scorecards or review recordings of your email interactions in the My Quality Results view. You don't need to use Interaction Web Portal or Interaction Supervisor for these tasks.

  **Requirement**: See Interaction Quality.

- **Genesys Widgets**
  Widgets are streamlined and lightweight elements you can add to your company's website to support activities like chatting with an agent. Interaction Connect supports the configuration of Genesys Widgets for use in your company's website. These widgets are easy to configure and deploy by means of code snippets you include in your company's website. For more information, see Widgets.




  **Note**: The initial release supported the Genesys Chat widget.

- **Genesys Intelligent Automation**
  The PureConnect integration with Genesys Intelligent Automation is a fully tested, secure offering that allows easy integration of bots and other services with on-premises and cloud implementations of PureConnect. It uses a server less, event driven microservice that deploys to, and resides in the cloud. For more information, see Plugins Configuration and the PureConnect Integration with Genesys Intelligent Automation Technical Reference.

- **Interaction Process Automation**
  Interaction Process Automation (IPA) is a communications-based process automation system that manages business processes by routing work items to qualified and available members of your organization in a defined and controlled manner.

  **Requirements**: Only agents with the appropriate licenses and rights can use Interaction Process Automation. For more information, see IPA User Licenses and IPA User Rights. Also, IPA is available to Interaction Connect users only by special arrangement. To unlock this feature, the CIC administrator must contact Graeme Provan, Global Director of Business Automation.

  If you have the appropriate license and user rights, you can:
  - pick up a work item and complete a necessary task
  - start a process that routes work items to other members of your organization
- **Social Media conversations**
  Social Media Conversation is a new interaction type that enables agents to respond to Facebook posts and mentions on Twitter. Interaction Connect users can now receive and reply to these ACD-routed social media interactions in the familiar

Current Interactions view. For more information, see Social Media.

Administrators can enable and configure Social Media interactions in the **Social Media** view. For more information, see Configure Social Media.

You can review and acknowledge scorecards or review recordings of your Social conversations in the My Quality Results view. See Social Conversation Scorecard.

> **Note**: In a future release, social media interactions will also include Facebook and Twitter private (direct) messages.

- **Stationless Logon**

  Administrative, supervisor, Interaction Process Automation, Interaction Optimizer, Social Media, and other features are available without a station in Interaction Connect. Also agents can log on and handle interactions that do not require a station (like chats and emails) without consuming a Basic Station license. Interaction Connect hides or disables features that require a station when you log on without selecting a station. For more information, see Stationless Logon.

  When you log on without a station or Client Access license, but have a **Supervisor** license, the new **Monitored Interactions view** enables you to continue to monitor interactions that you are listening to or recording. For more information, see Monitored Interactions.

# 2018 R3

- **My Quality Results view**

  You can now review and acknowledge scorecards or review recordings of your interactions in the My Quality Results view. You don't need to use Interaction Web Portal or Interaction Supervisor for these tasks.

  > **Requirement**: See Interaction Quality.

- **Interaction Scripter**

  The Interaction Scripter integration with Interaction Connect now supports **custom campaign scripts**. For more information about custom scripts, see Interaction Scripter.

  > **Note:** Custom scripts written to run in Interaction Scripter .NET Client must be modified to run in Interaction Connect. Developers can find information about the required modifications in the Interaction Scripter Developer's Guide in the PureConnect Documentation Library.

  You can **delay receiving calls** after logging on to campaigns. You can start receiving calls when you are ready by selecting the Start Receiving Calls button in the Campaigns sidebar. For more information, see Log on to Campaigns.

- **Interaction Optimizer Integration**

  Interaction Optimizer enables you as an agent to view your schedule, submit time off requests, and trade shifts with other agents. Schedule reminders appear as both desktop alerts and as badges on the **Activity Feed** icon. You can set reminder times for each type of scheduled activity. These setting control how far in advance you are alerted to changes in your scheduled activity.

  Your CIC administrator determines whether you have access to these Interaction Optimizer features inside Interaction Connect.

# 2018 R2

- **Call Security**

  CIC provides call security that prevents others from listening in on a call or even determining which internal parties are involved in a conversation. 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. Call security icons appear in My Interactions. For more information, see Call Security.

- **Custom Buttons**

  Your CIC administrator can create custom buttons for the Queue Control toolbar which appears on the My Interactions view and other queue management views. A custom button can invoke a handler or an add-in. A custom button can be available for use at all times or only when an interaction is selected, or only when a specific type of interaction (such as a chat) is selected, or only when an active (not disconnected) interaction is selected.

- **Workgroup Activation Management**

  A user who has an **Interaction Supervisor Plug-In: Workgroups** license and who has enabled supervisor features can manage other users' workgroup activation status from various places in Interaction Connect. New **User Activations** and **Workgroup Activations** buttons can appear on the Company Directory or workgroup directory toolbars. You can also manage user Activations from the **Agent Statistics** view. You can also manage the activation status for members of a workgroup from the **Workgroup Statistics** view and the **Workgroup Overview**.

You use a new activation toggle control to manage activation status. You can also use this new control to manage your own workgroup activation status in the **Workgroup Activation** dropdown list.

## 2018 R1

- **Personal Prompts**
  You can now record personal prompts in Interaction Connect. Personal prompts are messages you record which are played to people who call you. See Personal Prompts Options.
- **Ring Sounds**
  You can select different ring sounds for calls, chats, emails, and other interactions. See My Interactions Ring Sounds.

## 2017 R4

- **Web-Based phone**
  You can test the microphone and speakers you select for use with the Web-Based phone. Your microphone and speakers selections are saved for the next time you log on to Interaction Connect and select the Web-Based Phone as your workstation.
- **Monitored Appearances**
  You can set up Monitored Appearances to observe and manage interactions for selected users. You can configure ring and alert settings for these monitored appearances. Access Control rights determine which queues you can view and what actions you can perform on the interactions in these queues. See Working with Monitored Appearances and Configure Monitored Appearances.
- **Workgroup, User, and Station queue views**
  If you have the appropriate Access Control rights, you can add views to display and manage interactions for selected workgroups, users, and stations. See Introduction to Queues.

  You can filter these views by interaction type, state, or assigned user. Supervisors can also set additional queue filter parameters that control the maximum number of interactions shown and the order in which they appear. See Filter a Queue View.
- **Customize Queue Control Toolbars**
  You can add, remove, or rearrange buttons on Queue Control toolbars. See Customizing Queue Control Toolbars.
- **Interaction Scripter integration**
  The Interaction Scripter integration enables you to process outbound calls placed by Interaction Dialer. The new Interaction Scripter view contains information pertaining to the call, the customer, and the campaign, based on behavior defined in a script. This information appears in a form that you complete. All information that you collect or modify during the call is routed back to database tables. The features available in the Interaction Scripter view are very similar to those in Interaction Scripter .NET Client (sometimes called the Dialer client.)

## 2017 R3

- **Create and edit directory entries**
  You now have the ability to create, edit and delete directory entries.

  > **Note**: When you have the appropriate rights, as in the IC Private Contacts directory, you can insert and delete directory entries. You need the Directory Administrator Security right to edit public directories belonging to other users. You cannot edit Company Directory entries. Some additional conditions apply when you want to add, edit or delete contacts in a **private** directory. For more information, see Working with Directories.
- **Create Speed Dial views**
  You can now create Speed Dial views from inside Interaction Connect. You can share these views with other CIC users or keep them private. For views you make Public, you also determine if other users can add, change or delete entries or even rename the Speed Dial view.

  > **Note**: CIC does not support LDAP data sources for General Directories or Speed Dial directories in the current Interaction Connect release.
- **Camp**

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.

- **Faxes**
  A new Fax view is available. It enables you to view PNG or PDF format faxes in your browser. You can sort and select the faxes appearing in this view. You can also download the fax file.

  > **Note**: You can download and view I3F format faxes in Interaction Fax. Or you can download TIF format faxes and view them in the default Windows application for TIF files.

- **Text Messages**
  ACD-routed SMS text messages can appear in Interaction Connect as chats. You interact with these text messages exactly as you would any other chat.

- **Voicemail**
  A new Voicemail view is available. It enables you to view and play voicemail messages. You can sort and select the messages appearing in this view. You can also download the voicemail message file. The Voicemail view automatically refreshes when you receive a new voicemail message. A new Voicemail Message Waiting Indicator (MWI) appears when you have unheard voice mail messages.

## 2017 R2

- **Advanced Dialing Options**
  The Advanced Dialing Options dialog box now has a Call History drop-down list that enables you to select a recently-dialed number.

- **Web-Based Phone**
  The Web-Based Phone feature enables Interaction Connect user to use a web browser on a PC as a SIP telephone using WebRTC as the communication protocol. The Web-Based Phone eliminates the need to distribute, install, and configure a physical IP telephone for each agent or user, or to install a SIP soft phone application on PCs.

  > **Note**: The Web-Based Phone requires CIC 2017 R3 for PureConnect Cloud.

- **Co-Browse**
  The new Co-browse and a new Co-browse widget in the My Interactions sidebar enables you to assist visitors to your company's website. The visitor can show an agent the issue or question they have on a webpage. You can view the screen and interact with the screen to point a website visitor to information or guide them in resolving an issue. The limits of your manipulation of the visitor's screen is at the visitor's discretion.

  > **Requirements**: Since this feature leverages PureCloud, your CIC administrator must enable the Genesys Cloud for PureConnect feature as outlined in the Genesys Cloud for PureConnect Administrator's Guide. Co-browse is an advanced and billable feature and requires the paired PureCloud organization to be upgraded to Engage 3. Special pricing is available for existing CIC customers. PureCloud Administration is required to give co-browse permission to users. The co-browse feature is not available in Interaction Connect until your PureCloud administrator assigns you the appropriate Co-browse permissions.

- **Email on behalf of a workgroup**
  You can start an email interaction on behalf of a workgroup. When you start this interaction, you are prompted to select a workgroup and outbound mailbox. This outbound email interaction can be included in Customer Interaction Center reports and statistics. Additionally, as an interaction, it could be processed by any custom email handlers in your Customer Interaction Center installation.

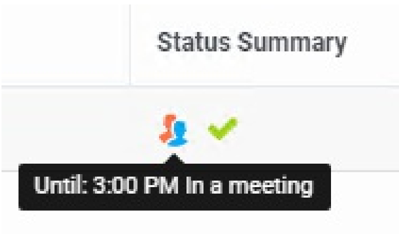
- **Personal Responses**
  You can create your own responses, organize them in categories, and store them in a personal Response Management library. Search for and use these personal responses in interactions.

  > **Requirements**: The Response Management Editor is available to Interaction Connect users only if you have 2017 R2 or later CIC server. For other requirements, see Working with Response Management

## 2017 R1

- **Workgroup Statistics**
  Three new views enable you to view live statistical data for selected workgroup queues. If you have the appropriate rights, you can add the **Workgroup Statistics** view, **Workgroup Overview,** and **Agent Overview** to Interaction Connect. The **Workgroup Statistics** view enables you to view basic statistics and can help you monitor your performance and compare it to that of a selected workgroup. The **Workgroup Overview** enables you to view live statistical data for a selected workgroup in an efficient and highly visual format. The **Agent Overview** shows the activity of an agent within a selected workgroup.

- **Status Summary icon tooltip**
  Tooltips for **Status Summary** icons now display **Status Notes** and **Until Date** and **Time** if available.

- **Response Management shortcuts and alternate languages.**
  To use Response Management shortcuts with certain alternate languages in Windows, such as Chinese Simplified PRC, you can now press **Ctrl+Alt+Space** instead of pressing **Ctrl+Space**. For some alternate languages, **Ctrl+Space** changes the language setting.

## 2016 R4

- **Enhanced Password Requirements**
  Your CIC administrator has new Password Policy options that may require you to use a minimum number of upper and lower case letters, numbers and even special characters in your CIC password. New Password Policy restrictions can also prevent you from using your phone extension or the reverse of your phone extension as a CIC password.

- **New ways to insert images in Email replies.**
  You can drag and drop an image into an HTML email reply in any browser where you are using Interaction Connect. You can also cut and paste images from the Windows clipboard in all browsers except for Internet Explorer 10 and Safari which do not support this feature.

- **Genesys Cloud for PureConnect**
  PureCloud is a cloud collaboration, communications, and customer engagement platform that takes full advantage of the distributed nature of the cloud.

  If your CIC administrator enables Genesys Cloud for PureConnect, you can experience the collaborative features of PureCloud. Genesys Cloud for PureConnect brings users together in a single environment that allows for seamless communication between CIC and PureCloud users by automatically synchronizing CIC and PureCloud user information.

## 2016 R3

- Dial on Behalf of a Workgroup
  You can associate an outbound call with your workgroup. Primarily used for administrative and reporting purposes, this feature enables the call to count towards an agent’s and the workgroup’s statistics.

- **Drag and Drop configuration**
  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 create this conference. If you have the appropriate rights, you can turn off these confirmation dialog boxes by clearing the **Confirm drag and drop operations** check box in the **General** node of the Application Settings dialog box.

- **PureCloud for CIC**
  If your CIC administrator enables Genesys Cloud for PureConnect, you can experience the collaborative features of PureCloud. Genesys Cloud for PureConnect brings users together in a single environment that allows for seamless communication between CIC and PureCloud users by automatically synchronizing CIC and PureCloud user information.

- **Secure Pause a Recording**
  You can use Secure Pause to avoid recording sensitive information, such as a Social Security number or credit card number, during a call.

- **Snippet Recordings**
  If you have the appropriate license and rights, you can use the new **Snip** button to create SASF (Secure Authenticated Stream Format) interaction recordings that are stored in the CIC database. For more information about the difference between Ad hoc and Snippet recordings, see Recording Types.

  > **Note**: Snippet recordings of email interactions are available only if your CIC administrator separately enables this feature. Snippet recordings of email interactions are not available by default.

- **Wrap-Up codes**
  You can assign Wrap-Up codes to interactions associated with a workgroup queue. Your CIC administrator can generate reports to categorize call details by Wrap-Up codes.

## 2016 R2

- **Email**
  You can use the CIC client to read and respond to ACD-routed email messages. 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.
  A new Email configuration option controls whether inline images and other linked content appear in incoming email messages. Depending on the browser you use for the CIC client and type of audio file, you can click a **Play** button to hear audio files attached to an incoming email message.
- **Response Management**
  You can use stored responses, such as answers to Frequently-Asked-Questions, to handle interactions more quickly.
- **Status Summary icon tooltips**
  Point to an icon in a directory's **Status Summary** column to display a tooltip that explains its meaning.

## 2016 R1

- **Add-in Architecture**
  Interaction Connect's new add-in architecture enables your in-house developers to add custom features to the CIC client.
- **Initiate an intercom chat**
  You can chat with other CIC client users. In previous releases, you could participate in intercom chats if invited by another CIC client user, now you can initiate a chat with another CIC client user on the same CIC server.
- **Logon page with DOD/JITC authentication**
  Department of Defense employees can use Common Access Cards (CAC) to log on to the CIC client.

## 2015 R4

- **Account Codes**
  You can assign Account codes to interactions. Account codes are useful for organizing interactions by customer for billing purposes. Some configuration is required.
- **Additional Directories**
  You can display Speed Dial, General, Station Group, Workgroup, and Workgroup and Attendant Profile directories.
- **Client Memos**
  CIC administrators can create client memos to communicate with CIC client users. These memos can appear as desktop pop-ups and notifications.
- **Request Assistance**
  You can chat with your supervisor when you request assistance with an interaction.
- **Save Logs**
  If you experience a problem, you can generate a CIC client log file, attach it to an email message and send it your CIC support representative.

## 2015 R3

- **Callbacks**
  Callbacks are now a supported interaction type in Interaction Connect. Using the Callback feature, visitors to your company's website can leave a request for an agent to call them back. CIC routes the request as a callback interaction and it appears in the appropriate queue.

# 2015 R2

Interaction Connect GA release.

**Related Topics**

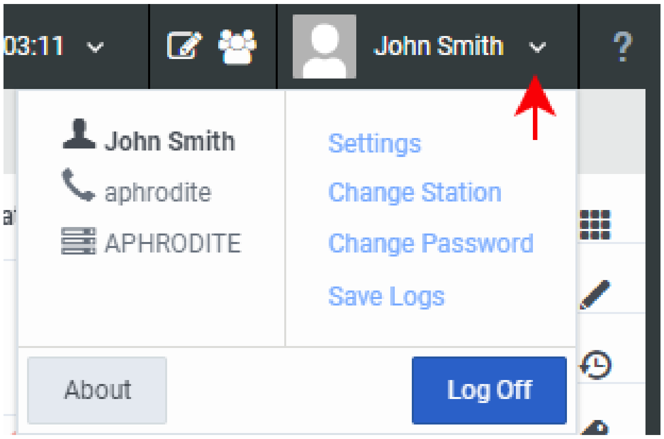

Add-in Architecture
Assign Codes to an Outgoing Interaction
Camp on an Internal Extension
Co-browse
Create Personal Responses
Create a Speed Dial View
Dial on Behalf of a Workgroup
Display the Workgroup and Profiles View
Email Configuration
Genesys Cloud for PureConnect
Initiate a Chat Session
Personal Prompts Options
Request Assistance from Your Supervisor
Save Logs
Single Sign On
Start an Email Interaction
Supervisor Client Memos
Understanding Account Codes
Understanding Wrap-Up Codes
Use the Voicemail View
Use a Response Shortcut
Web-Based Phone
Workgroup Overview
Workgroup Statistics View
Working with Callback Requests
Working with Email Messages
Working with Directories
Working with Other Directories
Working with Response Management
Working with Text Messages

# Save Logs

> **Note**: Your CIC administrator can set a server parameter in Interaction Administrator that can hide the **Save Logs** command. Contact your CIC administrator for details.

If you experience a problem, you can generate a CIC client log file, attach it to an email message and send it your CIC support representative.

1. Open the menu and select **Save Logs**.




   **Result**: The CIC client generates a log file named **inin-logs.txt** and places it in your Windows **downloads directory**. It appends a number to the log file name if you created this file previously.

2. In your Windows downloads directory, right-click the file and select **Send to** > **Mail recipient**.

   **Result**: A new email message window opens in your default email program. The selected log file is attached to the message.

   > **Note**: Windows 10 doesn't have the **Send to** option until you create a MAPI file. You can attach the inin-logs.txt file to an email to your Genesys Customer Care representative or other designated person.

3. Supply any other useful information or comments in the email message.
4. Address the message to your Genesys support representative or other designated person and click **Send**.

   > **Note**: Contact your PureConnect administrator for the email address for all of your company’s problem reports.

# Genesys Cloud for PureConnect features

Genesys Cloud for PureConnect is a cloud collaboration, communications, and customer engagement platform that takes full advantage of the distributed nature of the cloud.

If your CIC administrator enables Genesys Cloud for PureConnect, you can experience the collaborative features of Genesys Cloud. Genesys Cloud for PureConnect brings users together in a single environment that allows for seamless communication between PureConnect and Genesys Cloud users by automatically synchronizing user information.

The **Collaborate** button enables you to access Genesys Cloud in a browser and chat with Genesys Cloud users or share files. You can search for individuals and groups in your organization. You can also complete your Genesys Cloud profile.

**Related Topics**

Genesys Cloud

## Genesys Cloud

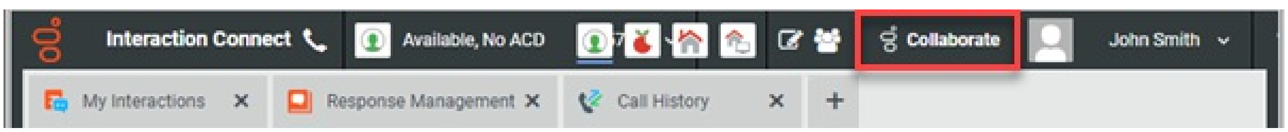
Here are a few things you can do in Genesys Cloud:

- **Profiles** – Complete your profile – add contact information, photo, and so on. Set your status.
- **Search** – Search for individuals and groups in your organization
- **Chat** – Send messages to individuals and groups
- **Hierarchy views** – Browse the structure of your organization
- **Documents** – Store, organize, and share files with other users

### Start Genesys Cloud

If your CIC administrator enabled Genesys Cloud for PureConnect, a **Collaborate** button appears in the CIC client.

Click the **Collaborate** button.




Genesys Cloud appears in a new browser tab. You log on automatically to Genesys Cloud.

**Tip**: If a splash screen appears, double-click Collaborate/Communicate.

### Use Genesys Cloud

For more information about using Genesys Cloud, click the **Help** button on any page or go to the Genesys Cloud Resource center at https://help.mypurecloud.com/articles/purecloud-collaborate-features/. The Resource Center contains help topics and also enables you to access articles, videos, FAQs, and more. It is the home of all Genesys Cloud instructional and educational information about the many features in Genesys Cloud.

# Accessibility Enhancements

Interaction Connect includes accessibility enhancements based on WCAG 2.0 (Web Content Accessibility Guidelines). The enhancements include screen reader support, keyboard navigation, and a new Command Palette for command shortcuts. For the visually impaired, there are improved contrast ratios for text and links and support for content resizing up to 200 percent.

> **Requirements**: To enable users to use the keyboard to create conference calls and conference chats, the PureConnect administrator must set the **accessibilityMode** Optional General Server Parameter to **True**. Also, when set to True, a message box appears in Interaction Connect if search results are null in Call History or the Company Directory. Button labels appear in bold text. Interaction Connect users can elect to use accessibility enhancements for the visually impaired by enabling Accessibility Mode.

## Getting Started

**To use the accessibility enhancements:**

- Start the screen reader before starting Interaction Connect.

  > **Requirements**: JAWS is the only currently supported screen reader. It is a licensed application.

- To enable Accessibility Mode, select **Enable accessibility mode** in the Application Settings **Features** page.

For more information about accessibility features, see:

- Screen Reader
- Accessibility Mode
- Access Keys
- Command Palette
- Navigation Bar
- Keyboard Navigation
- My Interactions Shortcuts
- Set Status in Accessibility Mode
- Create a Conference Call in Accessibility Mode
- Create a Conference Chat in Accessibility Mode
- Legibility

## Screen Reader

The screen reader describes the currently focused element like a selected interaction or toolbar button. Every time you press **Tab** to change your focus, the screen reader tells you what your focus is.

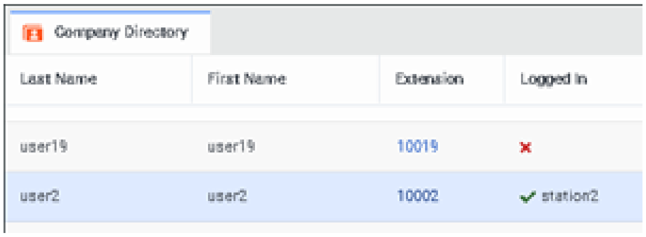
The screen reader also reads out messages, alerts, and other notifications. It describes required actions like "Type password" and makes a loading sound when you Save Logs.

# Accessibility Mode

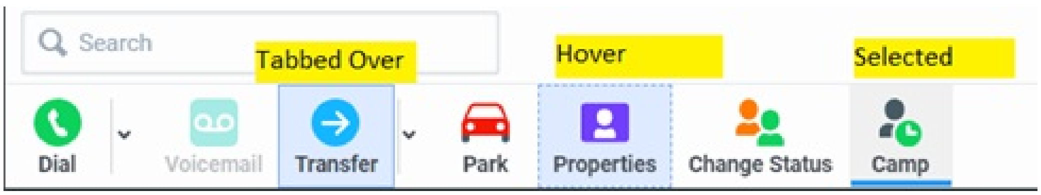
Accessibility Mode is an on or off switch for features tailored for the visually impaired.

When you enable Accessibility Mode:

- Use the **Conference** button or the Command Palette to create conference calls and conference chats. For more information, see Create a Conference Call in Accessibility Mode and Create a Conference Chat in Accessibility Mode.
- Use the right and left arrow keys to move from cell to cell in **My Interactions** and in a table view like the **Company Directory.**
- A high contrast border appears for the currently selected cell in a table.-
- In the Company Directory, **Logged In** and **Logged Out** icons appear in high contrast colors.



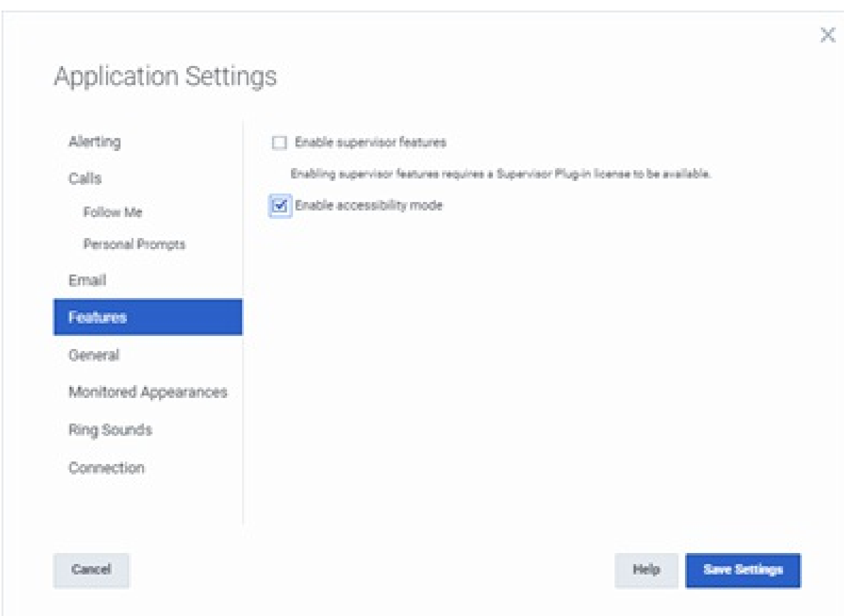

- In the Company Directory, command button highlights change depending if you tab over, select, or hover.




- For screen reader users, it reads the content of the currently selected cell. When this option is off, screen readers read the contents of each cell in the row.

**To enable or disable Accessibility Mode:**

- Press **Alt+ Shift+A**.
- In the Navigation Bar, select **Jump To**. Use the **Down** arrow key to select **Accessibility Settings** and press **Enter**. Then in the Applications Settings dialog box, click **Features.** Select or clear the **Enable accessibility mode** check box. Click **Save Settings**.



# Access Keys

Browser access keys enable you to shift focus to a specific part of the Interaction Connect interface.

> **Note**: Access key combinations can vary according to which browser you use. For a general description of access keys and their uses, see https://cchealth.org/help/access-keys.php.

## Accessibility Mode

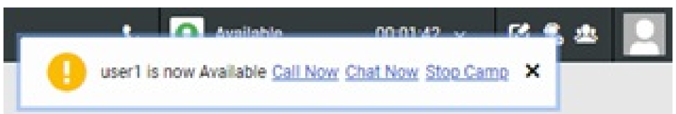
Use the same access keys to turn Accessibility Mode on or off:

- Press **Alt+ Shift+A**.

## Alerts

PureConnect not only reads alerts but automatically shifts focus to the alert.

- To focus on the alert, **Chrome** and **Internet Explorer** users press **Alt + N**.
- **Firefox** users press **Alt+Shift+N**.




> **Note**: This access key combination applies to alerts appearing **inside** the browser. It does not apply to Desktop Alerts appearing on your Windows desktop. This access key combination is browser-dependent, like the access keys for Client Memos.

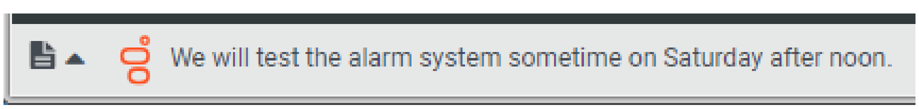
## Command Palette

The Command Palette gives you context-sensitive keyboard access to common commands.

- In Windows, press **Ctrl+.** (period)
- In Mac OS, press **Command+.** (period)

## Client Memos

Client memos appear in the Notification area. This area is either the top or lower side of the Interaction Connect interface, depending on your browser. The keys for shifting focus are also browser-dependent, like the access keys for Client Memos.




To shift focus to a client memo:

- **Chrome** and **Internet Explorer** users press **Alt+C**.
- **Firefox** users press **Alt+Shift+C**.

## Command Palette

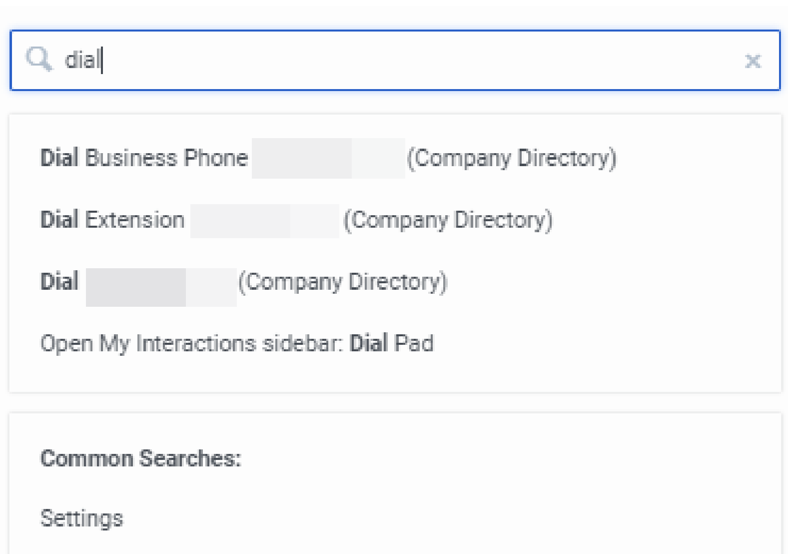
To avoid conflicts with browser access key combinations already used by your browser, Interaction Connect includes a command palette. The command palette gives you keyboard access to common commands like Pickup or Dial.

The command palette is **context-sensitive**. It provides commands appropriate to your current focus and user rights. For example, if you select a Company Directory contact, the command palette includes the Dial command for dialing the contact's phone number.

> **Note**: The Command Palette always includes My Interactions specific commands, regardless of your focus.

To use the Command Palette:

1. To display the Command Palette, do one of the following:
   - In Windows, press **Ctrl+.** (period)
   - In Mac OS, press **Command+.** (period)
2. Begin typing the name of the command.
   A list of matching and applicable commands appears. Search results include context like the name of a selected contact. Search results always include matching commands from My Interactions, regardless of your current focus.




3. To select the appropriate command, use the **down** and **up** arrow keys and press **Enter**.

## Navigation Bar

The Navigation Bar provides access to accessibility help; and the command palette.


**To display the Navigation Bar:**

- Select your browser's address bar and press **Tab**.
- Press **Tab** or **Shift+Tab** until the navigation bar appears.

**To use the Jump To options:**

1. Display the Navigation Bar.
   **Jump To** is selected by default.
2. To select **Accessibility Help**, **Command Palette Help**, or **Accessibility Settings**, use the Up and Down arrow keys.
3. Press **Enter**.

## Keyboard Navigation

Every function is available by means of the keyboard. Outlines and color contrast indicate **keyboard focus**.

## Views

- To navigate from one view tab to another, do one of the following:
  - To move to the next view tab, press **Ctrl+Shift+.**(period); that is **Ctrl+>**.
  - To move to the previous view tab, press **Ctrl+Shift+,**(comma); that is **Ctrl+<**.

> **Note**: Continuously pressing these keys cycles through the displayed views. JAWS announces the names of the highlighted tabs and prompts you to press **Spacebar** or **Enter** to display the view.

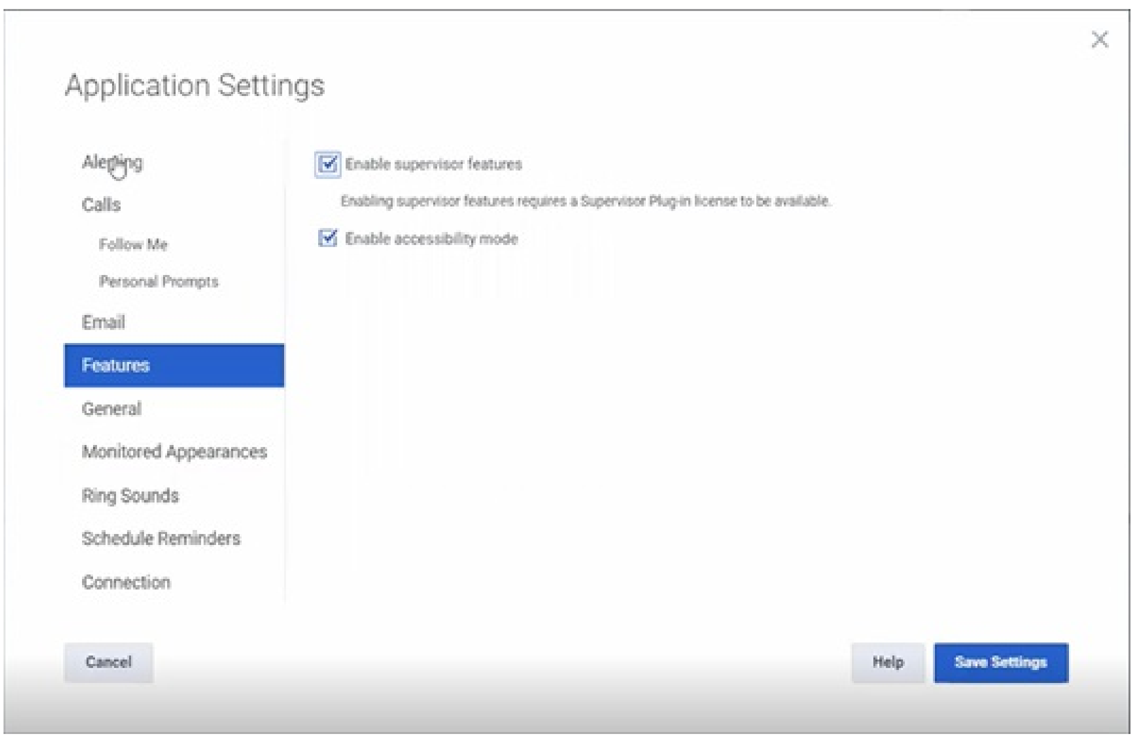
- Or to navigate from view to view and **within** a view, press **Tab** or **Shift+Tab**.
  Navigation within a view includes both the view contents and toolbar buttons.
- To move inside a selected view (activate the view), press **Spacebar**.

## Grid-based Views

- To move from row to row in grid-based views like the Company Directory, use the **Up** and **Down** arrow keys.
- If you enable Accessibility Mode, to move from cell to cell within a row use **Tab**, **Shift+Tab**, or the **Right** and **Left** arrow keys.
- To sort by the contents of the **currently selected column** in views with column headings, press **Spacebar** or **Enter.**

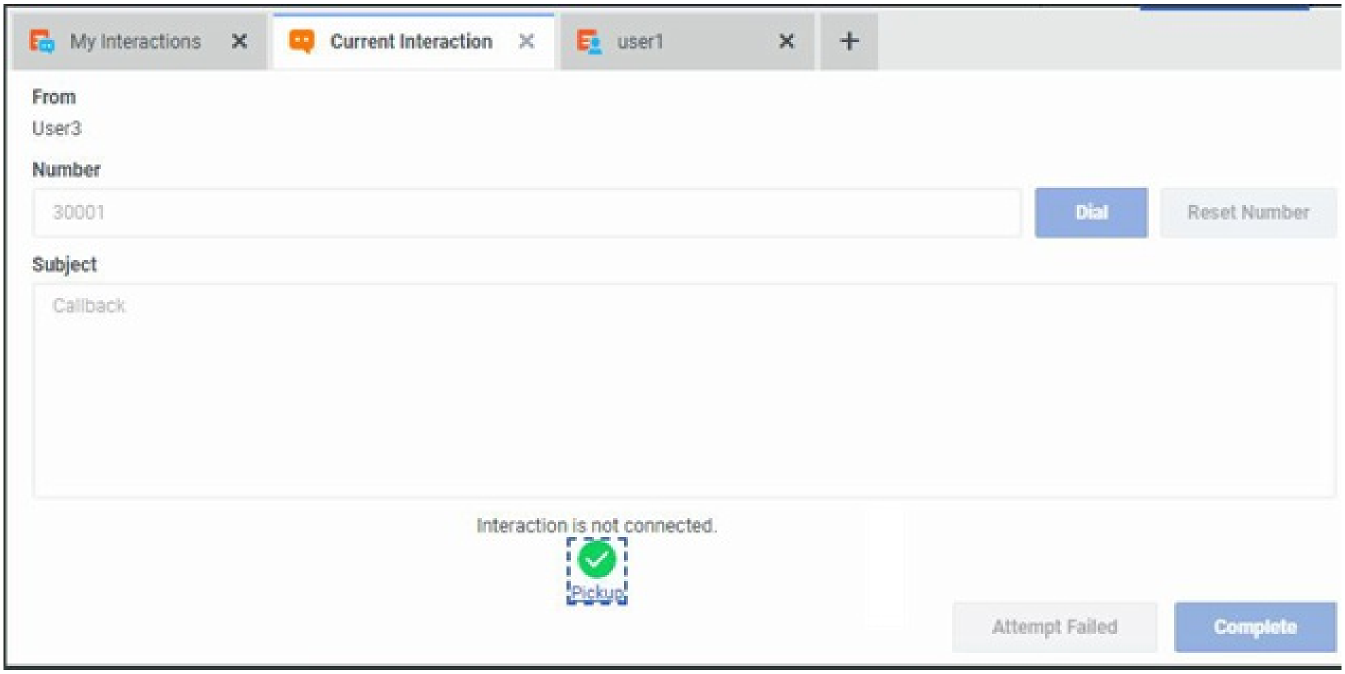
## Application Settings

Use the **Up** and **Down** arrows to select a setting type in the left side panel. Press **Spacebar** or **Enter** to move to the right-side settings panel. Focus moves to the first element in the panel. Use **Tab** to move to the elements in the panel.



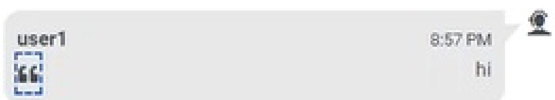

## Callbacks

Focus switches automatically to the **Current Interaction** view when you pick up a Callback interaction. Until you pick up a Callback interaction, the focus is on the **Pickup** button.




## Chats

When you work with Chat messages in the Current Interaction view, you can tab to the Qoute icon (reply). This icon is highlighted on hover or select. JAWS reads out a "Do you want to reply to this message?" prompt.

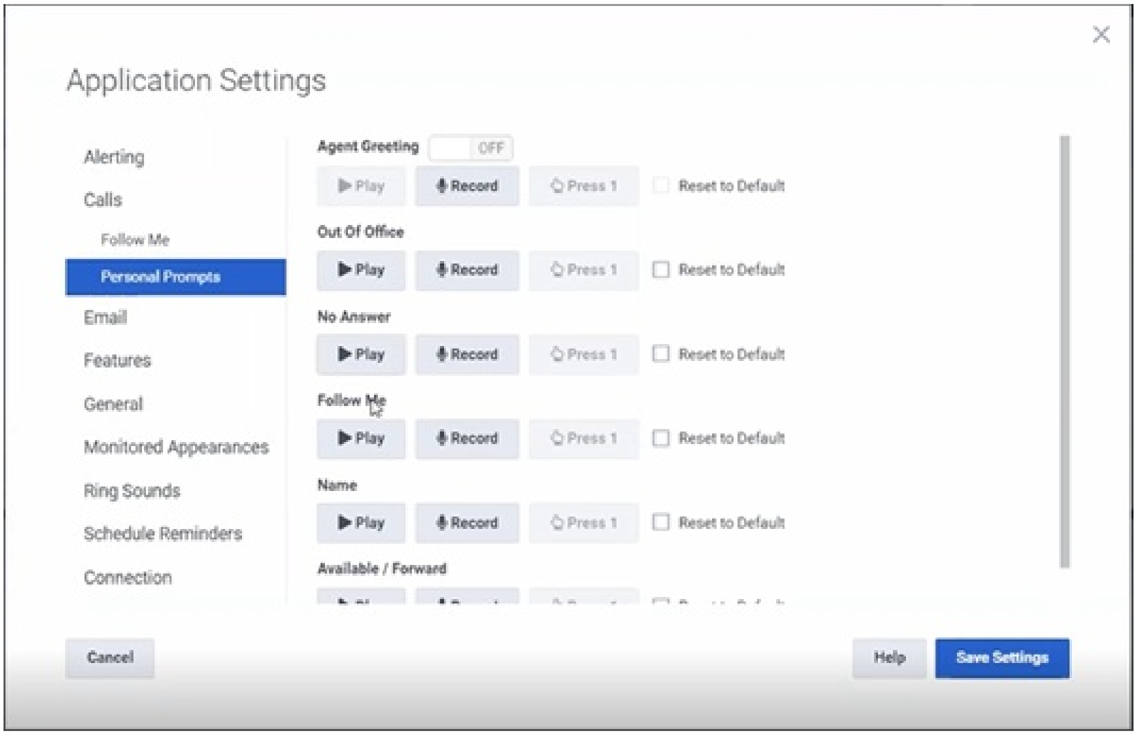



## Email messages

You can tab to the various elements of an email message in the **Current Interaction** view when composing a reply and then tab to the **Send** button. JAWS reads out all elements of an email message except for the body of the message. When viewing a sent or received email message, you can tab to the subject and  address fields.

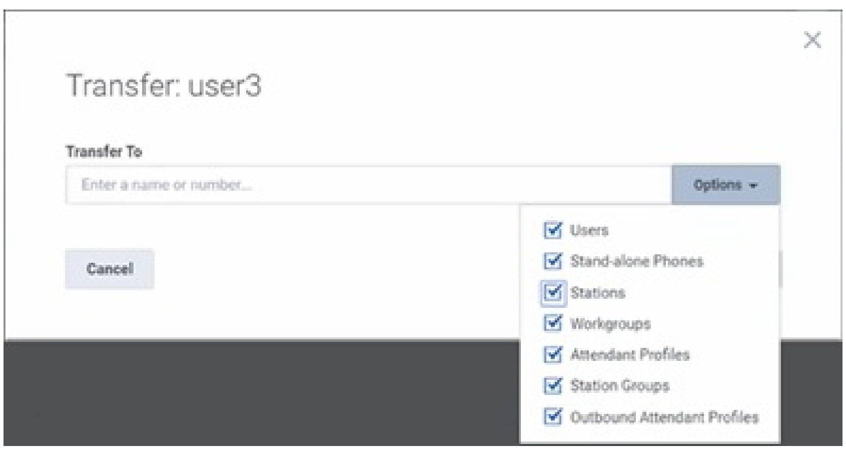
## Personal Prompts

When you configure personal prompts, use the **Up** and **Down** arrows to select **Personal Prompts**. Press **Spacebar** or **Enter** to move to the right-side settings panel. Focus moves to the first element in the panel. Use **Tab** to move to the to the options for each type of prompt. For more information, see Personal Prompts.




## Transfer interactions

Use **Tab** to navigate to all the fields and controls in the Advanced Dialing Options and Transfer dialog boxes. JAWS also reads out the contents of all fields.



# My Interactions Shortcuts

The following keyboard shortcuts are available **only when** My Interactions is your selected view. To use the corresponding action, the selected interaction must be in the correct state and you must have the appropriate rights.

Most of these shortcuts correspond to buttons on the My Interactions toolbar. For more information, see Queue Control Toolbar Buttons.

Click an action name for a description of the corresponding button or its function and requirements.

| Function | Shortcut |
|---|---|
| Coach an Interaction | Alt+O |
| Transfer a Call After Consulting the Recipient | Alt+C |
| Associate an Interaction to a Contact | Alt+A |
| Disconnect the current interaction | Alt+X |
| Hold | Alt+H |
| Join an Interaction | Alt+J |
| Journey Map | Ctrl+Alt+J |
| Listen to a Call | Alt+L |
| Mute | Alt+U |
| Pause Recording | Alt+G |
| Pickup | Alt+P |
| Private | Alt+I |
| Quick Add a Contact | Alt+Q |
| Record | Alt+R |
| Secure Pause a Recording | Ctrl+Alt+G |
| Remove a Disconnect Interaction from Queue | Ctrl+Alt+R |
| Transfer | Alt+T |
| Voicemail | Alt+M |

# Set Status in Accessibility Mode

Interaction Connect has a My Status section that enables you to set your current status, monitor time in current status, configure and use Fast Status buttons, view or specify status details and set your workgroup activation 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 PureConnect client users can view your status in Status column of the Company Directory.


**To set your status from the My Status drop down list:**

1. Display the Command Palette by doing one of the following:

- In Windows, press **Ctrl+.** (period)
- In Mac OS, press **Command+.** (period)

2. Begin typing **Change Status** or **Status**.
   A list of matching and applicable commands appears. Use the down arrow key to select **Change Status**.
3. To open the Status drop down list, press **Enter**.

   > **Tip**: Do not use the Down arrow key to open the list of available statuses. This removes **Available** from the list of selectable statuses.

4. Type a status name or use the **Up** or **Down** arrow keys to select a status and press **Enter**.
5. If needed, press **Tab** to **Set Status Details** and enter Status Notes, Forward Number, and Until Date and Time.

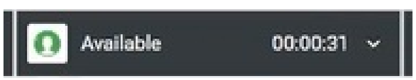
---

## Fast Status Buttons

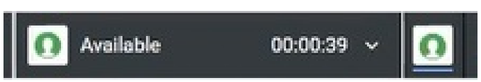
You can designate selected statuses as favorites. Favorite statuses appear as Fast Status buttons in the My Status section. Click a Fast Status button to set your status to one of you pre-selected favorites.

**To add a Fast Status button:**

1. Set your status. Keep your cursor in the My Status control.




2. Press **Ctrl+Alt+T** to make your current status a favorite status.
   A fast status button appears for your currently selected status.



# Create a Conference Call in Accessibility Mode

**Requirements**: Enable Accessibility Mode in PureConnect. Also, your PureConnect administrator must set the **accessibilityMode** Server Parameter to **True**.

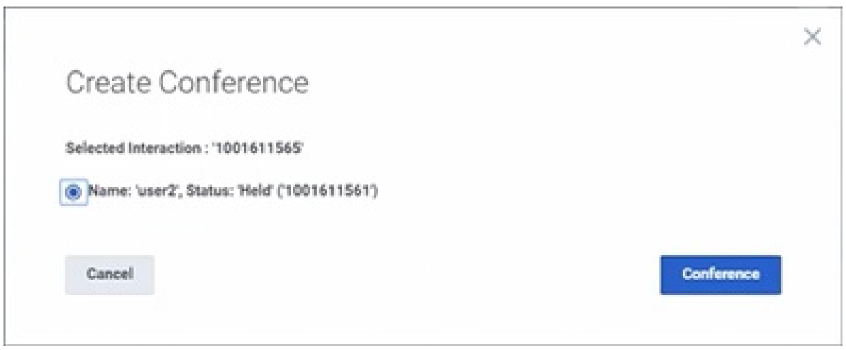
You can use the keyboard to create a conference call **only when in Accessibility Mode**. The Conference button is available only in Accessibility Mode.

**To create a conference call using the keyboard:**

1. Place a call.
2. Place another call. The previous call is placed on hold.
3. Repeat step 2 for each participant.
4. Select one of the calls you want to conference.
5. Do one of the following:

- Click the **Conference** button.
- Open the Command Palette by doing one of the following, then search for **Conference**. Use the down arrow key to select **Conference currently selected interaction (My Interactions)**. Press **Enter**.
  - In Windows, press **Ctrl+.** (period)
  - In Mac OS, press **Command+.** (period)

6. In the **Create Conference** dialog, press **Tab** to select the call you want, then press **Space.**




7. To create the conference, tab to the **Conference** button and press **Enter**.
8. To confirm you want to conference the selected interactions, in the **Conference Interactions** dialog, tab to the **Conference** button and press **Enter**.

## Create a Conference Chat in Accessibility Mode

> **Requirements**: Enable Accessibility Mode in PureConnect. Also, your PureConnect administrator must set the **accessibilityMode** Server Parameter to **True**.

You can use the keyboard to create a conference chat **only when in Accessibility Mode**. The Conference button is available only in Accessibility Mode.

**To create a conference chat using the keyboard:**

1. Initiate a chat session or pickup a Chat interaction.
2. Repeat step 1 for a each chat participant.
3. Select one of the chat interactions you want to conference.
4. Do one of the following:
    - Click the **Conference** button.
    - Open the Command Palette by doing one of the following, then search for **Conference**. Use the down arrow key to select **Conference currently selected interaction (My Interactions)**. Press **Enter**.
        - In Windows, press **Ctrl+.** (period)
        - In Mac OS, press **Command+.** (period)
6. In the **Create Conference** dialog, press **Tab** to select the chat or you want, then press **Space.**
7. To create the conference, tab to the **Conference** button and press **Enter**.
8. To confirm you want to conference the selected interactions, in the **Conference Interactions** dialog, tab to the **Conference** button and press **Enter**.

## Legibility

Interaction Connect features enhanced text and color contrast ratios based on WCAG 2.0 (Web Content Accessibility Guidelines). Improvements include borders or outlines around input fields, selected toolbar buttons, search fields, and the selected cell in a table view.

You can use your browser's Zoom feature to resize Interaction Connect interface up to 200 percent. Use the keyboard for vertical and horizontal scrolling when needed after resizing. Scrolling in two dimensions (vertically and horizontally) is minimized or eliminated where possible.

# 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
- Change Your Password
- Changing Station
- Exiting
- Language Setting
- Logging On
- Log on with a web-based phone
- Logging On Remotely
- Logging Off
- Private Mode
- Remote Station Types
- Running the CIC client from a Remote Location
- Single Sign On
- Stationless Logon

## Private Mode

Running Interaction Connect in a browser's "private" mode is not supported or recommended. Private mode typically disables browsing history and the web cache. In some instances, it prevents Interaction Connect from running at all.

"Private" mode has different names, depending on the browser: for example, Chrome Incognito mode, Internet Explorer InPrivate Browsing, and Firefox or Safari Private Browsing.

**Related Topics**

Starting and Exiting

## Logging On

**Requirements**: You need the Logon Stations Access Control right to a specific station to be able to log on to it.

**Warning**: Interaction Connect is an ICWS-based application. If you also use an IceLib-based application like IC Business Manager or your Interaction Connect system includes an IceLib-based application like a screen pop or third-party integration, you need to log on to Interaction Connect before logging on to the IceLib-based application. Otherwise, Interaction Connect may not be able to acquire the Client Access license it needs to function properly. You may not be able to add views for which you have rights or see default views like the Company Directory. If you experience this problem, contact your PureConnect administrator or Genesys Customer Care.

You can log on to only one CIC client station at a time, for security reasons.

- If you log on to a **different station**, the system drops the original station connection. For example, if you try to run Interaction Connect at the same time you are running Interaction Desktop on a different station, CIC drops the original connection. You receive a message at the original station stating "Your connection has been dropped due to a subsequent logon to a different station."
- If two different users try to log on to the **same station** from two different computers, the first user connects, the second doesn't.
- You can run **multiple instances** of Interaction Connect 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 Connect in different tabs of the same browser window or in a new browser window created from an existing browser window.

---

### Stationless Logon

Administrative, supervisor, IPA, Optimizer, Social Media, and other features are available without a station in Interaction Connect. Interaction Connect hides or disables features that require a station when you log on without selecting a station.

**Tip**: To log on without a station, select **Another Station** and then choose **No Station** as your Station Type.

## Save your settings

At several points in this log on process, you can select a check box that saves your selections. Saving your settings you to skip steps when logging on in the future. After you log on, you can adjust these automatic logon settings in the **Connection** page of the **Applications Settings** dialog box. And if you are using the web-based phone, you can change your microphone and speaker selections in the **Web-Based Phone** page of the **Applications Settings** dialog box.

**Tip**: If your CIC administrator has enabled Single Sign On and you select the **Always use this server** check box, you log back in automatically anytime you don't log off Interaction Connect but just close and reopen your browser.

**To log on to Interaction Connect:**

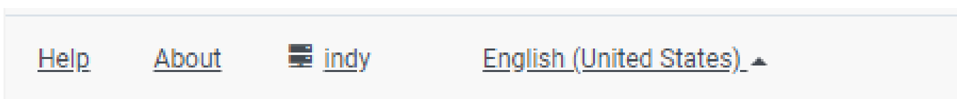
1. Point your browser to the logon page.

   **Tip**: Your CIC administrator can supply the URL for the logon page. If you have questions about any of the required entries, click the **Help** link in the **Application bar**.

2. If your organization uses more than one CIC server, you can choose a server:

   **Note**: You choose a CIC server at your initial logon, even if there is only one available. The logon process checks that the selected CIC server meets supported version requirements.

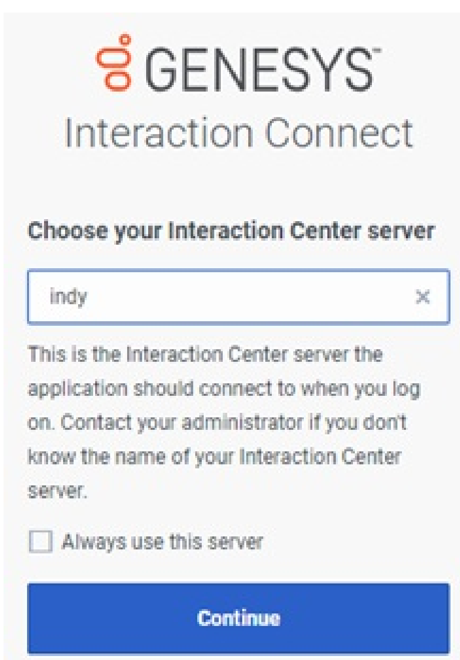
   a. If available, in the logon page, in the **Application Bar**, click the name of the currently selected server.

   b. In the **Choose Your Interaction Center Server** dialog box, do one of the following:

   If available, select a server from the Server drop-down list.

   Type the name of the appropriate CIC server in the **Server** text box.

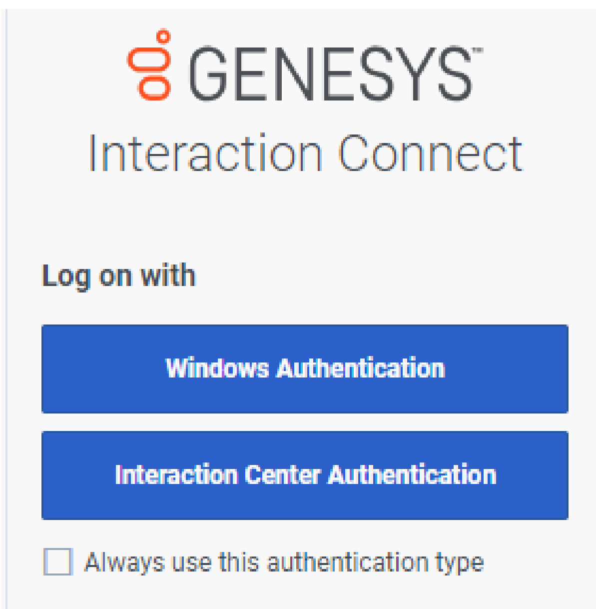
   
   

   c. Click **Choose Server**.

3. Optionally, change the language used in the interface. In the **Application bar**, click the name of the currently selected language and select a different language.

**Note**: This option is available only if your CIC administrator installs optional language packs on the CIC server. Also, your browser's language setting controls the formats used for dates, times, currency, and numbers.


4. If your CIC administrator has enabled Single Sign On, in the **Log on With** dialog box, do one of the following:




- Click **Windows Authentication** to use your Windows user ID and password to log on.
- Click **Interaction Center Authentication** to use your CIC user name and password to log on.
- Click the button for the alternate Identity Provider configured by your CIC administrator.

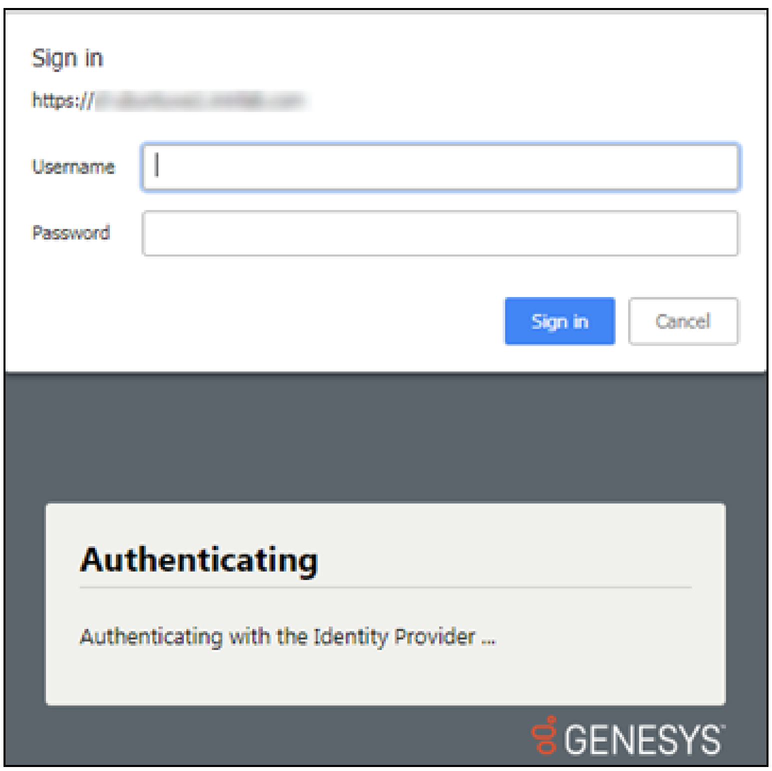
**Note**: The **Log on With** dialog box is available only if you can use more than one type of credentials to log on.

5. Enter the appropriate log on credentials by doing one of the following:

- If you selected **Interaction Center Authentication**, enter your **CIC User ID** and **Password** as configured in Interaction Administrator. Click **Log On.**


**Note**: You also see this dialog box if your CIC administrator has not enabled Single Sign On or you have a CIC 2015 R1 server.

- If you selected **Windows Authentication**, enter your **Windows user name** and **password**. Click **Sign In**.

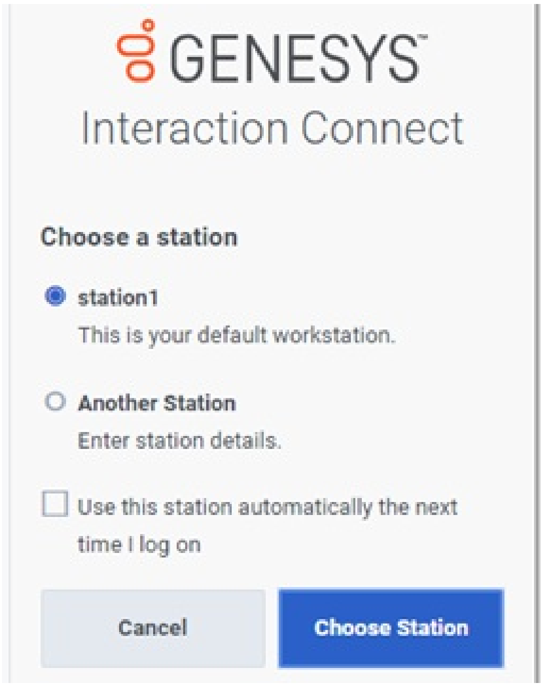



**Note**: This dialog box does **not** appear, if your CIC administrator configures your browser to enable Windows credentials to automatically pass to the CIC server. Also, the appearance of this dialog box varies according to the browser you use.

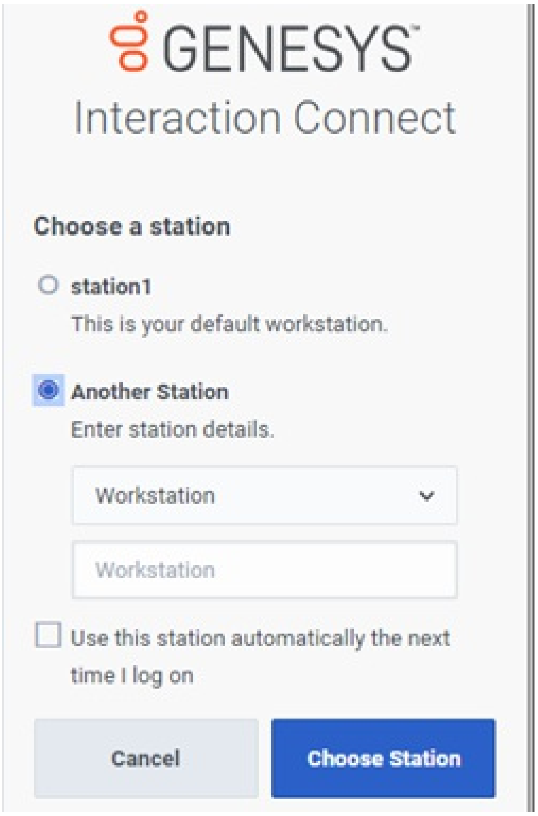
- If you selected another Identity Provider in the **Log on With** dialog box, follow your CIC administrator's instructions for entering credentials and logging on.

6. In the **Choose a Station** dialog box, do one of the following, and then click **Choose Station**:

- If the CIC administrator defined a default workstation for you, you can select it and click **Choose Station**.




- Or, select **Another Station,** complete the required details, and then click **Choose Station**.




## Station Type

In the Workstation drop-down list, select the type of station you are using to run the CIC client.

- Select **Workstation** if you use a computer and telephone connected by means of a telecom outlet (SIP or analog phone) to the CIC 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.
- Select **Web-Based Phone** if your CIC administrator has enabled this feature and set it up for you. For more information, see Web-Based Phone.
- Select **No Station**, if you are handling only interactions that do not require a station (like chats and emails) or if you require only the administrative and supervisor features in Interaction Connect. For more information, see Stationless Logon.

Do one of the following:

- If your station type is **Workstation** or **Remote Workstation**, enter the name of the workstation in the **Workstation** text box.
- If your station type is **Remote Number**, then enter the telephone number that CIC uses to call you in the **Remote Number** text box.
- If your station type is **Web-Based Phone**, make a selection from the **Microphone** and **Speaker** drop-down lists.

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

- To keep the connection to the CIC server active from the first time you require a voice connection to the CIC server until you log off, **select** the **Persistent** check box.
- To end the connection to the CIC server when either side disconnects for any reason, **clear** the **Persistent** check box.

### Persistent connection

**Requirements**: You need the Persistent Connections Security Right to select a persistent connection when you are using a Dynamic Remote Client Connection. You cannot use a Persistent Connect when you use a Web-Based Phone.

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 Security Right or station configuration, you can still log on after selecting **Persistent**. However, the CIC server ignores your request to establish a persistent connection.

**Example**: The first time a remote agent receives a call or requires a voice connection to the CIC 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 CIC server). If you leave the remote phone off-hook, and disconnect by means of the CIC client, the CIC 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.

**Related Topics**

Change Your Password
Web-Based Phone
Change your Web-Based Phone settings
Language Setting
Remote Station Types
Running the CIC client from a Remote Location
Single Sign On
Stationless Logon

## 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

## 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 CIC 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 CIC 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. Select the alerting call and click the Pickup button.
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 CIC 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 CIC 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 CIC 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 CIC 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


# 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 CIC 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 CIC server, the agent may enter a phone number (e.g., desk phone or cell phone) to which the CIC 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 CIC server is the remote station. The CIC 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 CIC 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 CIC server are not classified as either dynamic or configured “remote stations.” This is because SIP devices/phones connect directly to the CIC 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 CIC 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 CIC server. In any case, these stations are treated as local workstations by the CIC server.

## Remote Station Licenses

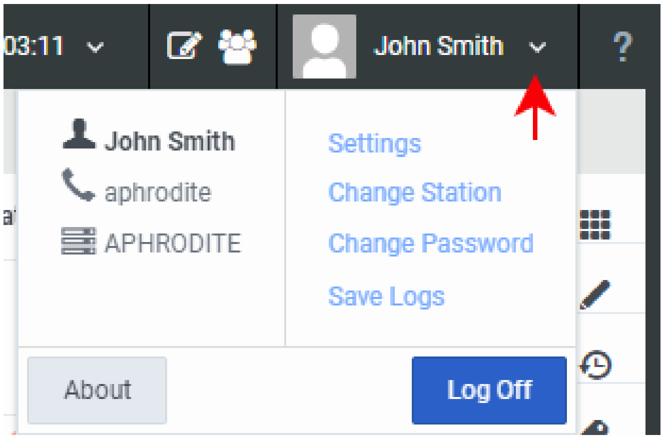
Even though dynamic remote stations are not configured in Interaction Administrator, each dynamic station connection is counted toward the total number of station licenses "in use" on your CIC server.  The number of current dynamic station connections is added to the number of configured stations (i.e., 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 CIC 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 CIC server as well.

### Related Topics

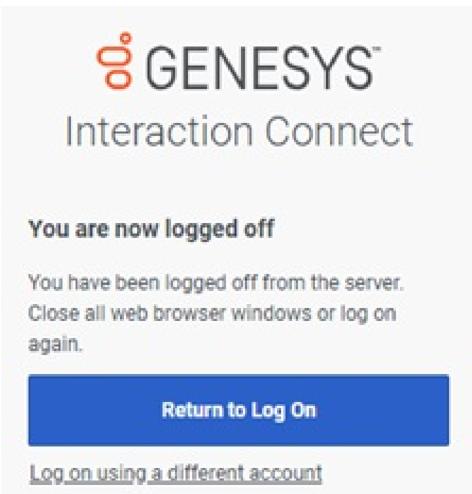
Running the CIC client from a Remote Location
Logging On

# Logging Off

You can log off by opening the menu and clicking **Log Off**.




This returns you to the Logon page and does not close the browser window. Click Return to Log On to log back on to Interaction Connect.




**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](#)

# 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](#)

# 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.

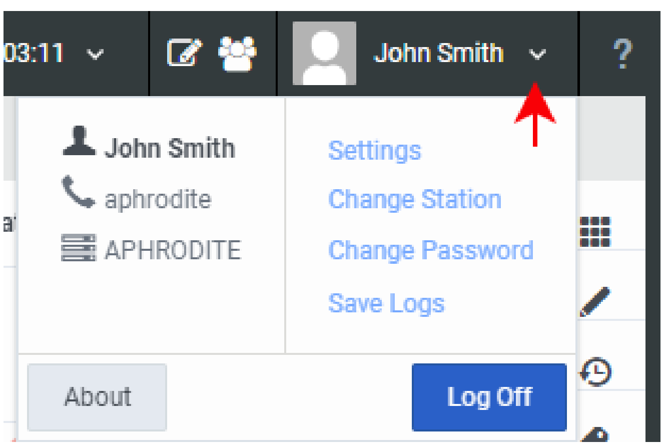
If your password is going to expire soon, a prompt appears periodically (usually once per day or on the next logon) asking if you want to change your password now. If you select **Yes**, then the Change Password dialog box appears.

> **Note**: You must have a valid CIC user ID and password to use the CIC client. This is required even if you use your Windows ID and password or other acceptable credentials to log on to the CIC client. For more information, see Single Sign On.

> **Tip**: You do not need to wait until you are prompted to change your password. You can change your password at any time.

**To change your password at any time:**

1. Open the Menu and click **Change Password**.




**Result**: The **Change Password** dialog box appears.

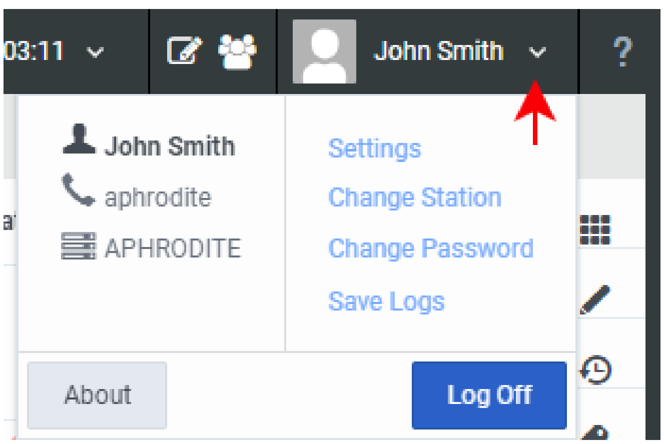

2. In **Old Password**, enter your current CIC password.
3. In **New Password**, enter your new CIC password.
4. In **Confirm New Password**, type your new password again.
5. Click **Change Password**.

## 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. You could logon without a station (Stationless Logon) and use change station to acquire a station, if needed.

**To change station:**

1. Open the menu and select **Change Station**.




2. In the **Choose a Station** dialog box, choose a station. For more information, see the instructions for choosing a station in Logging On.
3. Click **Choose Station**.

## Language Setting

If your CIC administrator has installed the appropriate Language Pack on the CIC server, you can select a language other than English for the Interaction Connect interface and help. The **Change Language** option is available when you log on to the CIC client.

> **Note:** This setting is independent of the Microsoft Windows **Regional and Language Options** setting. Your browser's language setting controls the formats used for dates, times, currency and numbers.

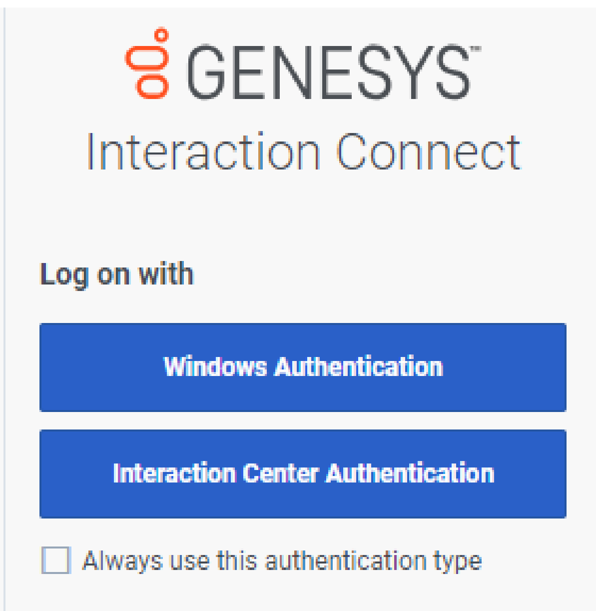
**Related Topics**

Logging On

## Single Sign On

Single Sign On enables you to log on to the CIC client using credentials other than your CIC user name and password. These credentials can be certified by any Identity Provider designated by your CIC administrator. Typically, you log on to your workstation, a network domain or some other secure system before you log on to the CIC client. This initial logon procedure prompts you for a user ID and password. These same credentials can then be used to log you on to CIC client automatically — without prompting you to enter the credentials again.

If your CIC administrator enables the Single Sign On feature, you can select which credentials to use in the **Log On With** dialog box.




**Related Topics**

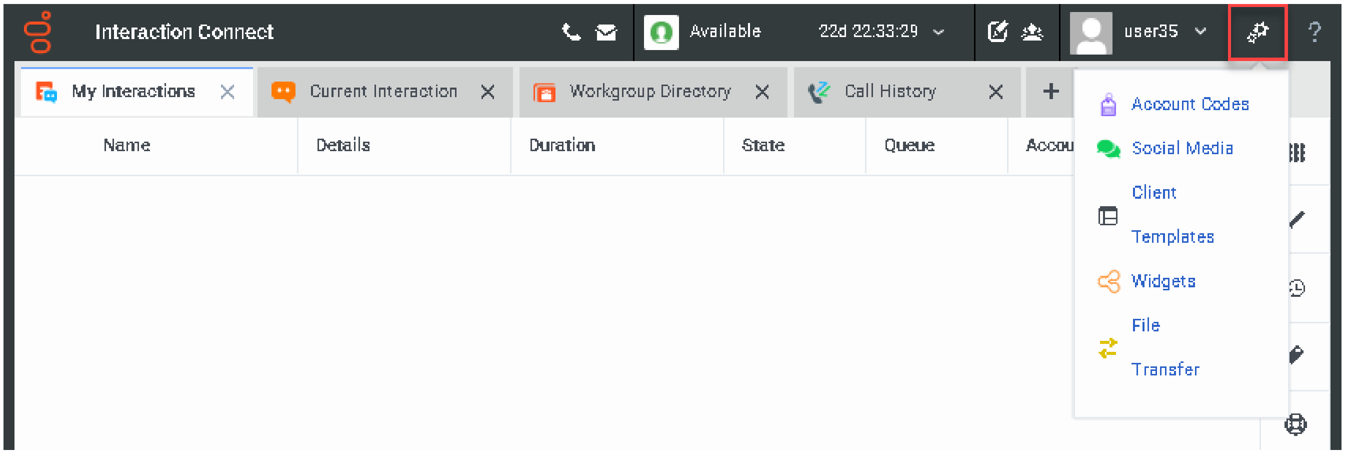
Logging On

# Administrators and Supervisors

## Administrator Views

If you have the appropriate administrator rights, an **Administrator Views button** appears in the CIC client. Your specific administrator rights determine the available selections.

To display your available options, click the button.




For more information about requirements for displaying these views and configuring the associated items, see:

- Working with Account and Wrap-Up Codes
- Configure Social Media and Managing Social Media
- Client Templates
- Widgets and Configure a Widget.
- Configure Inbound File Transfer Settings

## Configure a Widget

The Widgets view enables you to create, configure and deploy widgets to your company's website.

**Requirements**: See Widgets.

**To create a widget:**

1. Display the Widgets view, by doing one of the following:
   - Click the Administrator Views button, then click **Widgets**.
   - Use the Add Views dialog box. **Widgets** appears under Administration.
2. In the **Widgets** view, click **New**.
3. In the **Create a Widget** panel, type a **Name** for the widget.

3. Do one of the following:

- To configure this widget, click **Create**. In the Widget configuration panel, complete and save the Widget configuration options.

- To save the widget, but delay configuration, click the arrow on the **Create** button and select **Create Without Configuring**.

**To edit a widget's configuration:**

1. In the **Widgets** view, click a Widget configuration name.

   **Result**: The Widget configuration panel appears.
2. Update selected configuration options in the Widget configuration panel and then click **Save**.

**Related Topics**

Deploy a Widget

# Configure Inbound File Transfer Settings

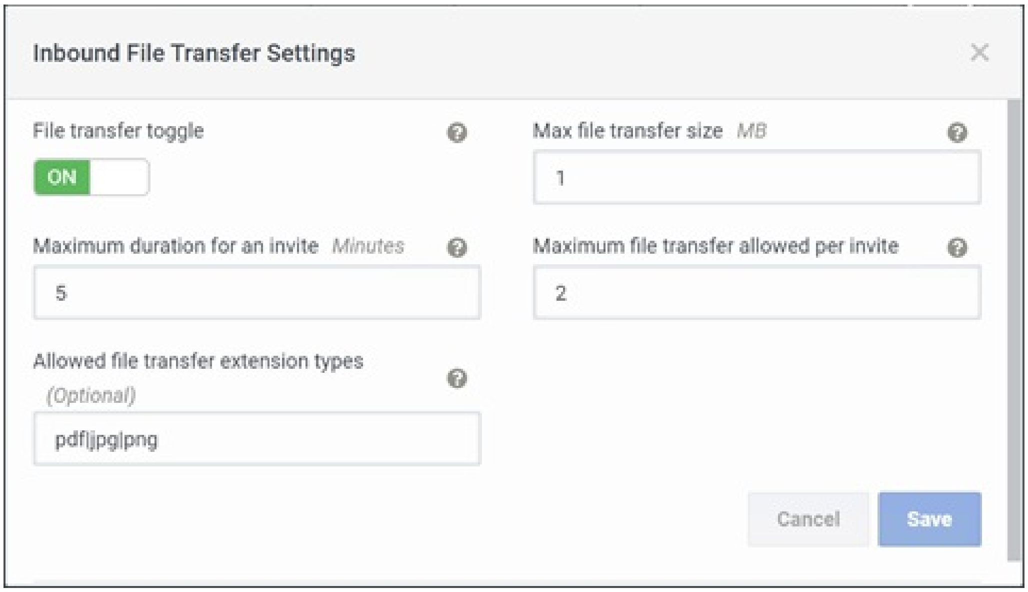
Your administrator can configure the settings that control inbound file transfers from visitors to your website and Interaction Connect users. By default, inbound file transfers are not allowed unless enabled here. Inbound file transfers work only for website visitors using the **Web Chat widget**. For more information, see Widgets and Accept and Send Files During a Chat.

**Requirements**: To configure inbound file transfer settings, administrators need the Widgets Configuration Master Security right. These settings control inbound file transfers for all Interaction Connect users. Agents do not need any additional rights after an administrator enables file transfer.

**To configure inbound file transfer settings:**

1. Click the Administrator Views button, then click **File Transfer**.

   **Result**: The Inbound File Transfer Settings dialog box appears.




2. To enable inbound file transfers for all Interaction Connect users, set the **File transfer toggle** to **ON**.

   **Note**: This setting enables or disables inbound file transfer for **all** Interaction Connect users.

3. In **Max file transfer size**, set the maximum size allowed for inbound transferred files in megabytes.

   **Note**: The maximum value you can set is 150 MB. The default is 5 MB.

4. In **Maximum duration for an invite**, set a limit in minutes for how long an agent's invitation to send a file remains usable.

   **Note**: After an invitation expires, the website visitor involved in a chat can no longer send a file to an agent. The default value is 15 minutes. The maximum limit is 300 minutes.

5. In **Maximum file transfer allowed per invite**, set a limit for the number of files a website visitor can send to an agent.

   **Note**: The maximum limit allowed is 25 files.

6. In **Allowed file transfer extension types**, enter the extensions of the types of files a **website visitor** can send to an agent.

   **Note**: To separate the file type extensions, use the pipe symbol (|). By default, all file types are allowed. Interaction Connect users can send any type of file.

7. When finished, click **Save**.

# Configure Account Codes

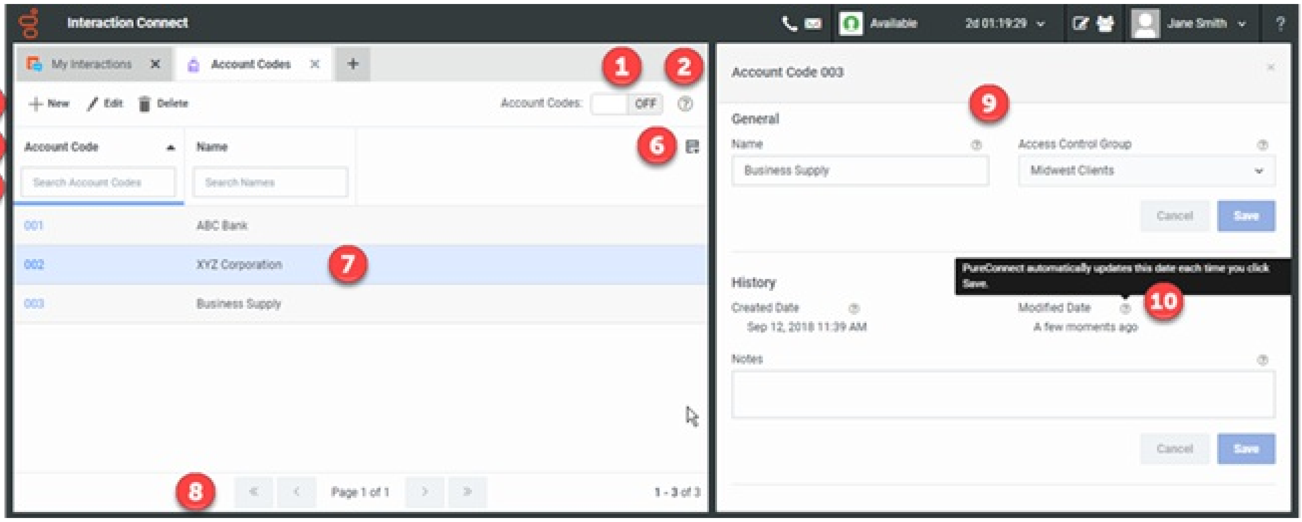
Administrators can create and configure Account Codes in Interaction Connect.

**Requirements**: You need the appropriate rights to both display the Account Code view and to configure account codes. See Requirements for Configuring Account Codes.

## Account Codes view

Display the Account Codes view by doing one of the following:

- Click the Administrator Views button, then click **Account Codes**.
- Use the Add Views dialog box. **Account Codes** appears under Administration.




| Account Codes view | | |
|---|---|---|
| 1 | **Account Codes** | Toggle switch for enabling account codes. This makes Account Codes generally available for assignment to interactions. Users must still meet the Requirements for Assigning Codes.<br><br>**Note**: The Account Codes toggle switch is visible only if you have the **Master Administrator** right, **Administrator Access** rights to **all** account codes, or Administrator Access to account codes in **all** Access Control Groups. It is not visible if you have Administrator Access only to **some** account codes; for example, selected individual account codes or account codes in selected Access Control groups. |
| 2 | **Help** | Click for Account Codes view help. |
| 3 | **Toolbar** | **New** (Add), **Edit**, and **Delete** controls.<br><br>**Note**: The **New** button is enabled only if you have the **Master Administrator** right, **Administrator Access** rights to **all** account codes, or Administrator Access to account codes in **all** Access Control Groups. The **New** button is disabled if you have rights to only **some** account codes. |
| 4 | **Column headings** | Sort the list by clicking the **Account Code** heading. Move columns by dragging and dropping column headings. For more information, see Customize Columns. |
| 5 | **Search** | Search for account codes by code number or name. |
| 6 | **Choose Columns** | Use the **Choose Columns** control to add or remove view columns. |
| 7 | **Account Codes** | A list of currently configured account codes. |
| 8 | **Paged display** | If you have more account codes than fit in the view, use the paging controls to scroll through the list. |
| 9 | **Configuration panel** | A slide out panel for adding or editing account codes. |
| 10 | **Help** | To display help for a selected field, point to this icon. |

**To configure Account Codes:**

1. Select the **Account Codes** view.

2. Do one of the following:

- To add an account code, click **New**.
- To edit an account code, select the code and click **Edit**.
- To delete an account code, select the code and click **Delete**.

> **Note**: When you add or edit an account code, the slide out panel appears.

3. In the slide out panel, complete these fields:

| | |
|---|---|
| **Code** | An account code is a set of numbers zero through 9 (up to a maximum of 50 digits). These numbers are associated with the account name.<br>**Note:** Account codes with leading zeros appear first in reports. For example, PureConnect sorts account numbers 1, 3, 20, 213, 0214, 1234, and 001235 as 001235, 0214, 1, 1234, 20, 213, and 3. |
| **Name** | The name of the account code. You select an account code by name when assigning an account code to an interaction. |
| **Access Control Group** | An Access Control Group (ACG) is a group of administrative rights. If you assign an ACG to an account code, then users must have this right to **edit** this account code configuration. You can assign only one ACG to an account code.<br>**Note**: This list appears only if the PureConnect administrator configures Access Control Groups in Interaction Administrator. |

4. Depending on whether you are creating or editing an Account Code, click **Create** or **Save**.

5. Optionally, manually document configuration changes in the **Notes** text box.

| | |
|---|---|
| **Created Date** | PureConnect automatically sets this date when a user creates the initial configuration for this account code. The date could be blank if an administrator created this account code during the initial PureConnect setup and configuration. |
| **Modified Date** | PureConnect automatically updates the date each time you click **Save**. |
| **Notes** | Type notes about configuration settings and changes. To identify the date of each note, you can manually enter the date beside each entry in the Notes field. |

6. Click **Save**.
7. After saving all configuration setting, click the **X** to close the slide out panel.
8. In the Account Codes view, set the **Account Codes** toggle to **ON** to enable Account Codes globally.

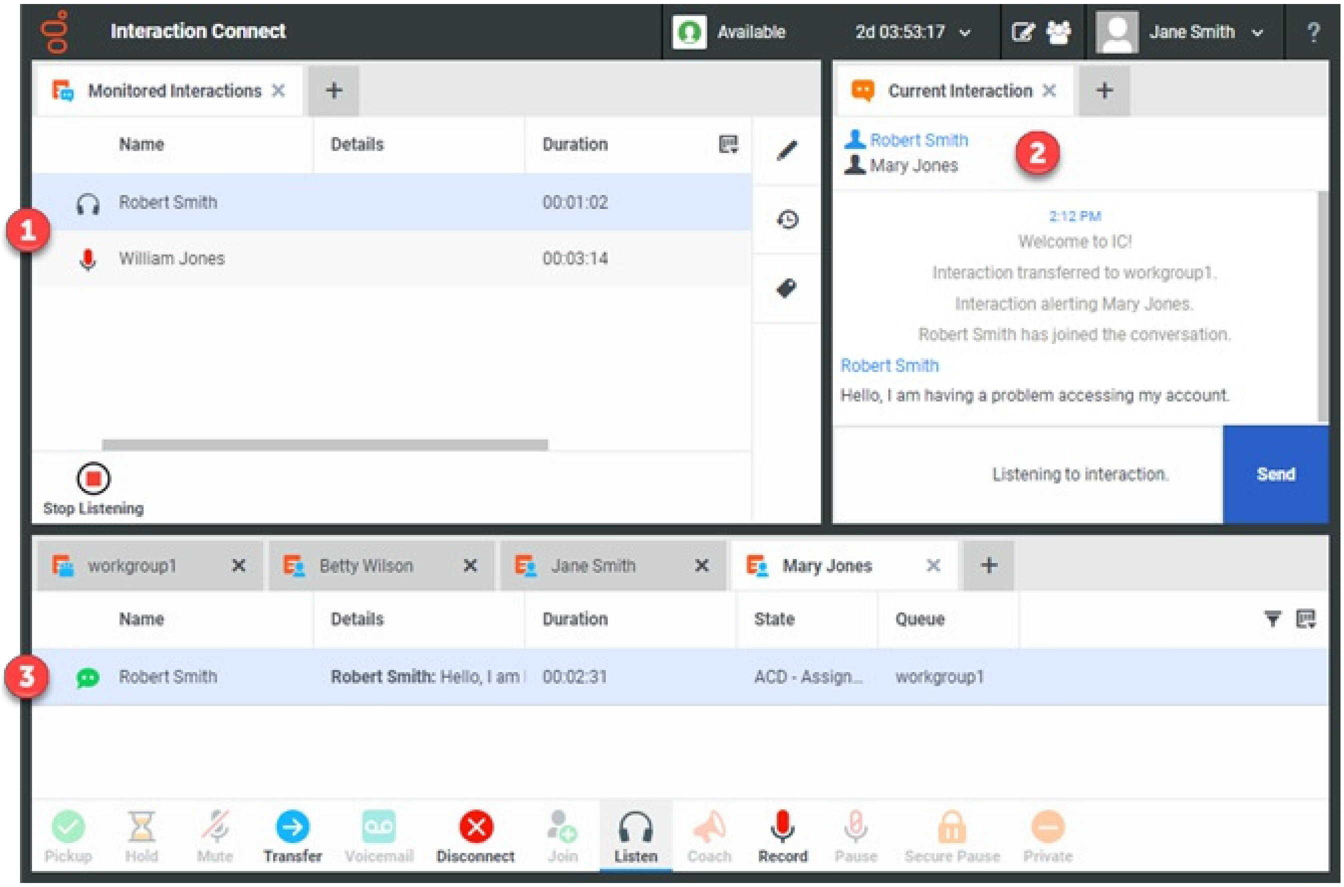
> **Note**: This makes Account Codes available. To use account codes, users must still meet the Requirements for Assigning Codes.

# Monitored Interactions

The Monitored Interactions view is available only to Supervisors. This view contains only the interactions that you are **listening to** or **recording**.

> **Requirements**: To display the Monitored Interactions view, you need the **Supervisor Plug-in: Workgroup license**. You must also log on **without** a station and **without** a Client Access License. For more information, see Stationless Logon.
>
> You select interactions to monitor in station, user, or workgroup queues. To monitor interactions on another queue, you need the appropriate Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights. You also need the "Record" and "Listen" Interaction Command Security Rights.

## Monitored Interactions view




| | |
|---|---|
| 1 | Interactions that you are monitoring appear in the Monitored Interactions view. |
| 2 | When available, information about the currently selected monitored interaction appears in the Current Interaction view. |
| 3 | You create a monitored interaction by listening to or recording an interaction in a User, Station, or Workgroup queue. |

**Tip**: To display the **Monitored Interactions** view, see Add or Close Views.

**To monitor interactions**:

1. Select an interaction from a queue that you have the rights to monitor.
2. Click the **Record** or **Listen** button.

   **Result**: The monitored interaction appears in the Monitored Interactions view.
3. When you finish monitoring the interaction, in the Monitored Interactions view, click **Stop Listening** or **Stop Recording**, as appropriate.

**Related Topics**

Stationless Logon

# Stationless Logon

Administrative, supervisor, IPA, Optimizer, Social Media, and other features are available without a station in Interaction Connect. Interaction Connect hides or disables features that require a station when you log on without selecting a station.

When you log on **with** a station, you must have both a Basic Station License and a Client Access License (assigned to a user or a station).If you logon **without** a station, Interaction Connect hides or disables features that require a Client Access License if you do not have a Client Access License.

**Tip**: To log on without a station, select **Another Station** and then choose **No Station** as your Station Type. You can switch back to using a station when necessary for managing ACD-routed interactions that require a station (call or callback) or using other agent-oriented features. Or you can log on after selecting a station, but later release the station by switching to **No Station**. For more information, see Changing Station.

## Available features

Here is what you can expect to see and do in Interaction Connect, based on how you log on and if a Client Access License is available.

| **Typical role** | *Agent* | *Limited Agent* | *Administrator or Supervisor* |
|---|---|---|---|
| **Log on with a Station?** | **Yes** | **No** | **No** |
| **Client Access License available?** | **Yes** (License checked automatically at station logon.) | **Yes** | **No** |
| Make a phone call control | Enabled | Visible but disabled | Hidden |
| Send email | Enabled | Enabled | Hidden |
| Directory views | • View available<br>• Make-call hyperlinks enabled<br>• Double-click dialing enabled<br>• Conference Call action available if you have security right. | • View available<br>• Make-call hyperlinks disabled<br>• Double-click dialing disabled<br>• Conference Call action disabled. | • View available if you have Supervisor license.<br>• Make-call hyperlinks disabled<br>• Double-click dialing disabled<br>• Conference Call action disabled. |
| Speed Dial views | • Views available<br>• Make-call functionality enabled<br>• Drag and drop conferencing enabled. | • Views available<br>• Make-call functionality disabled<br>• Drag and drop conferencing disabled. | • Views hidden |
| Wrap-up codes | Enabled | Enabled | Disabled |
| My Interactions | • View available<br>• All actions available according to Security Rights<br>• Monitored Appearances available in My Interactions | • View available<br>• Calls and Callback interactions do not alert.<br>• Pickup and Conference actions disabled.<br>• Other actions available according to Security Rights | • View hidden<br>• No interactions alert<br>• No supported media types |
| Monitored Interactions | • View hidden | • View hidden | • View available only if you have Interaction Supervisor Plug-in: Workgroup license<br>• All non-monitored interactions hidden.<br>• Actions disabled by capabilities<br>  ◦ Pick-up<br>  ◦ Conference<br>  ◦ Coach<br>  ◦ Join |
| Queue views | • View available<br>• All actions available according to Security Rights | • View available<br>• Actions disabled by capabilities<br>  ◦ Pick-up<br>  ◦ Conference<br>  ◦ Coach<br>  ◦ Join | • View availability governed by Supervisor license.<br>• Actions disabled by capabilities<br>  ◦ Pick-up<br>  ◦ Conference<br>  ◦ Coach<br>  ◦ Join |
| Call History | • View available<br>• Make Call links enabled | • View available<br>• Make Call links disabled | • View hidden. |
| Workgroup Statistics and Workgroup Overview | • Views available<br>• Functionality governed by Supervisor license | • Views available<br>• Functionality governed by Supervisor license | • Views availability governed by Supervisor license<br>• Functionality governed by Supervisor license |

| | | | |
|---|---|---|---|
| Scripter | • Views availability governed by two licenses:<br>• Scripter license<br>• Dialer license | • View hidden | • View hidden |
| Voicemail | • View available<br>• Station playback enabled | • View available<br>• Station playback disabled | • View hidden. |
| Message Waiting Indicator | • Available | • Available | • Hidden |
| Add-Ins | • Available<br>• Make Call API works | • Available<br>• Make Call API not available<br>• New API to retrieve current station information | • Available<br>• Make Call API not available<br>• New API to retrieve current station information |
| Personal Prompts | • Configuration page visible | • Configuration page visible, but disabled | • Configuration page hidden |
| **Agent views not requiring a station** | | | |
| Current Interaction | • View available | • View available | • Requires Supervisor license |
| Response Management | • View available | • View available | • View hidden |
| Fax | • View available | • View available | • View hidden |
| **Supervisor and Administrator views not requiring a station** | | | |
| Agent Statistics view | • Requires Interaction Supervisor Plug-In Workgroups license. See also Display and Configure Agent Statistics. | • Requires Interaction Supervisor Plug-In Workgroups license. See also Display and Configure Agent Statistics. | • Requires Interaction Supervisor Plug-In Workgroups license. See also Display and Configure Agent Statistics. |
| Interaction Optimizer views | • Requires Interaction Optimizer Client Access license. See Agent Optimizer Features and Requirements. | • Requires Interaction Optimizer Client Access license. See Agent Optimizer Features and Requirements. | • Requires Interaction Optimizer Client Access license. See Agent Optimizer Features and Requirements. |
| Genesys Cloud Integration view | • View available if the Genesys Cloud Integration is installed on IC Server. | • View hidden | • View hidden |
| Co-browse view | • CIC administrator must acquire Genesys Cloud Engage 3 license and configure the web-based phone feature. | • CIC administrator must acquire Genesys Cloud Engage 3 license and configure the web-based phone feature. | • CIC administrator must acquire Genesys Cloud Engage 3 license and configure the web-based phone feature. |
| Interaction Process Automation views | • Requires IPA Access license. See IPA User Licenses. | • Requires IPA Access license. See IPA User Licenses. | • Requires IPA Access license. See IPA User Licenses. |
| Administrator views | • Requires appropriate Administrator rights for the view. For the Account Codes view, see Requirements for Configuring Account Codes. | • Requires appropriate Administrator rights for the view. For the Account Codes view, see Requirements for Configuring Account Codes. | • Requires appropriate Administrator rights for the view. For the Account Codes view, see Requirements for Configuring Account Codes. |
| Widget Configuration | • Requires appropriate Administrator Access rights. See Widgets. | • Requires appropriate Administrator Access rights. See Widgets. | • Requires appropriate Administrator Access rights. See Widgets. |

**Related Topics**

Monitored Interactions

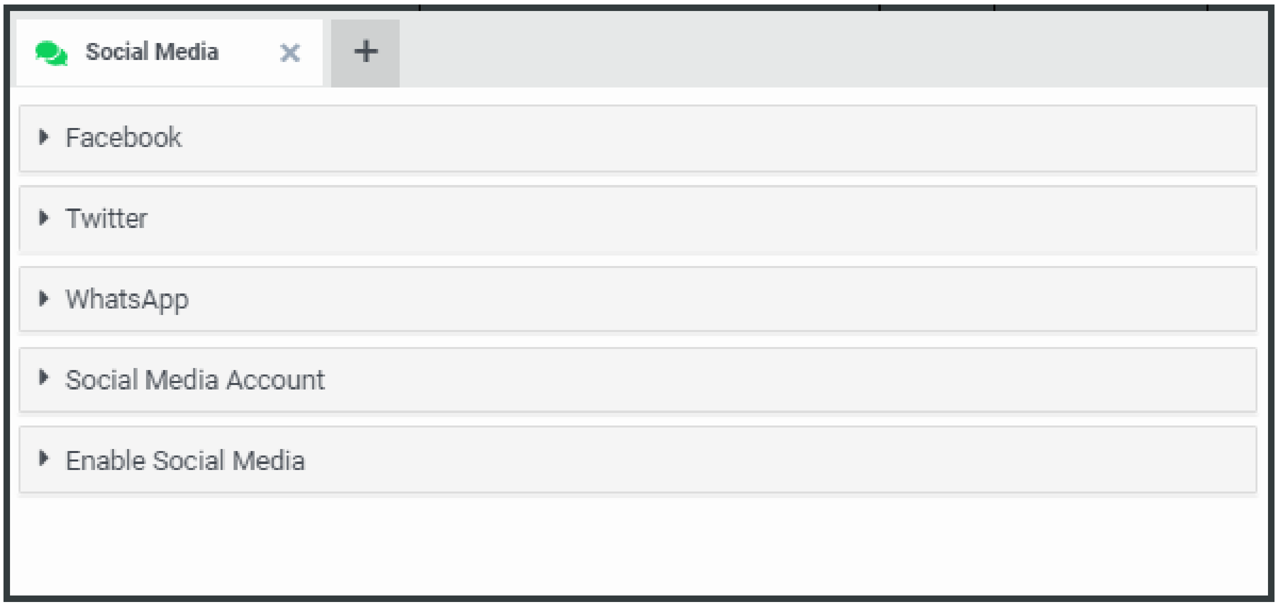
# Configure Social Media

Administrators can enable the social media feature, log on to a social media account, and create Facebook, Twitter, and WhatsApp channels in Interaction Connect.

> **Requirements**: To display the Social Media view, you need the **Social Media Administrator Access** right and the **ACD Social Media** license. To add a view to Interaction Connect, you also need the Customize Client Security right. For more information on the requirements for Social Media, see Managing Social Media and the PureConnect Social Media Technical Reference in the PureConnect Documentation Library.

**To configure social media:**

1. Display the **Social Media** view, by doing one of the following:
   - Click the Administrator Views button, then click **Social Media**.
   - Use the Add Views dialog box. **Social Media** appears under Administration.




2. Enable Social Media.
3. Log on to the corporate Social Media account.
4. Configure Facebook, Twitter, and WhatsApp channels.

> **Note**: You must enable Social Media and log on to your Social Media account before you can configure Facebook and Twitter channels.

**Related Topics**

Managing Social Media

## Enable Social Media

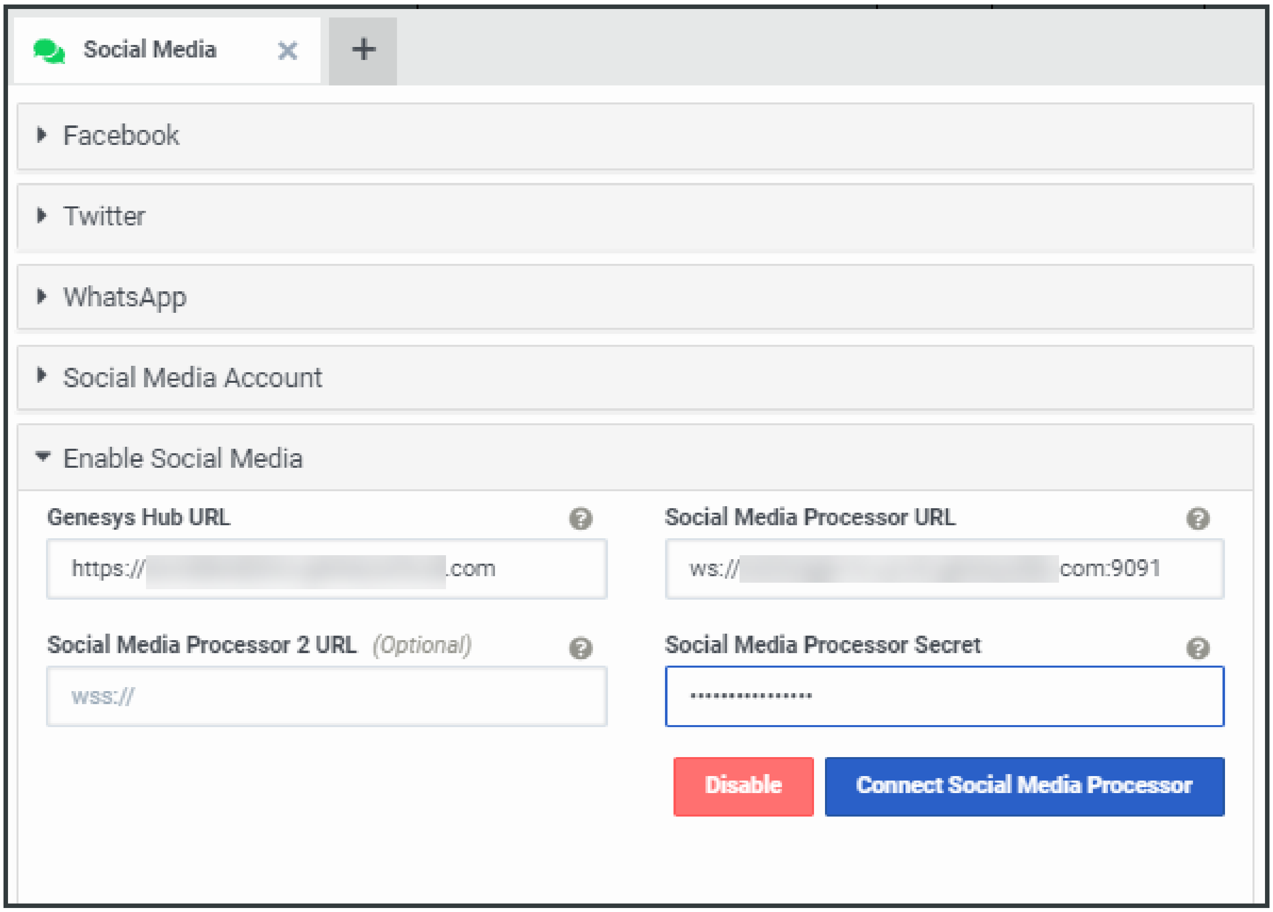
You enable social media by hooking up your Social Media Processor. The Social Media Processor processes and caches Social Media messages. For more information, see the *PureConnect Social Media Technical Reference* in the PureConnect Documentation Library.

1. Expand the **Enable Social Media** section of the **Social Media** view.
2. In **Genesys Hub URL**, enter **https://socialanalytics.genesyscloud.com**.

   **Note**: Genesys Hub URL is not required for WhatsApp Direct Messages.
3. Enter the URL in the **Social Media Processor URL** box.

   **Note:** In the OpenShift environment, this URL is unique for each customer. Whereas in the Hive environment, this URL is unique for each region.
4. In the remaining two fields, enter the required information, then click **Connect Social Media Processor**.

   **Note**: Open a ticket in your support portal with Customer Care to request a Social Media Processor in Genesys Cloud and a PureConnect Social Media account. Customer Care will provide the necessary information for this part of the configuration. See Managing Social Media for licensing requirements.




5. Click **Connect Social Media Processor**.

   **Result**: The CIC server starts communicating with the Social Media Processor.

   **Note**: After you Enable Social Media, the next step in the configuration process is to Log On to the Social Media Account.

**Related Topics**

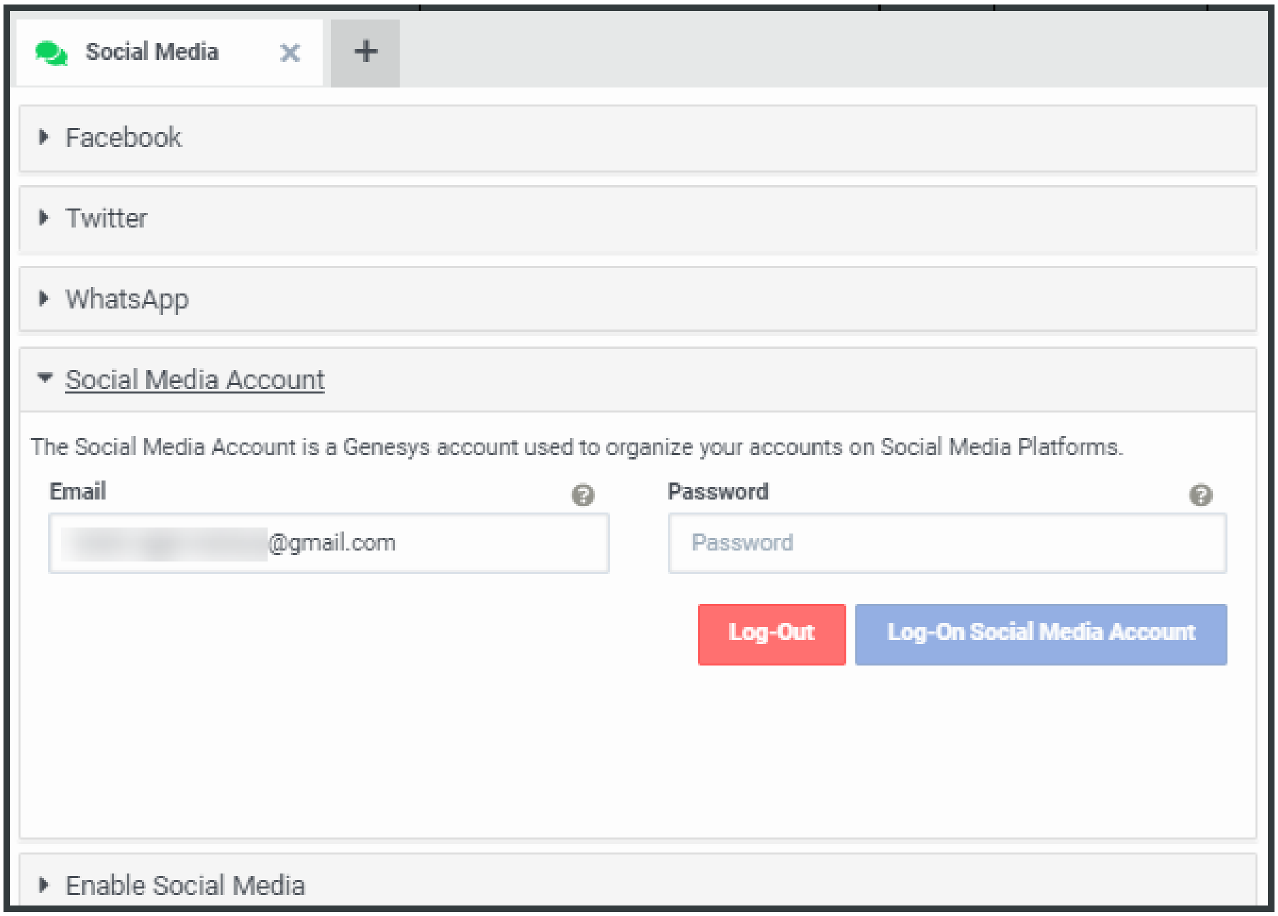
Configure Social Media

## Log On to the Social Media Account

To complete the process of deploying Social Engagement in the Genesys Cloud, you must log on to a corporate Social Media Account on the Genesys Hub. This is an overall account that contains all the platform accounts like Facebook, Twitter, and WhatsApp. This account enables the IC server to communicate with the Genesys Hub.

> **Note**: Open a ticket in your support portal with Customer Care to request a Social Media Processor in Genesys Cloud and a PureConnect Social Media account. Customer Care will provide the necessary information for this part of the configuration. See Managing Social Media for licensing requirements.

1. Expand the **Social Media Account** section of the Social Media view.
2. Enter your Social Media Account email address. This is where you receive notices and other information from the Genesys Hub.
3. Supply the password for the Social Media Account. (This is not the email account password.)




4. Click **Log On Social Media Account**.

> **Note**: After you log on to your company's Social Media Account, the next step in the configuration process is to configure the necessary Facebook, Twitter, and WhatsApp channels to receive and direct customer message to the appropriate workgroup.

**Related Topics**

Configure Social Media

## Configure Facebook channels

A channel represents a Facebook page. CIC routes visitor posts and direct messages on the selected Facebook page to the selected workgroup.

> **Note**: You must enable Social Media and log on to your Social Media account before you can configure Facebook or Twitter channels.

1. Expand the Facebook section and click **Add Facebook Account**.

2. Log on to an existing corporate Facebook account.

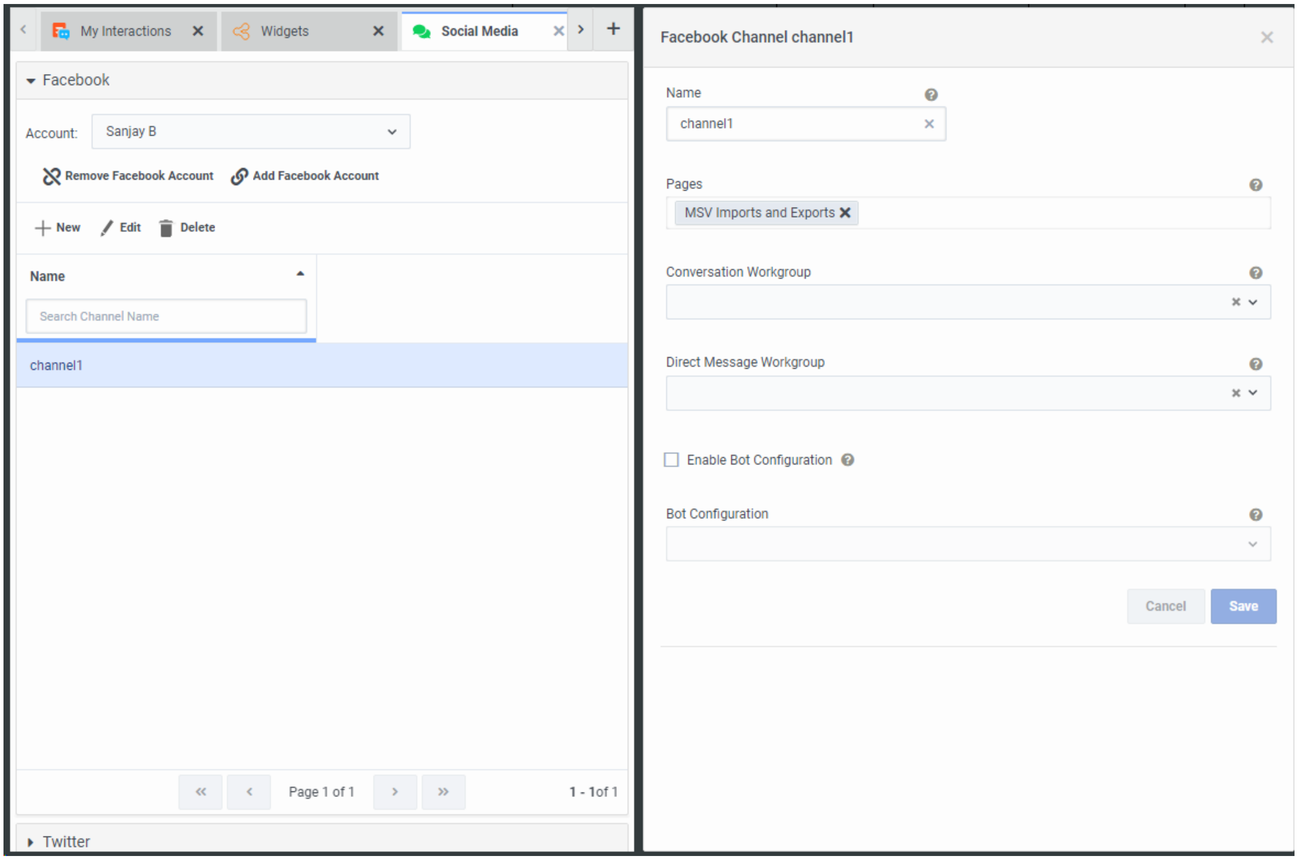
> **Note**: This is the account that manages your business Facebook page or pages.

**Result**: A successful logon adds this Facebook account to the **Account** drop down list.

3. If prompted, authorize the Facebook account to use the GenesysSocialEngagement app.

> **Note**: Authorizing the GenesysSocialEngagement app enables the Genesys hub to route visitor posts and direct messages on the Facebook page to the appropriate workgroup as interactions.

4. Click **New**.




5. In **Name**, type a name for this Facebook channel.

> **Note**: Use this label to organize your Facebook channels.

6. In **Pages**, select the appropriate corporate Facebook page.

> **Note**: This is the display name of the Facebook page. This selection is limited to the pages administered by the selected Facebook account.

7. Configure either or both of these options:
   - In **Conversation Workgroup**, select the CIC workgroup to which you want Social Media conversations to be routed.
   - In **Direct Message Workgroup** select the CIC workgroup to which you want Social Media direct messages to be routed.

> **Tip**: You can select the same or different workgroups for these options. Public conversations and direct messages for one channel can go to different workgroups.

> **Note**: The workgroup must have an **ACD queue**. CIC routes Social media interactions only to the agents in this workgroup who have the **ACD Social Media** license. The CIC administrator must also set **Utilization options** for **Social Conversation** and **Social Direct Message** for the workgroup or users.

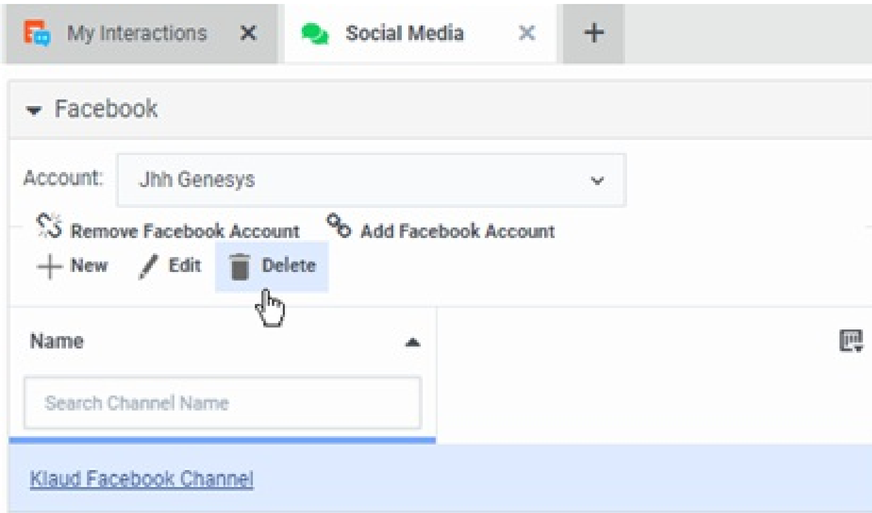
8. To enable bot configurations to incoming Social Media direct messages on a channel:
   - Check the **Enable Bot Configuration** box.
   - Select appropriate bot from **Bot Configuration** drop-down list for which bot configurations should be enabled.

**Note**: You must configure a bot from Bot View before you can enable the Bot configuration. (For more information, see Configure a Bot). Once you complete the enabling of bot configuration in social media, update the handlers 'CustomSocialMediaDirectMessageChatBotRouting.ihd' and 'CustomSocialMediaDirectMessagePostChatBotRouting.ihd' on the IC server for customization and publish handlers.

8. Click **Create**.

   **Result**: The new Facebook Channel name appears in the **Social Media** view.

   **Tip**: You can edit or delete the Facebook channel by selecting its label and clicking the appropriate button in the **Social Media** view.




**Related Topics**

Configure Social Media
Configure a Bot

## Configure Twitter channels

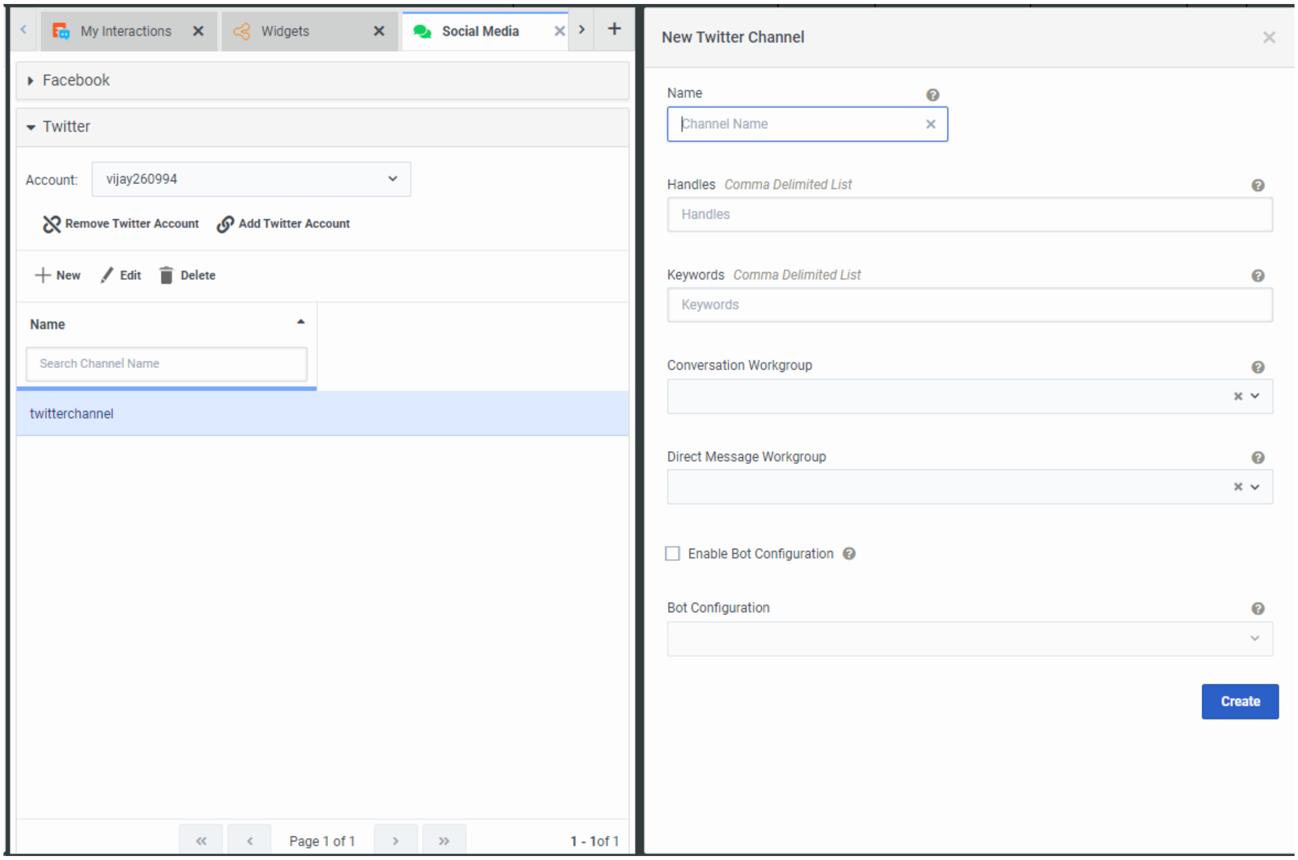
A channel represents a corporate Twitter account. CIC routes posts (tweets) and direct messages on the selected Twitter account to the selected workgroup.

**Note**: You must enable Social Media and log on to your Social Media account before you can configure Facebook or Twitter channels.

1. Expand the Twitter section and click **Add Twitter Account**.
2. Log on to an existing corporate Twitter account and authorize it to use the GenesysSocialEngagement app.

   **Note**: This is the account that manages your corporate Twitter feed. Authorizing the GenesysSocialEngagement app enables the Genesys hub to route Tweets and direct messages to appropriate workgroup as interactions.

   **Result**: A successful logon adds this Twitter account to the **Account** drop down list.
3. Click **New**.




4. In **Name**, type a name for this Twitter channel.

> **Note**: Use this label to organize your Twitter channels.

5. In **Handles**, enter the corporate Twitter username. If your company uses more than one account, separate the handles with a comma.
   **Result**: Tweets from this handle create an interaction.
6. In **Keywords**, enter search terms.
   **Result**: Any Tweet containing the keyword creates an interaction. Repeating the corporate handle as a keyword creates interactions for Tweets directed at the corporate handle.
7. Configure either or both of these options:
   - In **Conversation Workgroup**, select the CIC workgroup to which you want Social Media conversations to be routed.
   - In **Direct Message Workgroup** select the CIC workgroup to which you want Social Media direct messages to be routed.

> **Tip**: You can select the same or different workgroups for these options. Public conversations and direct messages for one channel can go to different workgroups.

> **Note**: The workgroup must have an **ACD queue**. CIC routes Social media interactions only to the agents in this workgroup who have the **ACD Social Media** license. The CIC administrator must also set **Utilization options** for **Social Conversation** and **Social Direct Message** for the workgroup or users.

8. To enable bot configurations to incoming Social Media direct messages on a channel:
   - Check the **Enable Bot Configuration** box.
   - Select appropriate bot from **Bot Configuration** drop-down list for which bot configurations should be enabled.

> **Note**: You must configure a bot from Bot View before you can enable the Bot configuration. (For more information, see Configure a Bot). Once you complete the enabling of bot configuration in social media, update the handlers 'CustomSocialMediaDirectMessageChatBotRouting.ihd' and 'CustomSocialMediaDirectMessagePostChatBotRouting.ihd' on the IC server for customization and publish handlers.

9. Click **Create**.
   **Result**: The new Twitter Channel name appears in the Social Media view.

> **Tip**: You can edit or delete the Twitter channel by selecting its label and clicking **Edit** or **Delete** in the **Social Media** view.

**Related Topics**

[Configure Social Media](#).
[Configure a Bot](#)

## Configure a WhatsApp channel

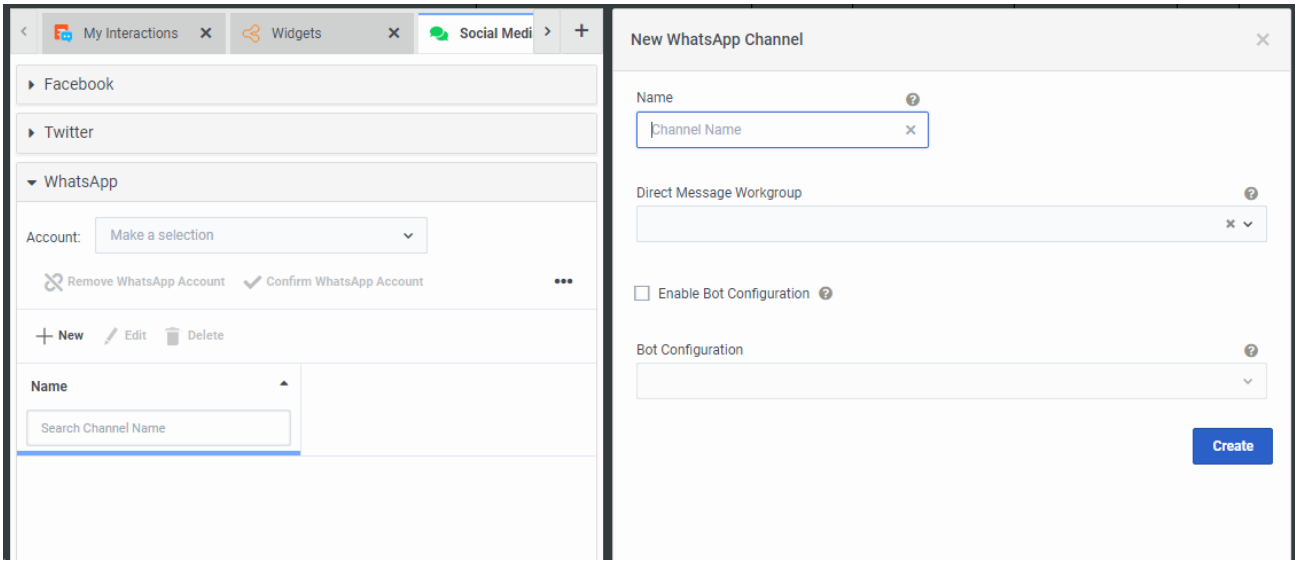
A channel represents a corporate WhatsApp account. CIC routes direct messages on the selected WhatsApp account to the selected workgroup. You can create **only one** WhatsApp channel. If you try to create more than one channel, the previous channel is overwritten.

> **Note**: You must enable Social Media and log on to your Social Media account before you can configure your WhatsApp channel.

1. Expand the WhatsApp section and click **Add WhatsApp Account**.
2. Log on to an existing corporate WhatsApp account.

   > **Note**: This is the account for your corporate WhatsApp direct messages. Authorizing the GenesysSocialEngagement app enables the Genesys hub to route WhatsApp direct messages to appropriate workgroup as interactions.

   **Result**: This adds the WhatsApp account to the **Account** drop down list.


   a. Enter the **Phone Number** for the new WhatsApp channel.

   > **Note**: Enter the phone number in E.164 International Standard Format: +(country code) <number>. Do not enter any spaces between the digits in the phone number; for example, +13175555555).

   b. Supply the **WABA Certificate** for this account.
   WABA is the WhatsApp Business Account. This is the Certification Authority (CA) certificate used for the SSL configuration of both the WhatsApp Business API Client and Webhooks. (see https://developers.facebook.com/docs/whatsapp/api/certificates/).

   c. For Authentication Method, select **Voice** or **SMS**.

   > **Note**: If you select **Voice**, you receive a call unless the Phone number you use is configured for Voicemail only.

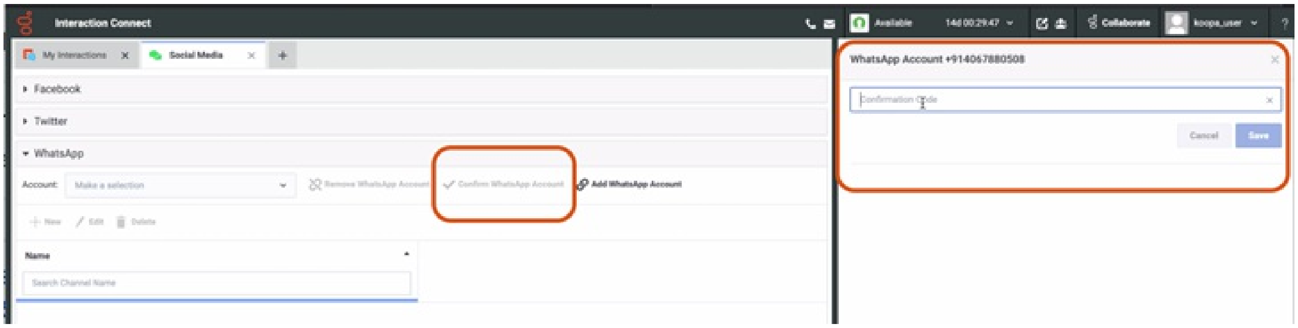
3. Click **Create**.
4. In the **Social Media** view, in the **Account** dropdown list, select the WhatsApp account.
5. In **Name**, type a name for this WhatsApp channel.

   > **Note**: Use this label to organize your WhatsApp channels.

6. To enable bot configurations to incoming Social interactions on a channel:
   - Check the **Enable Bot Configuration** box.
   - Select appropriate bot from **Bot Configuration** drop-down list for which bot configurations should be enabled.

   > **Note**: You must configure a bot from Bot View before you can enable the Bot configuration. (For more information, see Configure a Bot). Once you complete the enabling of bot configuration in social media, update the handlers 'CustomSocialMediaDirectMessageChatBotRouting.ihd' and 'CustomSocialMediaDirectMessagePostChatBotRouting.ihd' on the IC server for customization and publish handlers.

7. Click **Create**.
   **Result**: A Confirmation Code panel appears.




8. Enter the confirmation code you received via the Authentication Method you selected and click **Save**.
   **Result**: The new WhatsApp channel name appears in the Social Media view.

> **Note:** If you encounter an error message while creating the WhatsApp channel, the error may have occurred due to timeout. It may have taken too long to get the confirmation code. The integration may have been created anyway. Try reloading the page, selecting the phone number and clicking the **Confirm WhatsApp account** button. If there is any other issue, contact the Genesys Customer Care team for assistance.

> **Tip**: You can edit or delete the WhatsApp channel by selecting its label and clicking **Edit** or **Delete** in the **Social Media** view. If you delete a WhatsApp channel, wait for 15-20 minutes before creating another channel with the same phone number. If you encounter any errors while creating, editing, or deleting the WhatsApp channel, always try reloading the page and trying again before calling Customer Care.

**Related Topics**

Configure Social Media
Configure a Bot

# Manage Alerts

**Requirements**: To configure alerts, you need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features. You can view the active alerts you have configured in the Active Alerts view. To add views, you need the Customize Client Security right.

**Warning**: PureConnect does not support simultaneously logging into Interaction Connect and ICBM to manage alerts.

Alerts report real-time information. An alert notifies when a statistic enters a user-defined threshold, is within bounds, or is no longer within a range of values.

You can base alerts for telephone calls on calls longer than a specific duration, average hold time greater than a specified value, and many other metrics. Moreover, you can set alerts for any statistic in Interaction Supervisor. For example, an IT administrator can set an alert for when server disk space falls below a minimum threshold. A statistic can have multiple alert conditions, each with its own alert action and notification options. For example, an alert can have a condition that warns when it reaches a non-critical threshold, and another that sends email notifications when critical conditions exist.

Supervisors can configure alerts and display these alerts in Interaction Connect or Interaction Supervisor in ICBM. In Interaction Connect, you display your alerts in the Active Alerts view. Alerts also appear in Interaction Connect in the Agent Statistics, Workgroup Statistics, and Workgroup Overview views. Alerts use color-coded icons and tooltip text to emphasize selected metrics. Alerts can optionally send email notifications or client memos, play sounds, or invoke a handler.


**Related Topics**

- Add an Alert
- Edit an Alert
- Delete an Alert
- Alert Sounds
- Manage Alerts dialog box
- Active Alerts view

## Add an Alert

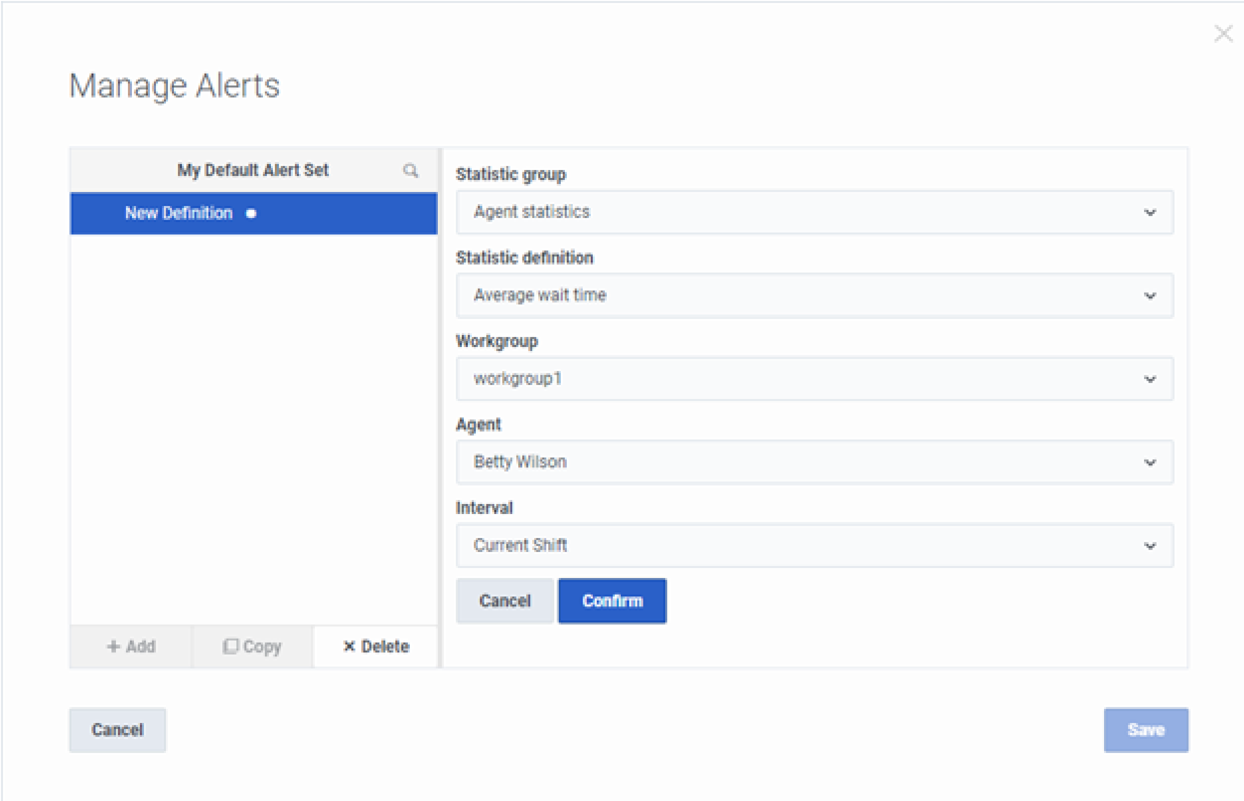
**Requirements**: See Manage Alerts.

Configuring an alert provides notification when a particular metric enters, is within bounds, or is no longer within a user-defined range of values. Alerts can be displayed in Interaction Connect or Interaction Supervisor using color coded icons and text attributes to highlight a metric. Alerts can optionally send email notifications, play sounds, or invoke a handler.

**To set an alert for a statistic:**

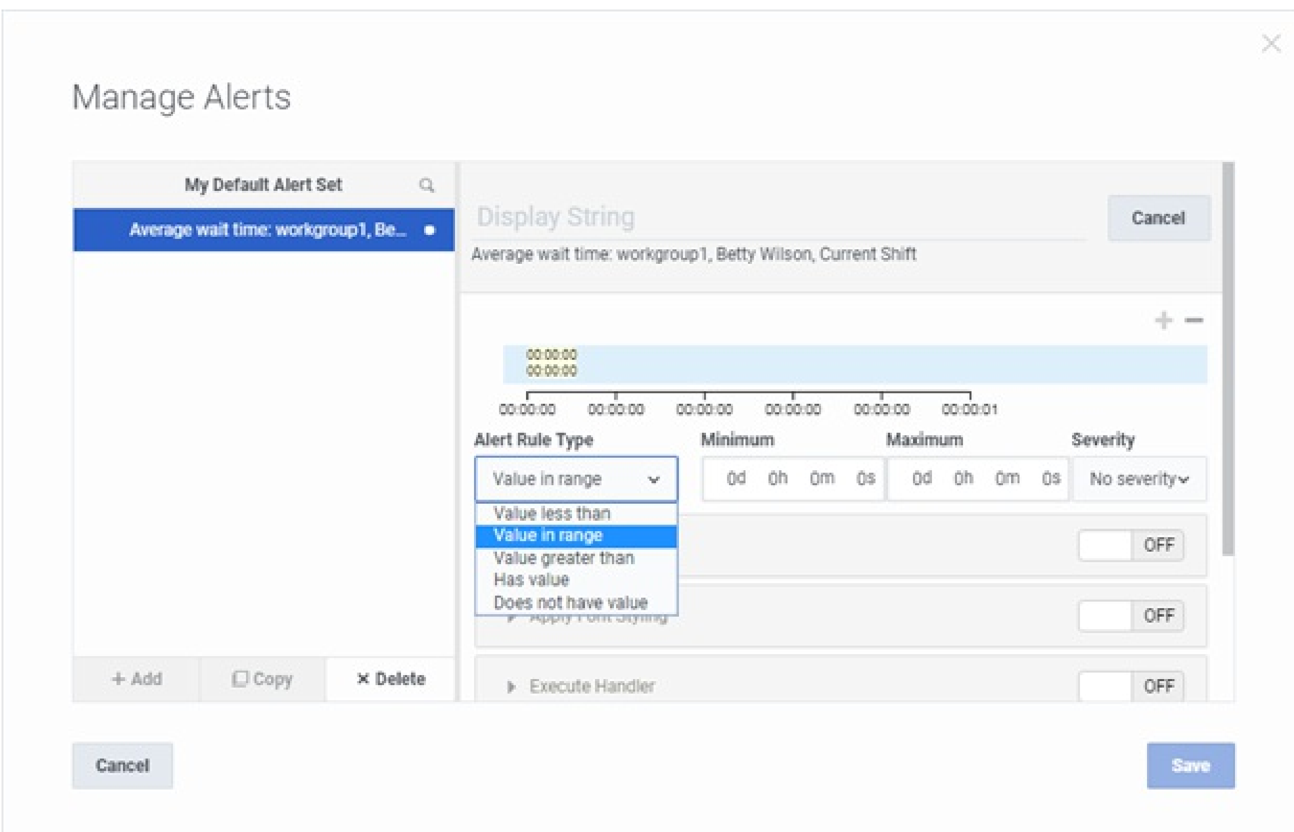
1. In the **Manage Alerts dialog box**, click **Add**.
2. From **Statistic group**, select a category of statistics.
3. From **Statistic definition**, select a statistic on which to base the alert.
4. Select the statistic parameters as needed.

   **Note**: The appearance of the **Manage Alerts** dialog box varies, depending on the selected statistic. For example, the **Average Wait Time** statistic has three parameters: Workgroup, Agent, and Interval (such as Current Shift). Other statistics require different parameters.




5. Click **Confirm**.

**Result**: The Manage Alerts dialog box changes to enable you to configure **alert rules**. The appearance of this dialog box varies and is based on the data type of the statistic.




6. Optionally, click **Display String** to change the name of the alert.

**Note**: The selections you have made so far become the name of the alert as it appears in **My Default Alert Set**. You can change it to any name you find useful.

7. Select an **Alert Rule Type**.

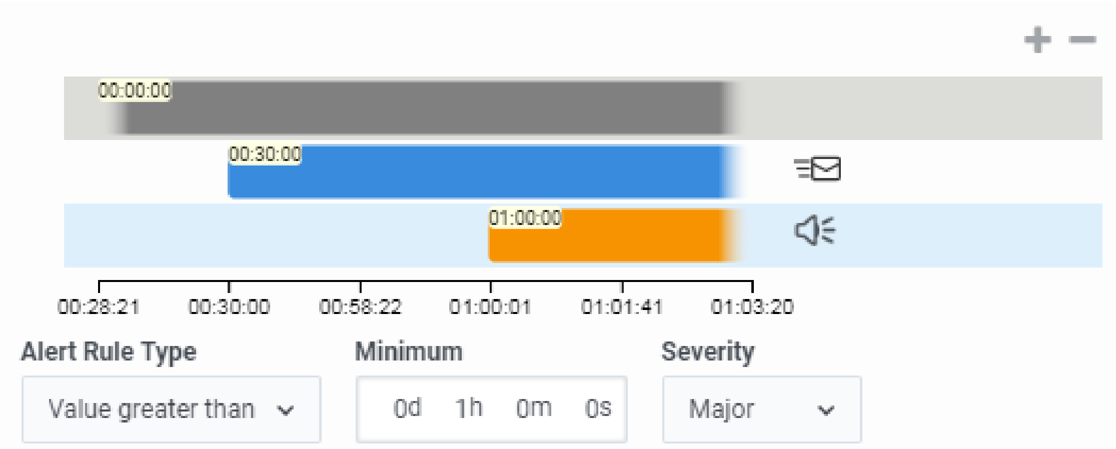
   **Tip**: If you have already defined an alert rule, click the plus sign (+) to add another alert rule. You can click the minus sign to remove a selected alert rule.

| Type of Statistic | Alert Conditions | Criteria you must supply |
|---|---|---|
| **Boolean statistics** | The value is True, Yes, 1 | No criteria are required by Boolean alert conditions |
| | The value is False, No, 0 | |
| | Has a value | |
| | Does not have value | |
| Numerical statistics<br>(integer, double and percent) | Value less than | Maximum value |
| | Value in range | Minimum and Maximum values |
| | Value greater than | Minimum value |
| | Has value | No criteria are required by this alert condition |
| | Does not have value | No criteria are required by this alert condition |
| Timespan statistics<br>(Duration, Time Duration, Future Duration, Finite Duration) | Value less than | Maximum time value, expressed in days, hours, hours, and minutes (ddd:hh:mm:ss) |
| | Value in range | Minimum time value, expressed in hours, minutes and seconds (hh:mm:ss)<br>Maximum time value, expressed in days, hours, hours, and minutes (ddd:hh:mm:ss) |
| | Value greater than | Minimum time value, expressed in hours, minutes and seconds (hh:mm:ss) |
| | Has value | No criteria are required by this alert condition |
| | Does not have value | No criteria are required by this alert condition |
| String statistics | The value is equal to a string | Character string |
| | The value is not equal to a string | Character string |
| | The value contains a substring | Character string |
| | The value does not contain a substring | Character string |
| | The value matches a prefix | Character string |
| | The value does not match a regular expression | Any regular expression. |
| | Has a value | No criteria are required by this alert condition |
| | Not Set | No criteria are required by this alert condition |

8. Select a **Severity** level.

   This setting determines the color of the icon that appears in statistics views when an alert is triggered. These alerts appear in the

   **Result**: The alert rule is represented by its values and severity level in the **Manage Alerts** dialog box.




9. To select one or more actions that occur when the alert condition is triggered, select an alert rule, and click **ON**. Set the necessary parameters for each selected rule.

   **Result**: Icons for each action appear to the right of the selected rule.

   - **Send Email**

     When you select this action, also select the names of the email recipients and whether to send emails when the statistic enters the alert condition, exits the condition, or when its value changes within the condition.
   - **Apply Font Styling**

     When you select this action, also select text color, background color, and font weight. The statistic control's value field changes to the selected font color, background color, and font weight when the alert is triggered.
   - **Execute Handler**

     When you select this action, select a handler that initiates when the statistic enters or exits the alert condition. Optionally, you can also set a string passed as a parameter to the handler in **Data to be sent with handler**.
   - **Play Sound**

     Select a sound to play when the value of the statistic enters the range of a condition, changes within the condition, or exits the range of a condition. You can select a sound for each option. To listen to the selected sound, press the **Play** button.

     > **Note**: See Alert Sounds.
   - **Send Client Memo**

     Select this option to send a client memo from Interaction Supervisor to one or more CIC client users when the alert occurs.

     > **Note**: You can address messages to any combination of workgroups or agents. A Client Memo is not an email message. A client memo appears in a CIC client as a notification along the bottom edge of the client window, or as a desktop alert (toast pop-up). For more information, see Supervisor Client Memos.

10. Click **Save**.

**Related Topics**

Manage Alerts
Copy an alert
Edit an Alert
Delete an Alert

## Copy an Alert

**Requirements**: See Manage Alerts.

You can create a new alert by copying an existing alert changing some of its parameters.

**Note**: You cannot change the previously selected Statistic group or Statistic definition in a copied alert. To change these selections, see Add an Alert.

**To copy an alert:**

1. Do one of the following:

- In the Manage Alerts dialog box, in the **My Default Alert Set** section, select the name of an alert.
- In the Active Alerts view, click the hyperlink in the Statistic column for the selected alert.
- In the Active Alerts view, double-click anywhere in the row for the selected alert.

2. Click **Copy**.
3. Select statistic parameters as needed.

   **Note**: The appearance of the **Manage Alerts** dialog box varies, depending on the selected statistic. For example, the **Average Wait Time** statistic has three parameters: Workgroup, Agent, and Interval (such as Current Shift). Other statistics require different parameters.

4. Click **Confirm**.

   **Result**: The Manage Alerts dialog box changes to enable you to configure **alert rules**. The appearance of this dialog box varies and is based on the data type of the statistic.

5. See Add an Alert for instructions on changing:
   - **Display String**
   - **Alert Rule Type**
   - **Severity Level**
   - **Alert actions**

6. Click **Save**.

**Related Topics**

Add an Alert
Edit an Alert
Delete an Alert

## Edit an Alert

**Requirements**: See Manage Alerts.

Edit an alert when you want to change the display string, alert rules, or actions.

**Note**: You cannot change the previously selected Statistic group or Statistic definition. To change these selections, create a new alert definition.

**To edit an alert:**

1. Do one of the following:

- In the Manage Alerts dialog box, in the **My Default Alert Set** section, select the name of the alert.
- In the Active Alerts view, click the hyperlink in the Statistic column for the selected alert.
- In the Active Alerts view, double-click anywhere in the row for the selected alert.

2. See Add an Alert for instructions on changing:
   - **Display String**
   - **Alert Rule Type**
   - **Severity Level**
   - **Alert actions**

3. Click **Save**.

**Related Topics**

Add an Alert
Copy an alert
Delete an Alert

## Delete an Alert

**Requirements**: See Manage Alerts.

There are several ways to delete an alert.

**To delete an alert:**

1. Do one of the following:

- In the Manage Alerts dialog box, in the **My Default Alert Set** section, select the name of the alert.
- In the Active Alerts view, click the hyperlink in the Statistic column for the selected alert.
- In the Active Alerts view, double-click anywhere in the row for the selected alert.

2. Click **Delete**.
   **Result**: The alert is marked for deletion.

3. Do one of the following:
   - To complete the deletion, click **Save**.
   - To cancel the deletion, click **Cancel**.

**Related Topics**

Add an Alert
Edit an Alert

## Alert Sounds

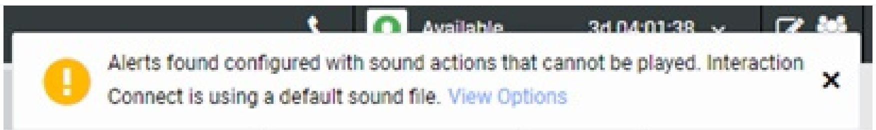
**Requirements**: See Manage Alerts.

An alert can play a sound when it enters, updates, or exits some condition. When you configure an alert in Interaction Connect, you choose from a defined list of sounds. However, if you configure an alert in Interaction Supervisor in ICBM, you can select any sound file on the IC server. Interaction Connect does not have access to those sound files.

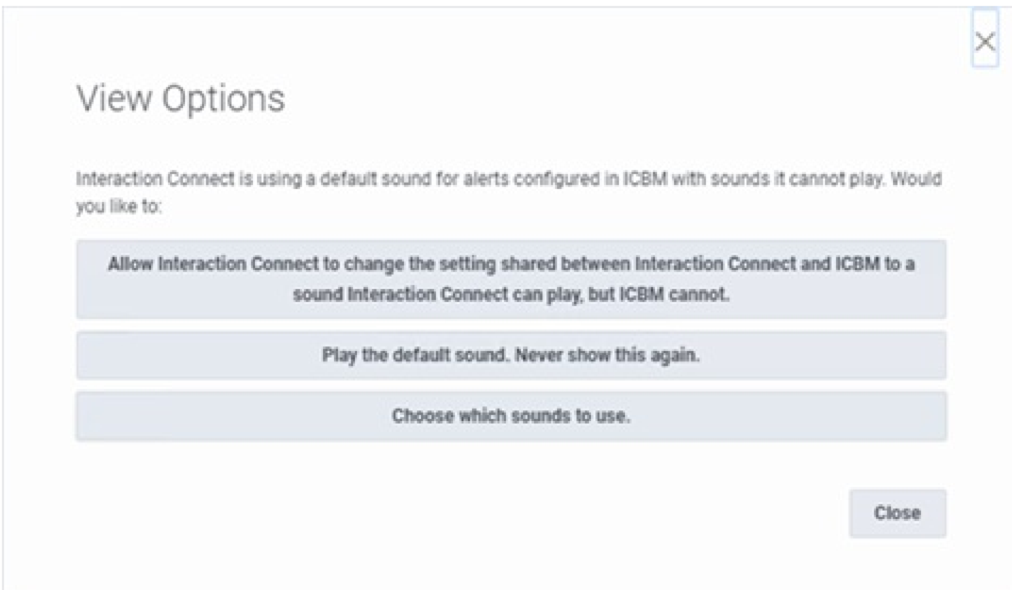
Because Interaction Connect cannot play custom sound files chosen for alerts in Interaction Supervisor, Interaction Connect displays a warning when you log on.

**To select a sound option:**

1. If you see a warning when you log on, select **View Options**.




2. Select an option in the **View Options** dialog box.




- **Allow Interaction Connect to change the setting shared by Interaction Connect and ICBM to a sound PureConnect can play, but ICBM cannot.**
  Select this option and Interaction Connect changes all of the alert sounds it cannot play to ones it can play. This selection does not change alert sounds configured in the future in ICBM. The alert sound warning appears for new alerts configured in ICBM with sounds that Interaction Connect cannot play.
- **Play the default sound. Never show this again.**
  To play the default sound for any alerts with unplayable alert sounds, now and in the future, select this option.

  **Note**: If you hide the warning, you can reverse this decision by clearing the **Notify me when alert sounds cannot be played** check box in General Application Settings.
- **Choose which sounds to use.**
  Select this option and then choose a sound in the **Play Sound** option for the affected alert. For more information, see Add an Alert.

  **Note**: Warning icons and tooltips appear in the Manage Alerts dialog box for each alert with unplayable alert sounds.

3. Click **Close**.

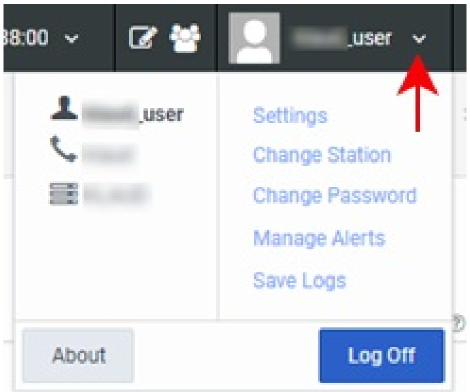
## Manage Alerts dialog box

**Requirements**: See Manage Alerts.

Use this dialog to add, edit, copy, and delete your alerts. You select a statistic, define the conditions for the alert, and optionally, select one or more actions triggered when the alert occurs.

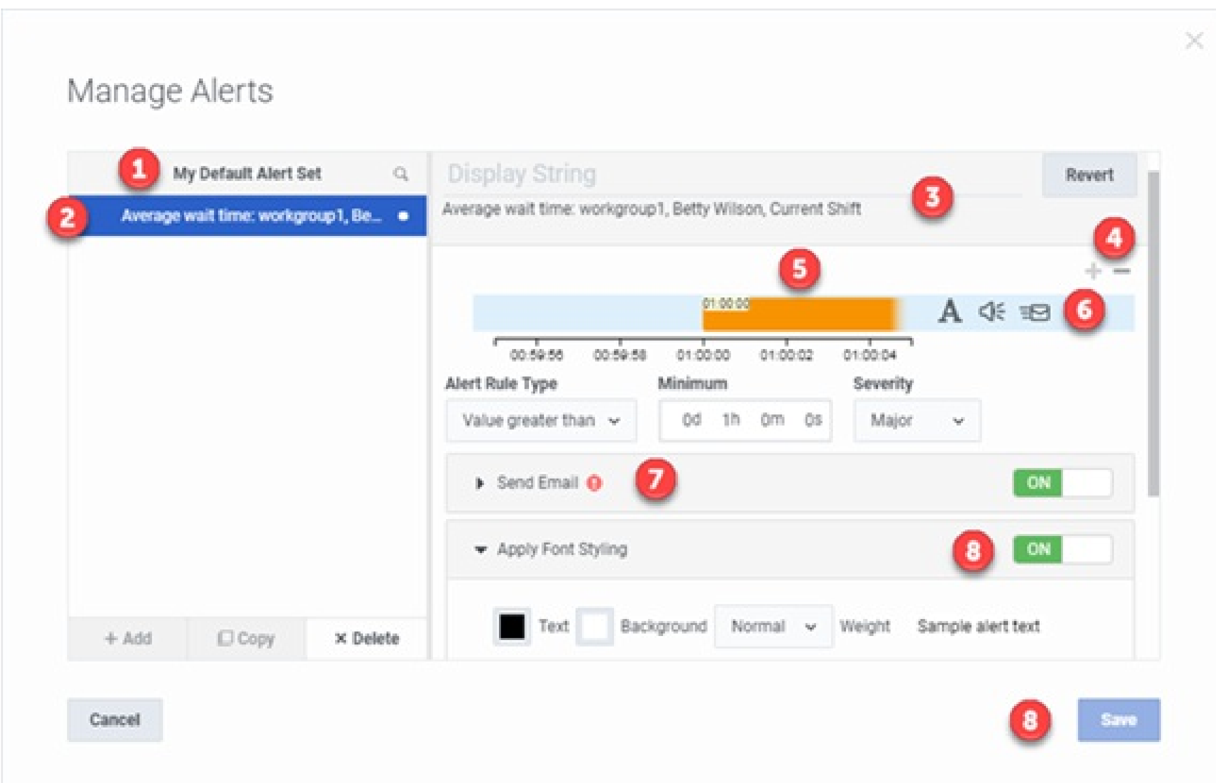
**To access the Manage Alerts dialog box, do one of the following:**

- Click the menu icon and then click **Manage Alerts**.




- In the Active Alerts view, click the hyperlink in the Statistic column for the selected alert.
- In the Active Alerts view, double-click anywhere in the row for the selected alert.

## Using the Manage Alerts dialog box

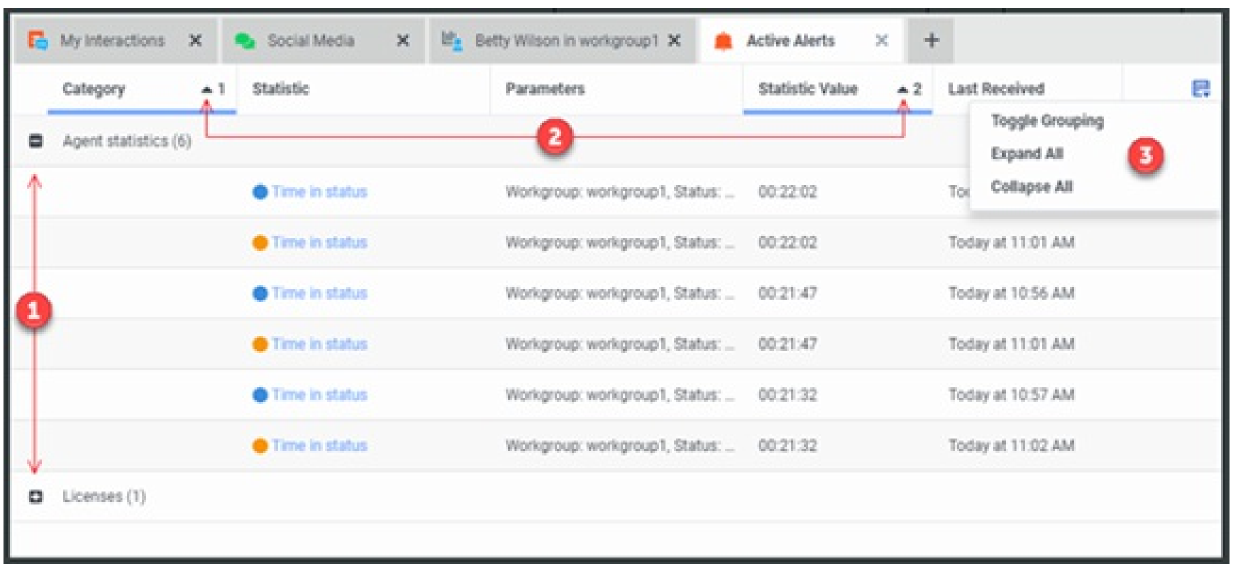


| | |
|---|---|
| 1 | The alerts you have configured.<br>**Tip**: In ICBM, you can display alerts configured by other users, if you have Master Administrator Access Rights. |
| 2 | Highlighting indicates the selected alert. The white circle indicates unsaved changes. |
| 3 | The name of the selected alert uniquely identifies it by the selections made in its definition. |
| 4 | Use the plus (+) and minus (-) signs to add and remove alert rules. |
| 5 | The alert color corresponds to its severity. |
| 6 | Icons correspond to the actions selected for this alert. |
| 7 | An error exists that prevents you from saving changes to this alert. Expand this section to identify and correct the error. |
| 8 | Expand an action section and make selections that define the action. |
| 9 | Notice that the **Save** option is not available until you correct any errors. |

## Active Alerts view

**Requirements**: See Manage Alerts.

Use the Active Alerts view to see your currently triggered alerts. Alerts that have not been triggered and alerts configured by other supervisors do not appear in this view.




| | |
|---|---|
| 1 | To expand or collapse a Category, click the plus (+) or minus (-) signs. |
| 2<br>•<br>•<br>• | Sort alerts by clicking a column heading.<br>When you group alerts by Category, you can sort alerts within each Category by clicking a second column heading.<br>When you toggle grouping off, you can sort alerts by any single heading.<br>The direction of the arrows in the column headings indicates sort order. |
| 3 | By default, alerts that are currently active are grouped by Category. To turn grouping on or off or to expand or collapse all category groups, use the **Toggle Grouping** control. |

# Client Templates

**Requirements**: You need the Manage Client Templates and Customize Client Security rights to create or edit templates for other Interaction Connect users. To apply the templates to users, the administrator needs the **Client Templates** Administrator Access right. An Interaction Connect user needs the Customize Client Security right to add, move, or remove views supplied by a client template.

Client templates affect the appearance and functionality of Interaction Connect. You create client templates in Interaction Connect. Interaction Connect saves client templates to the CIC server. A CIC administrator uses Interaction Administrator to apply templates to users, roles, and workgroups.

Client templates:

- Display a standard set of views.

  **Important**: A user's Access Control rights and Security Rights determine whether a view appears in an agent's interface. For example, if an applied template includes a workgroup queue view, the user still needs the View Workgroup Queues Access Control right for that queue to see this view.

- Set a default location for views included in the client template.

## Default views

Interaction Connect displays My Interactions and the Company Directory views by default for any new user not assigned a template.

## Changes to Templates

If you edit a client template, the agents assigned that template don't see those changes until an administrator reapplies the template in Interaction Administrator. Similarly, deleting a template does not affect agents assigned that template until an administrator assigns them another template.

## Applying Templates

A CIC administrator applies templates in Interaction Administrator. This administrator needs the **Client Templates** Administrator Access right. For more information, see Publish a client template in the Interaction Administrator help.

**Related Topics**

Create a Client Template
Edit a Client Template
Delete a Client Template

## Create a Client Template

**Requirements**: See Client Templates.

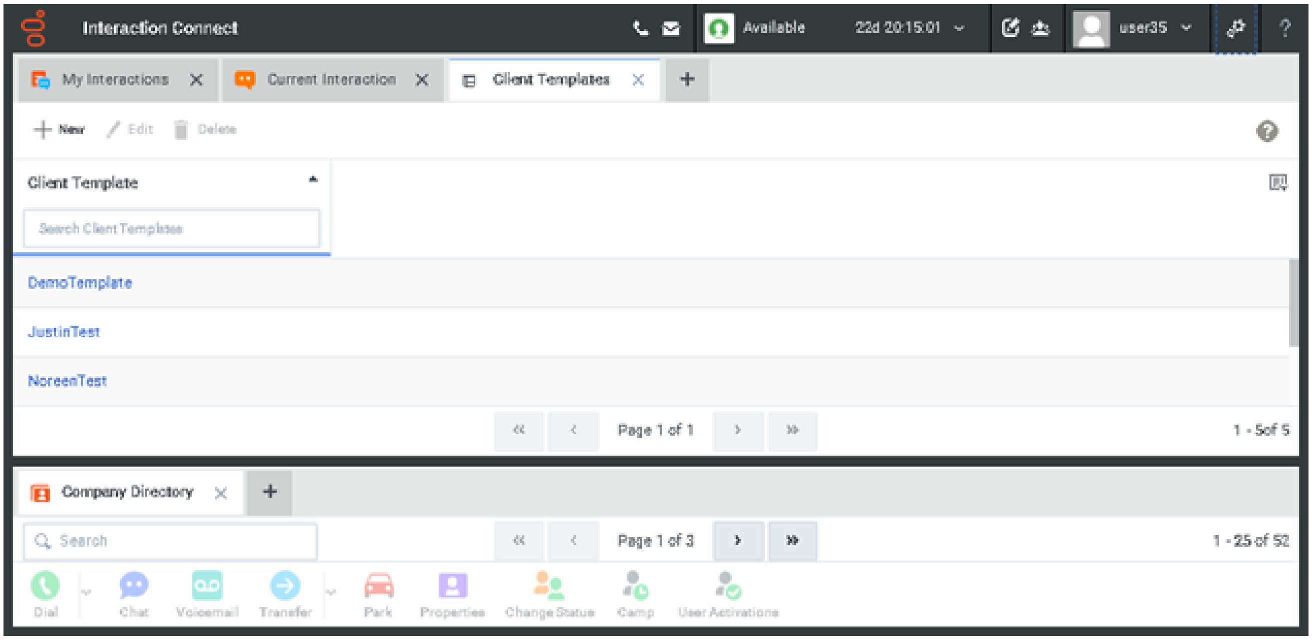
Use the same controls and procedures to create a client template as you use to adjust the appearance of Interaction Connect for yourself. You save these changes to a specific client template. Create as many client templates as you need.

**Note**: In Interaction Administrator, CIC administrators assign Interaction Connect client templates to roles, workgroups, or users.

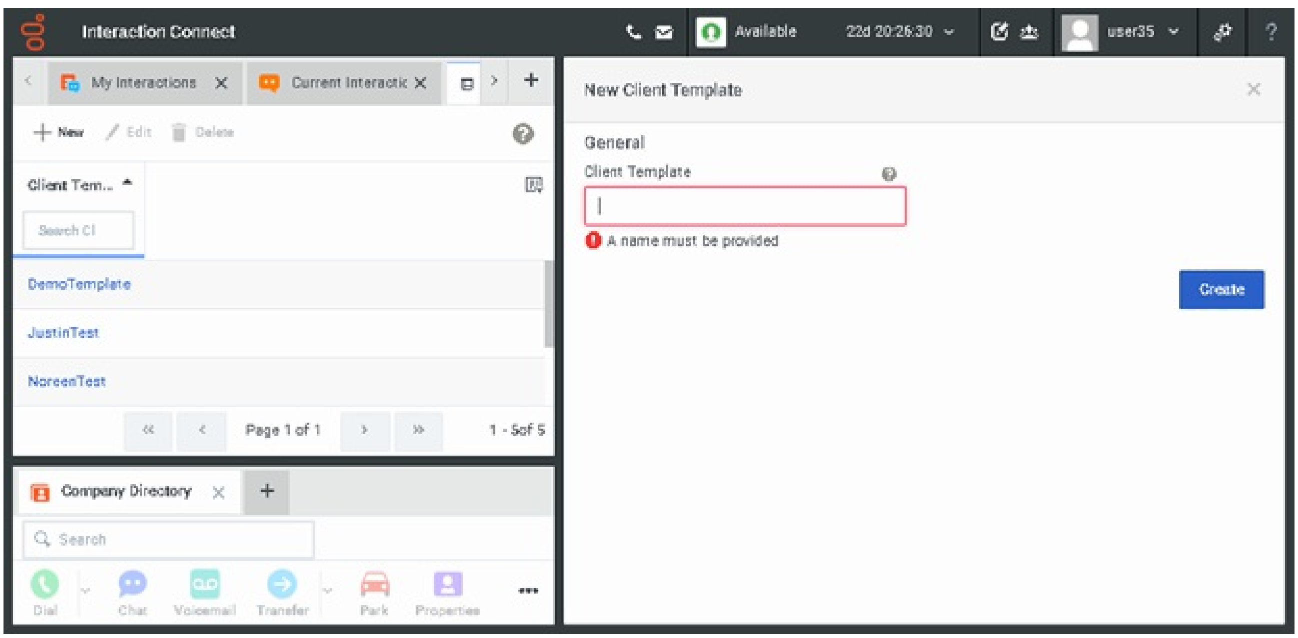
**To create a template:**

1. Display the Client Templates view, by doing one of the following:
   - Click the Administrator Views button, then click **Client Templates**.
   - Use the Add Views dialog box. **Client Templates** appears under Administration.

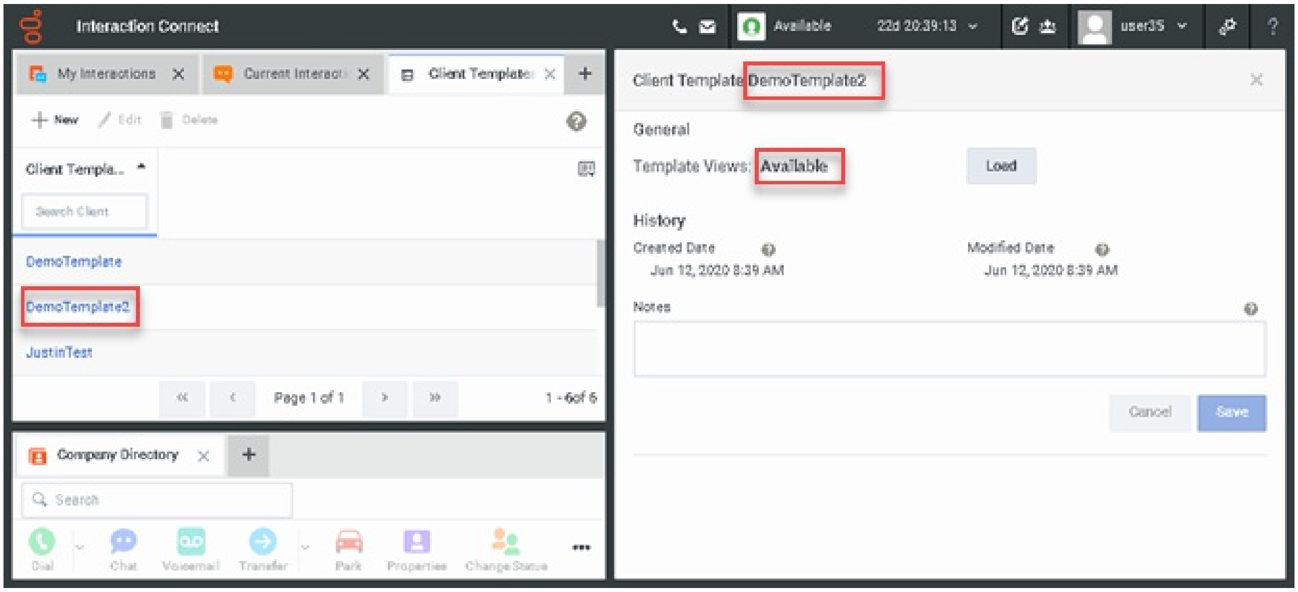
   **Result**: The Client Templates view appears. It lists the available Interaction Connect templates.



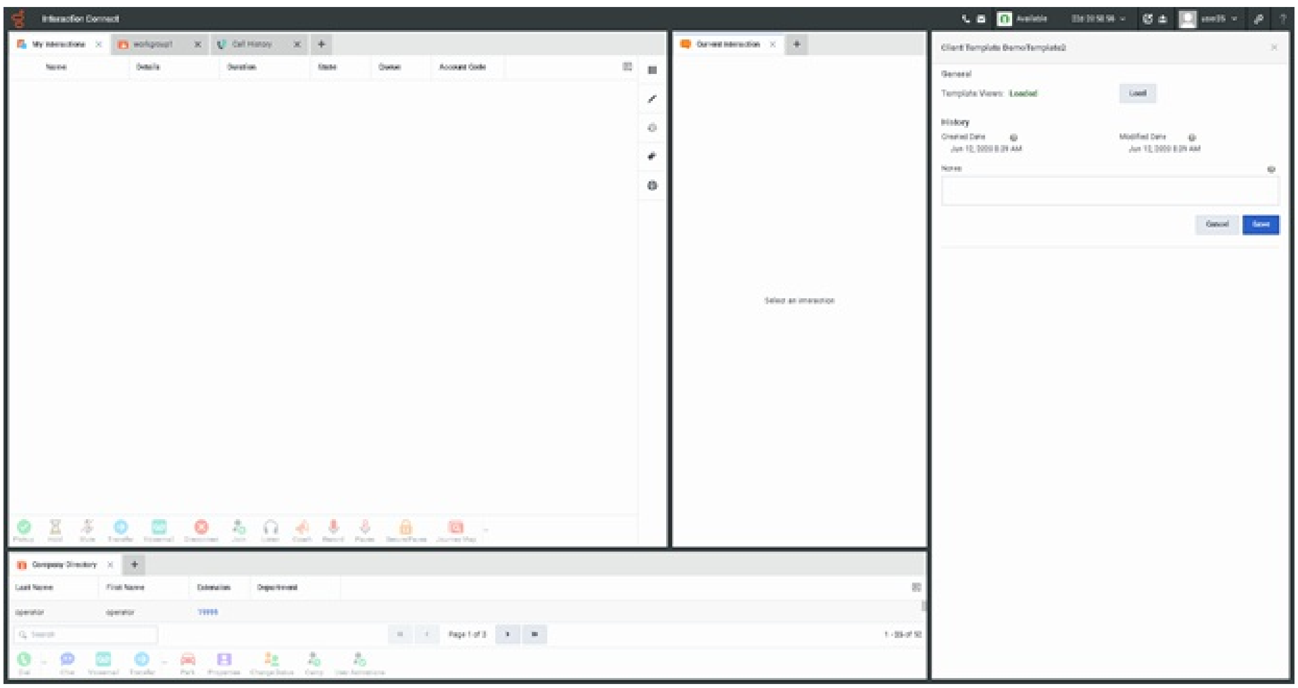

2. In the Client Templates view, click **New**.
   **Result**: The New Client Template view appears.




3. In the Client Templates view, type the name of the new template and click **Create**.
   **Result**: The new template's name appears in the title of the Client Template view and in the list in the Client Templates view. Notice that the status of the template is **Available**.




4. Click **Load**.
5. On the left-side, add or close views and change the view layout as needed.



> **Note**: The **Client Templates view** is not visible as you work on the template. Templates do not include the Client Templates view. Agents do not need it. Administrators with the appropriate rights can easily display it as needed.

6. Optionally, add a description or other information in **Notes**.
7. Click **Save** and close the right side view.

   **Result**: Your default layout is restored.

## Edit a Client Template

**Requirements**: See Client Templates.

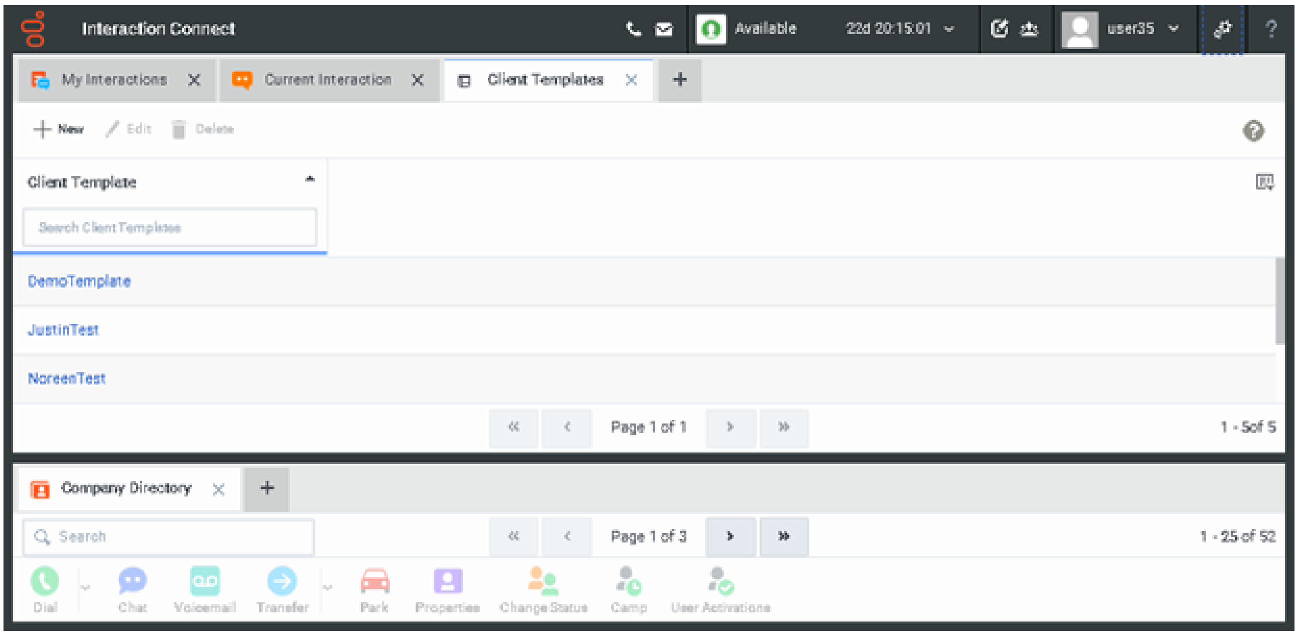
Use the same controls and procedures to edit a client template as you use to Create a Client Template.

**Note**: If you edit a client template, agents assigned that template do not see the changes until an administrator reapplies the template in Interaction Administrator.

**To edit a template:**

1. Display the Client Templates view, by doing one of the following:
   - Click the Administrator Views button, then click **Client Templates**.
   - Use the Add Views dialog box. **Client Templates** appears under Administration.

   **Result**: The Client Templates view appears. It lists the available Interaction Connect templates.

2. Find the template. In the Client Templates view, scroll the list of available client templates or type all or part of a template name in **Search Client Templates**.
3. Do one of the following:
   - Click the template name.
   - Select the template and click **Edit**.
4. On the left-side, add or close views and change the view layout as needed.

   **Caution**: Templates do not include the Client Templates view. Agents do not need it. Administrators with the appropriate rights can easily display it as needed. Do not re-display the Client Templates view and try to edit another template until you finish changes to the selected template and either save or discard your changes.

5. Optionally, on the right side, add a description or other information in **Notes**.

   **Note**: The **Cancel** button reverts the **Notes** content. It does not affect any changes you made to the view layout.

6. Do one of the following:
   - To save the changes to the template,click **Save**. then close theright-side Client Templates panel.
   - To discard changes to the template, close the right-side Client Templates panel.

   **Result**: Your default layout is restored.

## Delete a Client Template

**Requirements**: See Client Templates.

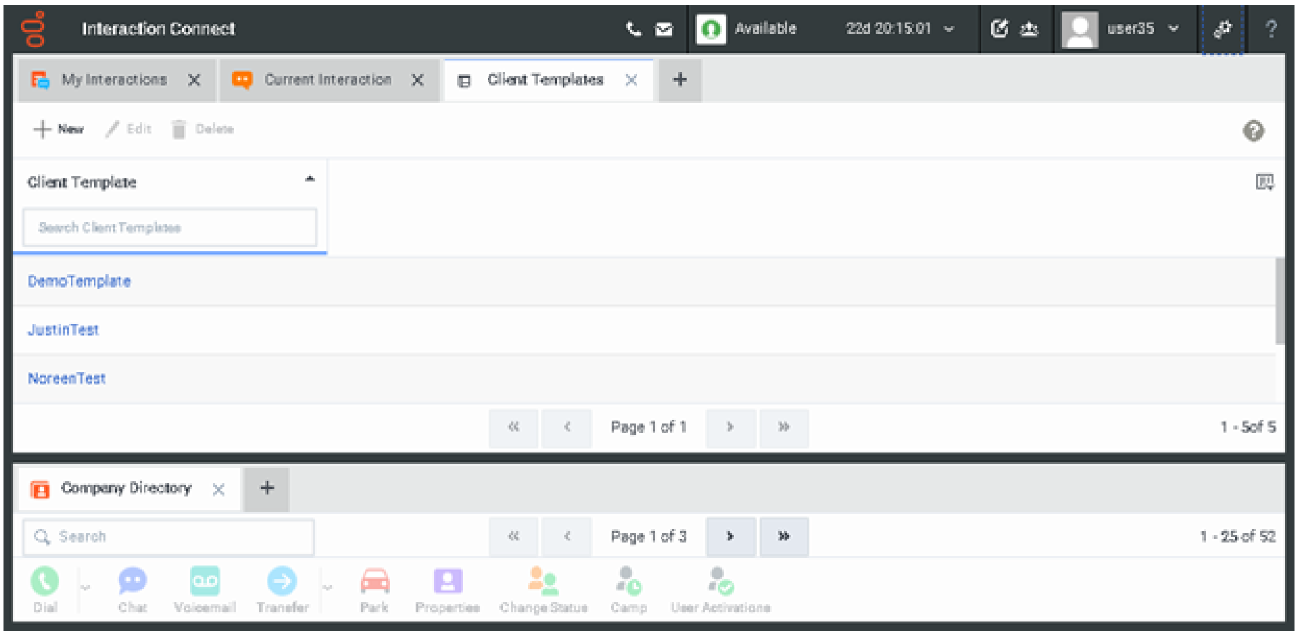
You can delete a template in the Client Templates view.

**Note**: If you delete a client template, agents assigned that template are not affected until an administrator assigns another template in Interaction Administrator.

**To delete a template:**

1. Display the Client Templates view, by doing one of the following:
   - Click the Administrator Views button, then click **Client Templates**.
   - Use the Add Views dialog box. **Client Templates** appears under Administration.

   **Result**: The Client Templates view appears. It lists the available Interaction Connect templates.




2. Find the template. In the Client Templates view, scroll the list of available client templates or type all or part of a template name in **Search Client Templates**.
3. Select the template and click **Delete**.
4. In the **Delete confirmation** dialog box, click **Confirm**.

# Using Views and Dialog Boxes

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

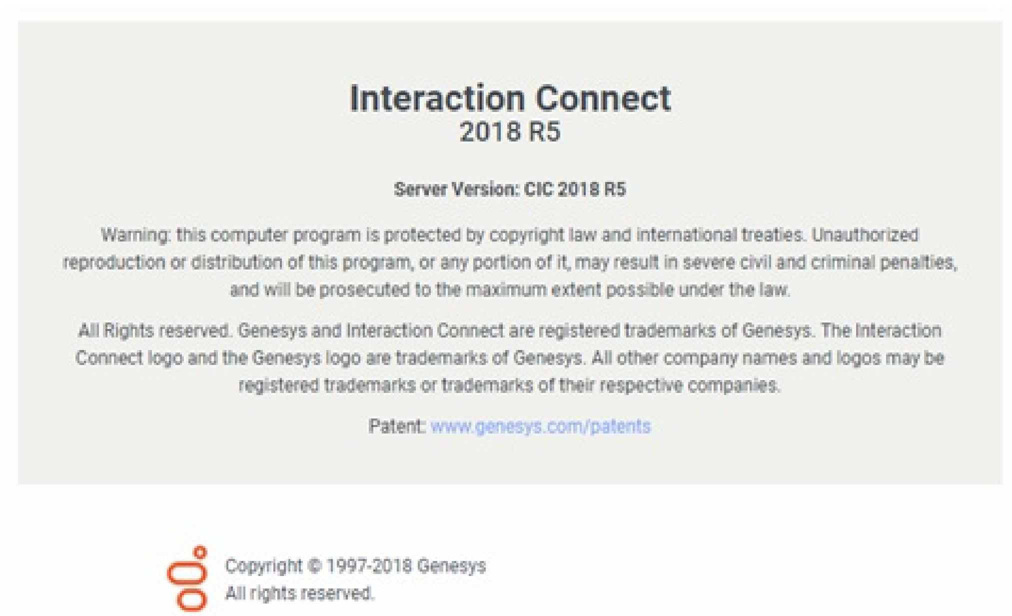
- About dialog box
- Add View Dialog Box
- Call History
- Camp Desktop Alert
- Change View Layout
- Dial Pad
- Directories
- Directory Properties Dialog Box
- My Interactions
- Supervisor Client Memos
- Transfer Dialog Box

## About dialog box

The About page displays release information for Interaction Connect and the IC server.

**To access the About - Interaction Connect page:**

- Open the menu and then click **About**.




**Related Topics**

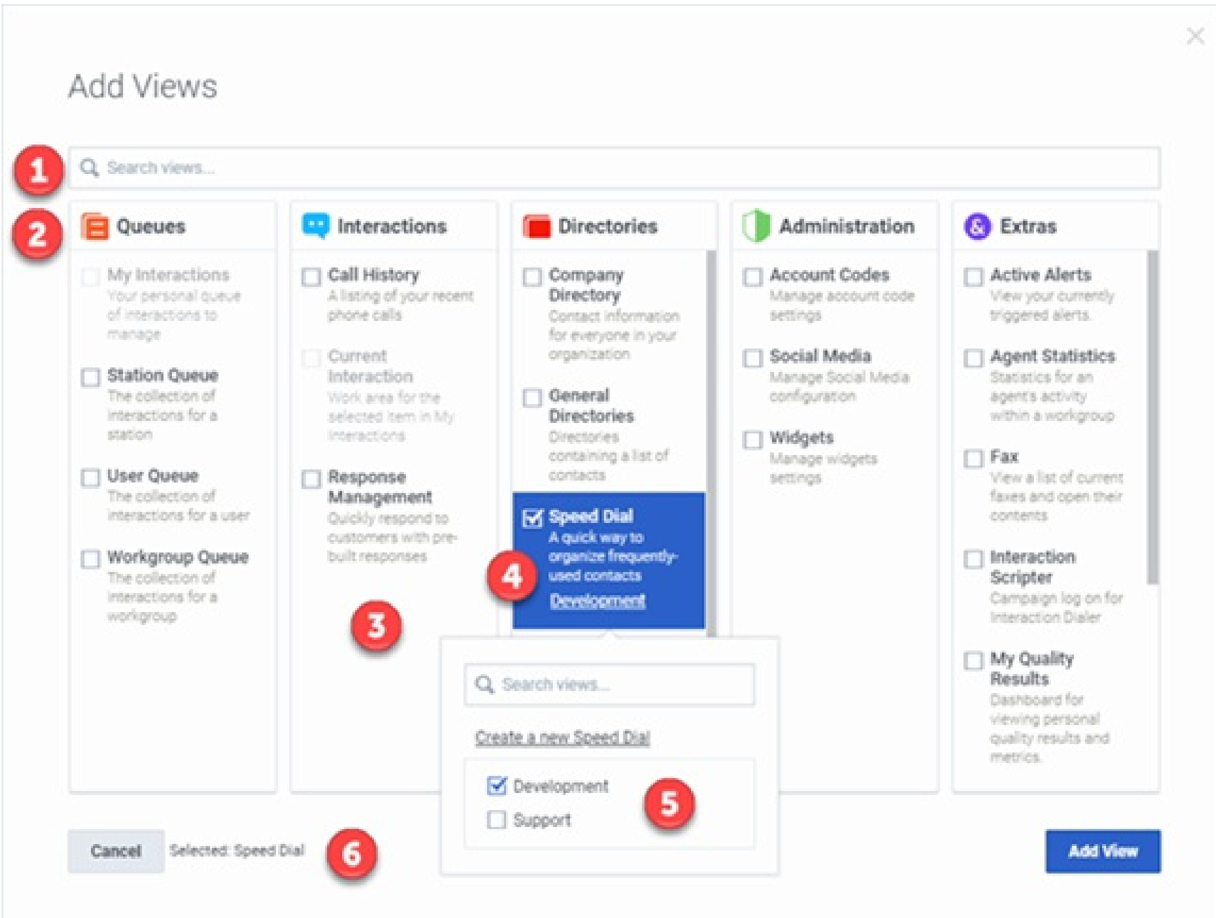
Feedback and PureConnect Customer Care

# Add View Dialog Box

Use the Add View dialog box to choose the views you want to display in the CIC client.

**To display the Add View dialog box:**

1. Click the **Add View** icon (Plus sign) next to any tab.
2. In the **Quick Picks** list, click **Show All Views**.



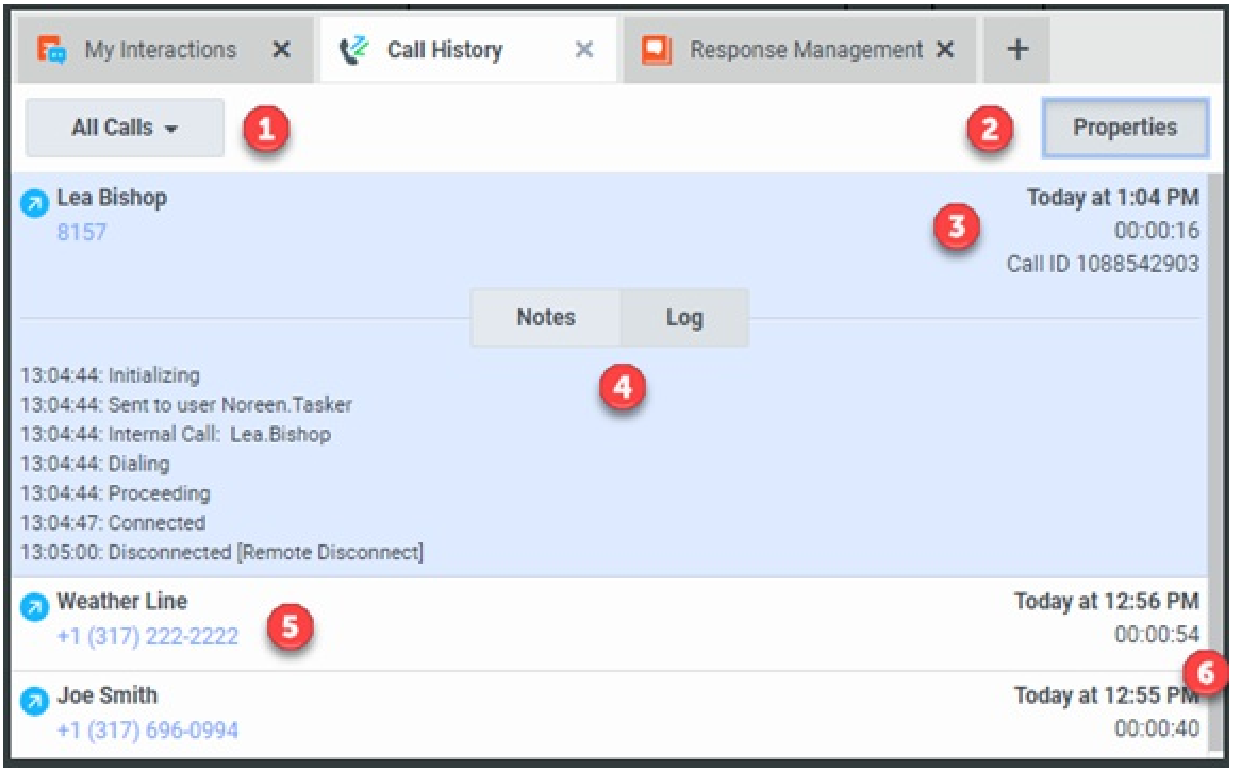

| | | |
|---|---|---|
| 1 | **Search text box** | To display a list of views with matching names, type all or part of a view name in the **Search** text box. |
| 2 | **Categories** | Views are grouped by category. |
| 3 | **Views list** | Each category displays the names and descriptions of the included views. Gray text indicates that Interaction Connect already displays this view. |
| 4 | **Select a view** | To display a view, select its check box. Selected views are highlighted. |
| 5 | **Available items** | For some views, make a further selection from the Available Items list. |
| 6 | **Selected views** | Names of the views you select appear here.<br>After you complete your selections, click the **Add View** button. |

**Related Topics**

Add or Close Views

# Call History

The Call History view 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 filtering criteria: All Calls, Missed Calls, Outgoing Calls, Answered Calls, or Forwarded Calls. |
| 2 | Click **Properties** to display call details. |
| 3 | Each item in the **Call History** list contains information about the call including starting date and time, duration, Call Id, and the name of the other party (if available). A call icon indicates whether the call was answered, missed or outbound.<br>**Note**: If you make the Call History view very narrow, the call duration does not appear. |
| 4 | Call details include controls to display Notes or Logs. |
| 5 | Click the phone number hyperlink to dial the number. |
| 6 | Use the scroll bar to view other calls in your call history. |

## Displaying the Call History View

1. In the Add View dialog box, from the **Interactions** list, select **Call History**.
2. Click **Add View**.

## Using Call History to Make Calls

You can click anywhere in a call history row or click directly on the Number hyperlink to dial the phone number associated with the call.

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 CIC 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. This retention policy uses the Call History Max Time server parameter which controls only the amount of data ClientServices needs to store in memory, avoiding Out Of Memory issues on CIC Server. It does not control the amount of call history displayed in the Call History view.

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

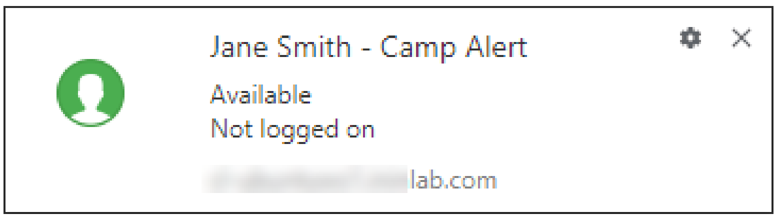
**Tip**: Call History items are added to your Call History dialog box when a call leaves your queue. When a call disconnects, it stays in the queue for a couple of minutes before it is automatically removed.

**Related Topics**

Customizing the Interface
Dial a recently dialed number

# Camp Desktop Alert

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

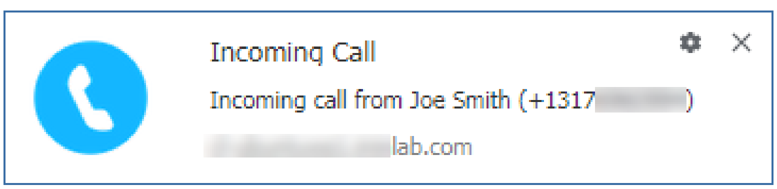



**Related Topics**

Camp on an Internal Extension
Desktop Alerts

# Desktop Alerts

Desktop Alerts notify you of alerting interactions and other events. The alert dialog box pops up in the bottom right corner of your Windows desktop. Click the alert dialog box to bring your browser window to the top of any open applications. This action also automatically selects the My Interactions view where you can pick up an alerting interaction.




The browser manages desktop alerts, so each user has to grant permission for them to appear. If you have not yet granted this permission, you are prompted to enable notifications when you log on.

**Note**: You can confirm notifications are allowed in Chrome by checking Settings > Advanced > Privacy and Security > Notifications and then ensuring the URL you use to access Interaction Connect is in the **Allow** section. Also, desktop alerts work in Chrome only if you run Interaction Connect over https, not http. This is a limitation imposed by Chrome.

# Using the Dial Pad

**Requirements**: The Dial Pad is available only if you are connected to a CIC server running 4.0 SU 6 or later.

The Dial Pad enables you to dial a phone number to make 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.

**To display the Dial Pad:**

- In the **My Interactions** sidebar, click the **Dial Pad** icon.

**To use the Dial Pad:**

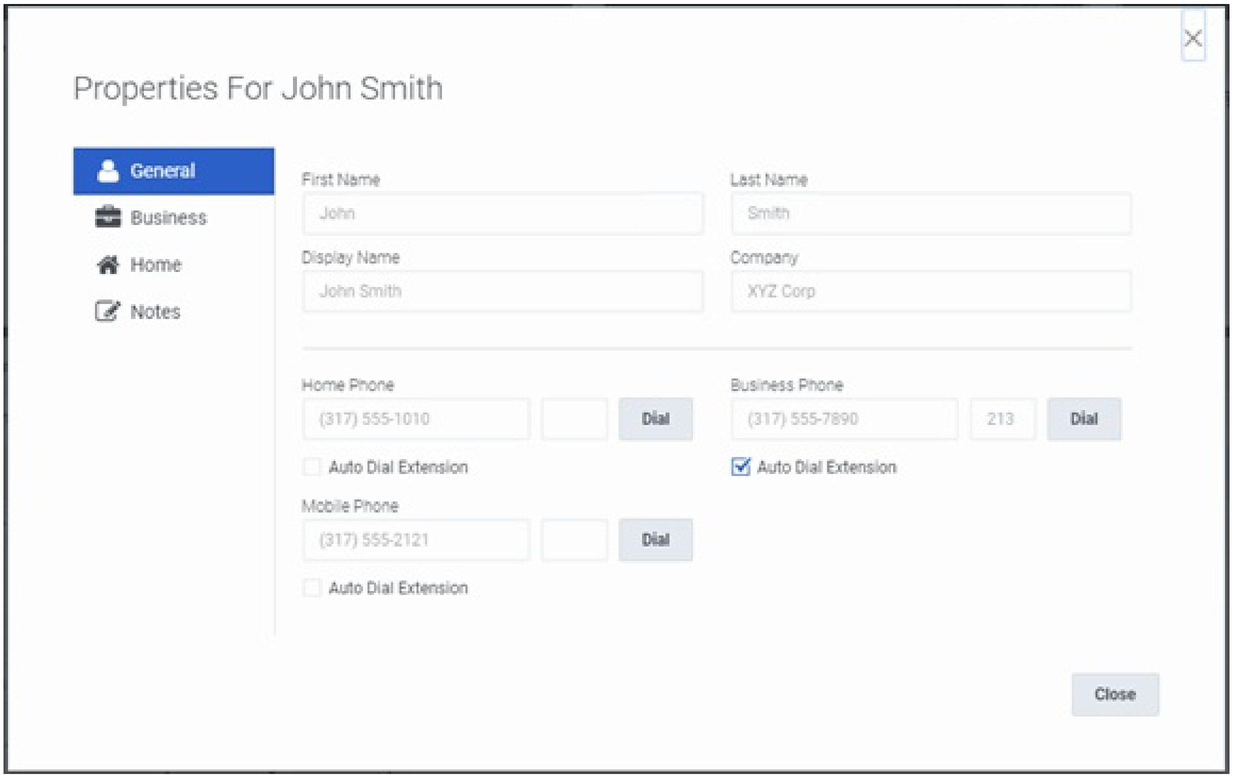
1. Click the appropriate buttons on the Dial Pad to dial a phone number.
2. Do one of the following:
   - If you do **not** have a connected interaction or the selected interaction is on hold, the numbers appear in the **Dial a number** field. Click **Dial** to dial the number.
   - If you have a connected or selected interaction that is not on hold, the numbers are sent to the interaction. You make selections from an automated telephone menu system. It's just like using a touch tone phone Dial Pad.
3. To end the call:
   - If using your handset, simply hang up the telephone.
   - Select the call in a queue view and click the **Disconnect** button.
   - Right-click the interaction and select **Disconnect** from the shortcut menu.

**Related Topics**

Disconnect button
Making Calls
My Interactions
Sidebar

# Directory Properties Dialog Box

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




**Note**: If you have the Directory Administrator Security right, the **Access Rights** tab appears in the Properties dialog box for IC Public Contacts. These Access Rights enable a user to change or delete Public Directory entries.


**Related Topics**

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

# Interaction

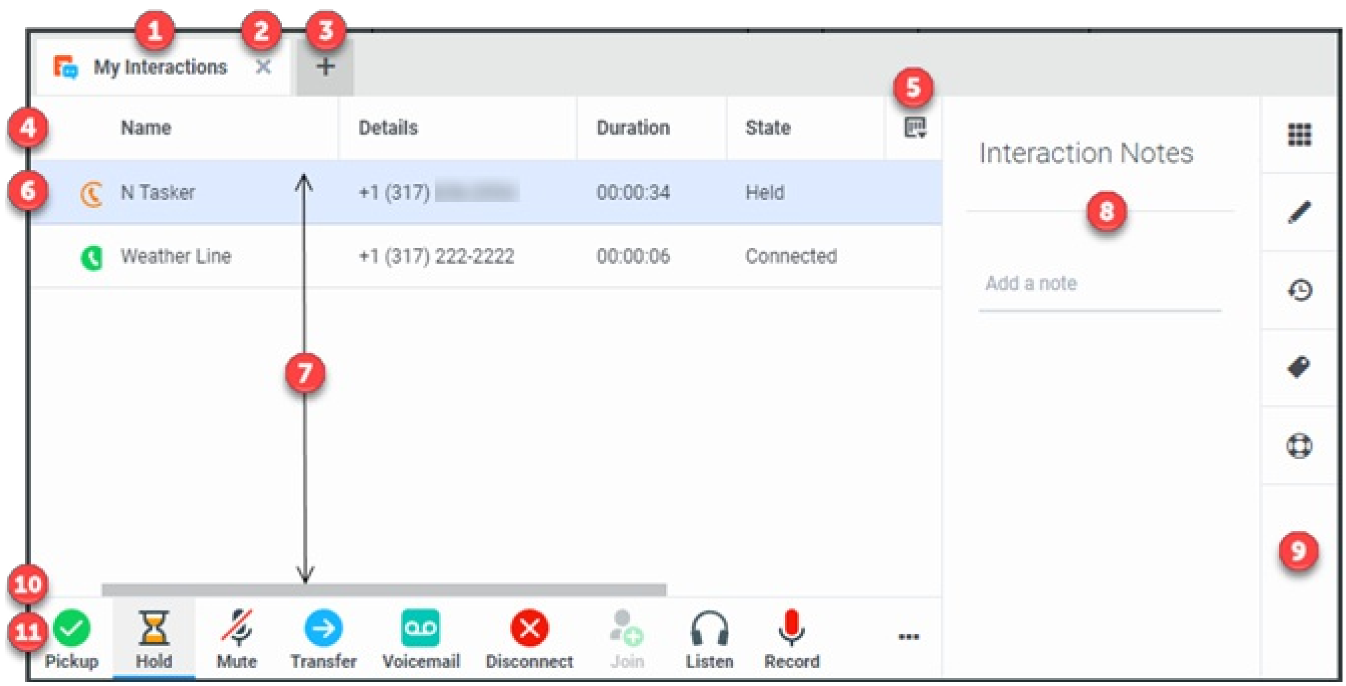
In the CIC client, an interaction is a communication between two parties. An example would be a telephone call. Each interaction is represented by a queue item in [My Interactions](#).

> **Note**: Only ACD-routed email messages appear in My Interactions or other queue. Personal email messages appear in your email program Inbox, not in My Interactions or other queue. Voicemail and faxes appear as email message attachments.

# 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 in the Queue column.

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



| | | |
|---|---|---|
| 1 | **My Interactions tab** | Select this tab to display the My Interactions view. |
| 2 | **Close** | Click the X on a tab to close the view.<br>**Note**: This does not delete a view. You can add back closed views. |
| 3 | **Add view** | Click the plus sign to add a view. |
| 4 | **Queue columns** | The Queue columns organize the information about each interaction in a queue. For more information, see Queue Contents and Understanding an Interaction's State. |
| 5 | **Choose columns** | Click this control to select the information displayed for each interaction in the My Interactions queue. For more information, see Add or Remove View Columns. |
| 6 | **Selected interaction** | My Interactions can contain more than one interaction. The currently selected interaction is highlighted. |
| 7 | **Queue contents** | All interactions in the My Interactions queue appear here. Disconnected interactions are removed after a set interval. |
| 8 | **Sidebar area** | The My Interactions sidebar can display the Dial Pad, Interaction Notes, Interaction Log, Interaction Properties, or Request Assistance. |
| 9 | **Sidebar controls** | To choose what appears in the sidebar area or to close the sidebar area, click the appropriate control. These controls include **Dial Pad**, **Interaction Notes**, **Interaction Log**, **Interaction Properties**, **Request Assistance**, and, when a sidebar selection is visible, a **Close** control.<br>**Tip**: Close the sidebar area by clicking the **Close** control at the bottom of the sidebar area or by clicking the same control used to open the sidebar. |
| 10 | **Scroll bar** | Use the horizontal scroll bar to view any queue columns that do not fit in the current browser window size. |
| 11 | **Queue Control Toolbar** | The type and state of the currently selected interaction determine which actions are available to you. Available actions are indicated by enabled toolbar buttons. For more information, see Using the Queue Control Toolbar.<br>**Tip**: You can add, remove, or rearrange buttons on the CIC client toolbars. For more information, see Customizing Queue Control Toolbars. |

**Related Topics**

Dial Pad
Queue Contents

# Queue Contents

**Requirements**: The View Queue Columns Access Control right determines which queue columns you can display in My Interactions or other queue view.

My Interactions and other station, user, or workgroup queues can display the following information about each interaction.

**Tip**: For more information about customizing a queue view, see Add or Remove View Columns.

| Column | Description |
|---|---|
| **Account Code** | An account code is an identifying set of numbers assigned to an account name in Interaction Administrator. In the CIC client, you can use account codes to organize interactions by customer. For more information, see Understanding Account Codes. |

| | |
|---|---|
| **ACD Wait Reason** | This column displays the reason an interaction has not yet been routed to a specific agent. Possible reasons include "No available agents" or "No available agents for this media type" among others. |
| **Associated Process** | This column displays the name of the process with which this interaction is associated. The ability to associate an interaction with a process is an Interaction Desktop feature. |
| **Attachments** | The Attachments column displays an icon if an email interaction has an attachment. It is blank if no attachments are present. This information is also available in the Details column, but the Attachments column enables you to sort by the presence or absence of an attachment. |
| **Chat Response Time** | This column shows the time that has elapsed since anybody involved in the chat entered some text. For more information, see Working with Chat Sessions. |
| **Details** | This column displays context-specific information based on the interaction type.<br>• For calls, it displays the Remote Address (phone number) that you dialed or the phone number of the party on an incoming call.<br>• For callbacks, it displays the subject entered by the website visitor requesting the callback. For more information, see Working with Callback Requests.<br>• For email messages, it displays the email subject as well as an importance icon and an attachments icon, if needed. For more information, see Working with E-mail Messages.<br>• For chats, it displays the name of the user who last typed, and the text they entered. It also displays a typing indicator (icon) to indicate that someone participating in the chat is currently typing. For more information, see Working with Chat Sessions. |
| **Duration** | Duration displays the amount of time an interaction has been active. |
| **Importance** | The Importance column displays an icon indicating whether an email message is of high or low importance. It is blank for "normal" importance. This information is also available in the Details column, but the Importance column enables you to sort email interactions by level of importance. |
| **Interaction Id** | The interaction’s identification number. Numbers are assigned sequentially and reset to zero any time the server is restarted. |
| **Interaction Type** | This is a code that corresponds to the interaction type.  For example, 0 is a call and 1 is a chat. See the *PureConnect Data Dictionary* in the PureConnect Documentation Library for more details. |
| **Line** | The line queue on which the interaction is located. |
| **Lstns** | If someone is listening to or monitoring your interaction, the listen icon appears in the Lstns column in your queue view. For more information, see Determine if Someone is Listening to or Recording Your Interactions.<br>**Note**: You need the Monitor Columns Security right and the appropriate View Queue Columns Access Control right to display the Lstns and Recs columns in a queue view. |
| **Name** | The name of the person or organization with whom a CIC client user is interacting.<br>For more information about how Interaction Center identifies a caller, see Caller Name.<br>**Note**: Voice Mail appears in the Name column for voice mail messages played back through your Telephone Handset. |
| **Number** | The telephone number of the person with whom a CIC client user is speaking. A SIP URI (SIP phone number in the format sip:x@y:port) appears in the Number column for SIP calls.<br>**Note**: Your CIC administrator can configure the server parameter BlockedTN to display a phrase such as “Private Number” for any incoming call with a blocked number. |
| **Queue** | The Queue column contains an icon indicating the interaction type and its state.<br>If this is an ACD-routed interaction, the name of the ACD workgroup queue to which the interaction was routed also appears here. |

| | |
|---|---|
| **Recs** | If someone is making a recording of your interaction, a record icon appears in the Recs column in your queue view. Record icons appear for both ad-hoc and snippet recordings. For more information, see Determine if Someone is Listening to or Recording Your Interactions and Recording Types.<br>**Note**: You need the Monitor Columns Security right and the appropriate View Queue Columns Access Control right to display the Lstns and Recs columns in a queue view. |
| **Security** | The Security column displays the current security level of the call. If a call is not secure, it displays "0." If a call is secure, it displays "100." |
| **State** | The current condition of an interaction. For more information, see Understanding a Call's State. |
| **Station** | The station queue on which the interaction is located. |
| **Subject** | This column displays an email message subject or the subject entered by a website visitor requesting a callback. This information is also available in the Details column, but the Subject column enables you to group related email messages by sorting by subject. |
| **Time in Status** | This column displays how long the agent has been in their current status. |
| **Time in Workgroup Queue** | This column displays the time that an interaction has spent in this workgroup queue. |
| **User** | The user queue on which the interaction is located. |
| **Work Item Category** | Each work item can be associated with a category. The names of the categories of your current work items appear in the Category column of My Interactions.<br>**Note**: When **My Interactions** contains Work Items, you can filter the view and display only Work Items from selected categories. |
| **Work Item Created On** | A Work Item Process creates Work Items as needed. Work Items are routed to agents to gather information or prompt the agent to take some action. This column displays the date the associated Work Item Process created this particular Work Item. For more information, see Working with Interaction Process Automation. |
| **Work Item Description** | A description of the Work Item. |
| **Work Item Due Date** | The date by which this Work Item must be completed. |
| **Work Item Error** | This column displays a description of an error. An error is a condition severe enough to prevent you or another agent from handling this work item. An administrator who is using Interaction Supervisor or Process Monitor or who is viewing your queue can also see this error. An administrator with the appropriate rights may be able to fix the problem and retry the process using Process Monitor.<br>For more information, see Working with Interaction Process Automation. |
| **Wrapup Code** | Wrap-Up codes indicate the nature of an interaction; for example, a billing problem, a new order, or a service request. For more information, see Understanding Wrap-Up Codes. |

**Related Topics**

Caller Name
Understanding a Call's State

# 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 another user's status.


**Related Topics**

Set Another User's Status

# Shortcut Keys

As part of the Accessibility enhancements in 2020 R1, Genesys introduced a few keyboard shortcuts for commonly-used operations. These are available for all users.

For more information, see the keyboard shortcuts in the Accessibility help. In particular, see My Interactions Shortcuts and Access Keys.

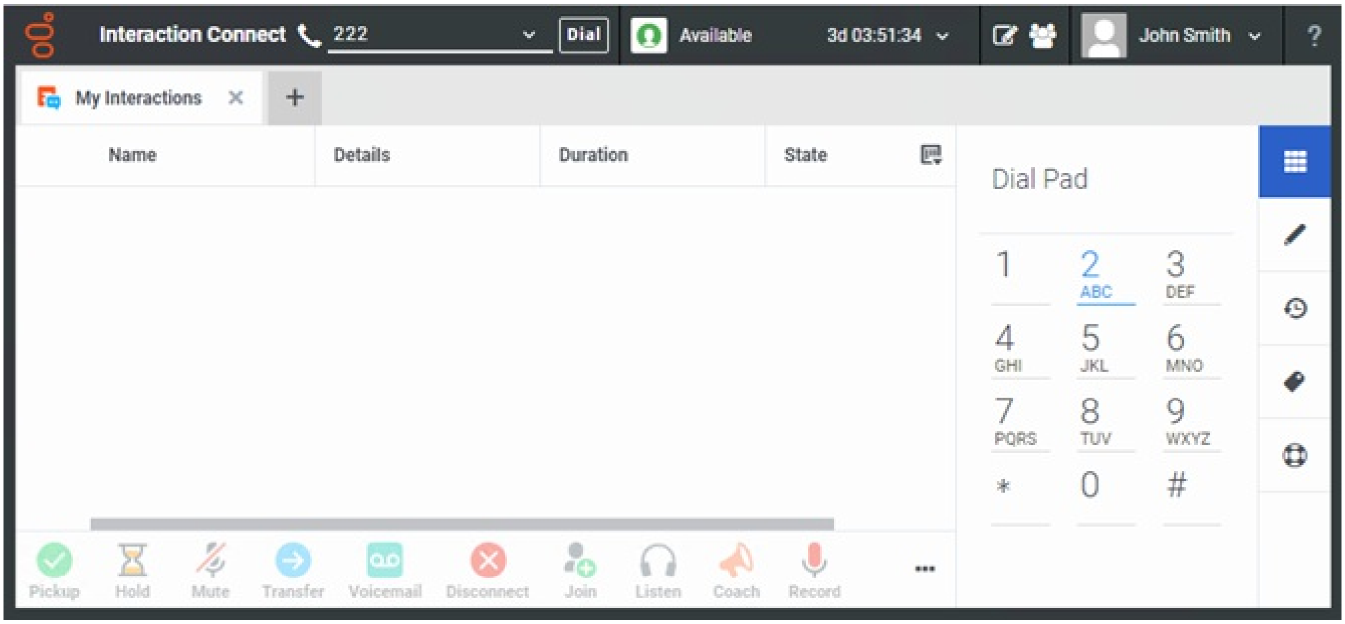
# Sidebar

The My Interactions Sidebar enables you to display the **Dial Pad**, **Interaction Notes**, or **Interaction Log.** You can also assign **Account and Wrap-Up Codes** to interactions and **Request Assistance** from your supervisor. To choose what appears in the Sidebar, click the appropriate control on the right edge of the sidebar area.

**Tip**: Close the sidebar area by clicking the same control used to open the sidebar.

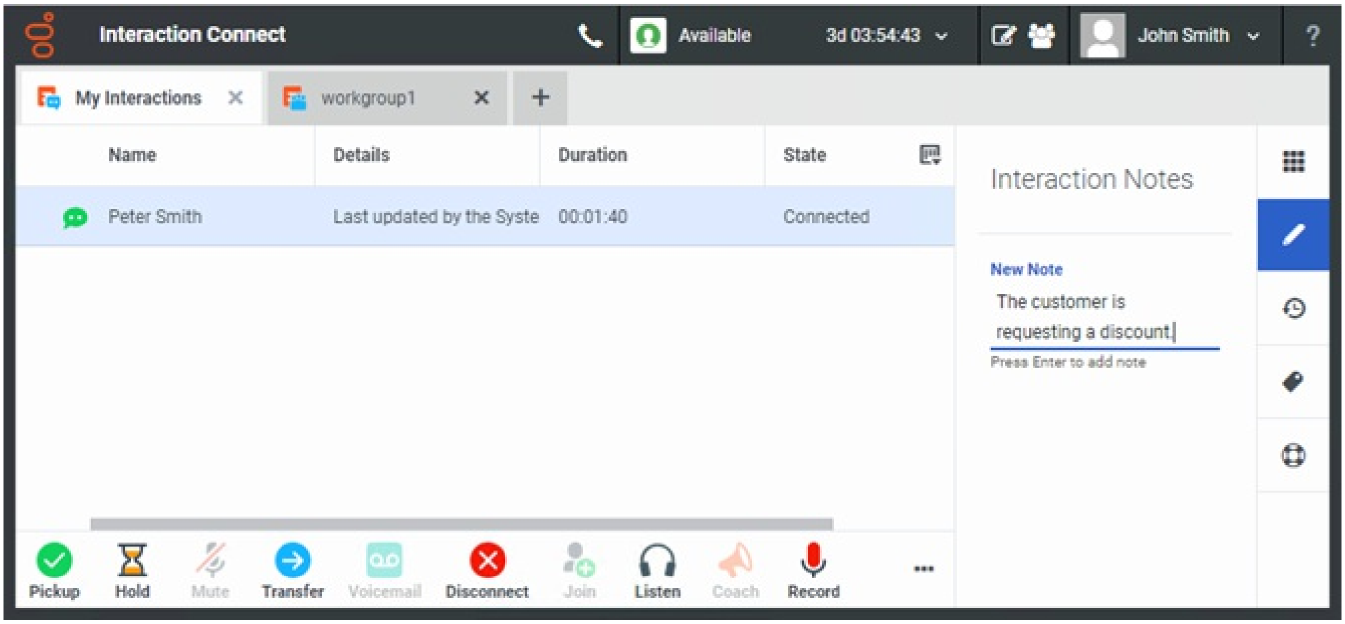
## Dial Pad

Numbers that you click in the Dial Pad appear in the Dial a Number field.



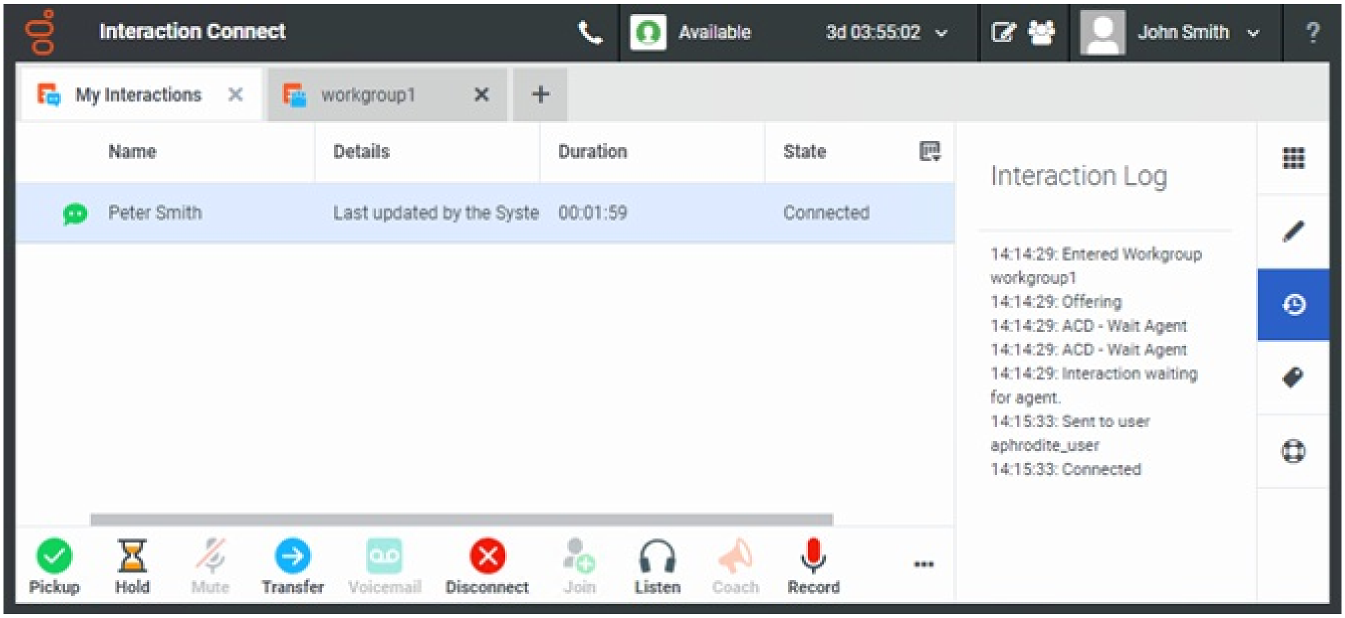

## Interaction Notes

Select a connected interaction and make notes in the Interaction Notes sidebar. To add a note to the interaction, press **Enter**.



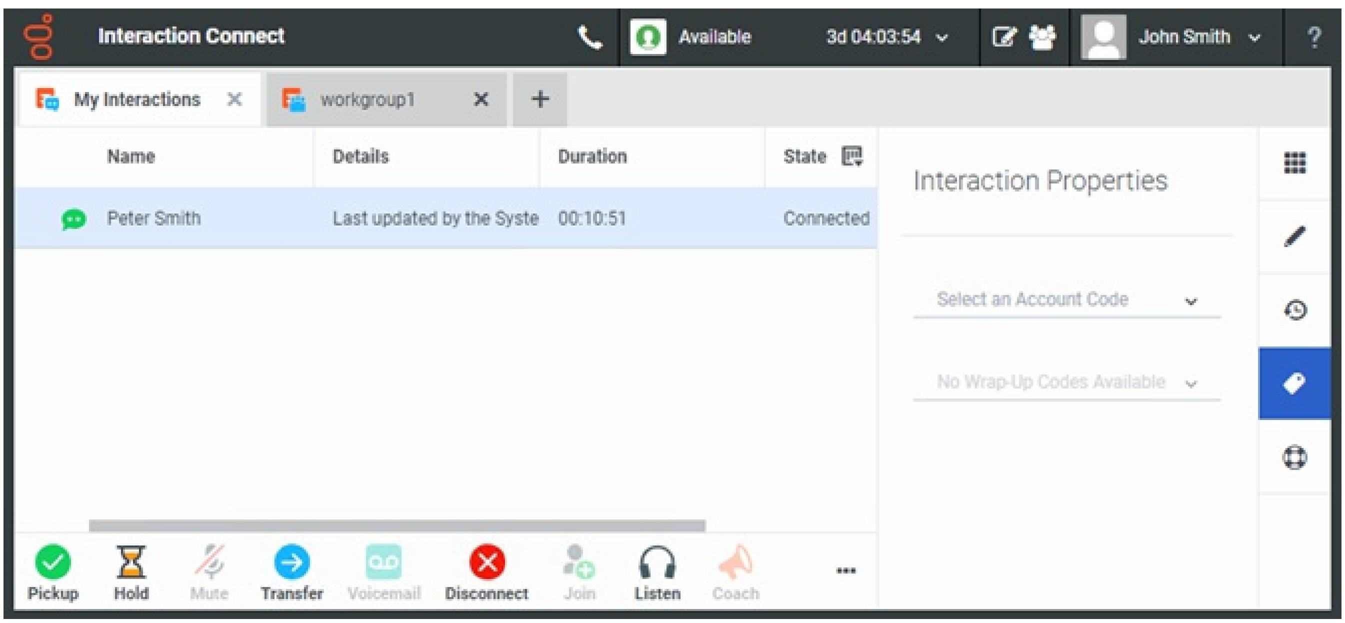

## Interaction Log

The Interaction Log sidebar displays the connection and routing details for the selected interaction.



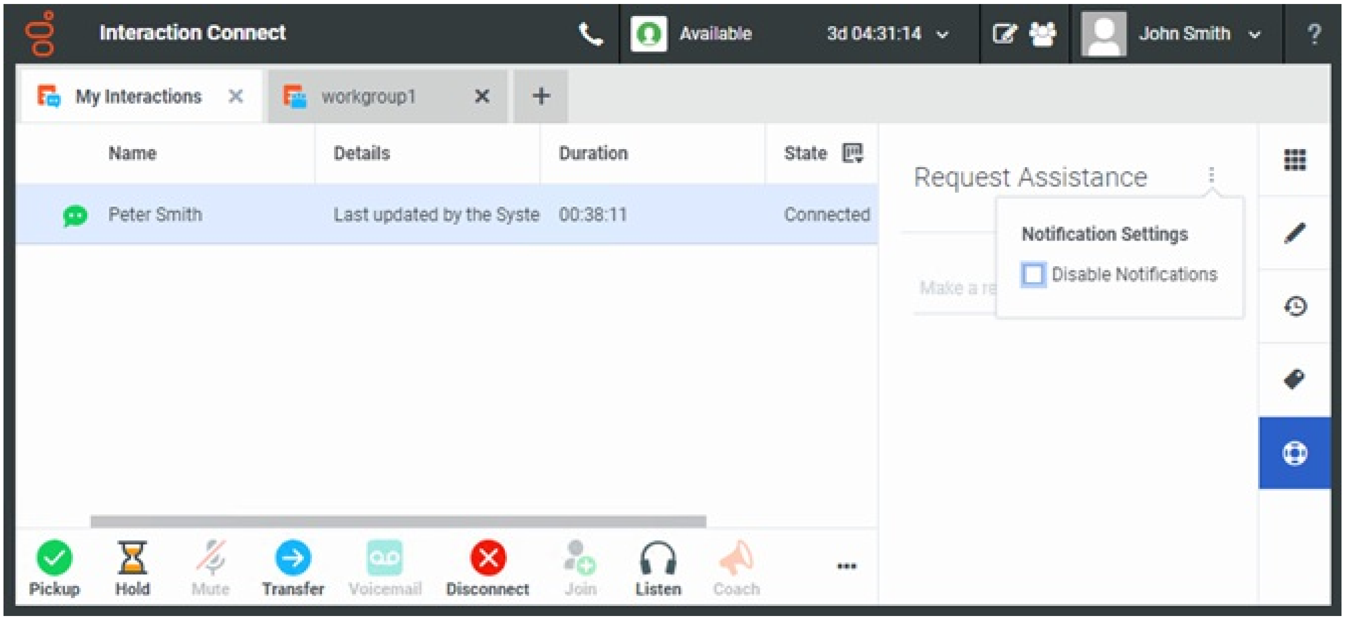

## Interaction Properties

Select an interaction and assign an Account code or Wrap-Up code. Account codes are sometimes used for customer billing purposes. To assign a Wrap-Up code, you must be a member of a workgroup for which the CIC administrator has configured and activated Wrap-Up codes.



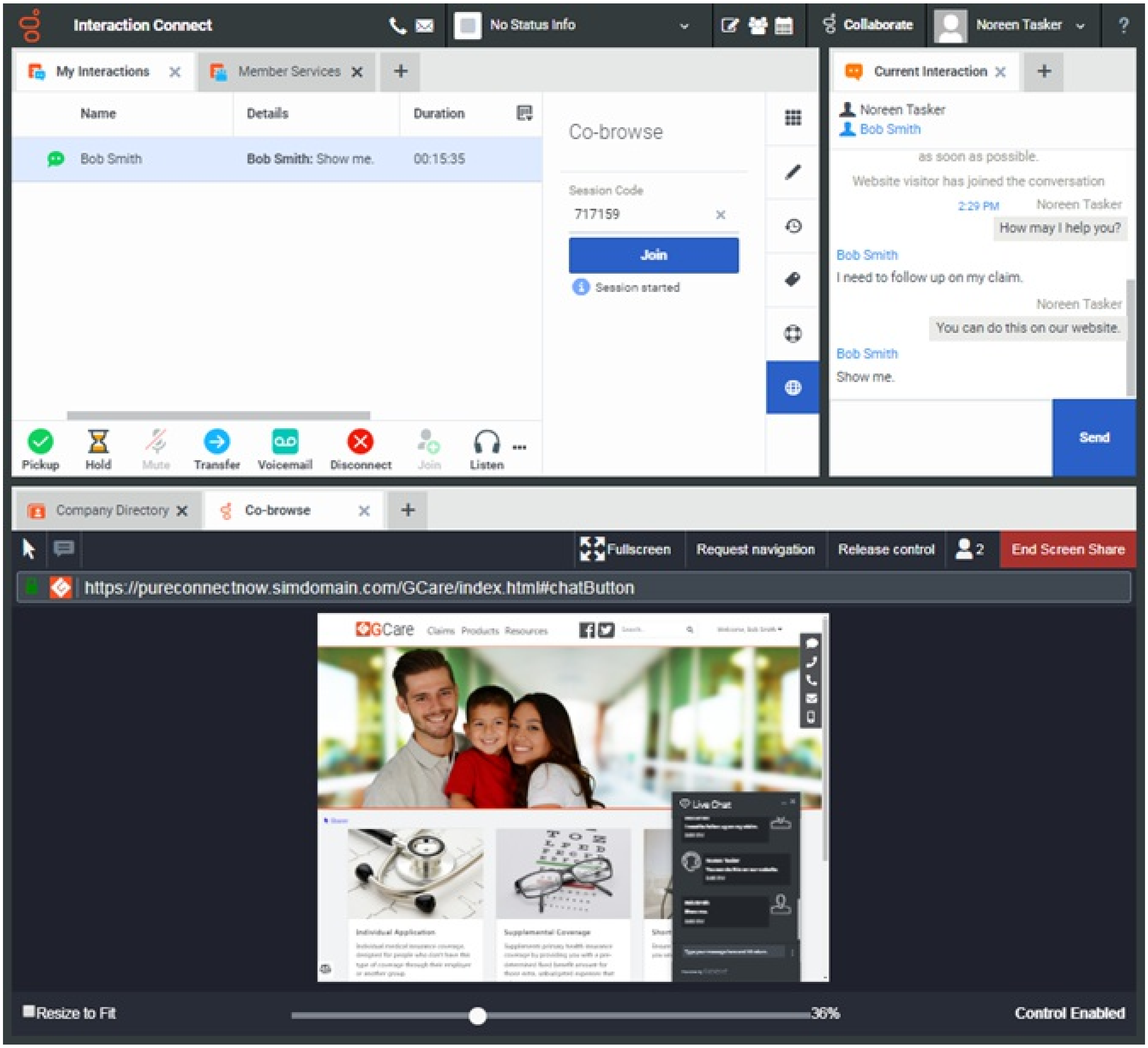

## Request Assistance

Select an ACD-routed interaction and request assistance from your supervisor.




## Co-browse

Select an interaction and enter a Session Code in the Co-Browse sidebar. After you click **Join**, you see the website visitor's view of your company's webpage.




## Related Topics

- Account Codes
- Add Notes
- Dial Pad
- Request Assistance from Your Supervisor
- Use Co-browse during an interaction

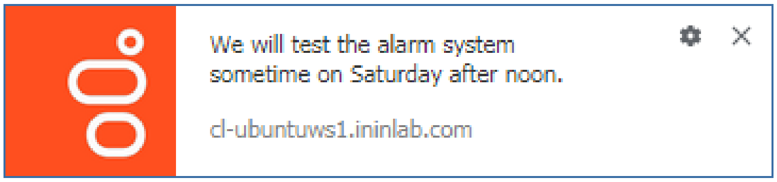
# Supervisor Client Memos

CIC administrators can easily communicate with selected users, workgroups or roles by means of brief messages (client memos). An administrator creates these client memos in Interaction Supervisor and they appear in the CIC client. There are two ways you can receive these client memos: desktop pop-ups and notifications.

## Desktop pop-ups

Desktop pop-ups (toast) appear in the lower right-hand corner of your Windows desktop. Pop-ups remain on the screen until you close them or the supervisor removes them.

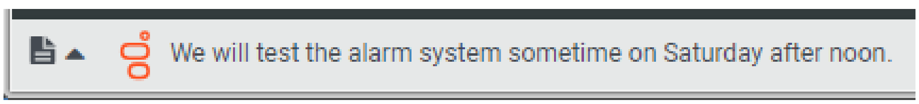
**Note**: You cannot retrieve a desktop pop-up after you close it.



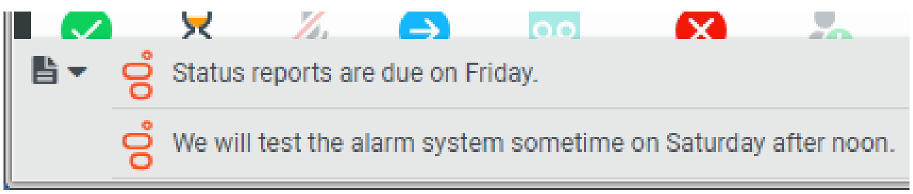

## Notification Area

Notifications appear in lower edge of the Interaction Connect interface. This notification area contains the text of the latest client memo. If you receive multiple client memos, the text of the client memos scroll one at a time into this area.

**Note**: Notifications do not appear in this area in Internet Explorer. However, they do appear as messages in the top part of the Interaction Connect interface.



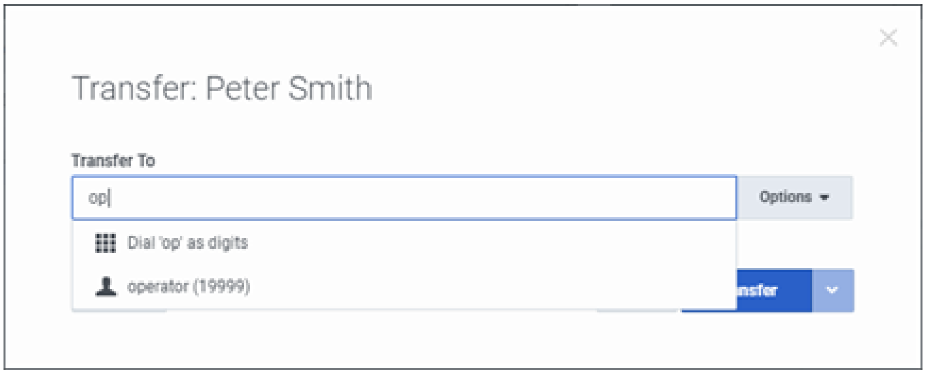

**Tip**: Click the drop-down arrow in the notification area to display a list of your current notifications.




# Transfer Dialog Box

**Requirements**: Access Control Rights determine which Attendant Profiles, User Queues, 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, User Queues, Workgroup Queues, and Station Queues for matching names and numbers.

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.

**Note**: Interaction Connect does not currently support the use of non-English IME (Input Method Editor) for text input in the **Transfer To** text box.

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.

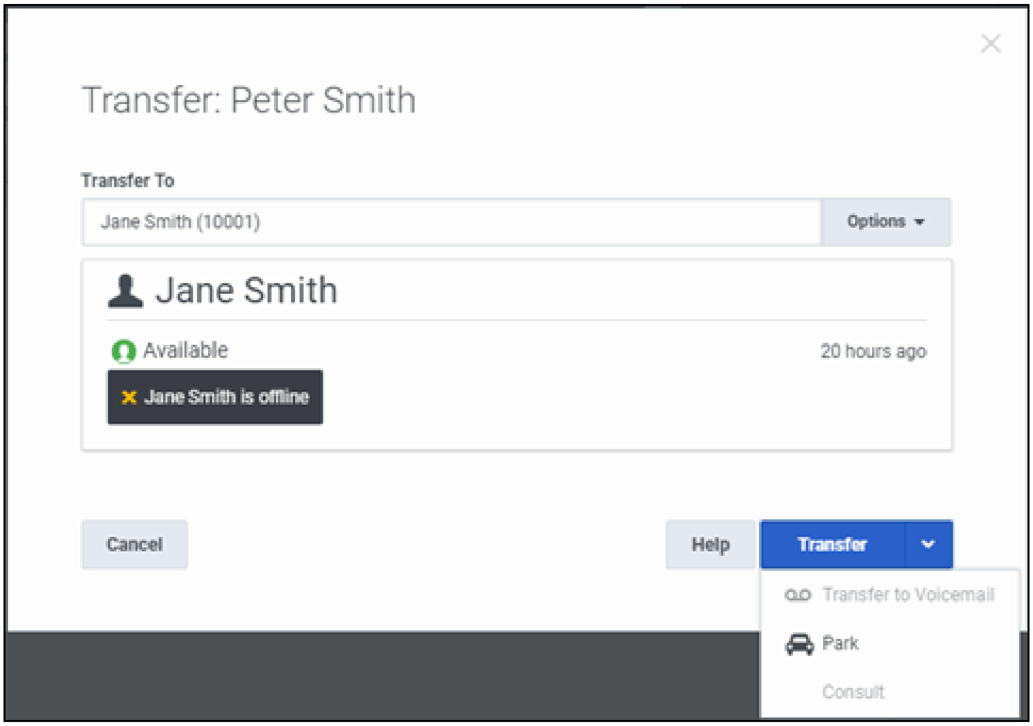
  **Requirements**: Search Station Queues and Search Workgroup Queues Access Control rights determine which station and workgroup queues are available as transfer targets.

- 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

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

## Custom Buttons

**Requirements**: You need the appropriate View Client Buttons Access Control right to see all or selected custom buttons in the Queue Control toolbar.

Your CIC administrator can create custom buttons for the Queue Control toolbar which appears on the My Interactions view and other queue management views.

A custom button can invoke a handler or an add-in. A custom button can be available for use at all times or only when an interaction is selected, or only when a specific type of interaction (such as a chat) is selected, or only when an active (not disconnected) interaction is selected.

Custom buttons to which you have the appropriate rights are shown by default and are appended to the right side of the Queue Control toolbar. You can select a **Button Style** for custom buttons in the Customize Toolbar dialog box. You can move or remove a custom button from your Queue Control toolbar just like any other interaction button.

Custom buttons can also appear in the context menu. If you right-click an interaction, it shows the same buttons that are enabled in the toolbar, depending on the button configuration. For example, if you right-click on the active interaction, you see the custom buttons that are available only when you *select an active interaction* as well as those that are *always available*. If you right click on the grid outside of any interaction or even on a disconnected interaction, then you see only the custom buttons that are *always available.* Custom buttons can also be removed by the CIC administrator from your Queue Control toolbar and the Customize Toolbar dialog box.

The behavior and appearance of custom buttons are defined in Interaction Administrator. Contact your CIC administrator for information on using custom buttons.

**Note**: Custom buttons defined in Interaction Administrator can appear in both Interaction Desktop and Interaction Connect.  Custom buttons that invoke an add-in work only in Interaction Connect.  Custom buttons that launch a local application work only in Interaction Desktop. Custom buttons that invoke a handler work in both CIC clients.

**Related Topics**

Using the Queue Control Toolbar

## Customizing Queue Control Toolbars

**Requirements**: The Customize Client Security Right enables you change the buttons in a Queue Control toolbar. You also need specific rights to add and use buttons on the Queue Control toolbar. For more information, see Using the Queue Control Toolbar.

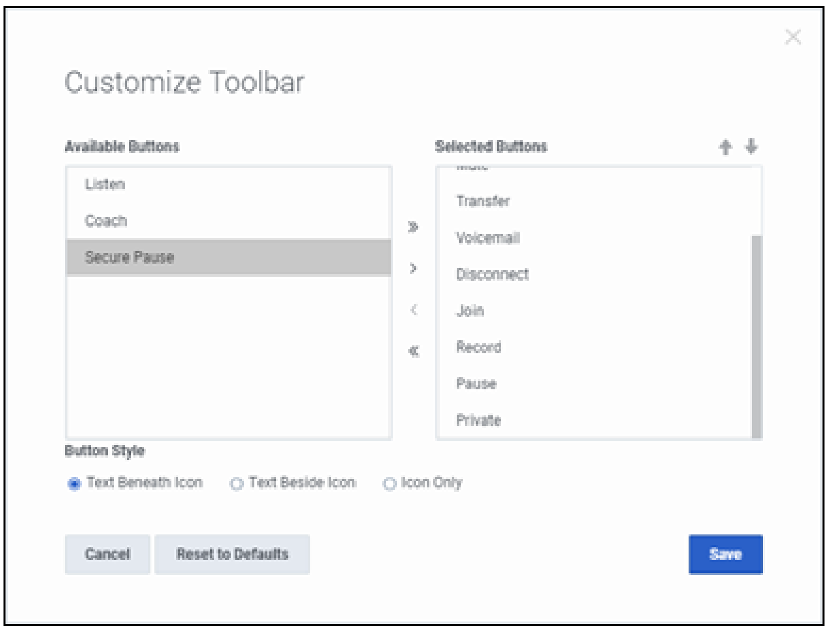
You can add, remove, or rearrange buttons on Queue Control toolbars. The Queue Control toolbar appears on each queue management view (such as My Interactions). Button configuration is specific to each queue view; that is, you can have a different toolbar configuration on each queue view.

**Video:**

https://player.vimeo.com/video/432925894

**To customize a Queue Control toolbar:**

1. Right-click anywhere in a Queue Control toolbar and click **Customize Toolbar**.
2. In the Customize Toolbar dialog box, do any of the following:




- To add a button to the toolbar, from the **Available Buttons** list, select a button name and click **>**.
- To add all the available buttons, click **»**.
- To remove a button from the toolbar, from the **Selected Buttons** list, select a button name and click **<**.
- To remove all buttons from the toolbar, click **«**.
- To change the order of buttons on the toolbar, from the **Selected Buttons** list, select the button name and use the **Up** and **Down** arrows to move the button to the desired position on the toolbar.
- In the **Button Style** section, make a selection that determines whether the buttons have labels and, if labeled, where the labels appear.

3. Do one of the following:

- Click **Save** to save the new settings.
- Click **Cancel** to discard any changes you made to the toolbar this time.
- Click **Reset to Defaults** to return the toolbar to its default configuration.

**Related Topics**

Custom Buttons
Customizing the Interface

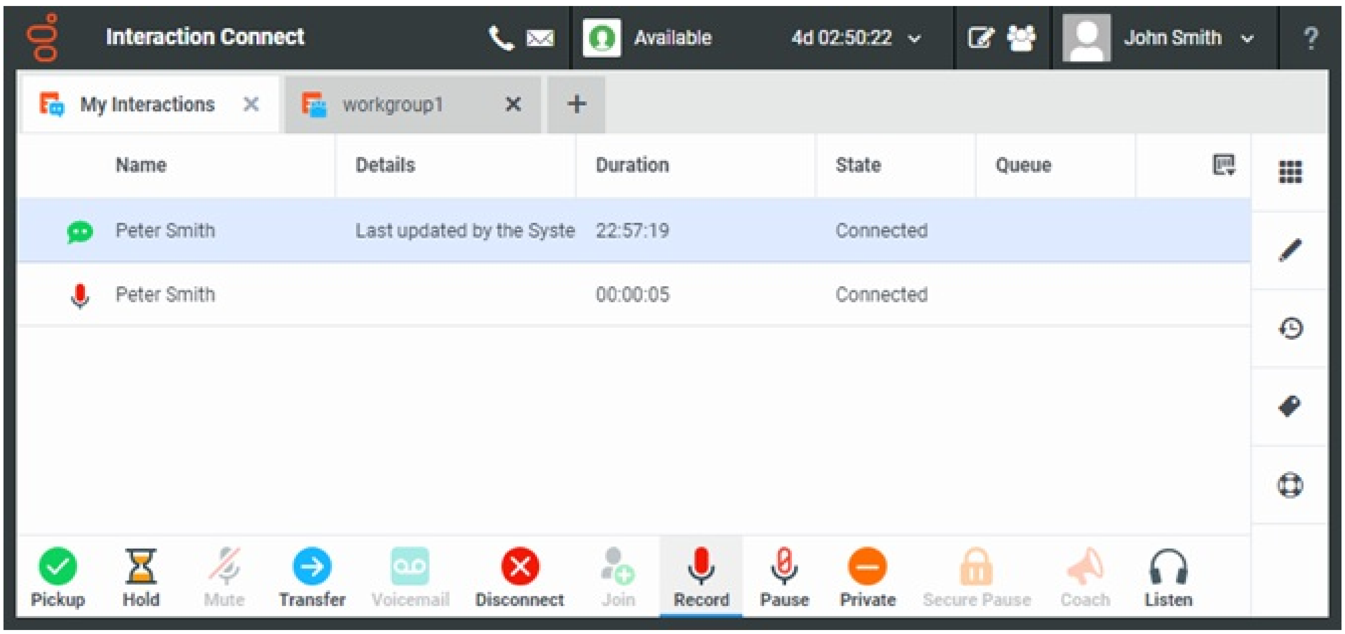
# Using the Queue Control Toolbar

**Requirements**: Your CIC administrator controls whether a button appears on the Queue Control toolbar by default, whether you can add a specific button to the toolbar, and also whether you can use a specific button. If you do not see a specific button in the CIC client and you cannot add it to the toolbar or the button is disabled, you may not have the appropriate rights to see or use it.

Interaction Command Rights determine whether you can add a specific button to a Queue Control toolbar, if it does not appear by default.

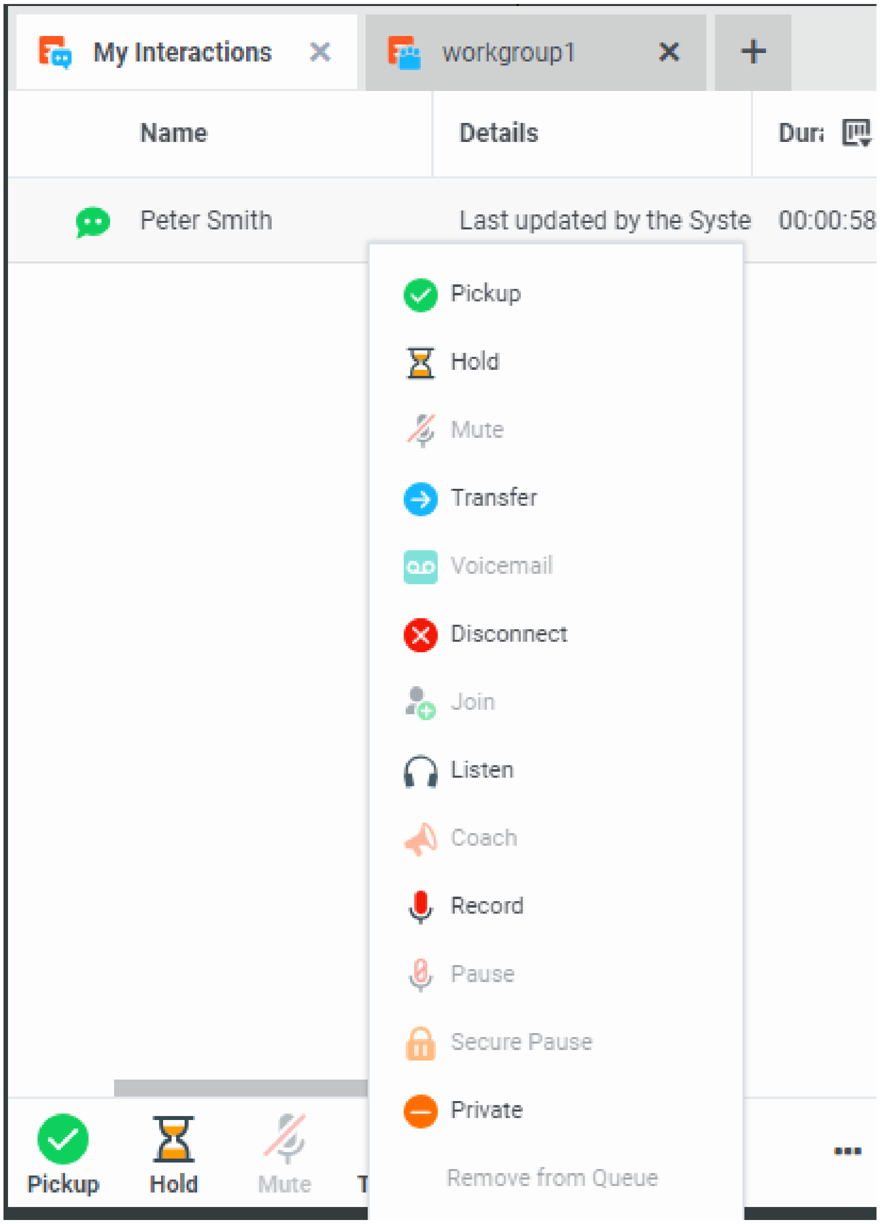
My Interaction Rights determine the actions you can perform on interactions in My Interactions. Access Control rights determine which actions you can perform on **other queues** you have the rights to display. To **Disconnect**, **Hold**, **Mute**, **Pickup** or **Transfer** interactions, you need the appropriate Modify Station Queues, Modify User Queues, or Modify Workgroup Queues Access Control rights. To **Coach**, **Join**, **Listen**, **Record**, or **Snip** interactions, you need the appropriate Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights.

The Queue Control toolbar helps you manage your interactions. It appears on each queue management view.




## Queue Control Shortcut menu

You can view the currently available queue control shortcuts by right-clicking on an interaction in My Interactions or other queue tab. This displays the shortcut menu for the current interaction. Actions that are not available for the current interaction are grayed-out.




**Related Topics**

- Custom Buttons
- Customizing Queue Control Toolbars
- Queue Control Toolbar Buttons

## Queue Control Toolbar Buttons

**Requirements**: You need the appropriate Interaction Command Right to add a Queue Control button to a Queue Control toolbar. You need the appropriate My Interaction Right to use the button when it appears in the My Interactions toolbar. To **Disconnect**, **Hold**, **Mute**, **Pickup** or **Transfer** interactions in other queues, you need the appropriate Modify Station Queues, Modify User Queues, or Modify Workgroup Queues Access Control rights. To **Coach**, **Join**, **Listen** or **Record** interactions in other queues, you need the appropriate Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights.

Queue Control Toolbar buttons enable you to work with a selected interaction. Your CIC administrator controls which buttons appear on the Queue Control toolbar in My Interactions or other queue view by default.

Click a button name for a description of its function.

| | |
|---|---|
| | Coach |
| | Conference Call<br>Conference Chat |
| | Disconnect |
| | Hold |
| | Join |
| | Journey Map |
| | Listen |
| | Mute |
| | Pause |
| | Pickup |
| | Private |
| | Record |
| | Secure Pause |
| | Snip Button |
| | Transfer |
| | Secure Input |

| | |
|---|---|
|  | Voicemail |

## Custom Buttons

Your CIC administrator can create custom buttons for the Queue Control toolbar. These buttons are defined in Interaction Administrator.

**Related Topics**

- Customizing Queue Control Toolbars
- Using the Queue Control Toolbar

## Coach Button

**Requirements:** The "Coach" Interaction Command Right determines if the Coach button can appear on a toolbar. It also controls whether the Coach command appears on a shortcut menu. The Coach Interactions Security right enables you to coach an interaction appearing in My Interactions. The Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights enable you to coach an interaction appearing on another queue.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click this button to add yourself to an agent's call on any user or station queue you have permission to monitor. This enables you to provide advice to the agent without the customer knowing that you are assisting on the call. The agent can hear your side of the conversation, but the customer cannot.<br><br>This feature is especially helpful to supervisors who are training new agents, monitoring employee customer service performance, or simply providing assistance with a customer call.<br><br>**Tip**: If the agent presses the Mute button while you are "coaching" the agent, the customer no longer hears the agent but the agent can continue to converse with you. The Mute button does not affect the audio between the agent and the coach.<br><br>**Note**: You must have permission to use the Coach feature and you must have permission to monitor queues. If you have questions about your rights and permissions, see your CIC administrator. |

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

**Related Topics**

- Coach an Interaction
- Using the Queue Control Toolbar

## Conference Button

**Requirements**: Enable Accessibility Mode in PureConnect. Also, your PureConnect administrator must set the **accessibilityMode** Server Parameter to **True**.

You can use the keyboard to create a conference call or chat **only when in Accessibility Mode**. The Conference button is available only in Accessibility Mode.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click Conference to create a conference for two or more calls or chats. |

**Related Topics**

Create a Conference Call in Accessibility Mode
Create a Conference Chat in Accessibility Mode

## Disconnect Button

**Requirements**: The "Disconnect" Interaction Command Right determines if the Disconnect button can appear on a toolbar. It also controls whether the Disconnect command appears on a shortcut menu. The Disconnect Interactions Security right enables you to disconnect an interaction appearing in My Interactions. The Modify Station Queues, Modify User Queues, or Modify Workgroup Queues Access Control rights enable you to disconnect an interaction appearing on another queue.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click Disconnect to disconnect the current interaction. |

**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. It also controls whether the Hold command appears on a shortcut menu. The Put Interactions on Hold Security right enables you to hold an interaction appearing in My Interactions. The Modify Station Queues or Modify User Queues Access Control rights enable you to hold an interaction appearing on another queue.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click Hold to place the selected interaction on hold.<br>To take the interaction off hold, click Hold again, or click Pickup. |

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

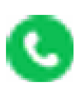
**Tip:** Your CIC administrator can configure a maximum hold time for interactions. By default, interactions on hold for longer than fifteen minutes are disconnected. Your administrator can change the amount of time an interaction can remain on hold and the behavior that occurs once the hold time is 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

## Join Button

**Requirements:** The "Join" Interaction Command Right determines if the Join button can appear on a toolbar. It also controls whether the Join command appears on a shortcut menu. The Join Interactions Security right enables you to join an interaction appearing in My Interactions. The Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights enable you to join an interaction appearing on another queue.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click this supervisory feature button to add yourself to a call on any user or station queue you have permission to monitor, and both the agent and the customer can hear your side of the conversation. When you use the Join feature, the CIC client creates a conference call between the agent, the customer, and you.<br>The connected call icon is displayed.<br> |

**Related Topics**

Join an Interaction
Using the Queue Control Toolbar

## Listen Button

**Requirements:** The "Listen" Interaction Command Right determines if the Listen button can appear on a toolbar. It also controls whether the Listen command appears on a shortcut menu. The Listen in on Interactions Security right enables you to listen to an interaction appearing in My Interactions. The Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights enable you to listen to an interaction appearing on another queue.

| | |
|---|---|
| **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.<br>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.<br>**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. |

**Warning**: Genesys 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**

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. It also controls whether the Mute command appears on a shortcut menu. The Mute Interactions Security right allows you to disable the microphone on your telephone while working with an interaction appearing in My Interactions. The Modify Station Queues or Modify User Queues Access Control rights allow you to disable your microphone for an interaction appearing on another queue.

| | |
|---|---|
| **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.<br>Click **Mute** again to reactivate the microphone.<br>If you are in a conference call hosted by a different CIC 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.<br>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. It also controls whether the Pause command appears on a shortcut menu. The Pause Interactions Security right enables you to pause while recording an interaction appearing in My Interactions. The same Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights that enable you to record an interaction appearing on another queue also enable you to pause while recording.

**Note**: **Pause** is not available if you are making a Snippet recording. Snippet recordings can be started or stopped, but not paused. **Pause** is also unavailable if the call is not in a state in which this action can be performed.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Use this button to control an ad-hoc recording session.<br>Click this button to pause the recording session. Click it again to resume the recording session. |

**Warning**: Genesys 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**

- Record a Call
- Record Button
- Recording Types
- Snip 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. It also controls whether the Pickup command appears on a shortcut menu. The Pickup Interactions Security right enables you to pick up an interaction appearing in My Interactions. The Modify Station Queues, Modify User Queues, or Modify Workgroup Queues Access Control rights enable you to pick up an interaction appearing on another queue.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click this button to pick up the current interaction, or to take the current interaction off hold. |

**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. It also controls whether the Private command appears on a shortcut menu. The Private Interactions Security right enables you to mark an interaction appearing in My Interactions as private.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click this button to prevent other Customer Interaction Center users from recording or listening to your conversation.<br>**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

## 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. It also controls whether the Record command appears on a shortcut menu. The Record Interactions Security right enables you to record an interaction appearing in My Interactions. The Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights enable you to record an interaction appearing on another queue.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click Record to record the currently selected call. A call recording is saved as a. wav file.<br>Clicking Record the first time starts the recording session for a call. Clicking Record again stops the recording session for a call.<br>**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.

**Warning**: Genesys 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.

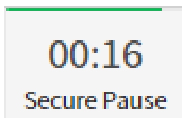
**Related Topics**

Record a Call
Record a Chat Session
Snip Button
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. 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 |
| **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**.<br><br>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.**<br><br><br><br>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.<br><br>**Tip**: Pressing **Secure Pause** multiple times during a pause does not increase the duration beyond the maximum time limit.<br><br>**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. |

**Warning**: Genesys 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**

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

## Snip Button

The **Snip** button enables you to make recordings of all or selected parts of an interaction. Interaction Recorder manages these Snippet recordings and stores them in the CIC database. For more information about the differences between Snippet and Ad hoc recordings, see Recording Types.

**Note**: Snippet recordings of email interactions are available only if your CIC administrator separately enables this feature. Snippet recordings of email interactions are not available by default.

**Requirements:** See the Requirements for Snippet Recordings.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar<br>**Tip**: The **Snip** button does not appear on the Queue Control toolbar by default. If you have the appropriate rights and license, you can customize the toolbar and add the Snip button. |
| **Description** | Click **Snip** to make a snippet recording of the currently selected call or chat.<br>**Note**: Snippet recordings of email messages is not enabled by default.<br>Clicking **Snip** the first time starts the recording session for a call. Clicking **Snip** again stops the recording session for a call.<br>**Note**: You cannot use **Pause** during a Snippet recording. However, you can use the Snip button to create multiple recordings during the same interaction, skipping over the parts you don't want to record. The Snip button is unavailable if the interaction is not in a state in which this action can be performed or if you do not have the appropriate rights. Contact your CIC administrator if you need security rights to use this feature. |

**Warning**: Genesys 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**

- Record a Call
- Record a Chat Session
- Recording Types
- Using the Queue Control Toolbar

## Transfer Button

**Requirements**: The "Transfer" Interaction Command Right determines if the Transfer button can appear on a toolbar. It also controls whether the Transfer command appears on a shortcut menu. The Transfer Interactions Security right enables you to transfer an interaction appearing in My Interactions. The Modify Station Queues, Modify User Queues, or Modify Workgroup Queues Access Control rights enable you to transfer an interaction appearing on another queue.

| | |
|---|---|
| **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

## Secure Input

**Requirements**: The "Secure Input" Interaction Command Right determines if the Secure Input button can appear on a toolbar. It also controls whether the Secure input command appears on a shortcut menu. The Initiate Secure Input Interactions Security right enables you to process the secure input.

| | |
|---|---|
| **Icon** |  |
| **Location** | Queue Control toolbar |
| **Description** | Click this button to process the secure input. |

**Related Topics**

- Processing Secure Input
- Using the Queue Control Toolbar

### Voicemail Button

**Requirements**: The "Voicemail" Interaction Command Right determines if the Voicemail button can appear on a toolbar. It also controls whether the Voicemail command appears on a shortcut menu. 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 |
| **Description** | Click this button to transfer a selected call to your voice mail account.<br>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.

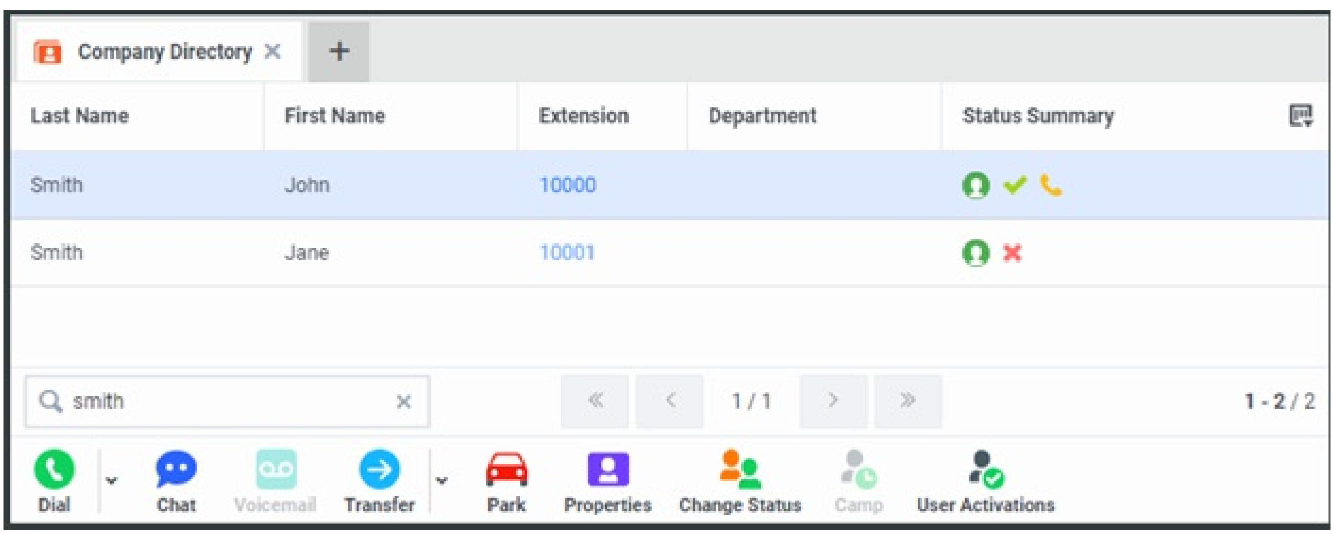
**Related Topics**

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

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

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

| Toolbar Button | Function |
|---|---|
| | Dial |
| | Initiate a Chat Session |
| | Voicemail |
| | Transfer |
| | Consult |
| | Park on Queue |
| | Properties |
| | Change User's Status |
| | Camp on an Internal Extension |
| | User Activations |
| | Workgroup Activations |

**Related Topics**

Using the Directory Toolbar

## Camp Button

**Requirement**: The HideClientCamp server parameter controls whether the Camp button appears in the Directory toolbar for members of selected workgroups. If you do not see this button, contact your CIC administrator

| | |
|---|---|
| **Icon** | |
| **Location** | **Directory Toolbar** |
| **Description** | Click this button to camp on the internal extension of a selected directory entry.<br>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**<br>**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. |

**Related Topics**

Directory Toolbar Buttons
Set Another User's Status

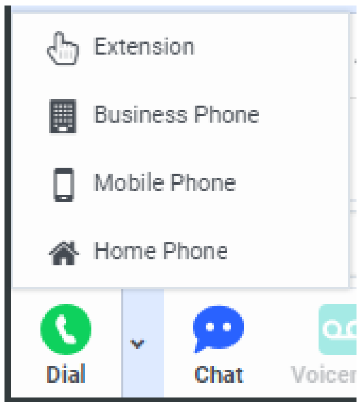
## Initiate New Chat Button

| | |
|---|---|
| **Icon** | |
| **Location** | **Directory Toolbar** |
| **Keyboard shortcut** | **Ctrl+Shift+C** |
| **Description** | Click this button to start and participate in intercom chats with other CIC client users.<br>**Note**: To initiate an intercom chat, you need the View Directory Status Columns Access Control right for the Logged In column in the directory view. This enables the CIC client to determine if another CIC user is available for a chat. This right enables the Chat button when another CIC is available for a chat. |

**Related Topics**

Initiate a Chat Session

## Dial Button

<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 dial a specific number associated with a selected directory entry by doing one of the following:
<ul>
<li>Select an entry in the Company Directory and then click the Dial button to dial the default number.</li>
<li>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.</li>
</ul>

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

### Related Topics

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

## Park on Queue Button

<table>
<tr><td>Icon</td><td></td></tr>
<tr><td>Location</td><td>Directory Toolbar</td></tr>
<tr><td>Description</td><td>You can place any connected call or connected ACD-routed email interaction in your queue in a selected user's queue or workgroup queue.<br><br>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.</td></tr>
</table>

### 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**

- 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.<br>Select a directory entry and click this button. The currently selected call is transferred to the designated user's voice mail. |

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

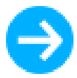
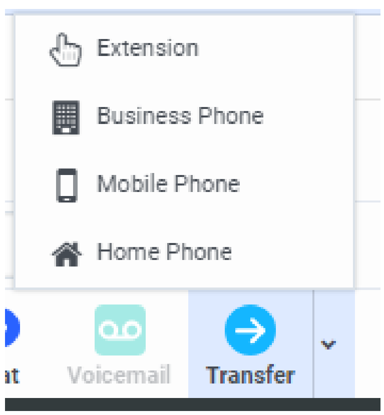
**Related Topics**

- 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.

**Note**: For more information about checking which numbers are associated with your directory entries, see View and Edit Directory Entries.

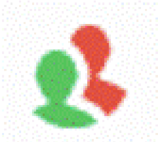
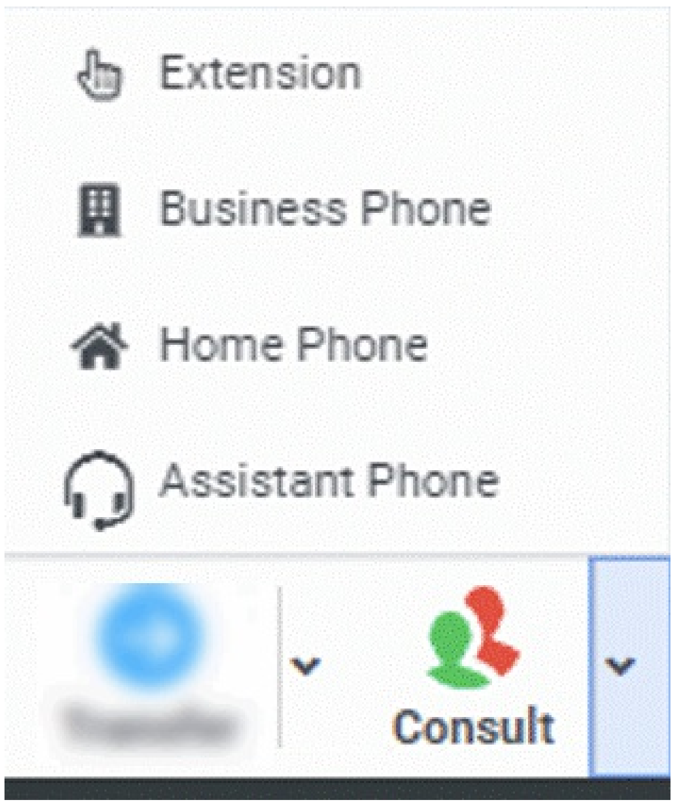
| | |
|---|---|
| **Icon** |  |
| **Location** | **Directory Toolbar** |
| **Description** | Use this button to transfer a call to a specific number associated with a selected directory entry by doing one of the following:<br>• Select an entry in the Company Directory and then click the Transfer button to transfer the call to the default number.<br>• 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.<br><br> |

**Related Topics**

Transfer a Call Without Consulting the Recipient
View and Edit Directory Entries

## Consult

> **Note**: For more information about checking which numbers are associated with your directory entries, see <u>View and Edit Directory Entries</u>.

<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 consult with other Agent during a call by dialing a specific number associated with a selected directory entry by doing one of the following:
<ul>
<li>Select an entry in the Company Directory and then click the Consult button.</li>
<li>Select an entry in the Company Directory and then click the arrow on the Consult button. Click one of the displayed "Consult" entries to connect the call to the associated number.</li>
</ul>


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

**Related Topics**

- Transfer
- User Activations
- Workgroup Activations
- Send to Voicemail
- Properties

## User Activations Button

**Requirement**: You need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features.

| | |
|---|---|
| **Icon** |  |
| **Location** | Directory Toolbar |
| **Description** | Click this button to manage the workgroup activation status for the selected user. |

**Related Topics**

Change a User's Activated Workgroups

## Workgroup Activations Button

**Requirement**: You need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features.

| | |
|---|---|
| **Icon** |  |
| **Location** | **Workgroup Directory Toolbar** |
| **Description** | Click this button to manage the activation status for the members of this workgroup. |

**Related Topics**

Change a User's Activated Workgroups

# Configuration Options

**Requirements**: You need the Customize Client Security right to customize your personal CIC client configuration settings.

The CIC client organizes your configuration options in a single dialog box.

**Calls**

- Follow Me Routing
- Personal Prompts

**Connection**

**Email**

**Features**

**Monitored Appearances**

**General**

**Related Topics**

Understanding the Application Settings Dialog Box

## Understanding the Application Settings Dialog Box

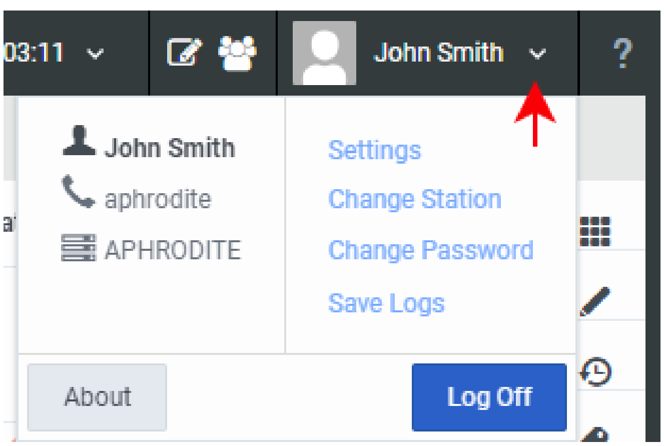
**Requirements**: You need the Customize Client Security right to customize your personal CIC client configuration settings.

You use the Application Settings dialog box to control the appearance and behavior of Interaction Connect.

### Accessing the Application Settings Dialog Box

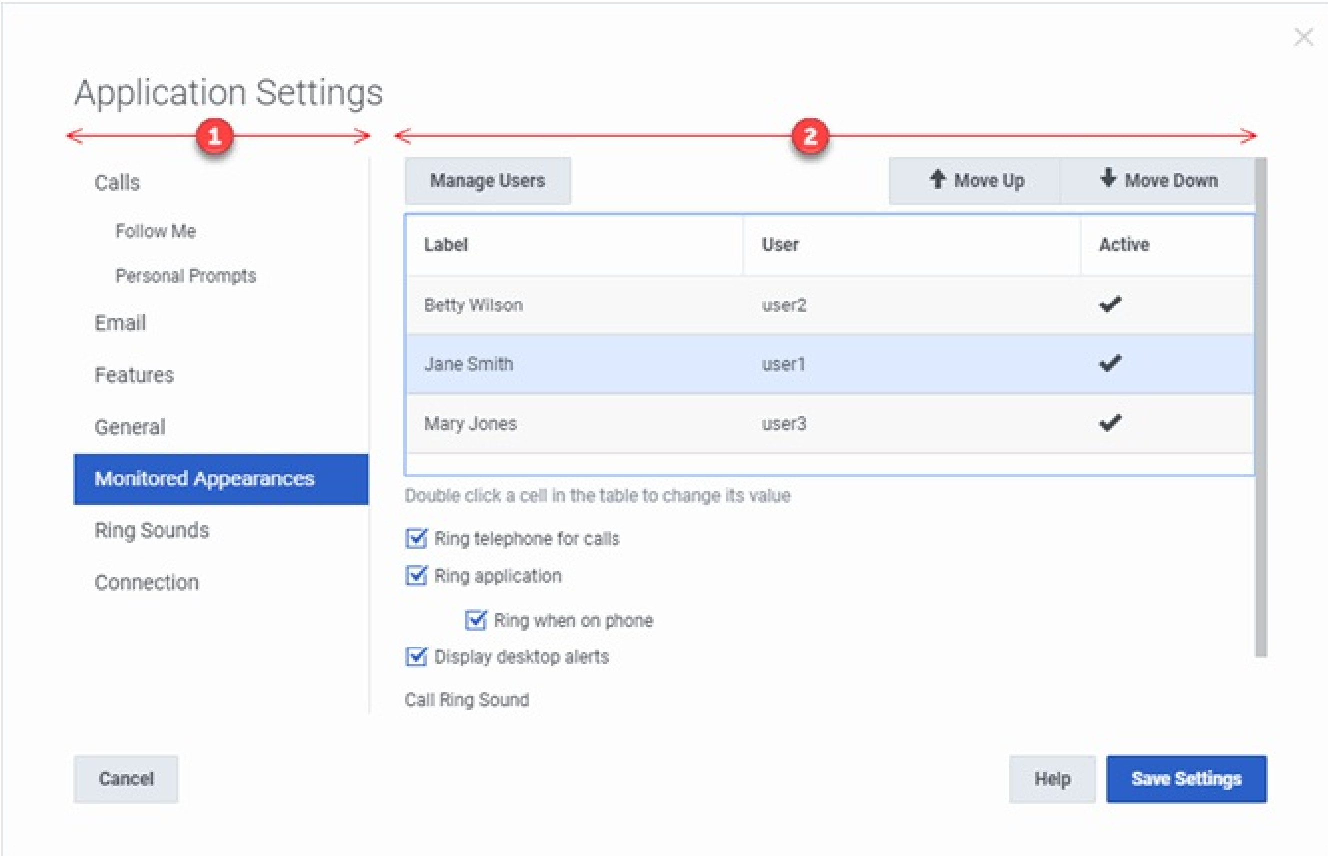
To access the Application Settings dialog box:

- Open the menu and select **Settings**.




### Using the Application Settings Dialog Box

You select the appropriate settings node in the Navigation pane. You configure individual configuration settings in the Properties details pane.




| | | |
|---|---|---|
| 1 | **Navigation pane** | The available types of settings are in a tree view control on the left. Click any node to display the settings for that node. |
| 2 | **Properties details pane** | The settings associated with each node appear in the Properties details pane. |

## Add-in Architecture

Your company's in-house developers can add custom features to the CIC client. An add-in is a piece of customer code or customer GUI that the CIC client detects and loads into a secure context, protecting both the CIC client and the customer from potential problems. This piece of code can then interact with core CIC client functionality without risk.

Contact your CIC administrator for more information about any custom features your company may have added to the CIC client.

# Alerting Options

**Requirements**: You need the Customize Client Security right to configure an alerting option.

You can have multiple interactions in the My Interactions queue. However, you can perform actions (such as mute, record, transfer, etc.) on *only* the currently selected interaction.

When you enable this option, Interaction Connect automatically selects the oldest interaction that is not disconnected when you disconnect your current interaction.

**To automatically select the next interaction:**

1. In the Applications Settings dialog box, click **Alerting**.
2. Select the **Auto select interactions after disconnect** check box.
3. Click **Save Settings**.

The CIC administrator can configure how Interaction Connect notifies you of new incoming calls, faxes or voice mail, among other options. For more information about these alerting options, see:

- Voice Mail / Fax Paging
- My Interactions Ring Sounds
- Desktop Alerts

# Calls Configuration

**Requirements**: You need the Customize Client Security right to customize your personal CIC client configuration settings.

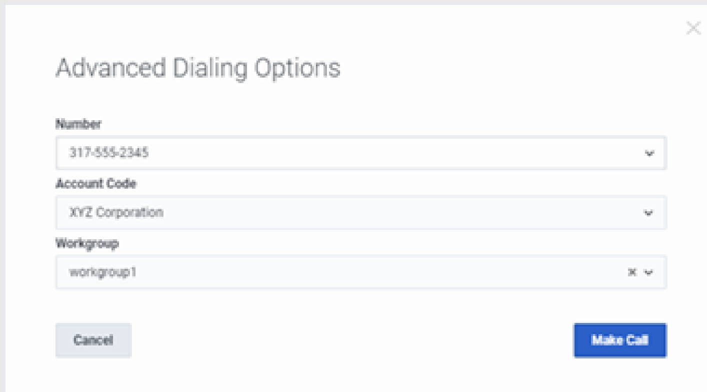
Calls options control automatic disconnects on outbound calls, automatic pickups on held calls, call waiting, account and workgroup codes availability, and other features.

**To set calls options:**

1. In the Application Settings dialog box, click the **Calls** node.
2. In the Calls property details pane, complete the fields as described in Calls Options.
3. Click **Save Settings** to save your selections and close the Application Settings dialog box.

## Calls Options

**Note**: As of CIC 2016 R3, you can set the **Add account codes or workgroup when dialing** option. Your CIC administrator can set the other call options for you.

| | |
|---|---|
| **Timeout for external calls (in seconds):** | This option determines the number of seconds your outgoing calls ring before they are disconnected.<br>**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. |
| **Add account codes or workgroup when dialing** | If enabled, the Advanced Dialing Options dialog box appears when you start a call. It defaults to the last account code you used. For more information, see Advanced Dialing Options.<br> |
| **Analyze outgoing external calls** | If enabled, Telephony Services (TS) monitors whether the outgoing interaction connects to a person or an answering machine.<br>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 when call becomes unsecure** | If enabled, an open lock 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 incoming calls** | 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 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. |

**Related Topics**

Understanding the Application Settings Dialog Box

# Connection Settings

> **Requirements**: You need the Customize Client Security right to customize your personal CIC client configuration settings.

At several points during the log on process, you can save your selections. Use the **Connection** page of the Application Settings dialog box to adjust these automatic logon settings.

1. In the Applications Settings dialog box, click **Connection**.
2. Adjust these settings as needed:

| | |
|---|---|
| **Default Language** | **Note**: This option is available only if your CIC administrator installs optional language packs on the CIC server. Also, your browser's language setting controls the formats used for dates, times, currency, and numbers.<br>To change the language used in the Interaction Connect interface, do one of the following:<br>• Select a language.<br>• To use your browser's language setting for the interface, click the **X** in the drop-down list. This clears the current selection and sets the list to **Detect automatically**. |
| **Automatically select "*server*" as the server at log on.** | This setting automatically selects the server named here as your Interaction Center server. |
| **Always use "*type of authentication*" to authenticate with "*server*".** | If your CIC administrator has enabled Single Sign On, this setting automatically selects the type of authentication to use with this CIC server when you log on to Interaction Connect. |
| **Always use the station "station" when I log on to "server".** | This setting automatically supplies the name of your workstation or remote number when you log on using this CIC server. |

3. Click **Save Settings**.

**Related Topics**

Logging On
Single Sign On

# Email Configuration

**Requirements**: You need the Customize Client Security right to configure email pickup or reply options.

You can block the automatic downloading of pictures or other linked content in ACD-routed email messages. Automatic downloads can verify your email address to spammers and cause you to receive more junk email. Automatic downloads can also consume bandwidth and cause email messages to open more slowly.

**Note**: You can unblock picture downloads on a case by case basis in the Current Interaction view.

**To configure email pickup or reply options:**

1. In the Applications Settings dialog box, click **Email**.
2. Make the following selections:

| | |
|---|---|
| **Always download external content in email messages** | This check box controls the default behavior of email messages in the Current Interaction view when you pick up or reply to an ACD-routed email message.<br>Do one of the following:<br>• To download and display automatically any images included in ACD-routed email messages, **select** the check box.<br>• To prevent automatic downloading and display of images, **clear** the check box.<br>**Result:** Any ACD-routed email message which contains an image displays a warning message instead. If you trust the source of the email message and want to display the blocked image, you can click the "To protect privacy" banner in the received email message.<br>**Note**: Blocking automatic image downloads speeds up email message downloads and can help protect you from junk email. |
| **No longer show email after sending** | Select this option to clear the **Current Interaction** view automatically when you click **Send**.<br>**Note**: This setting applies only when you reply to or forward an ACD-routed email message. After you click **Send,** the Current Interaction view contains the original (parent) email message. |
| **No longer show email after disconnecting** | Select this option to clear the **Current Interaction** view automatically when you click **Disconnect**.<br>**Note**: This setting applies only when you reply to or forward an ACD-routed email message. After you click **Disconnect**, the Current Interaction view contains the original (parent) email message. |

3. Click **Save Settings**.

**Related Topics**

Pick Up or Reopen an Email Message
Reply to an Email Message
Understanding the Application Settings Dialog Box

# Feature Settings

You can display some statistical views that help you manage agents. You need an **Interaction Supervisor Plug-In: Workgroup** license to configure which statistics appear in these views. Or you can use these views with a default selection of statistics which does not require a Supervisor license. For more information, see Display and Configure Agent Statistics and Display and Configure the Workgroup Statistics view.

You can also manage the activation status of agents. You need the **Interaction Supervisor Plug-In: Workgroup** license and the Modify Workgroup Queues Access Control right for the selected workgroup.

**To give CIC explicit permission to use your Interaction Supervisor Plug-In license:**

1. In the Applications Settings dialog box, click **Features**.
2. Select the **Enable supervisor features** check box.
3. Click **Save Settings**.

**Related Topics**

Agent Statistics
Change a User's Activated Workgroups
Change Default Limit for Interactions in a Monitored Queue
Filter a Queue View
Workgroup Overview
Workgroup Statistics View

## 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 *CIC TUI User's Guide* or *Quick Reference Card* in the PureConnect Documentation Library.

To add a follow-me phone number:

1. In the Application Settings dialog box, click **Calls > Follow Me**.
2. To prompt callers for their name, in the Follow Me properties details pane, select the **Screen Calls** check box.

   **Note**: When you select **Screen Calls** and later 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.
3. Click **Add Number**.
4. In the **Details** section, complete the fields as described below.

| | |
|---|---|
| **Phone Number** | Enter a telephone number you want the CIC client to call if you are not available.<br>**Dialing Pause**<br>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.<br>**Note**: Use of the comma (,) to create a two-second delay is not supported in all platforms. |
| **Timeout** | Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds.<br>**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** | To require that you or another call recipient must enter your CIC client password to accept the call, select **Use Pin**.<br>**Note**: This feature can prevent someone else from answering your calls through the follow-me routing process. |

5. To add another number, repeat steps 3 and 4.
6. Click **Save Settings** to save your settings and close the Application Settings 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 **Move Up** or **Move Down**.
   - To delete a number, select a number and click **Remove**.
   - To change the settings for a number, select the number and type new values in the **Phone Number** and **Timeout** and then select or clear the **Use Pin** checkbox.
2. Click **Save Settings** to save your settings.

**Related Topics**

Understanding Follow-me Routing
Understanding the Application Settings Dialog Box
Start Follow-Me Routing

## General Options

**Requirements**: You need the Customize Client Security right to configure general options.

**To set general options:**

1. In the Applications Settings dialog box, click **General**.
2. Make the following selections:

| | |
|---|---|
| **Confirm drag and drop interaction operation** | This check box controls the behavior of the confirmation dialog box which can appear anytime you perform a drag and drop operation such as dragging and dropping a call on another call to create a conference call.<br>Do one of the following:<br>• Select the check box to display the confirmation dialog box.<br>• Clear the check box to suppress the confirmation dialog box. |
| **Notify me when alert sounds cannot be played** | An alert can play a sound when it enters, updates, or exits some condition. A warning appears when Interaction Connect cannot play an alert sound chosen in Interaction Supervisor. For more information, see Alert Sounds.<br>Do one of the following:<br>• Select this check box to display the warning even if you have previously chosen to suppress it.<br>• Clear this check box to suppress the warning. |

3. Click **Save Settings**.

**Related Topics**

Create a Conference Call Using Drag and Drop
Understanding the Application Settings Dialog Box

## Configure Monitored Appearances

**Requirements**: For information about required rights, see Working with Monitored Appearances. Also, you should set up monitored appearances only for users at **your site**. You should not configure a monitored appearance for a user configured on a separate site (on another CIC server) or for multi-site users.

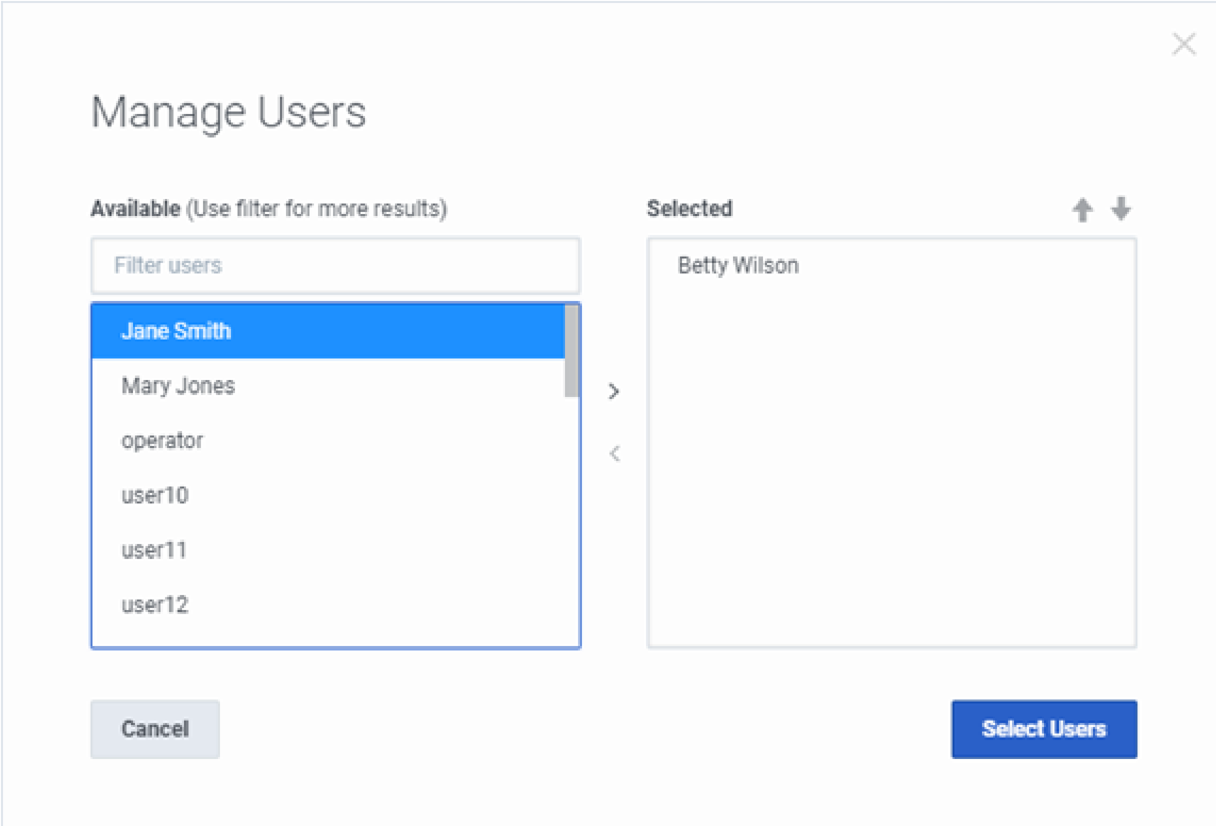
Use the Monitored Appearances property details pane to add, remove, and change the order of user queue in the Monitored Appearances view.

**Tip**: If you have the appropriate rights, you can also drag and drop a user from the Company Directory to the Monitored Appearances view to create a monitored appearance.

**To add a monitored appearance:**

1. Do one of the following:
   - If you have not yet configured a monitored appearance, open the Applications Settings dialog box.
   - If you already have one monitored appearance, in the Monitored Appearances view, right-click in the right side pane and select **Configure Appearances**.
2. If not already selected, in the Application Settings dialog box, click the **Monitored Appearances** node.
3. In the Application Settings dialog box, click **Manage Users**.

   **Result**: The Manage Users dialog box appears.




4. Create a list of selected User queues by doing any of the following:

   - To add a user queue, In the **Available** list, select a name and click **>**.
   - To remove a user queue, in the **Selected** list, select a name and click **<**.
   - To rearrange the order in which the user queues appear in the **Monitored Appearances** view, select a name and use the up and down arrows in the **Selected** list.

5. When the **Selected** list contains the names of the user queues you want to monitor, click **Select Users**.

   **Result**: The Application Settings dialog box reappears.
6. To change the name that appears on the Monitored Appearances view for a user, double-click its **Label** cell. Type a unique name for that monitored appearance.
7. To change whether this monitored appearance appears in the Monitored Appearance view, double-click its **Active** cell. Select the **Active** check box to display the Monitored Appearance, clear the check box to hide the Monitored Appearance.
8. To change the behavior of alerts for a Monitored Appearance queue, select a Monitored Appearance from the list and adjust its settings.

> **Note**: If all the users who are monitoring a user queue and the monitored user are all in a **Do Not Disturb** status, CIC doesn't alert any station. The call goes directly to voice mail. If any of the monitoring users or the monitored user are in an **Available** status, only that agent's station rings.

| | |
|---|---|
| **Ring telephone for calls** | Select this to ring your telephone when a new interaction arrives on the monitored queue.<br>**Note**: The **Modify User Queues** Access Control Right is required to enable the **Ring telephone for calls** or the **Ring application** alerting options for a monitored appearance. |
| **Ring application**<br>**Ring when on phone** | Select **Ring application** to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.<br>**Tip**: If you also check the **Ring when on phone** check box, incoming calls for the monitored user ring on your computer even if you are already on the phone. For more information about the ways the CIC client can notify you of incoming interactions, see Answer an Incoming Interaction. |
| **Display desktop alerts** | Display a desktop alert for alerting interactions on this monitored appearance.<br>**Note**: Desktop alerts are not supported for all browsers. |
| **Call Ring Sound** | Next to the **Call Ring Sound** text box, click the controls to select and then preview the distinctive sound played when new calls arrive on this monitored user queue.<br>**Note**: This setting enables you to select a different sound for each of your monitored queues. |

9. After you finish configuring monitored appearances, click **Save Settings**.

**Related Topics**

Activate and Deactivate Monitored Appearances
Configure Monitored Appearances
Delete a Monitored Appearance
Working with Monitored Appearances

# Personal Prompts Options

**Requirements**: You need the Customize Client Security right to configure personal prompts options.

Personal prompts are messages that you record and which are played to people who call you. The specific prompt played to the caller depends on your status.

**Tip**: To avoid being interrupted when recording, saving, and playing back prompts, it may be more convenient if you change your status to a non-ACD status.

**To set personal prompts options:**

1. In the Applications Settings dialog box, under **Calls**, click **Personal Prompts**.
2. In the Personal Prompts properties details pane, do the following for each prompt you want to record:
   a. Click **Record**.

      **Result**: CIC initiates a telephone call to your station.
   b. Pick up the call and follow the verbal instructions to record the prompt.
   c. Press **1** on your telephone to end the recording. Or, click the **Press 1** button.

      **Note**: The **Press 1** button is particularly useful if your station is a Web-Based Phone.
3. To activate the **Agent Greeting** prompt only, click **ON**.

   **Note**: This control applies only to the Agent Greeting prompt. You do not need to activate any of the other prompts.
4. Optionally, do either or both of the following:
   - To review a recorded prompt, click the **Play** button.

     **Note**: If you have not previously recorded the prompt or the system cannot find the prompt file, you hear an error message. Try recording the prompt again. If the problem persists, contact your CIC administrator.
   - To return a prompt to a generic recording, click **Reset to Default**.

5. Click **Save Setting** to saveyour settings and close the Application Settings dialog box.

## Personal Prompts Types

This section describes the types of prompts used by the CIC client and the conditions under which a caller hears a particular prompt.

| | |
|---|---|
| **Agent Greeting** | Record a message to play to callers before you answer an ACD call. This greeting, also known as a "smile", is intended for use by call center agents who are members of a workgroup and are receiving ACD calls.<br><br>You must set Agent Greeting to **ON** to enable this prompt.<br><br>This feature is best used with the **Auto Answer Calls** (user/agent attribute set in Interaction Administrator). When used with **Auto Answer Calls** enabled, your **Agent Greeting** plays to the caller as you are being alerted. The length of your **Agent Greeting** is limited to 10 seconds, and therefore, is considered an introduction or "smile".<br><br>**Note:** Once recorded, your Agent Greeting is played to all ACD callers alerting on your queue. To disable this greeting, your system administrator must delete your recording from the CIC server. |
| **Out of Office** | Record a message that is played if:<br>◦ You are in a DND status. (Your status is Gone Home, Out of the Office, or some other "not available" status.)<br><br>and<br>◦ You have recorded the Out of Office message.<br><br>**Note**: If you are in a DND status, and did **not both** record **and** activate the Out of Office(OOO) message, the caller hears an automated status-based message such as "*Your name* is At Lunch." If no status-based message is available, the caller hears "*Your name* is not available." |
| **No Answer** | Record a message that is played if:<br>◦ You are **not** in a DND status. (Your status is Available; Available, No ACD; or some other "available" status).<br><br>and<br>◦ You do not answer your phone.<br><br>and<br>◦ You have recorded the **Record No Answer** message.<br><br>**Note**: If you are **not** in a DND status and did **not** record the **Record No Answer** message, the caller hears a status-based message such as "*Your name* is working at home." |
| **Follow Me** | Record a message that is played if your status is set to **Available, Follow Me**.<br><br>When you set your status to **Available, Follow Me**, your *Follow Me* message plays to callers while the CIC client consecutively calls you at a series of numbers you set up to find you and CIC eventually connects you to the caller. |
| **Name** | Record your name. This recording is used in status-based messages, such as "*Your name* is At Lunch." |
| **Available, Forward** | Use this button to record a message to play to callers when your status is set to **Available, Forward**. This message is played to callers while they wait for the CIC client to forward the call to you at another location. This prompt enables users to control the message the CIC client plays to callers when it forwards calls to a remote location.<br><br>If you do not record this prompt, callers hear a standard prompt: "<User name> is at a remote location. Please hold while we transfer you to that location." |

**Related Topics**

Understanding the Application Settings Dialog Box

## 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 a DND type (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 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 PureConnect administrator for details.

Click here for possible status values.

> **Note**: You can also 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 *CIC TUI User's Guide* in the PureConnect Documentation Library.

**Related Topics**

Personal Prompts Options
Set your status

## Ring Sounds

> **Requirements**: You need the Customize Client Security right to configure interaction ring sounds.

> Ring Sounds configuration settings designate the MP3 files played for various types of interactions.

- The sound for **Calls** plays when calls ring on your My Interactions queue. If you are working with Monitored Appearances, calls arriving on those queues could have a different sound. For more information, see Customize Monitored Appearance Alerts.
- The sounds for Chats, Emails, Callbacks, and all other interaction types play when these interactions arrive at your CIC client station.

**To set ring sounds:**

1. In the Application Settings dialog box, click the **Ring Sounds** node.
2. For each interaction type, select a ring sound from the drop-down list. Click the **Play** control to listen to the selected sound.
3. When finished with your selections, click **Save Settings**.

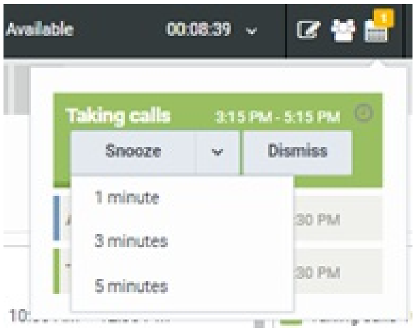
**Related Topics**

Customize Monitored Appearance Alerts
Understanding the Application Settings Dialog Box

## Schedule Reminders

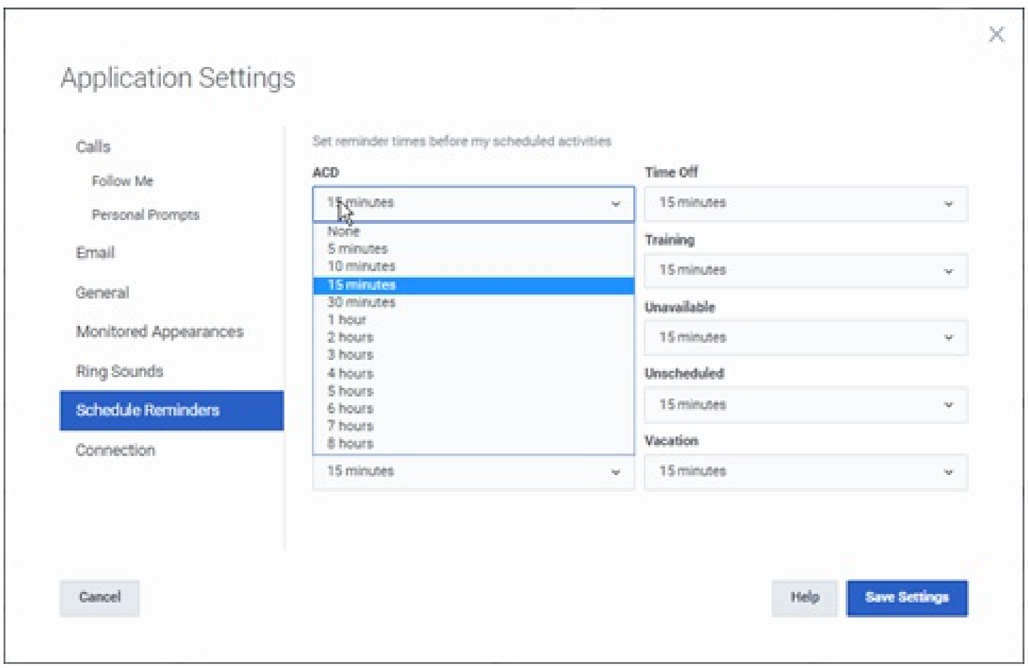
**Requirements**: You need the Customize Client Security right to customize your personal CIC client configuration settings. For other requirements, see Agent Optimizer Features and Requirements.

You can set reminder times for each type of scheduled activity. These setting control how far in advance you are alerted to changes in your scheduled activity. You display these schedule reminders by clicking the **Activity Feed** icon.




**To set schedule reminders:**

1. In the Application Settings Dialog Box, click **Schedule Reminders**.
2. Change the current interval under any type of scheduled activity and select a different time.




3. Click **Save Settings** to save these new settings and close the Applications Settings dialog box.

**Related Topics**

Understanding the Application Settings Dialog Box

# Voice Mail / Fax Paging

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).

# Customizing the Interface

You can customize queue or directory views.

- Add or Remove View Columns
- Add or Close Views
- Change View Layout
- Change View Order
- Customize Columns
- Customizing Queue Control Toolbars
- Display the Response Management View
- Display the Workgroup and Profile View
- Move Views
- Resize a Docking Zone

## Add or Close Views

**Requirements**: You need the Customize Client Security right to add views. Certain other rights control which views you can display. For more information, see the View General Directories, View Station Queues, View User Queues, View Workgroups, and View Workgroup Queues rights. In addition, certain plug-ins can dynamically register new categories of views.

**Warning**: Interaction Connect is an ICWS-based application. If you also use an IceLib-based application like IC Business Manager or your Interaction Connect system includes an IceLib-based application like a screen pop or third-party integration, you need to log on to Interaction Connect before logging on to the IceLib-based application. Otherwise, Interaction Connect may not be able to acquire the Client Access license it needs to function properly. You may not be able to add views for which you have rights or see default views like the Company Directory. If you experience this problem, contact your PureConnect administrator or Genesys Customer Care.

You can:

- Determine which available views appear in your interface, including directory and queue views, speed dial, personal and public contacts, and call history.
- Edit some views, such as Speed Dial. You can create new speed dial views, edit the name of an existing speed dial view, or delete an existing speed dial view (assuming you have the correct permissions).
- Control where the views appear. You can drag and drop views from zone to zone. For more information, see Docking Architecture.
- Configure which columns appear in the selected views and the order in which the columns appear. For more information, see Add or Remove View Columns.

**Tip**: Views with contents that are unique to your interface have the text "**Private**" in their name (for example, IC Private Contacts.) When you add a view, private Speed Dial views and Directory views display a lock icon next to their name in the Available items list.

**To add views:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. Do one of the following:
   - Select a view from the **Quick Picks** list.

     The view is added.
   - Click **Show All Views**.

     Continue to the next step.
3. Optional. In the Add Views dialog box, use the **Search** text box to locate the appropriate view.
4. Select one or more views from the view categories.
5. Click the **Add View** button.

**To close a displayed view:**

- Click the **Close button** (x) on a view tab.

**Related Topics**

Customizing the Interface
Understanding the Application Settings Dialog Box
Working with the Company Directory
Working with Other Directories

## Add or Remove View Columns

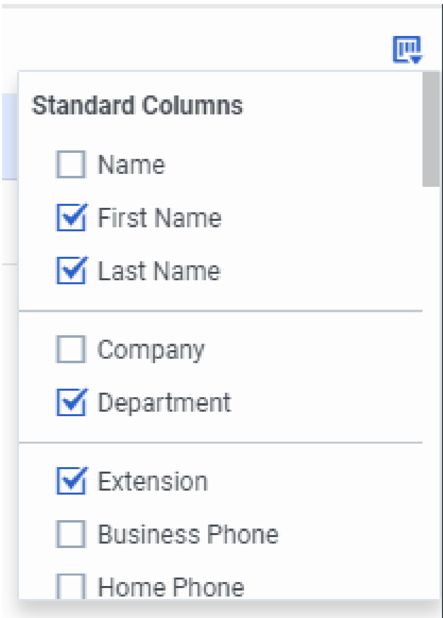
**Requirements**: The Customize Client Security Right enables you to add or remove view columns. The View Directory Status Columns Access Control right determines which Status columns you can add to a **directory view**. The View Queue Columns Access Control right determines which columns you can add to a **queue view**.

You can add or remove columns from any queue or directory view.

**To add or remove a column:**

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

   **Result**: The Choose Columns dropdown list appears.




2. Do one of the following:
   - To add a column, select the checkbox for the column name.
   - To remove a column, clear the checkbox for the column name.
3. When finished, click outside the Choose Columns dropdown list.

**Related Topics**

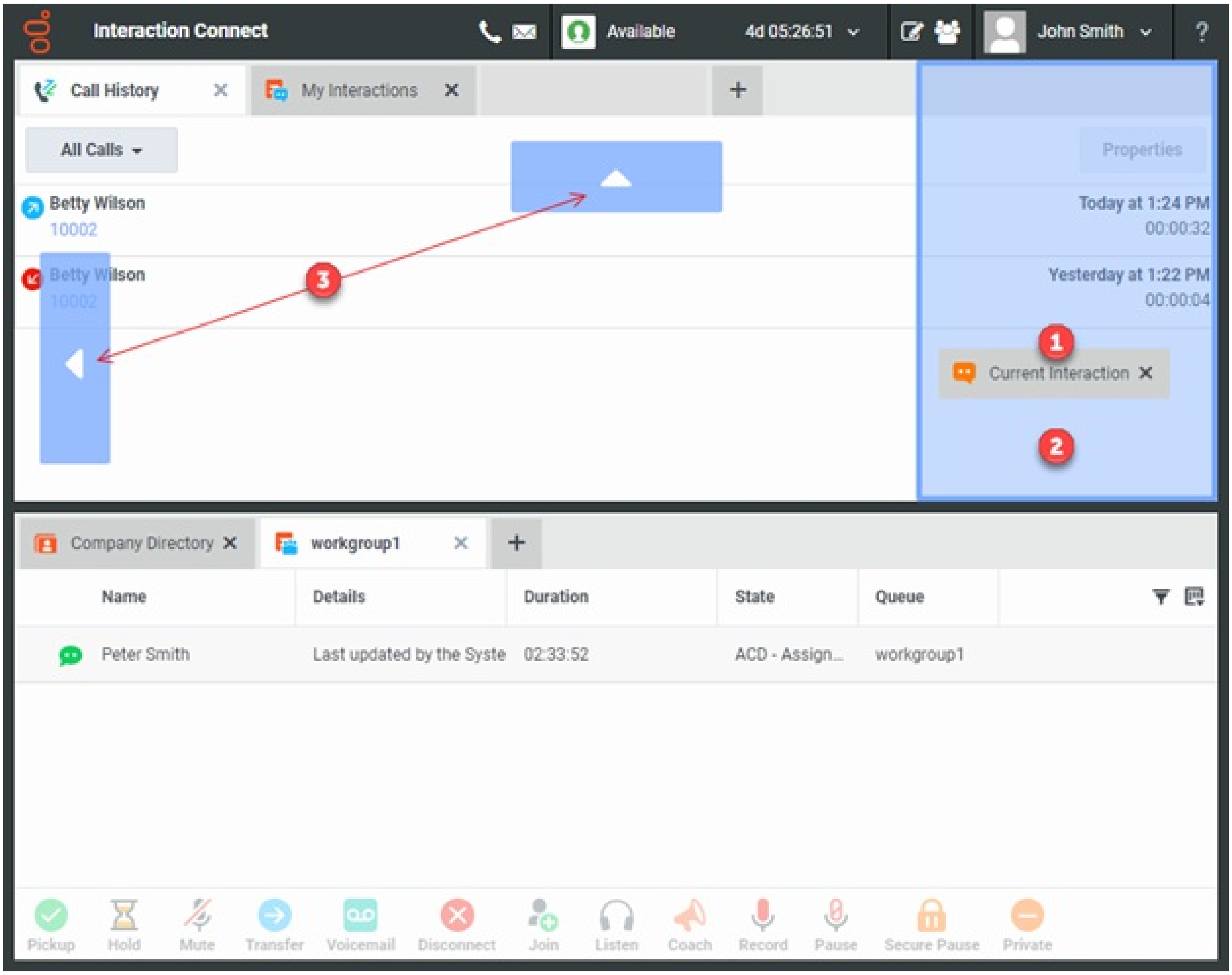
Change View Layout
Customize Columns
Working with the Company Directory
Working with Other Directories

## Change View Layout

Using a flexible docking architecture, you can arrange views within the Interaction Connect interface, placing them in more convenient locations to suit your needs.

To move a view, click and hold the tab with your mouse and start dragging it. Docking icons appear on the Interaction Connect window, showing you locations where you can create a new docking zone and move the view.

When you drag the view on top of an arrow, Interaction Connect indicates the area to which the view moves when you "drop" it. You can also drag a view within its current set of tabs to reorder it. Or you can drag a view to another set of tabs and drop it there.




| | | |
|---|---|---|
| 1 | **Selected view** | To move a view, click and hold on its tab and start dragging it. |
| 2 | **Selected docking zone** | When you drag the view on top of an arrow, Interaction Connect indicates the area to which the view moves when you release your mouse and "drop" it.<br>**Tip**: You can also drag a view within its current group of tabs to reorder it. |
| 3 | **Create new docking zones** | These arrows indicate the areas where you can create a new docking zone to hold the currently selected view. |

**Related Topics**

[Add or Close Views]

## Change View Order

**To change the order of views in a zone:**

1. Click and hold on the tab for the view you want to move.
2. Drag and drop the tab in its new position on the tab line (on top of the tab currently occupying the target position.)

**Related Topics**

Add or Close Views

## 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.

**Note**: Although you can reorder the columns in a queue view such as **My Interactions**, the "Interaction Type" column is always fixed to the left. (Or to the right, for Right-to-Left languages.)

**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
Change View Layout
Working with the Company Directory
Working with Other Directories

## Customizing Queue Control Toolbars

**Requirements**: The Customize Client Security Right enables you change the buttons in a Queue Control toolbar. You also need specific rights to add and use buttons on the Queue Control toolbar. For more information, see Using the Queue Control Toolbar.

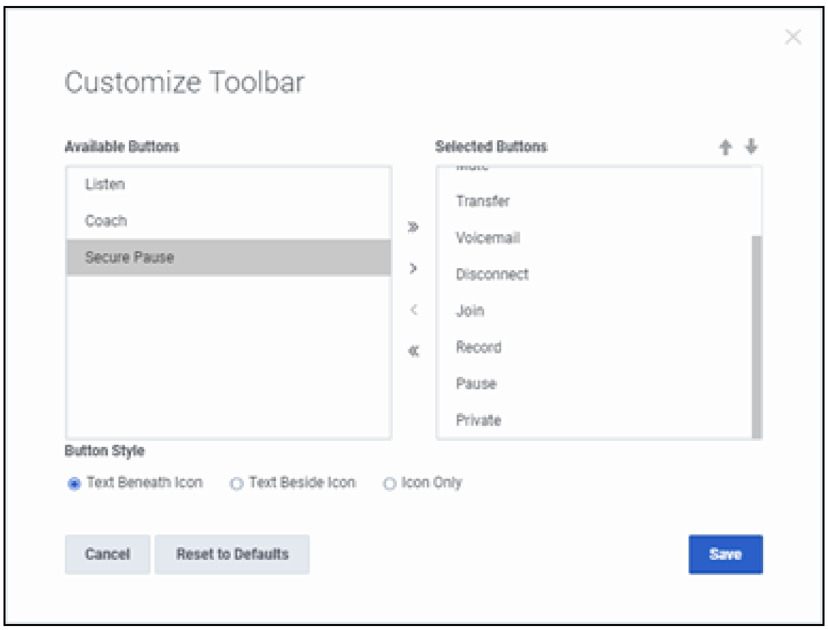
You can add, remove, or rearrange buttons on Queue Control toolbars. The Queue Control toolbar appears on each queue management view (such as My Interactions). Button configuration is specific to each queue view; that is, you can have a different toolbar configuration on each queue view.

**Video:**

https://player.vimeo.com/video/432925894

**To customize a Queue Control toolbar:**

1. Right-click anywhere in a Queue Control toolbar and click **Customize Toolbar**.
2. In the Customize Toolbar dialog box, do any of the following:




- To add a button to the toolbar, from the **Available Buttons** list, select a button name and click **>**.
- To add all the available buttons, click **»**.
- To remove a button from the toolbar, from the **Selected Buttons** list, select a button name and click **<**.
- To remove all buttons from the toolbar, click **«**.
- To change the order of buttons on the toolbar, from the **Selected Buttons** list, select the button name and use the **Up** and **Down** arrows to move the button to the desired position on the toolbar.
- In the **Button Style** section, make a selection that determines whether the buttons have labels and, if labeled, where the labels appear.

3. Do one of the following:

- Click **Save** to save the new settings.
- Click **Cancel** to discard any changes you made to the toolbar this time.
- Click **Reset to Defaults** to return the toolbar to its default configuration.

**Related Topics**

Custom Buttons
Customizing the Interface

## Move Views

You can move any view to a new location.

1. Click and hold the tab for the view you want to move.
2. Without letting go of the view tab, do one of the following:
   - To add the view to an existing group of tabs, point to that group.
   - To create a new docking zone and move the view there, point to a docking zone arrow.
3. Release the button to drop the view in its new location.

   **Result**: The view automatically moves to the chosen area.

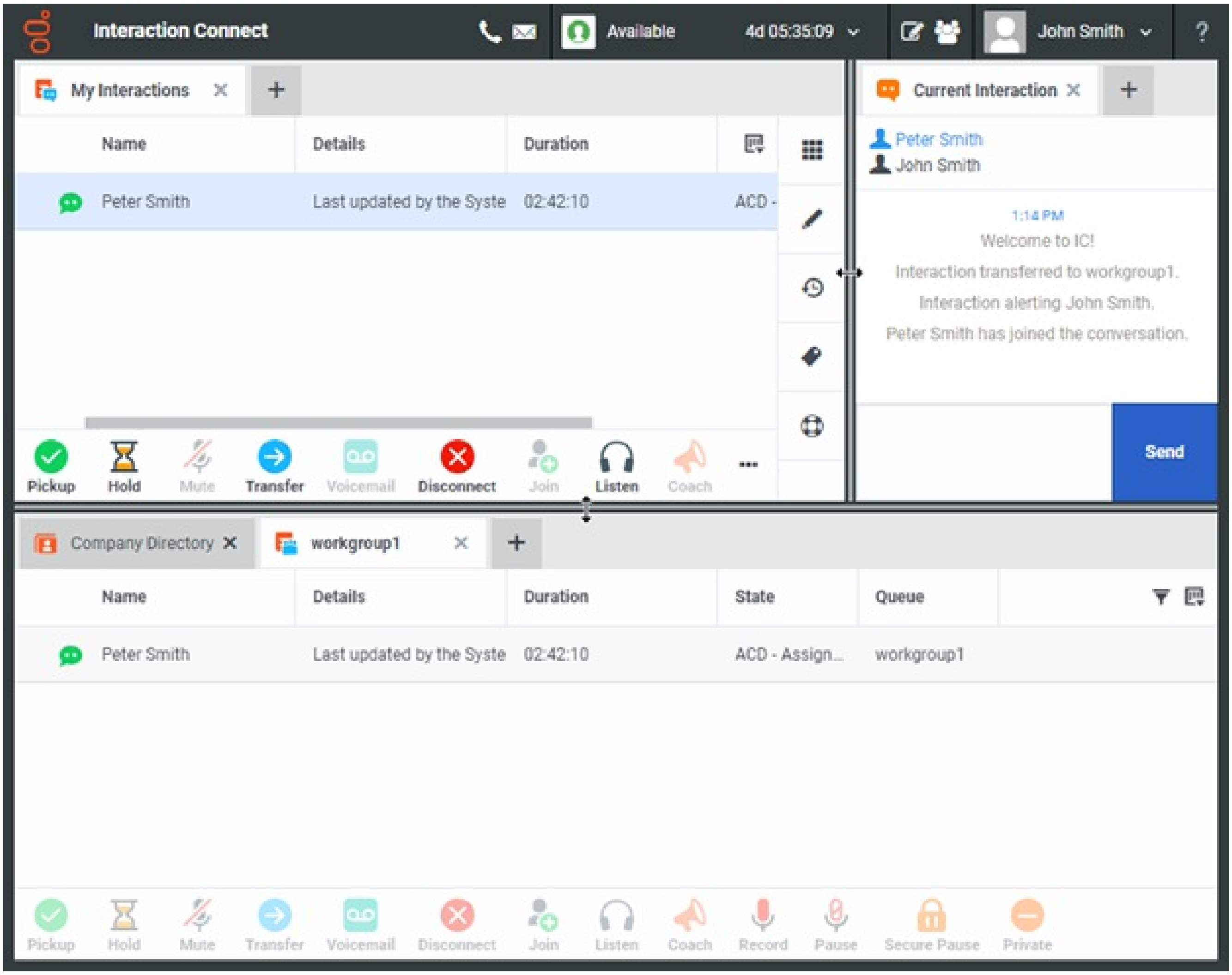
### Related Topics

Add or Close Views
Change View Layout

## Resize a Docking Zone

Use the splitter area to resize docking zones.

| | | |
|---|---|---|
| 1 | **Horizontal splitter area** | To change the height of a zone, point to horizontal splitter area between the zones. When the pointer changes into a resize cursor, drag the splitter up or down. |
| 2 | **Vertical splitter area** | To change the width of a zone, point to the vertical splitter area between the zones. When the pointer changes into a resize cursor, drag the border to the right or left. |




### Related Topics

Add or Close Views
Change View Layout

# Working with Account and Wrap-Up Codes

If you have the appropriate rights, you can assign account codes to interactions. These account codes are useful for reporting and billing purposes. For more information, see Understanding Account Codes.

**Requirements for Assigning Codes**:

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, enable the **Add account codes or workgroup when dialing** configuration option in Calls Configuration

To display the Account code and Wrap-Up code columns in My Interactions, 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.

Administrators can create and configure Account Codes in Interaction Connect.

**Requirements for Configuring Account Codes**:

To display the Account Codes view, you need the **Master Administrator** right or **Administrator Access** rights to at least one account code.

If you have Administrator Access to **All** account codes, you can view, edit, delete, or add any account code.

If you have Administrator Access to only the account codes in selected **Access Control Groups**, you can view, edit, delete, or add account codes only for those Access Control Groups.

If you have Administrator Access only to **selected account codes**, you can view, edit, or delete only those account codes. You cannot add any account codes.

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
- Configure Account Codes
- Understanding Account 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**: Administrators with the appropriate rights can also configure account codes in Interaction Connect. See Configure Account Codes. If your CIC administrator wants you to designate only a workgroup name on outgoing interactions, Account Code configuration is not required.

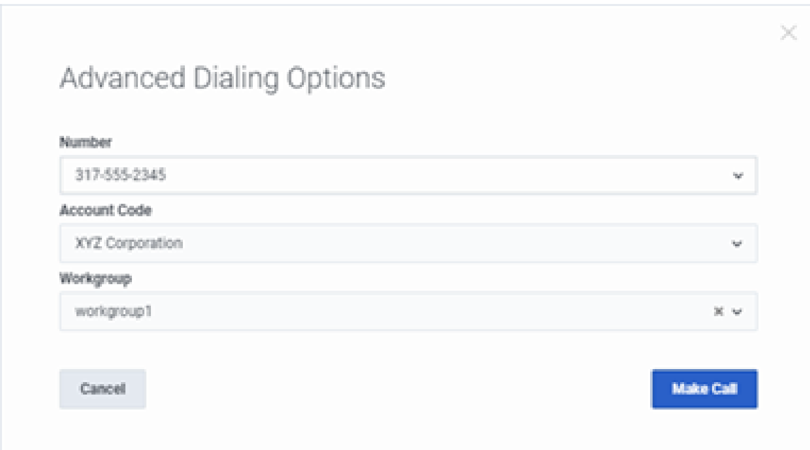
- Grants you access to all or some of the configured Account Codes.
- (Optionally) Enables **Advanced Dialing Options** on your CIC user account.
- Assigns you to at least one ACD workgroup.

In the CIC client, you:

- Select the **Add account codes or workgroup when dialing** option in Application Settings to display the **Advanced Dialing Options** dialog box when you start a call.

## 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.




Note these things about the Advanced Options 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.

- 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 leave the Workgroup blank for calls not made on behalf of a workgroup.
- You can only associate a call with a workgroup at the time the call begins.
- 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.

### Related Topics

Assign Codes to an Outgoing Interaction
Calls Configuration

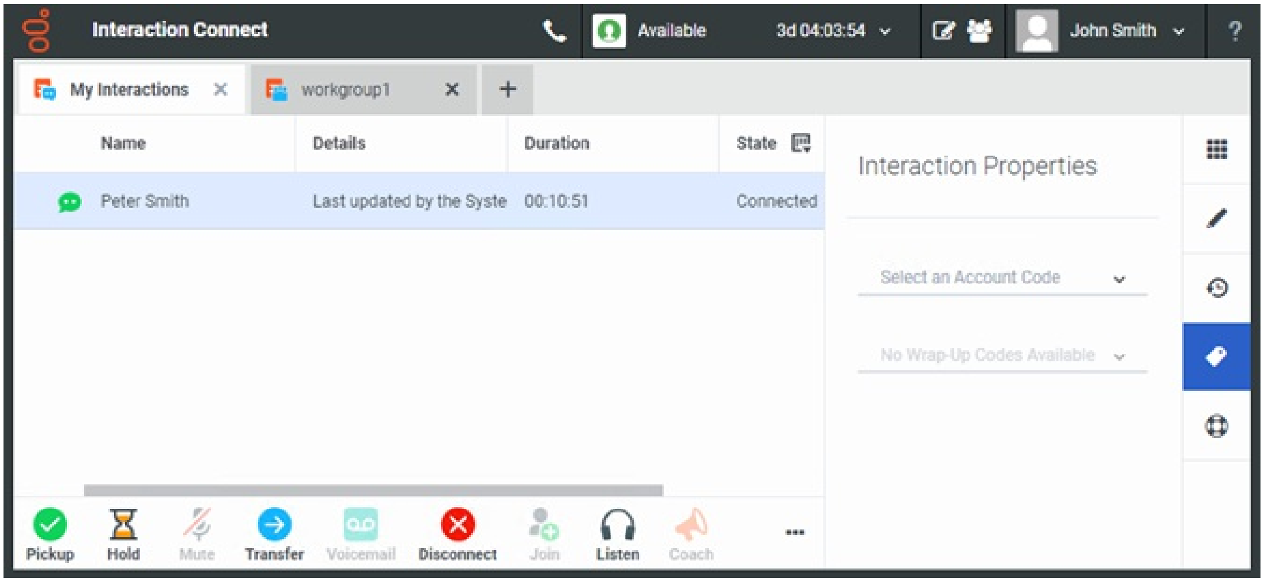
# Assign Codes to an Incoming Interaction

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

You can assign Account codes and Wrap-Up codes to an incoming interaction in the **Interaction Properties** sidebar.

**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. In the **Interaction Properties sidebar**, select an Account code and Wrap-Up code.




**Result**: The codes you assigned to the interaction appear in the Account Code and Wrapup Code columns of your queue.

**Related Topics**

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

# Assign Codes to an Outgoing Interaction

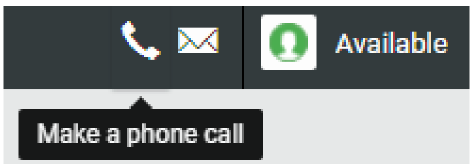
**Requirements**: See Working with Account and Wrap-Up Codes.

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.

**Tip**: You can also assign an Account code in the **Interaction Properties** sidebar. In the same sidebar, you can assign a Wrap-Up code to an outgoing interaction made on behalf of a workgroup.

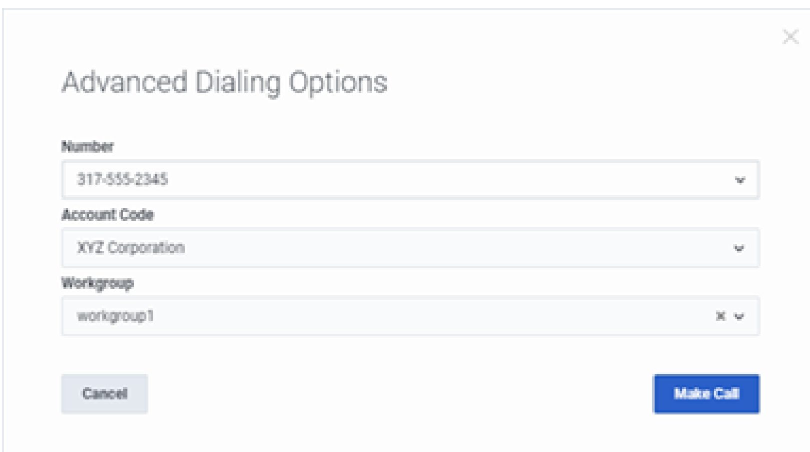
**To assign an account code or a workgroup to an outgoing interaction:**

1. Click the **Make a phone call** icon.




   **Result**: The Advanced Dialing Options dialog box appears

2. Type a phone number or select a recently-called number from the **Number** drop-down list.




3. Select the appropriate **Account Code** or **Workgroup** code.

   **Note**: Account code defaults to the last account code you used.

4. Click **Make Call**.

**Related Topics**

Advanced Dialing Options
Sidebar
Understanding Account Codes

# Understanding Account Codes

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

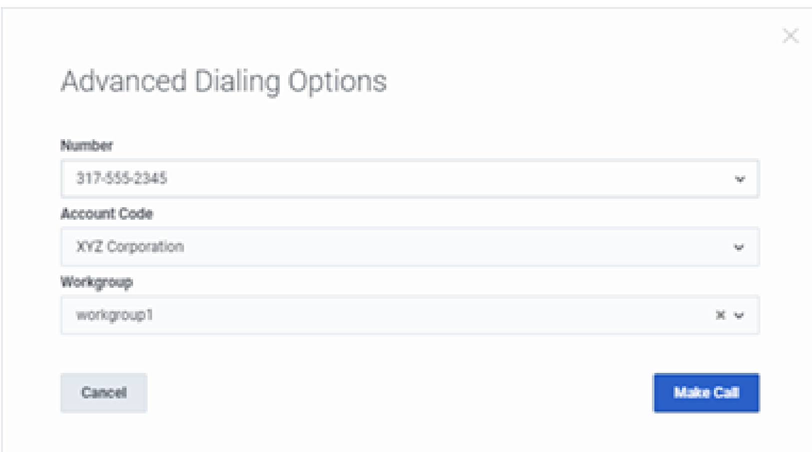
In the CIC client, you can use account codes to organize interactions by customer. You may find this feature useful for customer billing purposes, or if you process interactions through Customer Interaction Center for more than one company. Your system administrator can generate reports to categorize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

## 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.
- When you are working with a callback request, chat, or email interaction, select the appropriate account code in the **Interaction Properties** sidebar.
- 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:

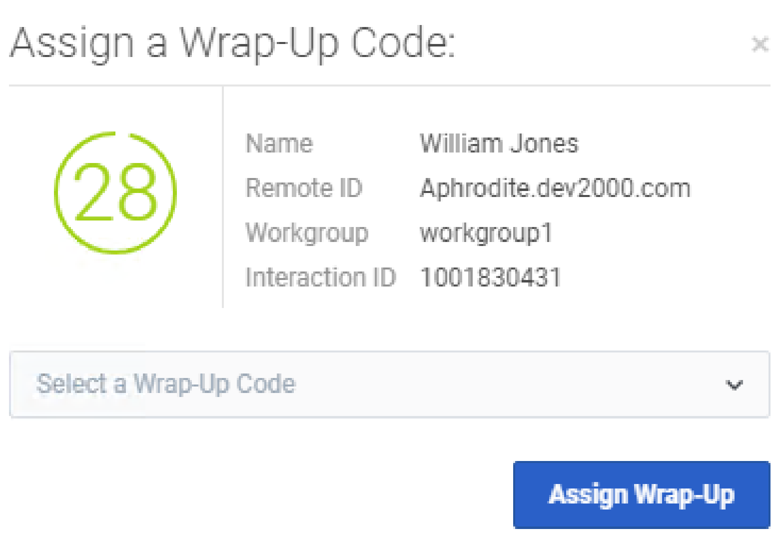
- You can assign Wrap-Up codes to all **incoming ACD-routed** interactions and to **outgoing** calls that are dialed on behalf of a workgroup.
- You can assign or change a Wrap-Up code any time **during** an interaction. See Interaction Information View and Assign Codes to an Interaction.
- If a Wrap-Up 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 outbound email messages, including 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 sidebar. 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

# Interaction Connect and Genesys Predictive Engagement

Genesys Predictive Engagement (formerly known as Altocloud) is a customer journey analytics platform that analyzes all kinds of visitor journey behavior and data. Your organization can use it to observe and analyze visitors on your digital properties, such as websites. Predictive Engagement can predict what it will take for visitors to achieve a desirable business outcome, and then acts to offer the most appropriate and effective channel to assist them in completing their journey.

The first phase of the PureConnect integration with Predictive Engagement enables your organization to track the sequence of pages a website visitor sees and the actions they take. It also enables your organization to automatically offer chat interactions with website visitors who trigger specific actions, as long as there are agents available to handle the interactions. Once an interaction is connected to a licensed agent, the agent can view a map that outlines the visitor's journey on the website.

> **Requirements**: The Predictive Engagement view is available in Interaction Connect only if the CIC system has the required feature and agent licenses and the administrator completes the appropriate Predictive Engagement and CIC configuration and setup. For more information, see the *PureConnect Integration with Genesys Predictive Engagement Technical Reference* in the PureConnect Documentation Library.

## Agent and Customer Experience

In a typical experience, a visitor to your organization's website clicks various tabs and buttons, making choices and possibly entering some data. At the appropriate point in the visitor's journey, Predictive Engagement offers assistance by prompting the visitor to initiate a chat with an agent. The chat widget may also prompt the customer to enter additional information or to type a question. This initiates a chat interaction which PureConnect routes to the appropriate workgroup. An agent picks up the chat interaction and uses the **Current Interaction** view to chat with the visitor. The agent can also get additional information by viewing the visitor's website journey in the **Predictive Engagement** view. As the agent and visitor chat, the visitor sees the agent's chat messages in the Genesys chat widget visible on your organization's website.

## Widget Configuration

As part of enabling Predictive Engagement, your PureConnect administrator must configure a widget in Interaction Connect and deploy it to your website.

> **Note**: To enable Predictive Engagement-initiated chats, the PureConnect administrator should complete the required General Configuration for widgets and copy the generated script tag to your organization's website. Configuration of the Web Chat Plugin is **not** required for Predictive Engagement chats. The Web Chat Plugin configuration is needed only for web chats. For more information about chat types, see Working with Chat Sessions.

For more information, see Widgets.

## Related Documentation

- A list of Genesys Predictive Engagement documentation is available at https://all.docs.genesys.com/ATC#t-1. See the **PureConnect** tab.
- The *PureConnect Integration with Genesys Predictive Engagement Technical Reference* in the PureConnect Documentation Library
- See also Genesys Predictive Engagement Integration in the PureConnect Documentation Library.

**Related Topics**

Predictive Engagement view
Working with Chat Sessions

# Predictive Engagement view

**Requirements**: See Interaction Connect and Genesys Predictive Engagement.

The Predictive Engagement view (formerly called the Altocloud view) displays a visitor's journey on your company's website. It gives you a real-time visualization of their experience and enables you to assist them in achieving their goal, whether it is ordering a product, requesting a quote, or some other specific milestone.

The Predictive Engagement view includes such details as where a visitor has been on your website and the actions they have taken.

## Displaying the Predictive Engagement view

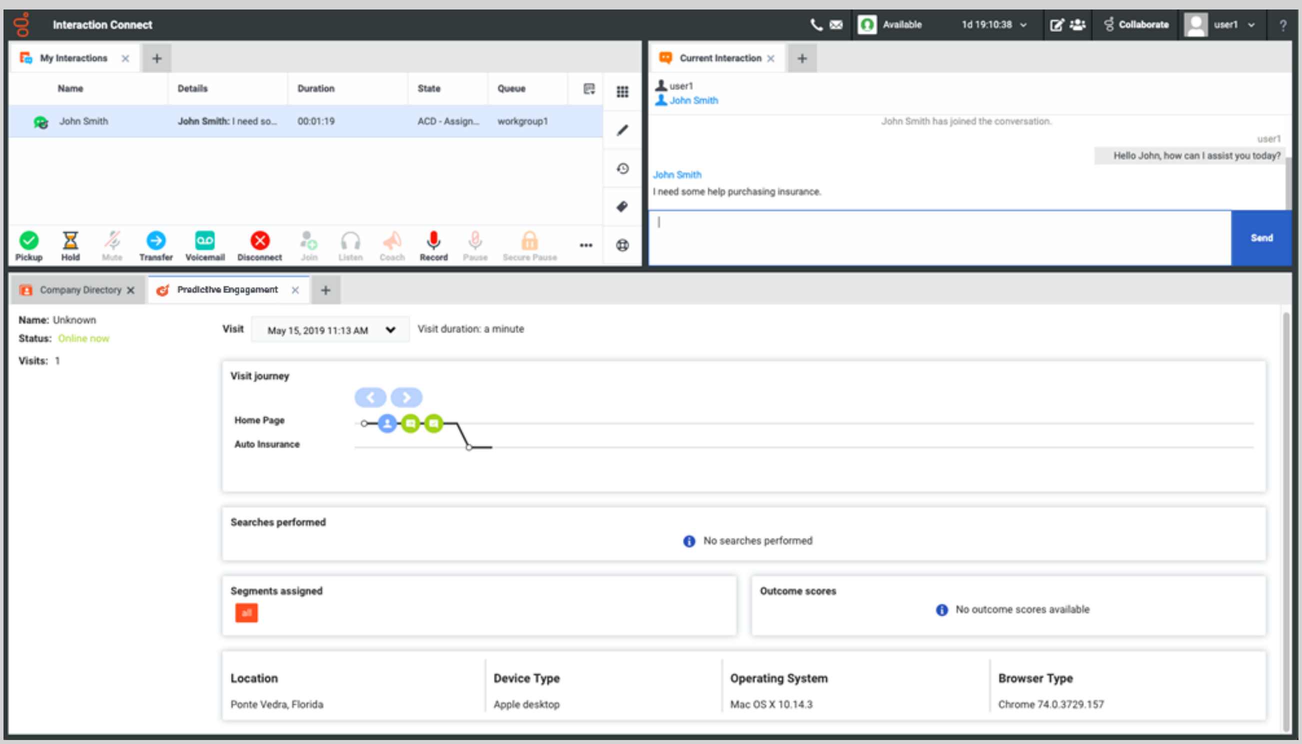
1. In the Add View Dialog Box, from the **Interactions** list, select **Predictive Engagement**.
2. Click **Add View**.

## Using the Predictive Engagement view

Predictive Engagement chats are ACD -routed interactions that appear in the appropriate queue. When you pick up a Predictive Engagement chat, you can use the **Current Interaction** view to chat with the customer. While you are connected to a Predictive Engagement chat, you can view a map that outlines the customer's journey on your company's website in the **Predictive Engagement** view.

The line in the Predictive Engagement view represents the visitor's clickstream. The pages the visitor has browsed appear down the left. To see URLs rather than page titles, click the **Title/URL** toggle. To see additional activity, click the arrows. To see details about a key interaction point, hover over its colored icon. For more information about the elements included in the journey map, see Customer Journey in the Genesys Predictive Engagement documentation.

**Note**: To make a journey map appear in the **Predictive Engagement** view, you must be actively working with a Predictive Engagement interaction. Web chats and intercom chats do not contain the information supplied by the Genesys Predictive Engagement integration. Predictive Engagement interactions are distinguished by the badge on the icon.




### Related Topics

Interaction Connect and Genesys Predictive Engagement
Customizing the Interface
Working with Chat Sessions

# Working with Callback Requests

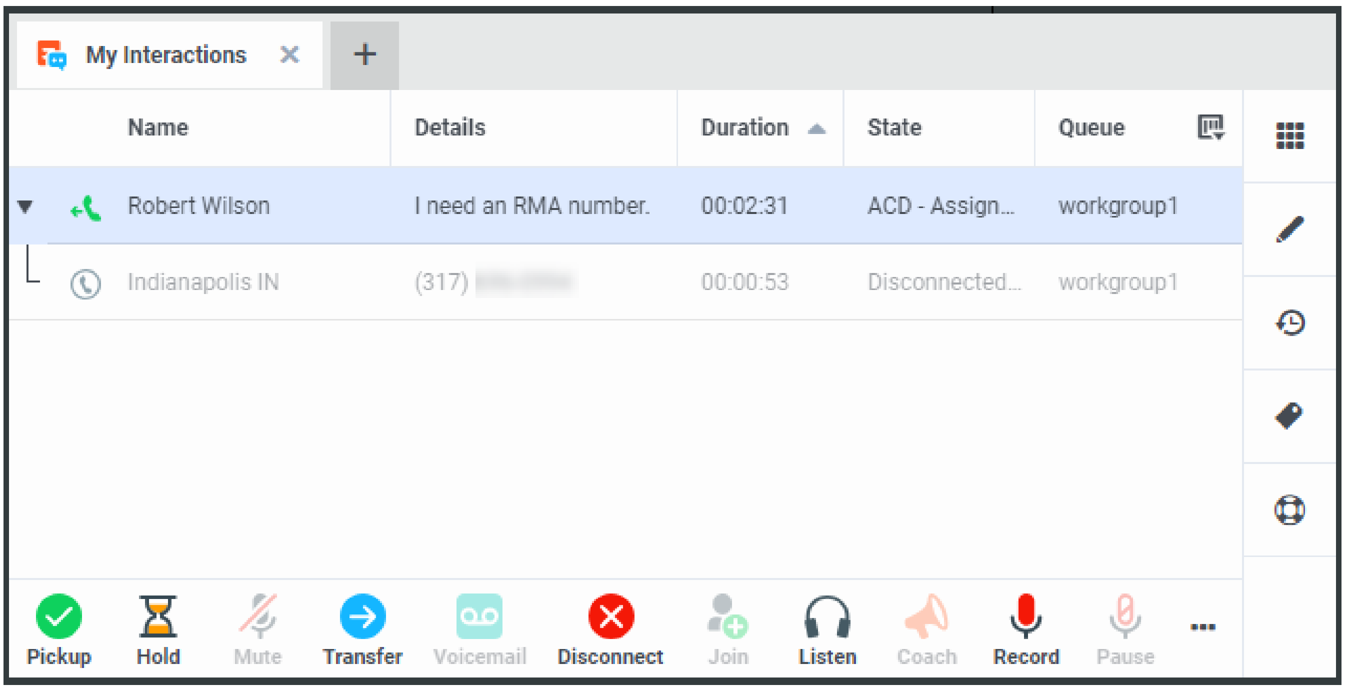
Using the Callback feature, visitors to your company's website can leave a request for an agent to call them back. A visitor starts the Callback process by clicking the appropriate button on a web page and completing information in a Callback dialog box. Customer Interaction Center routes the request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

A callback request and the call made in response to a callback request are identified by their icons. The **Details** column for the callback request shows the subject the website visitor entered. The **Details** column for the call made in response to the callback request shows the number dialed.

> **Note**: The View Queue Columns Access Control right determines whether you can display the Details column in My Interactions or other queue views.




A callback request and the call made in response to a callback request are identified by their icons.

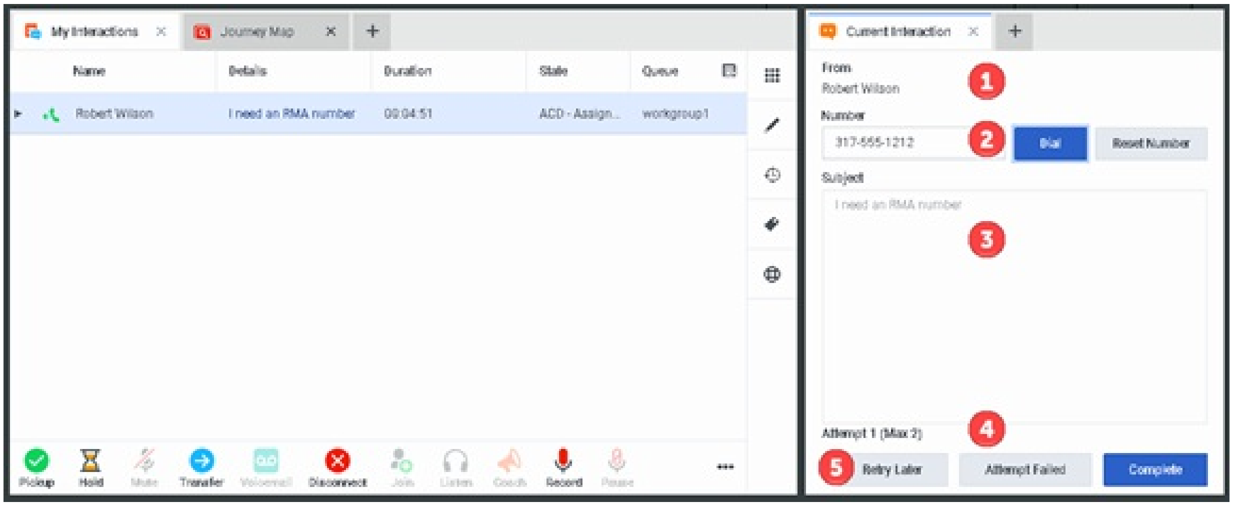
- When you pick up a callback request interaction, it appears in the **Current Interaction** view.
- When you pick up a callback request, its state changes to ACD Assigned: (Agent name), and other agents are not able to respond to this request. However, if the callback request is transferred to you, 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**
Callbacks and the Current Interaction View
Respond to a Callback Request

## Callbacks and the Current Interaction View

When you pick up a Callback request, the **Current Interaction** view displays the Caller name and number.

**Tip**: You can display the **Current Interaction** view in a side by side arrangement with My Interactions. Use the **Sidebar** to add notes about this interaction.




| | | |
|---|---|---|
| 1 | **From** | The name of the person who requested that someone call them back. |
| 2 | **Number** | The telephone number supplied by the person who requested the callback. Clicking the **Dial** button dials this telephone number.<br>You can change the number before calling. **Reset Number** sets the changed telephone number back to the original number. |
| 3 | **Subject** | This area displays the reason the callback was requested. This information is usually required as a part of the process for requesting a callback. |
| 4 | **Attempt** | If your CIC administrator enables the **Retry Later** feature, this displays the number of calls attempted in response to the callback request and the maximum number of attempts allowed. |
| 5 | **Retry Later**<br>**Attempt Failed**<br>**Complete** | After you make the requested call, use these buttons to indicate whether you reached the requester or not.<br>**Retry Later**<br>The **Retry Later** button appears only if your CIC administrator has enabled this feature. Click this button to remove the callback request from your queue and place it back on the workgroup queue in a "Snoozed" state. 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 also configures the maximum number of times agents can retry a callback request.<br>**Attempt Failed**<br>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.<br>**Tip**: If your CIC system is appropriately configured, you can assign a Wrap-Up code that explains the reason for this failure in the **Interaction Properties** sidebar.<br>**Complete**<br>Click this button to indicate you reached the requester and completed the callback interaction.<br>**Note**: This action disconnects only the callback interaction. You must disconnect the call interaction separately. |

**Related Topics**

Add or Close Views
Respond to a Callback Request
Sidebar

# Manage Callback Requests

## Add Notes to an Interaction

Use the **Interaction Notes** sidebar in **My Interactions** to add notes to the currently selected 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.

**To add notes to an interaction:**

1. In **My Interactions**, expand the **Interaction Notes** sidebar.
2. In the text box, type your observations or comments and click the **Add Note** icon (plus sign).

    **Result**: Your notes appear in the **Interaction Notes** sidebar.

**Related Topics**

Respond to a Callback Request
Manage a Chat Session
Sidebar
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:**

- When working with a callback request, chat, or email interaction, select the appropriate codes in the **Interaction Properties** sidebar.

    > **Note**: Wrap-Up codes are not used for email message replies or forwarded email messages.

- When making a call, select a code in the Advanced Dialing Options dialog box.

**Related Topics**

Assign Codes to an Incoming Interaction
Assign Codes to an Outgoing Interaction
Manage a Chat Session
Sidebar
Understanding Account Codes
Understanding Wrap-Up Codes

## 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 request appears in the Current Interaction view.
2. Click the **Dial** button to return the call.

   **Result**: This creates a call that is associated with the callback request. For more information, see Callback Interaction.
3. Optionally, in the **Interaction Notes Sidebar**, click **Add Note** and add a note to the callback request.
4. Optionally, in the **Interaction Properties Sidebar**, do either or both of the following:
   - Select the Callback request or the call and assign an **Account code**.
   - Select the Callback request and assign a **Wrap-Up code**.
5. In the **Current Interaction** view, click one of the following buttons, depending on the result of your callback session:

| | |
|---|---|
| **Complete** | Click this button to indicate you reached the requester and completed the callback interaction.<br>**Note**: This action disconnects only the callback interaction. You must disconnect the call interaction separately. |
| **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.<br>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.<br>**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. If your outgoing call is still connected, select the call interaction and click **Disconnect**.
7. If needed, separately disconnect the Callback request.

**Note**: If Wrap-Up Codes are configured for your workgroup and you have not assigned one, you are reminded to assign a Wrap-Up code when you disconnect the Callback request.

**Related Topics**

Assign Codes to an Interaction
Callbacks and the Current Interaction View
Sidebar

## 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. In the Response Management View, search for and then select an appropriate response.
2. Do one of the following:
   - View the information in the response and use it indirectly when responding to the Callback Request or researching your reply to an email message.
   - Copy and paste the information from the response to **Interaction Notes** in the **My Interactions** Sidebar.

**Related Topics**

Search for a Response
Use Response Management in an Email Message
Working with Callback Requests

# 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.

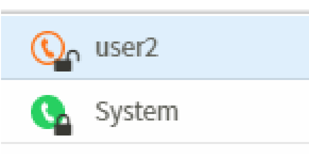
CIC administrators can configure the use of two encryption protocols to support encryption of call audio (SRTP) and call control information (TLS). This provides confidentiality and flexibility for security-sensitive organizations. Your CIC administrator can use Interaction Administrator to configure 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.

Call security icons appear in My Interactions. They appear only if your system is configured to have secure calls and *end-to-edge security*.




> **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).

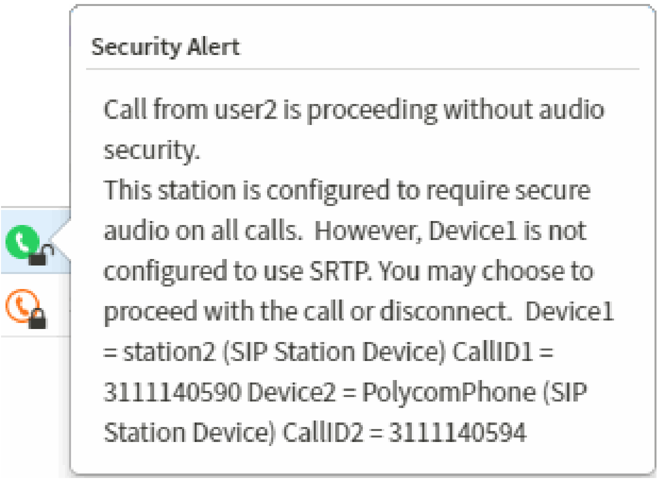
  > **Note**: The Secure Call icon indicates only *end-to-edge* security; i.e. security from a device configured to use TLS/SRTP and controlled by CIC (such as your phone) to the point where CIC passes the call to an outside agency or a device that is not configured for TLS/SRTP.
  >
  > Outside agencies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

- Hover over or click an unsecured call icon for more details. To dismiss this tooltip, press <Esc> or click the icon again.




**Related Topics**

[Calls Configuration]

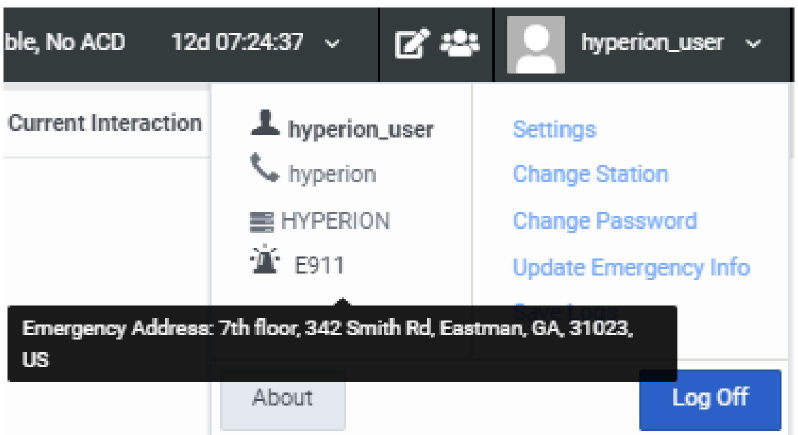
# E911 Emergency Calls

Interaction Connect supports E911 (Enhanced 911) for emergency calls. E911 provides a caller's location information to 911 dispatchers. PureConnect routes the 911 call to the nearest PSAP (Public Safety Answering Point) based on this emergency location information. This routing enables emergency services to be dispatched quickly to your exact location. The E911 service provider, West Corporation, validates and provisions this emergency location information.

> **Requirements**: Your PureConnect administrator must subscribe to the E911 service with West Corporation, then enable and configure the E911 feature in Interaction Administrator. This configuration includes specifying server parameters and location information for each CIC station. For more information, see the Interaction Administrator help and the *E911 Technical Reference*.
>
> If you log on **without** a station or use a remote station, the Enhanced 911 feature is not available. For more information, see Stationless Logon and Remote Station Types.

You can call 911 using any of the methods available in Interaction Connect. For example, you can use the **Dial a number** field. For more options, see Making Calls.


A quick way to verify that this feature is available for you is to look for the E911 link in the Interaction Connect menu. To display your current emergency information, point to this link.




*Copyright and trademark*

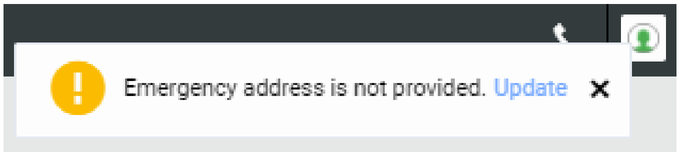
## Update E911 Emergency Information

The PureConnect administrator can maintain your emergency information in Interaction Administrator. Interaction Connect reflects any changes made there. However, you can also update your emergency information when needed. Always update this information when you change stations to a  Remote Number or a WebRTC phone. In this case, you receive a warning if your emergency information is blank.

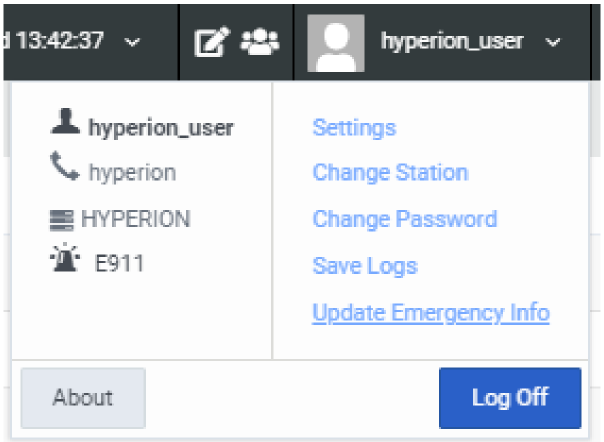
When you update your emergency information, the E911 service provider, West Corporation, validates this information and stores it in a database. The first time you log on using a Remote Number or a WebRTC phone, Interaction Connect also saves your emergency information in your browser's cache.

> **Note**: Clearing your browser cache or using a different browser also causes Interaction Connect to prompt you to enter your emergency information. Agents who log on using a Remote Number or a WebRTC phone can update emergency information only through Interaction Connect.

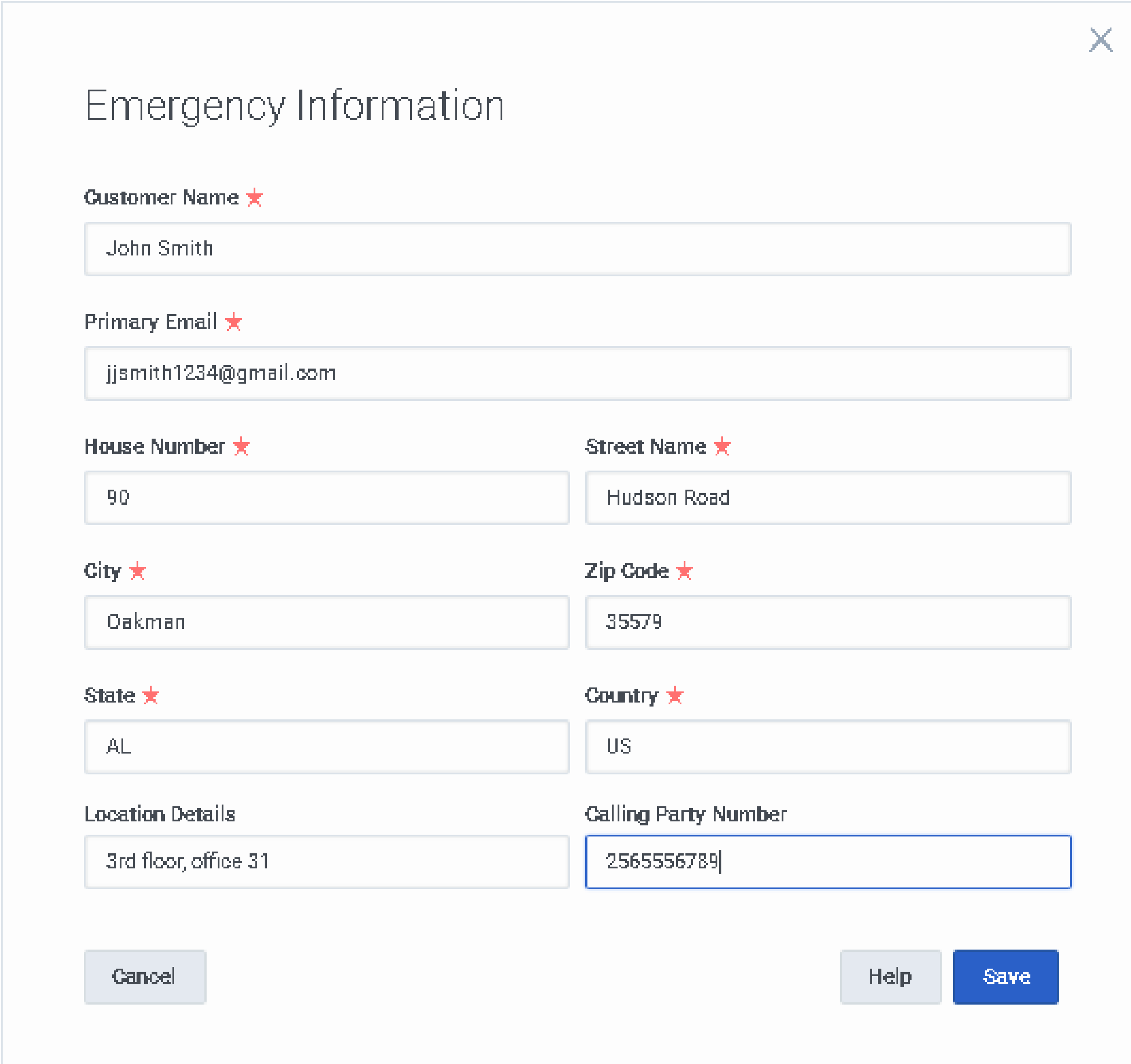
1. Do one of the following:
   - Click **Update** when you see this warning.




- Open the menu and select **Update Emergency Info**.




2. In the **Emergency Information** dialog box, supply or update your information. An asterisk indicates required information.




| | |
|---|---|
| **Customer Name** | Enter your name.<br>**Note**: The ALI (Automatic Location Identification) record field is NAM. |
| **Primary Email** | Enter your email address.<br>**Email Alerts**: You receive an email at this address when you call 911 from this station. Also, West Safety Services sends notifications of any problems with your information in its database to this address. For examples, see E911 emergency Call Alerts. |
| **House Number, Street Name, City, Zip Code, State, Country** | Supply the address of your station's location.<br>**Note**: The E911 service provider validates this location information. |
| **Location Details** | Enter information that assists emergency personnel in finding your precise location, particularly within an office building. Add details such as: Building 1, 3rd floor, north wing, office 26, next to elevator. |
| **Calling Party Number** | Enter the outbound 10-digit Automatic Number Identification (ANI) used for emergency calls from this station. |

3. Click **Save**.

**Related Topics**

E911 Emergency Calls

## E911 Emergency Call Alerts

When your PureConnect administration enables the E911 feature, you receive an email alert when you call 911. For more information, see E911 Emergency Calls.

> **Note**: You do not receive any email alerts when you use a stationless logon and place a 911 call.

### E911 Call Alert Example

You receive an E911 Call alert when you call 911 from a station that has E911 Emergency Call Information verified and recognized by the E911 service provider. This alert provides the details of your E911 call. It includes links to the E911 service provider. It also identifies the location of the Emergency Response Location (ERL), complete with a link that displays the transmitted location in Google Maps.

```
911 Call Alert

Endpoint: 12345
Callback: 4433605594

Account Name: [redacted] SIP Test-PureConnect2

ERL ID: 218CE856-4780-43F0-B7B5-24C04914AD66
Name: Test PureConnect
Street Number: [redacted]
Street Name: [redacted]
Location: PureConn Test
City: Snohomish
State: WA
Zip Code: 98290
View in Map

Time: 2019.06.04 07:36:09 - PDT

West Safety Services Support Contact Information
NOC Support (888) [redacted]

Open Support incident via email support@911.west.com

Technical Resource Center: https://support.911.west.com

Dashboard Login: https://portal.911.west.com
```

### Alert for Non-Provisioned Station

If your PureConnect administrator enables the E911 feature, but the emergency services provider has not provisioned your station, you receive an email warning about the missing information when you place a 911 call. Although the E911 service provider routed your 911 call to an Emergency Call Response Center, your location information was not available.

> **Tip**: Contact your PureConnect administrator about getting provisioned for E911 calls.

```
Time: 2019.06.04 10:57:31 - EDT
IP-PBX System: [redacted]
Account Name: [redacted]
Caller ID: 8665555555

An emergency call was received from the subscriber above, the call was routed to the Emergency
Call Response Center.

At this time, the subscriber is not provisioned in our database.

Please update the West Safety Services database with the subscriber's ID.

West Safety Services Support Contact Information
NOC Support (888) [redacted]7
```

Open Support incident via email support@911.west.com

Technical Resource Center: https://support.911.west.com

Dashboard Login: https://portal.911.west.com

# Making Calls

There are a number of ways to make a call in the CIC client. You can use the **Make a Phone Call** toolbar and enter a number in the **Dial a 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
- 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 Dial a number field
- Using Call History to Make Calls


---

## 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 **Dial a number** field and click **Dial** or press **Enter**.

**To call an external (phone company) operator:**

- Type **00** or the external operator number in the **Dial a number** field and click **Dial** or press **Enter**.

  > **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**


Make a Call using the Dial a number field
Making Calls


---

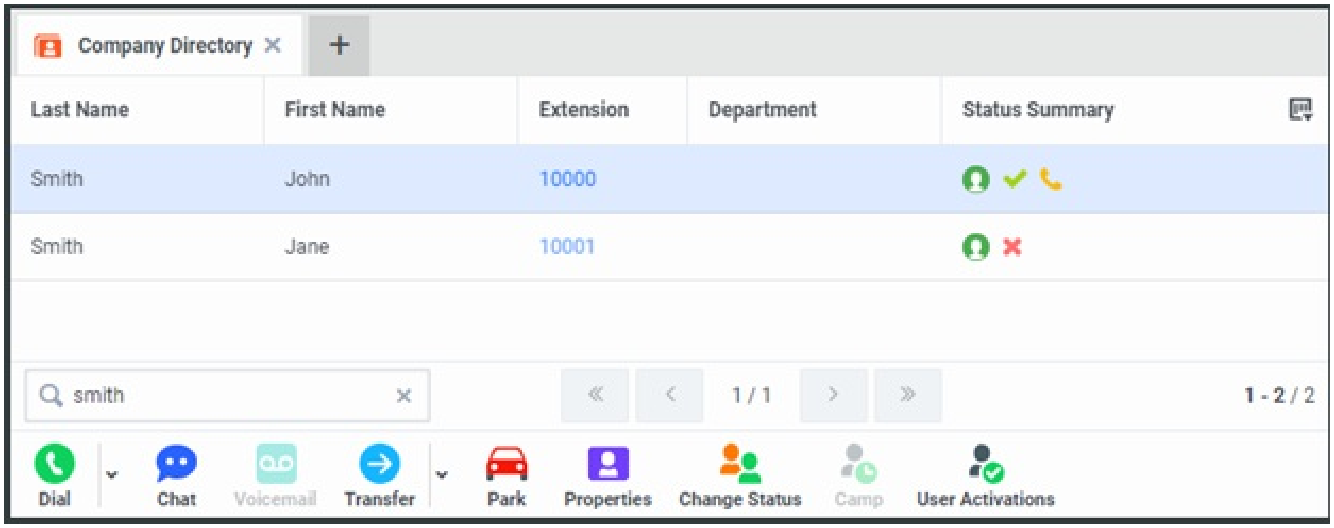
## Click to Dial a Directory Contact

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.

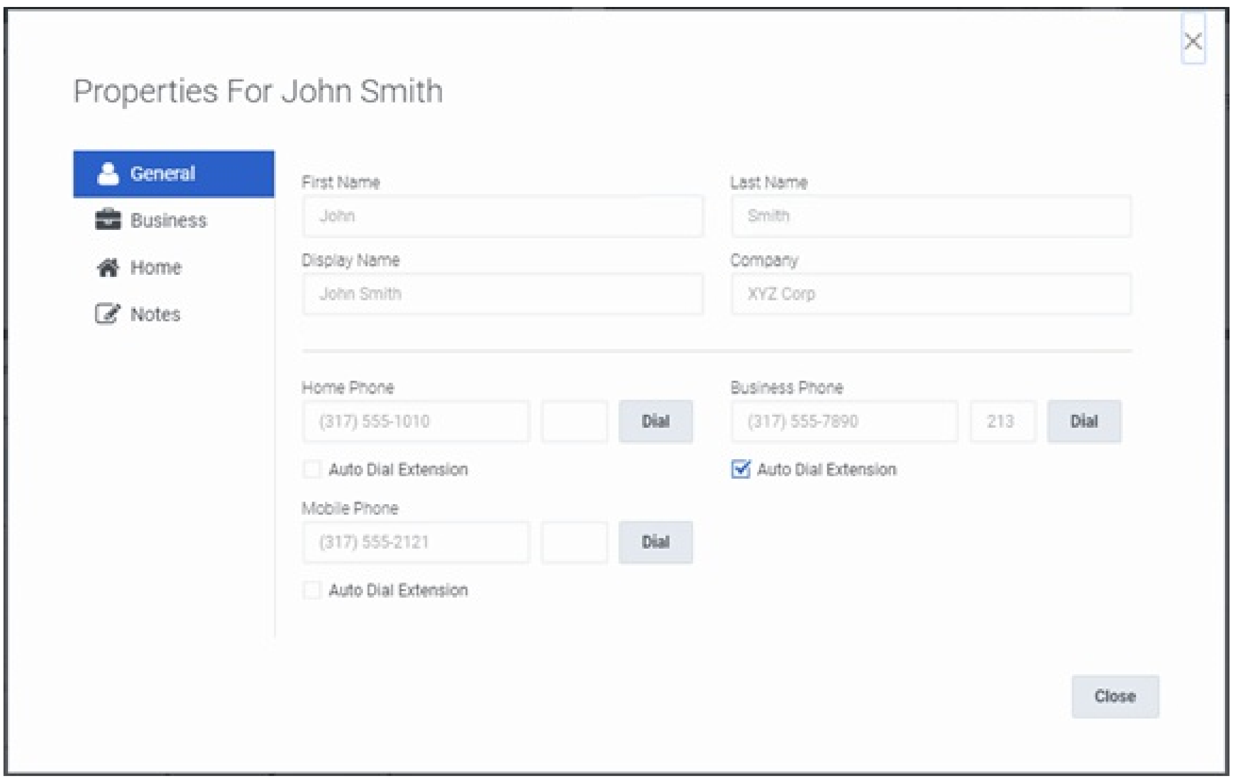
If **Auto Dial Extension** is enabled for a contact's phone number, the CIC client automatically dials the extension after the call connects.

**Video:**

https://player.vimeo.com/video/436481155




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

## 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.

**Video:**

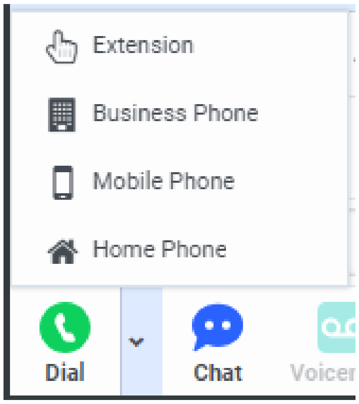
https://player.vimeo.com/video/436481155

### 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 Search field on the directory tab. 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 Search a 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
Working with the Company Directory

## 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 **Dial a number** field and click **Dial**.

> **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

## Dial a Recently Dialed Number

A list of names and numbers you have recently called is available in the **Enter a number to dial** drop-down list.

**To dial a recently dialed number:**

- Click the down arrow to the right of the **Dial a number** field and select a number from the **Recent Calls** list.

**Related Topics**

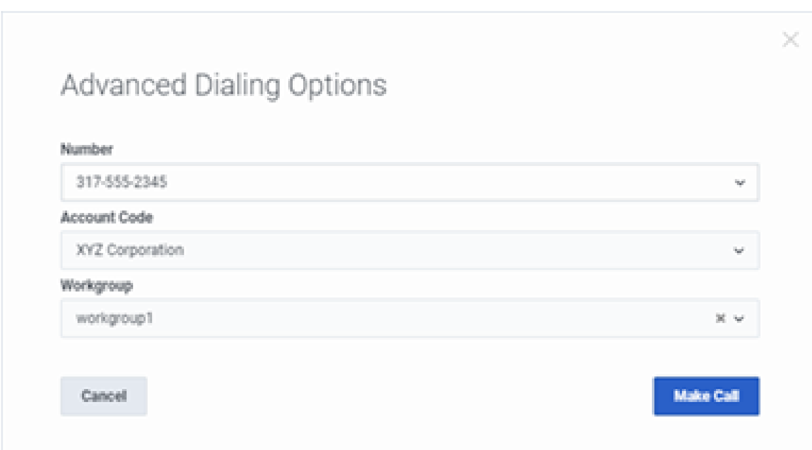
Call History
Making Calls

## 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 and Advanced Dialing Options.




**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.
- Right-click the call and choose **Disconnect** from the menu that appears.

**Related Topics**

Disconnect Button
Disconnect Someone From a Conference Call

## 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.

You can use two **number signs** (##) to enter additional DTMF tones that are required before the carrier connects the call. A common use is including a carrier account code when dialing a remote station, for example, 317-555-1212##1234.

**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.

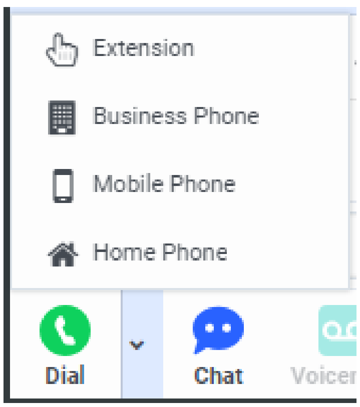
Or, if you want to make a call without using the CIC client, simply dial the number from your telephone. The call appears in My Interactions where you can watch the status of the call.

**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

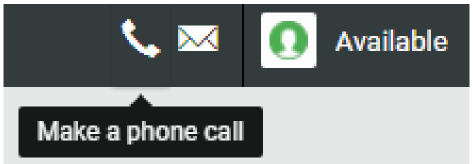
## Make a Call using the Dial a number field

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.

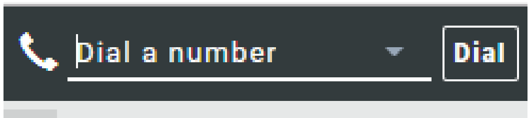
> **Note:** To find out if you have privileges to make toll calls, see your CIC administrator.

**To make a call:**

1. Click the **Make a phone call** icon.




2. Type a telephone number in the **Dial a number** field.




2. Click **Dial** or press **Enter.**

**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 CIC server and wish to put the call on hold without disrupting the call with hold music. By default, Conference calls hosted on your **local** CIC 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. Do one of the following:
   - Click the Hold button.
   - Right-click the call and choose **Hold** from the menu that appears.

   **Result**: The **Hold** button now has a lower edge border 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 or Inbound | The interaction was connected to a user or a station. If call 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 by a CIC user or station and is no longer active. |
| Disconnected (Remote Disconnect) | Outbound or Inbound | The interaction was disconnected by someone outside the CIC system (for example, a customer) 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

**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
- Pick Up a Call From a Queue
- Pick Up a Call From Voicemail
- Place a Call on Hold

**Related Topics**

Respond to a Callback Request
Pick Up a Chat Request
Pick Up or Reopen an E-mail Message

## 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.
- Displaying a Desktop Alert.
- 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.
- 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.
7. Caller name as entered in the Transfer Dialog box.

**Related Topics**

Queue Contents

# 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. Do one of the following:
   - Click the **Pickup** button.
   - Right-click the call and choose **Pickup** from the menu that appears.

   **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
Pick Up a Call From a Queue

## 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 CIC server and wish to put the call on hold without disrupting the call with hold music. By default, Conference calls hosted on your **local** CIC 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. Do one of the following:

   - Click the Hold button.
   - Right-click the call and choose **Hold** from the menu that appears.

   **Result**: The **Hold** button now has a lower edge border 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

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

- Drag and Drop a Call on a Name in a Directory
- 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

## Drag and Drop a Call on a Name in a Directory

You can transfer a call to an extension inside your organization or to an external directory entry by dragging it from My Interactions and dropping it on a name in the Company Directory or other directory. This is similar to a blind transfer because you are not consulting the recipient of the transfer.

**Tip**: To speak with a transfer recipient before a caller is transferred, see Transfer a Call After Consulting the Recipient.

This procedure assumes you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring. You can use drag and drop call transfer only to the Company Directory, not to any other private or public directory.

**To transfer by dragging a call onto a name in the Company Directory:**

1. Tell the caller that he or she is going to be transferred.
2. Scroll (or search) the Company Directory view until you can see the name of the transfer recipient.
3. Select and drag the call from My Interactions to the name in the Company Directory.
4. In the **Transfer Interaction** dialog box, click **Transfer**.

    **Result**: The caller is placed on hold, and the recipient's telephone rings. The call disappears from your My Interactions queue, and appears as a notifying call in the transfer recipient's My Interactions.

Related Topics

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

## 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. Do one of the following:
   - On the Queue Control toolbar, click the Transfer button.
   - Right-click the call and choose **Transfer** from the shortcut menu.

   **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 down arrow in the **Transfer** button and select **Park**.

   **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.

**Related Topics**

Monitor Two or More Queues at the Same Time
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. Do one of the following:
   - On the Queue Control toolbar, click the **Transfer** button.
   - Right-click the interaction and select **Transfer** from the shortcut menu.

   **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 down arrow on the **Transfer** button and select **Consult**. This enables you to speak with the transfer recipient while your original caller stays on hold.

   **Result**: The Consult Call dialog box appears. The original caller is placed on hold. A call is placed to the intended transfer recipient.

   During Consult transfer, use the Dial pad to dial a digit to transfer a call to IVR or Auto attendant.

   **Note**: The highlighted line indicates the parties who are connected and can speak to each other.

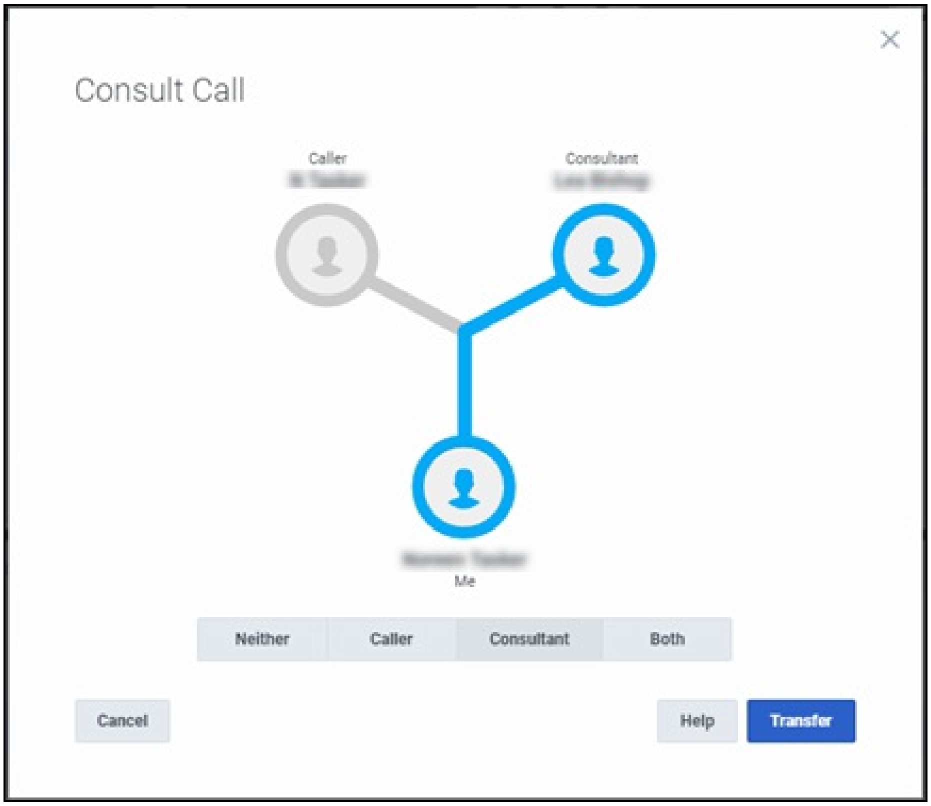
>>>> ORIGINAL //eic/2021r2_systest/products/documentation/source/ConnectClient/Transfer_Call_After_Consulting.htm#2

▫

==== THEIRS //eic/2021r2_systest/products/documentation/source/ConnectClient/Transfer_Call_After_Consulting.htm#3

▫

==== YOURS //inf-5cd0246xjc_eic_main_systest/products/documentation/source/ConnectClient/Transfer_Call_After_Consulting.htm




<<<<

6. Do one of the following:

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

  **Result**: The call is transferred to the Consultant and is removed from your queue.
- To speak to the caller again without exiting the transfer operation, click **Caller**.

  > **Note**: This puts the call to the Consultant on hold. 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.
- To speak to the Consultant again without exiting the transfer operation, click **Consultant**.
- To enable a three-way conversation with the Caller, Consultant and you, click **Both**.

  > **Note**: This creates a conference call. You can now speak to both the Caller and the Consultant. If you later complete the transfer, the conference call is replaced by a standard two-party call.
- To put both parties on hold, click **Neither**.

  > **Tip**: This enables you to talk to someone else or make another call without involving the caller or consultant.
- 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. Or 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**

Drag and Drop a Call on a Name in a Directory
Park a Call on Another Person's Extension
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

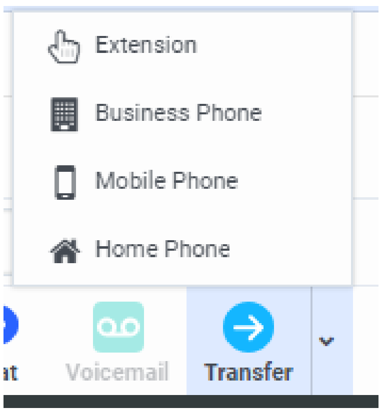
[Transfer a Call Using a Transfer Button](#)
[Transfer a Call Without Consulting the Recipient](#)
[Transfer Button](#)

## Transfer a Call to a Directory Entry

**To blind transfer using a Directory:**

1. Inform the caller that he or she is going to be transferred.
2. Do one of the following:

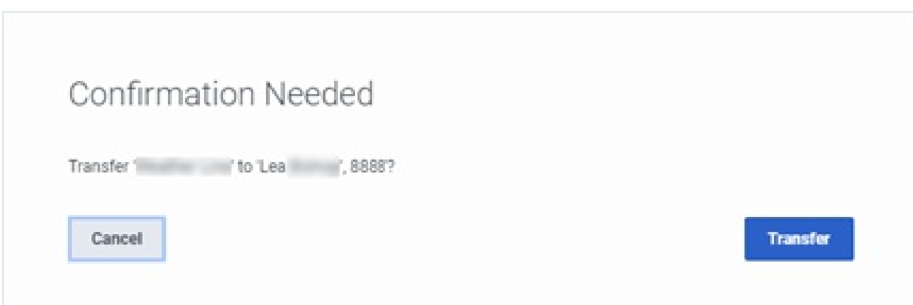
- Select an entry in the Company Directory and then the Directory toolbar **Transfer** button. This transfers the call to the contact's default phone number.
- Select an entry in the Company Directory, click the down arrow on the **Transfer** button and then select one of the phone numbers for that contact.




**Result**: The call disappears from My Interactions and is transferred to the selected number.

**To drag and drop blind transfer:**

1. Inform the caller that he or she is going to be transferred.
2. Click the interaction and drag and drop it on a Company Directory entry.
3. In the **Transfer Confirmation** dialog box, click **Transfer**.




**Result**: The call disappears from My Interactions and is transferred to the selected number.

**Related Topics**

[Drag and Drop a Call on a Name in a Directory](#)
[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. These procedures assume you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring.

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.

**Video:**

https://player.vimeo.com/video/437056174

**To transfer a call to a workgroup:**

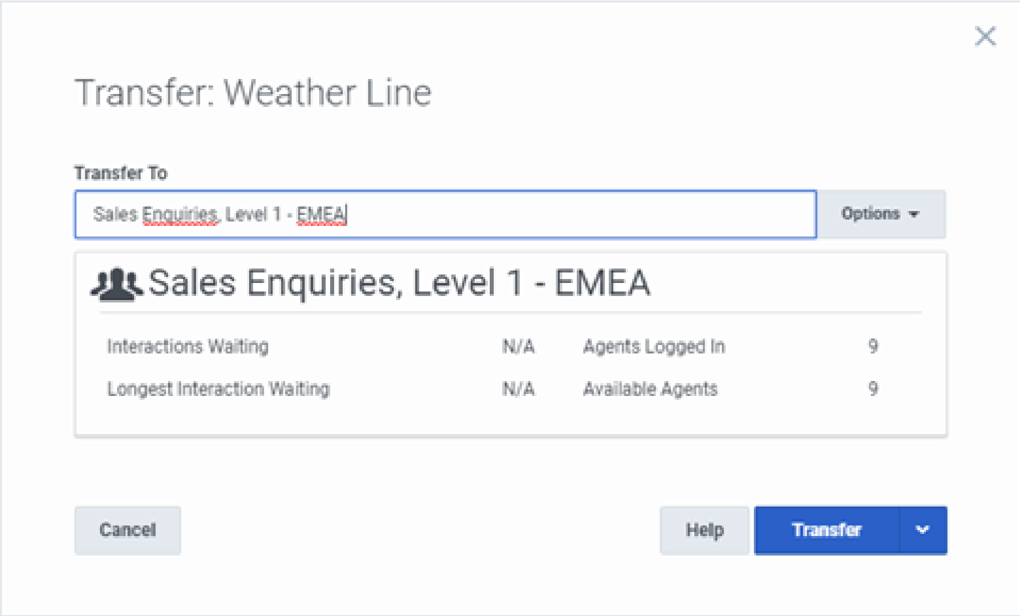
1. Inform the caller that he or she is going to be transferred.
2. While the call is still connected, do one of the following:
   - On the Queue Control toolbar, click the Transfer button.
   - Right-click the call and choose **Transfer** from the menu that appears.

   **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.

   **Result**: Status information for the selected CIC Workgroup appears. This enables you to check the workgroup's current statistics before transferring the call. Use this information to estimate the probable wait time for a transferred call.




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. Do one of the following:

- Drag the call to a workgroup in the Workgroups and Profiles directory view. In the **Transfer Confirmation dialog box**, click **Transfer**.
- Select a workgroup name in the Workgroups and Profiles directory view and press **Enter**.
- Click on a workgroup name in the Workgroups and Profiles directory view. In the Directory toolbar, click **Transfer**.

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

**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 both **inbound and outbound 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. Do one of the following:

- On the Queue Control toolbar, click the **Transfer** button.
- Right-click the call and choose **Transfer** from the menu that appears.

**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 to **inbound and outbound 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.

**Result**: The Profile Name appears in the status area.

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. Inform the caller that he or she is going to be transferred.
2. Do one of the following:
   - Drag the call to an Attendant Profile name in the Workgroups and Profiles directory view. In the Transfer Interaction dialog box, click **Yes**.
   - Select an Attendant profile name in the Workgroups and Profiles directory view and press **Enter**.

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

**Related Topics**

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 **Transfer to Voicemail** option may not be available 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 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:**

1. Tell the caller that he or she is going to be transferred to another person's voice mail.
2. Do one of the following:
   - On the Queue Control toolbar, click the **Transfer** button.
   - Right-click the call and choose **Transfer** from the menu that appears.

   **Result**: The **Transfer** dialog box appears.
3. In the **Transfer To:** field, type all or part of the transfer 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 or not 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 down arrow on the **Transfer** button and select **Transfer to Voicemail**.

   **Result**: The call is transferred to the recipient's voice mail and disappears from **My Interactions**.

**To transfer a call to another person's voice mail using the Directory toolbar:**

1. Select the call
2. Select a directory entry
3. On the Directory toolbar, click the **Voicemail** button.

**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, do one of the following:**

- Select the call, if it is not already selected, then on the Queue Control toolbar, click the Voicemail button.
- If the call is connected, right-click the call and select **Voicemail.**

> **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**

Create a Conference Call Using Drag and Drop
Drag and Drop a Call Onto a Name in a Directory
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 down arrow on the **Transfer** button and select **Consult**. For more information, see Transfer a Call After Consulting the Recipient.
   - To send the call to the intended recipient's voice mail, click the down arrow on the **Transfer** button and select **Transfer to Voice Mail**. 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 down arrow on the **Transfer** button and select **Park**. 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**

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

## Transfer a Call Using the Directory Toolbar

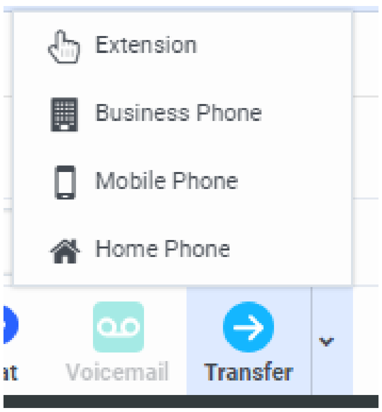
**To transfer a call using the Transfer button:**

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 or other call queue:**

1. Inform the caller that he or she is going to be transferred.
2. Do one of the following:

    - On the Queue Control toolbar, click the **Transfer** button.
    - Right-click the interaction and choose **Transfer** from the menu that appears.

    **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 or other queue and is routed to the selected recipient.

**Related Topics**

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

## Transfer a call to MS Teams User

You can transfer call to available MS Teams user. A transfer dialog is displayed for call transfer which fetches MS Teams users along with their presence statues and the options in the Transfer dialog window should have MS Teams users enabled.

# 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**

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

## 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.

**Note**: CIC does not forward **ACD-routed calls** when you are in an Available Forward status.

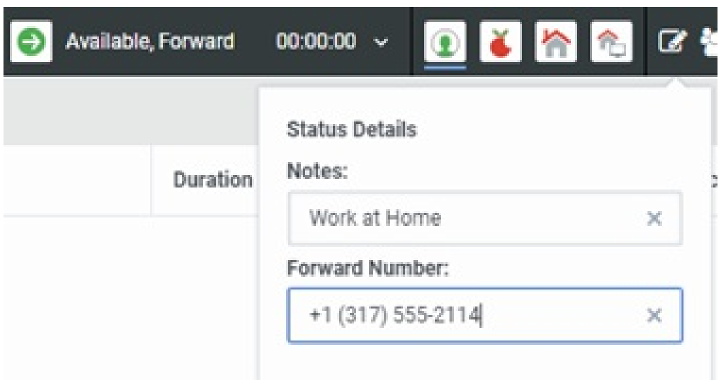
If you will be away from your desk but accessible at another telephone number, you can forward your calls. You can forward calls to an internal extension, a local number, a cellular telephone, or even a long-distance number (if you have the appropriate rights.)

- When you choose to forward calls to a remote telephone number, you must set your status to **Available, Forward**. The CIC 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 calls to your remote location:**

1. From the **My Status** drop-down list. select **Available, Forward**.
2. Click **Status Details** next to them **My Status** drop-down list.




**Note**: **Notes** and **Forward Number** default from the last time you selected Available, Forward.

3. In the Status details popup, in **Forward Number**, type the phone number where you can be reached.
4. In **Notes,** enter any additional information on your status.

**Requirements**: You need the Status Notes right in order to create or modify Status notes.

5. Press **Enter** to save your status details.

**Related Topics**

Set Status Details

## Understanding Follow-me Routing

> **Requirements**: You need the Follow Me 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

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 *CIC TUI User's Guide* or *Quick Reference Card* in the PureConnect Documentation Library.

To add a follow-me phone number:

1. In the Application Settings dialog box, click **Calls > Follow Me**.
2. To prompt callers for their name, in the Follow Me properties details pane, select the **Screen Calls** check box.

   **Note**: When you select **Screen Calls** and later 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.
3. Click **Add Number**.
4. In the **Details** section, complete the fields as described below.

| | |
|---|---|
| **Phone Number** | Enter a telephone number you want the CIC client to call if you are not available.<br>**Dialing Pause**<br>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.<br>**Note**: Use of the comma (,) to create a two-second delay is not supported in all platforms. |
| **Timeout** | Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds.<br>**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** | To require that you or another call recipient must enter your CIC client password to accept the call, select **Use Pin**.<br>**Note**: This feature can prevent someone else from answering your calls through the follow-me routing process. |

5. To add another number, repeat steps 3 and 4.
6. Click **Save Settings** to save your settings and close the Application Settings 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 **Move Up** or **Move Down**.
   - To delete a number, select a number and click **Remove**.
   - To change the settings for a number, select the number and type new values in the **Phone Number** and **Timeout** and then select or clear the **Use Pin** checkbox.
2. Click **Save Settings** to save your settings.

**Related Topics**

Understanding Follow-me Routing
Understanding the Application Settings Dialog Box
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

**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. You can also use **Join** to connect to another user's phone call. Anyone with a telephone can participate in a conference call. Any CIC client user participating in the conference session can add or delete the other conference call 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.

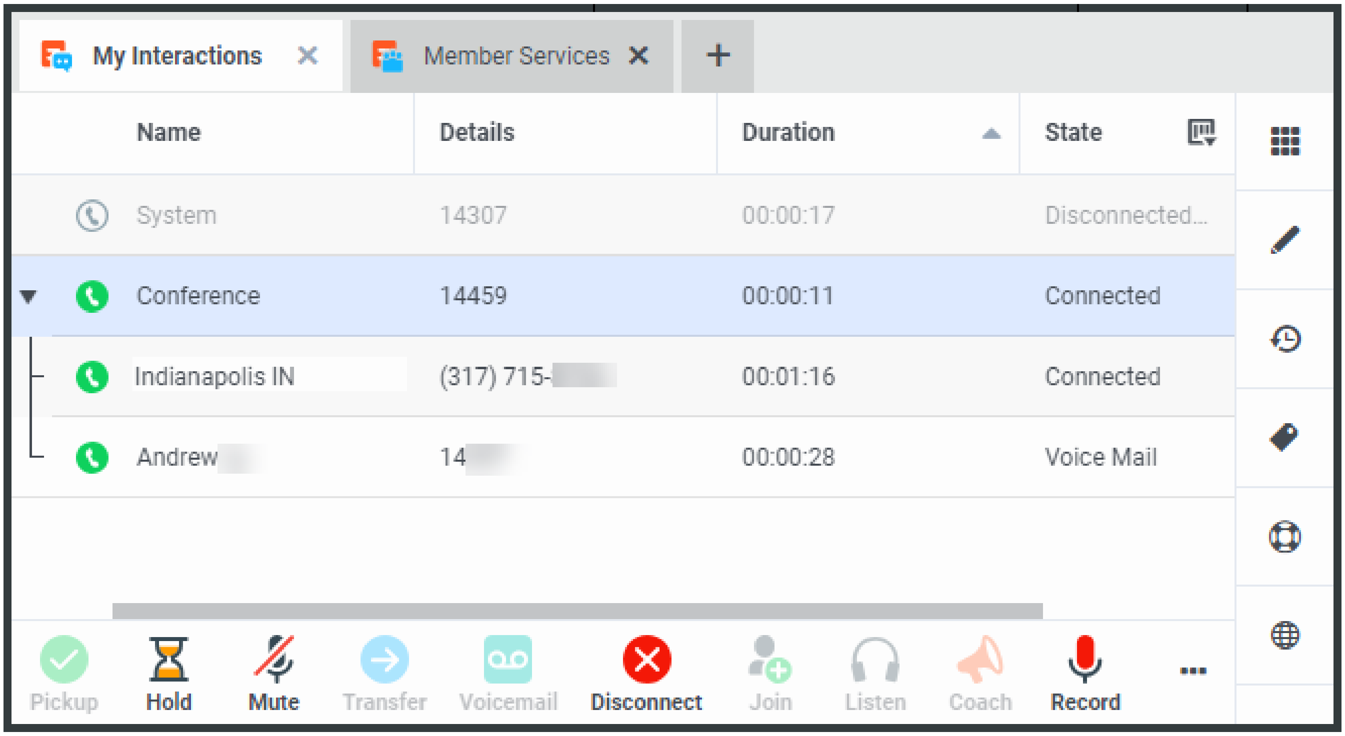
**Tip**: You can put a conference on Hold by selecting the conference and clicking the **Hold** button. You can click the **Pickup** or **Hold** buttons to reconnect to a held conference. For more information, see Place a Call on Hold.

**Related Topics**

Conferencing Features
Create a Conference Call Using Join
Create a Conference Call Using Drag and Drop
Disconnect Someone From a Conference Call

## Conferencing Features

Conference calls appear in the queue views in a tree fashion. The conference call is the root interaction. Click the arrow next to the root interactions to show or hide the conference participants.




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

  **Result**: You see a new interaction with the name "Conference."
- To add parties to a conference, drag a connected call and drop it on the Conference interaction.

**Related Topics**

Create or Join a Conference Using Join
Disconnect Someone from a Conference Call
Create a Conference Call Using Drag and Drop
Making Conference Calls

## Create a Conference Call Using Drag and Drop

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

**Note**: If you are using Accessibility Mode, see Create a Conference Call in Accessibility Mode.

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 if you want to conference these interactions. Click **Conference**.

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

   Tip: If you have the appropriate rights, you can turn off these confirmation dialog boxes by clearing the Confirm drag and drop operations check box in the General node of the Application Settings dialog box.

**Related Topics**

Conferencing Features
Create a Conference Call Using Join

## Create or Join a Conference Call Using Join

**Requirements**: See Join.

**Note**: If you are using Accessibility Mode, see Create a Conference Call in Accessibility Mode. For more information about displaying a queue other than your own (My Interactions), see Monitor Two or More Queues at the Same Time.

You can create or join a conference call in My Interactions or a station or user queue that you are monitoring.

**To create or join a conference call using Join:**

1. Open the user or station queue you are monitoring.
2. Select the call or conference call you want to join.
3. Do one of the following:
   - Click the **Join** button.
   - Right click the call and choose Join from the menu that appears.

   **Result**: You are now connected to the call (or conference call already in progress).

**Related Topics**

Conferencing Features
Create a Conference Call Using Drag and Drop
Join Button
Join an Interaction

## Disconnect Someone from a Conference Call

**Requirements:** See Disconnect.

Any CIC client user participating in a conference call can disconnect other conference call participants.

**To disconnect someone from a conference call:**

1. Select the participant from the list of joined calls in **My Interactions**.

   **Note**: The conference call is the root interaction. Click the arrow next to the root interactions to show or hide the conference participants. For more information, see Conferencing Features.

2. Do one of the following:

   - Click the **Disconnect** button.
   - Right-click and choose **Disconnect** from the menu that appears.

**Related Topics**

Conferencing Features
Disconnect a Call
Disconnect Button

# Using Other Call Features

This section describes how to use other call features including:

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

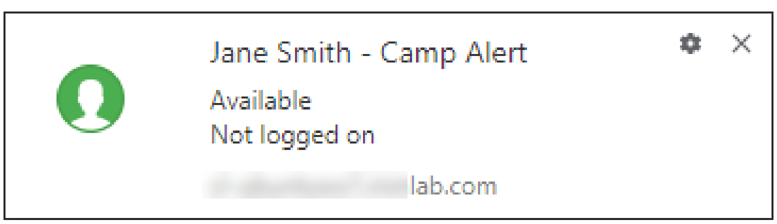
## Camp on an Internal Extension

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.

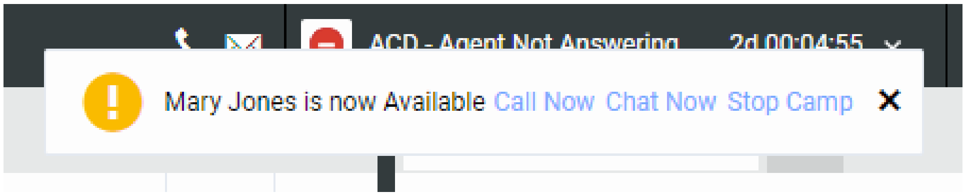
**To camp on an internal extension:**

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.




2. When the person's status changes to an available type, an alert appears. To call the user, click **Call Now**.




**Requirement**: Your Intercom Chat Security Right determines whether the Chat Now option is available.

**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

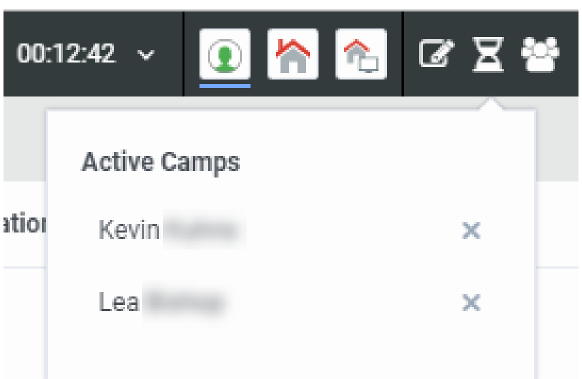
You can camp on any number of CIC client user extensions individually. If you want to see all the camps you have activated, use the Active Camps dialog box.

**To manage your current camps:**

1. Click the **Active Camps** icon


**Note**: This icon appears only when you have active camps.

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



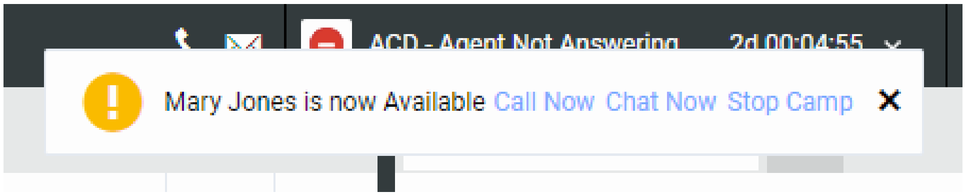

2. Do one of the following:
   - To stop camping on the selected person's extension, click the **X** next to a name
   - To close the list, click anywhere outside the **Active Camps** dialog box.

## Stopping Camping

You can terminate camping alerts in several ways.

**To stop camping, do one of the following:**

- Click the **X** next to a name in the Active Camps dialog box.
- Click **Stop Camp** in a Camp desktop alert.




- In the Company Directory or a Speed Dial view, select the name of user on whose extension you are camping, click the **Camp** button.

> **Tip**: A blue line on the bottom of the **Camp** button indicates you are camping on that user's extension. When you stop camping on that extension, the blue line disappears.

**Result:** CIC removes the name of the user from the list of active camps. Any camping alerts for that user disappear.

**Related Topics**

Camp Button
Camp Desktop Alert
Desktop Alerts

## Coach an Interaction

> **Requirements**: For more information, see Coach.

Use the supervisory Coach feature to add yourself to an agent's interaction on any queue you have permission to monitor. This enables you to provide advice to the agent without the customer knowing that you are assisting on the interaction. The agent can hear your side of the conversation, but the customer cannot.

This feature is especially helpful to supervisors who are training new agents, monitoring employee customer service performance, or simply providing assistance with a customer call.

You must have permission to use the Coach feature and you must have permission to monitor queues. If you have questions about your rights and permissions, see your CIC administrator.

> **Tip**: If the agent presses the Mute button while you are coaching the agent, the customer no longer hears the agent but the agent can continue to converse with you. The Mute button does not affect the audio between the agent and the coach.

> **Note**: You cannot coach on a conference call with 50 or more participants. If you are coaching a participant when a conference call exceeds this limit, your form of participation switches to **Listen**. For more information, see Listen Button.

**To coach an agent on an interaction:**

1. Make sure you have permission to monitor a specific queue.
2. Select the interaction you want to join and do one of the following:
   - Click the **Coach button**.
   - Right-click and choose **Coach** from the menu that appears.

   **Result**: You are now connected to the agent's interaction, enabling you to provide advice to the agent without the other party knowing you are assisting on the interaction.  The agent can hear your side of the interaction, but the other party cannot.
3. The **Listen** button is activated on your client. An icon appears in the agent's **Lstns** column on his or her client. To disconnect the session, click the **Listen** button.

**Related Topics**

Join an Interaction

## Determine if Someone is Listening to or Recording Your Interactions

> **Requirements**: You need the appropriate View Queue Columns Access Control right to display the **Lstns** and **Recs** columns

in a queue view. Also, 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.

### Lstns and Recs Columns

Several settings control the behavior of recording and listening in the CIC client. **Recs** and **Lstns** columns do not appear in My Interactions or other queue views by default. Before you can display these columns, the CIC administrator must grant you the appropriate user rights in Interaction Administrator. After the rights have been granted, you must add the **Lstns** and **Recs** columns to the appropriate views, such as My Interactions. For more information, see Add or Remove View Columns.

Once you have displayed the **Lstns** and **Recs** columns, if someone is listening to or recording your interaction, an icon is shown in the appropriate column.

### Listen Icon

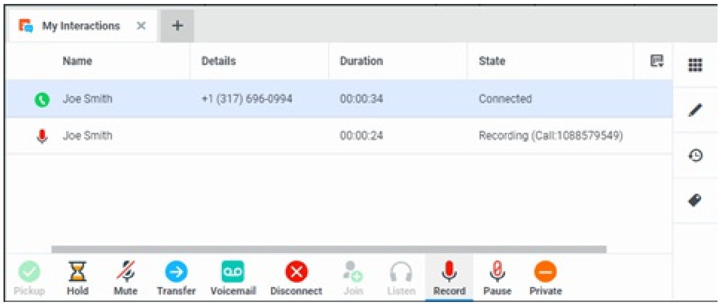
| | |
|---|---|
|  | If someone is listening to or monitoring your interaction, the listen icon appears in the **Lstns** column in your queue view. |

### Record Icon

Different record icons appear for Ad hoc and snippet recordings. For more information, see Recording Types.

### Ad hoc recording

When you make an ad hoc recording of an interaction, **two** interactions appear in your queue view:




- A Record icon in the **Recs** column on the line for the connected interaction indicates that someone is recording the interaction.
- A Record icon in the **first** column of the queue view indicates you are recording the interaction. In this position, it indicates interaction type and represents the recording you are making (a recording object).

If someone else is recording your interaction:

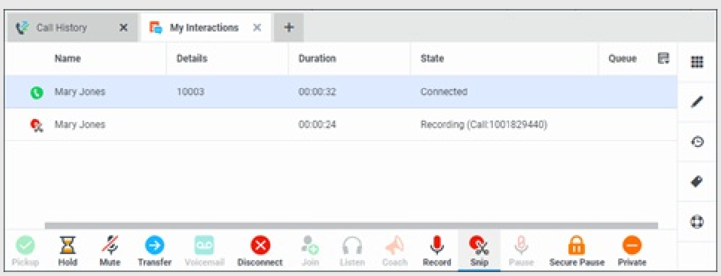
- A Record icon appears in the **Recs** column on the line for the connected interaction.
- The absence of an accompanying recording object with a Record icon in the first column indicates someone else is making the recording.

Other indications:

- If a number appears next to the Record icon, it indicates the number of CIC users who are recording the interaction.

### Snippet recording

When you make a snippet recording of an interaction, **two** interactions appear in your queue view:




- A Record icon appears in the **Recs** column on the line for the connected interaction.
- A Snippet icon in the first column of the queue view indicates you are making a snippet recording. In this position, it indicates interaction type and represents the recording you are making (a recording object).

**Warning**: Genesys 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 a Call
Manage a Chat Session
Record a Call
Record Button
Recording Types
Settings affecting Record and Listen indicators
Working with Calls
Working with Chat Sessions

## 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:

- Do you have the appropriate rights?

  You need the Monitor Columns Security right and the appropriate View Queue Columns Access Control right to display the **Lstns** and **Recs** columns in a queue view.
- 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 CIC 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 |

**Related Topics**

Determine if Someone is Listening to or Recording Your Interactions

## Join an Interaction

> **Requirements**: See Join.

The Join feature enables you to add yourself to an interaction. Both the agent and the outside party can hear your side of the conversation. When you use the Join feature, the CIC client creates a conference call between the agent, the customer, and you.

**To join an agent's interaction:**

1. Make sure you have permission to monitor a specific queue.
2. Select the interaction you want to join and do one of the following:
   - Click the **Join** button.
   - Right-click and choose **Join** from the menu that appears.

   **Result**: You are now connected via conference call to the agent's interaction. You can begin interacting with the agent and the customer.

**Related Topics**

Join Button
Create or Join a Conference Call Using Join

## Listen to a Call

**Requirements**: See Listen.

Choose this option to start continuous monitoring of a call in a queue. This feature enables a monitoring party to listen to both sides of a call. It is available on user or station queues and **My Interactions**, if you have the appropriate rights.

All calls in monitored queues alert you (ring, pop and Desktop Alerts) in a similar fashion to calls in **My Interactions**. These calls also appear in the Call History view.

To listen to a call in a queue:

1. Select the **My Interactions** or other queue tab.
2. Do one of the following:

- Right-click a call in the queue and choose **Listen** from the menu that appears.
- Select a call and then click the **Listen** button.

**Note:** When you listen to a call, a second call appears in a state of Monitoring Call.

**Warning**: Genesys 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**

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

## Record a Call

**Requirements**: This feature may or may not be available to you, depending on the licenses and rights assigned to you in Interaction Administrator. Two types of recordings are available in the CIC client. For the **Record** button, see the Requirements for Ad hoc recordings. For the **Snip** button, see Requirements for Snippet recordings.

**Warning**: Genesys 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.

With the appropriate license and rights, you can record a call. You can make two types of recordings: **Ad hoc** and **Snippet**. Use the **Record** button to create an Ad hoc recording or the **Snip** button to create a Snippet recording. For more information about the differences between these types of recordings, see Recording Types.

**Tip**: You can make either an Ad hoc or a Snippet recording of an interaction. You cannot make both types of recordings of the same interaction. For more information, see Snippet Recording Precedence.

After the recording ends, CIC stores all parts of the recorded call. Snippet recordings are stored in the CIC database and are available only to Interaction Recorder users - usually administrators and supervisors. 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** or **Snip**.

   **Result**: The button appears pressed, and the recording starts.
2. To pause an Ad hoc recording, click **Pause**.

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

   **Note**: **Pause** is not available if you are making a Snippet recording. For Ad hoc recordings, this pause affects only your recording of the interaction. Recordings made by other monitors of this interaction are not affected. If available, you can use the **Secure Pause** button to pause **all** recordings. For more information, see Secure Pause a Recording.
3. To stop recording, click **Record** or **Snip** again.

   **Tip:** Alternatively, you can select the recording in the queue view and click **Disconnect**.

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

**Note:** You can press the **Record** or **Snip** button more than once to stop or continue recording your call.

**Related Topics**

Record Button
Secure Record Pause Button

## Recording Types

With the appropriate license and rights, you can make two types of interaction recordings. Both the **Record** and **Snip** buttons enable you to record all or selected parts of an interaction.

### Ad hoc recordings

Use the **Record** button to create Media Server-based WAV files for call recordings and XML files for chat recordings. These recordings are not stored as part of the CIC database. Your CIC administrator manages the storage of Ad hoc recordings.

The CIC administrator can arrange for you to receive these recordings as email message attachments. You can use Interaction

Voicemail Player or a third-party application to play back call recordings. You need a third-party XML viewer to read an Ad hoc chat transcript.

**Requirements for Ad hoc recordings:**

The Record Interaction Command Right determines if the **Record** button can appear on a toolbar. It also controls whether the Record command appears on a shortcut menu. The Record Interactions Security right enables you to make an Ad hoc recording of an interaction appearing in My Interactions. The Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights enable you to make an Ad hoc recording of an interaction appearing on another queue.

## Snippet recordings

Use the **Snip** button to make recordings that are stored in the CIC database. Snip creates SASF (Secure Authenticated Stream Format) files. Snippet recordings store not only the interaction recording but also participant and event data. Snippet recordings can be encrypted.

CIC administrators and supervisors use Interaction Recorder to configure and manage snippet recordings. Authorized ICBM users can use the Interaction Recorder module to search for and play back snippet recordings. These authorized users can also associate tags, attributes, and Quality Management questionnaires with snippet recordings. In addition, supervisors with the appropriate rights can also create snippet recordings in the ICBM Interaction Supervisor Queues and Agent or Workgroup Queue views. Interaction Recorder Retention policies determine where and for how long CIC retains snippet recordings. Interaction Recorder Security Policies control access to these snippet recordings within IC Business Manager.

**Requirements for Snippet recordings:**

The CIC administrator must configure Interaction Recorder to **Enable Snippet Recordings**. The CIC administrator must assign a **Recorder Access** license to you or the station you are using. Snippet recordings of **email interactions** are available only if your CIC administrator separately enables this feature. Snippet recordings of email interactions are not available by default. Your CIC client is Interaction Desktop or Interaction Connect. The Snip Interaction Command Right determines if the **Snip** button can appear on a toolbar. The Snip Interactions Security right enables you to make a snippet recording of an interaction appearing in My Interactions. The Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues Access Control rights enable you to make a snippet recording of an interaction appearing on another queue.

## Snippet Recording Precedence

If you try to create both an ad-hoc recording and a snippet recording of the same call or chat interaction, the snippet recording takes precedence.

If you start an ad hoc recording first and then start a snippet recording, the ad-hoc recording merges into the snippet recording. Interaction Recorder server manages the resulting snippet recording. This snippet recording contains all the recorded data, from the beginning of the ad-hoc recording to when the snippet recording stops or the parent interaction is disconnected. You can use either the Record or Snip button stop this recording

However if you or another user start a snippet recording first, you cannot start an ad hoc recording of the same interaction. The Record button is unavailable.

## Snippet recordings of Email messages

Snippet recordings of email interactions are available only if your CIC administrator separately enables this feature. Snippet recordings of email interactions are not available by default.

**Note**: Ad-hoc recordings of email interactions are not supported.

- You can start a Snippet recording at any time: in the original email message or in the reply or forwarded email.
- If you start a Snippet recording in an email reply or forwarded email, the Snippet recording **must continue for as long as the original email message (parent interaction) is active**. That is, until you disconnect or transfer the parent email interaction.

> **Warning**: CIC does not create a Snippet recording of an email reply or forwarded email if you stop this recording or disconnect the reply or forwarded email before you send or disconnect the parent interaction.

- If you start a Snippet recording in an email reply or forwarded email, the Snippet recording is not saved until you send the reply or forward the email message.
- **All of the text** in the original email interaction or the mail reply is included in a Snippet recording. Partial recordings are not supported.
- All of the requirements listed in **Requirements for Snippet recordings** apply to Snippet recordings of email interactions.

> **Tip**: The **Snip** button appears on the Queue Control toolbar only if you have the appropriate rights and license.

> **Warning**: Genesys 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**

Access Control Rights
Record Button
Security Rights
Snip Button

---

## Request Assistance from Your Supervisor

> **Requirements**: The "Assistance" Interaction Command Right determines whether you can display the Request Assistance sidebar. The Request Assistance from Supervisors Security right enables you to request assistance from your supervisor.

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.

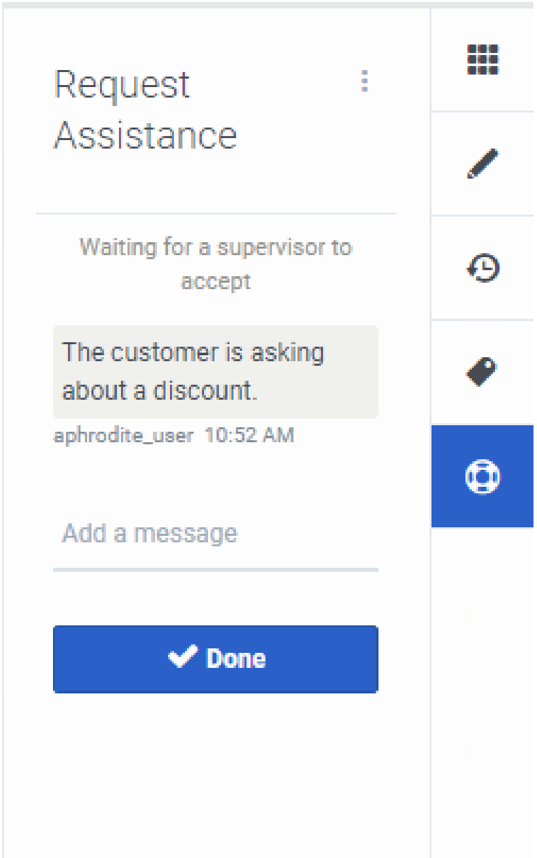
> **Note**: At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

### Requesting Assistance

**To request assistance:**

1. In My Interactions, select the ACD-routed interaction for which you need help.
2. Expand the **Request Assistance** sidebar.
3. In the text box, type your observations or comments and press **Enter**.

   **Result**: The workgroup supervisor receives an assistance request. Also, all supervisors on the same CIC server see a pop-up toast assistance request. You can chat with your supervisor in the **Request Assistance** sidebar.

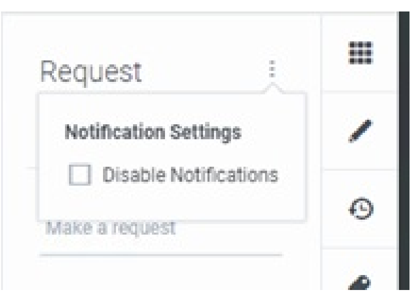



4. When you no longer need assistance and have finished your conversation with your supervisor, click **Done**.

> **Note**: Only the person who begins the Assistance Request process can end the request and the resulting conversation by clicking **Done**.

### Assistance Notification Settings

Use the **Notification Settings** icon in the **Request Assistance** sidebar to enable or disable assistance notifications. Assistance notifications occur when you supervisor responds to your assistance request.



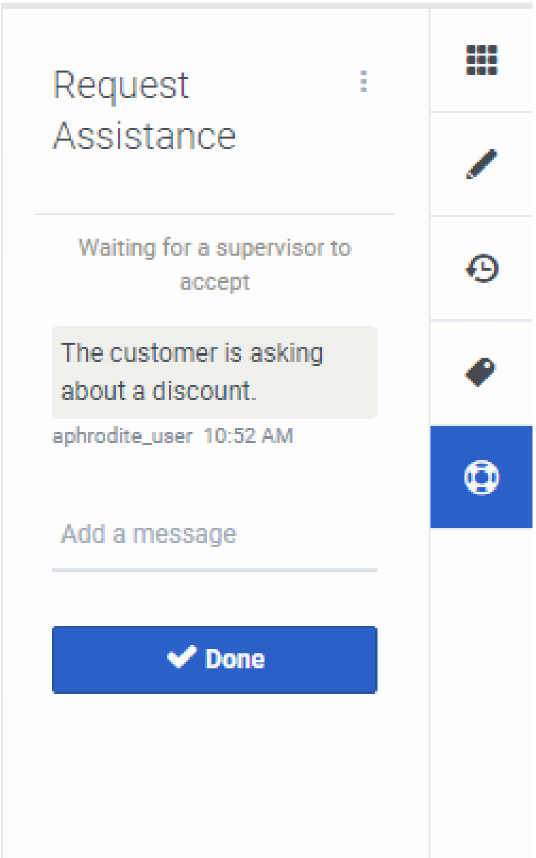

- To pop open the Request Assistance sidebar, **clear** the **Disable Notifications** check box.
- To display a red badge over the Request Assistance icon while the sidebar is collapsed or opened to a different sidebar item, **select** the **Disable Notifications** check box.

**Related Topics**

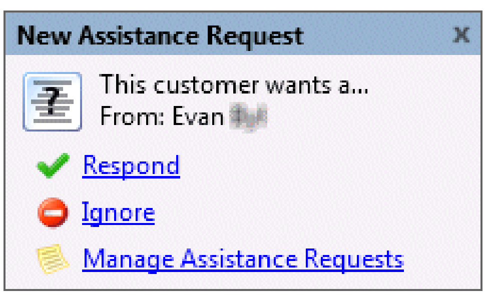
[Assistance Process](#)
[Manage a Chat Session](#)
[Sidebar](#)
[Working with Chat Sessions](#)

## Assistance Process

You submit an assistance request in the form of a problem description or question in the Request Assistance sidebar. You enter a problem description or question and press **Enter**.



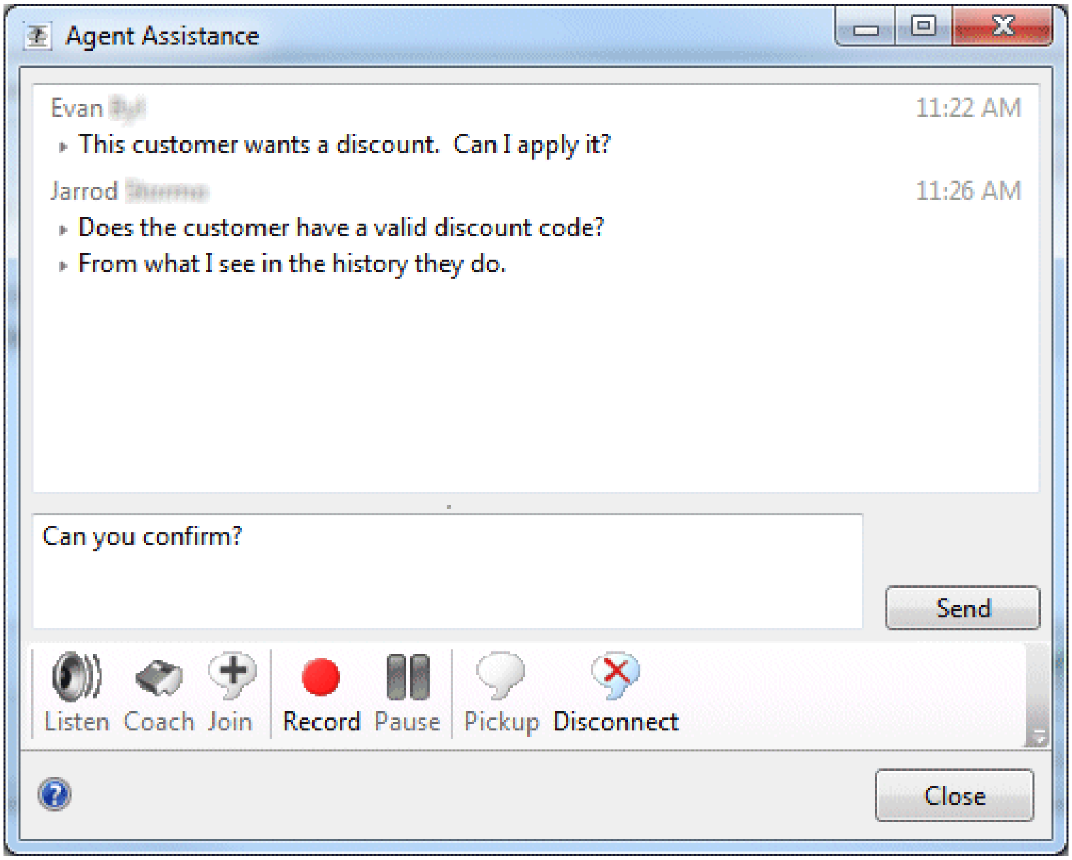

All of the workgroup supervisors on the same CIC server see this assistance request. If a supervisor responds to the request, the toast notification closes automatically for all supervisors.




**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.

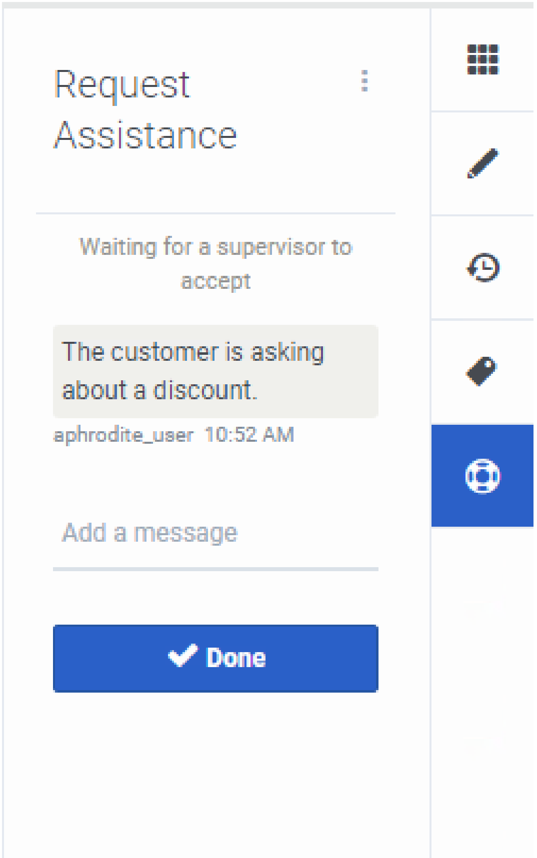
The supervisor responds to the notification by clicking a link:

- **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 sidebar.




**Related Topics**

Request Assistance From Your Supervisor

## Secure Pause a Recording

**Requirements**: See Secure Record Pause.

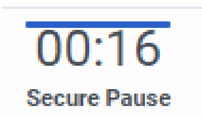
You can use Secure Pause to avoid recording sensitive information, such as a Social Security number or credit card number, during a call. This procedure assumes you are currently connected to a call. You do not have to be currently recording the call interaction.

**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.

**Warning**: Genesys 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**

Recording Types
Secure Pause Button

## View and Edit Interaction Properties

You can view extended information for a completed interaction or make notes during the interaction.

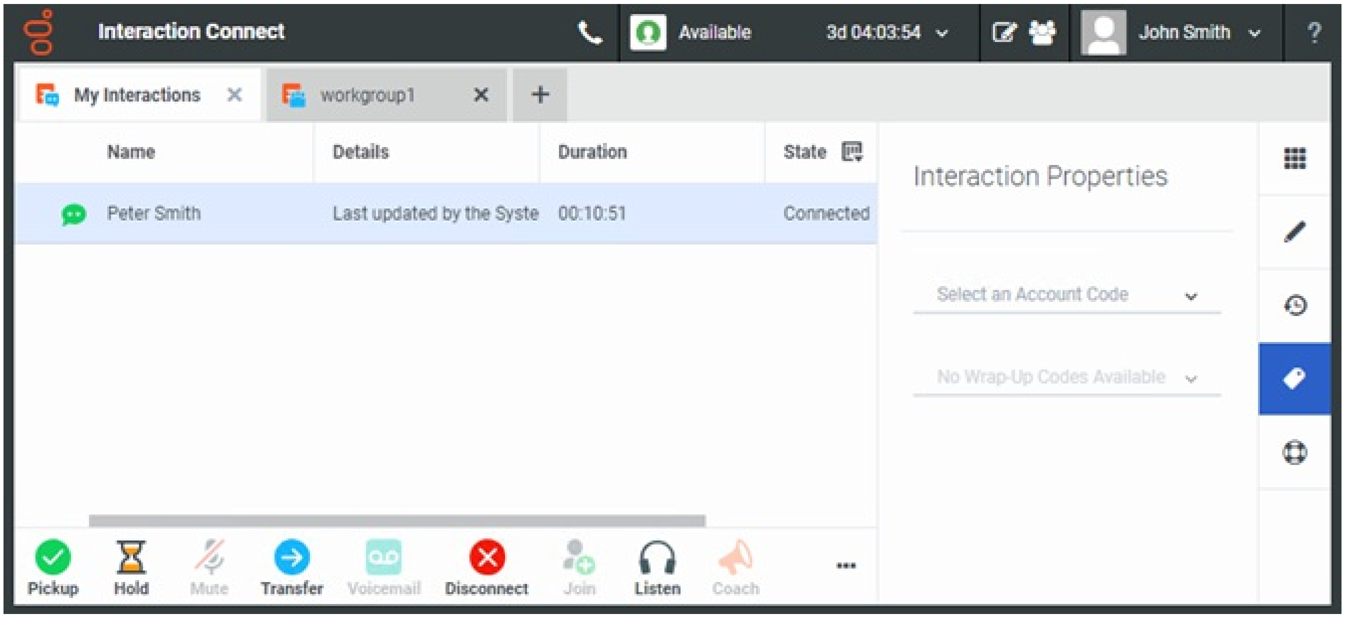
**To view interaction details, do one of the following:**

- In My Interactions, select an interaction and click the **Interaction Properties**, **Interaction Log**, or **Interaction Notes** sidebar control.
- In Call History, select an interaction and click the **Properties** button. To select which interaction properties to display, click **Notes** or **Log**.

### Properties

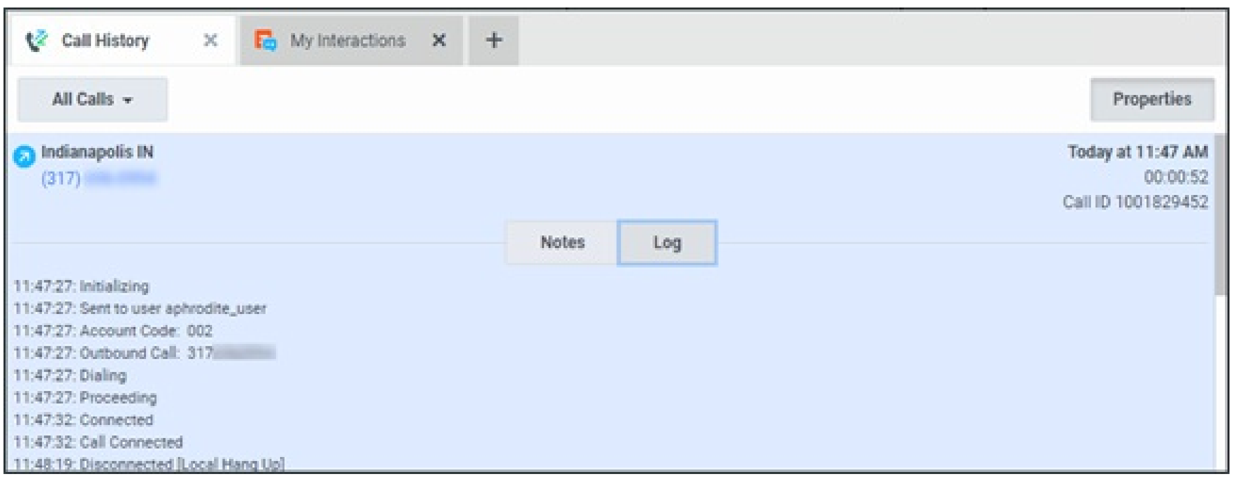
If your system is configured to use Account Codes and Wrap-Up codes and you have the appropriate rights, you can assign these codes in the Interaction Properties sidebar.

**Note**: The Wrap-Up code you view or assign applies only to the interaction segment created when you were connected to the interaction.




## Log

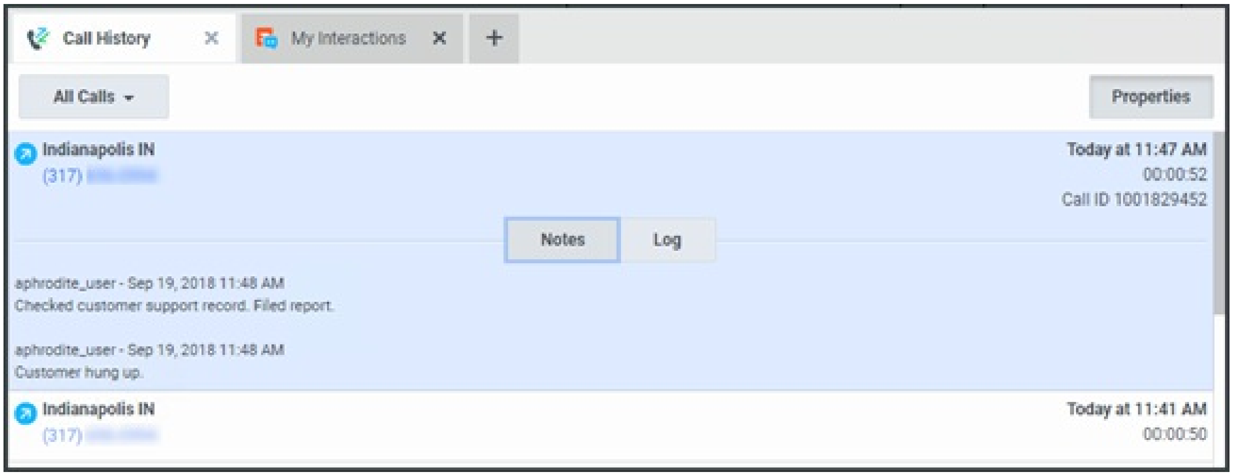
The **Log** describes changes in the interaction's state. This information goes into a log file and is used for reporting purposes.




## Notes

**Notes** record information typed by an agent about an interaction.

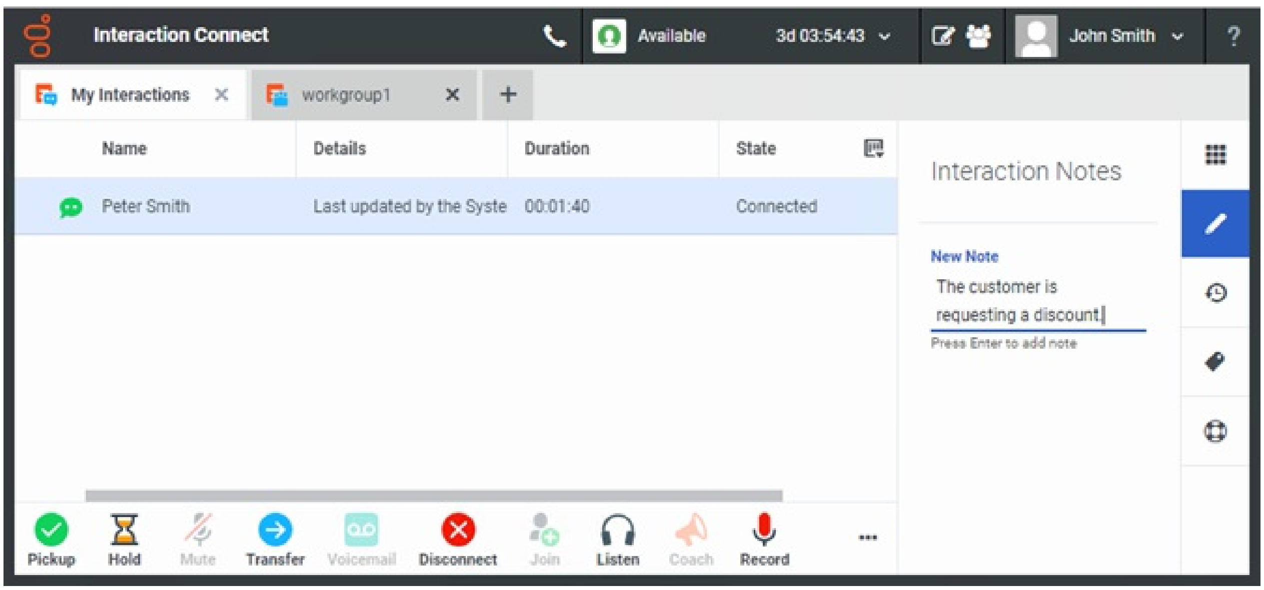
> **Note**: You can take notes on an interaction only while the interaction is selected and active, during a call, for example.




**To take notes on an interaction:**

1. In My Interactions, select an interaction. In the Sidebar area, click the Interaction Notes control.

   **Result**: The **Interaction Notes** sidebar appears.
2. In the **New Note** text box, type the notes.




3. Press **Enter**.

   **Result**: The text appears in the **Interaction Notes** sidebar.

**Tip**: You can add additional notes to the same interaction while it is in progress.

**Related Topics**

Add Notes to an Interaction
Assign Codes to an Incoming Interaction
Assign Codes to Outgoing Interaction
View and Edit Directory Entries
Working with Account and Wrap-Up Codes

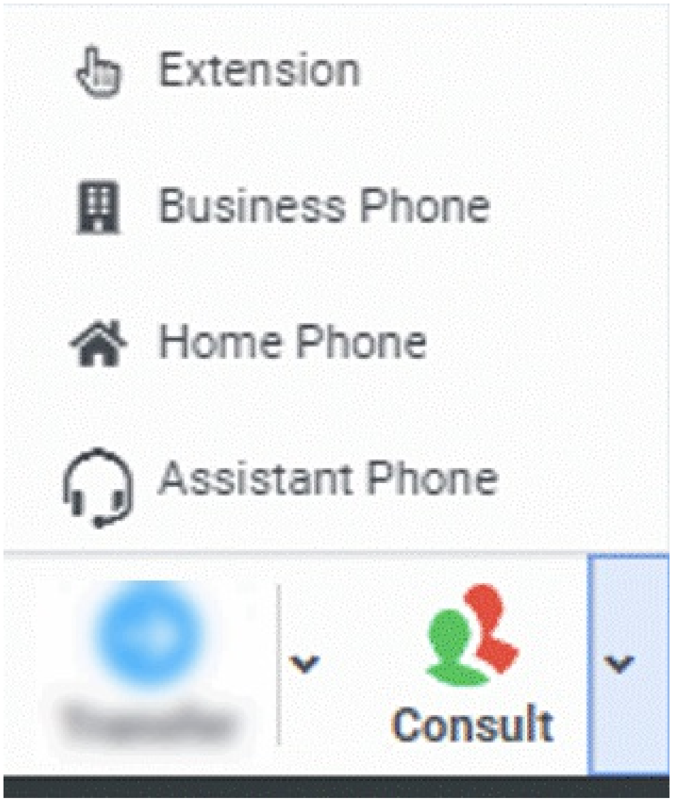
## Consult during a call

**To consult an agent during a call using the Consult button:**

1. While the call is selected in My Interactions, Locate and select the directory entry to whom you want to consult during the call.
2. Do one of two things:
   - In the Directory toolbar, click the Consult button.

     **Result**: This connects the call to the default number for the selected entry.
   - In the Directory toolbar, click the arrow on the Consult button and then click one of the displayed "Consult" entries to connect to the associated number.

     **Result**: This connects the call to the selected number for the selected entry.




**Note:** After consulting, you can transfer the call using Transfer button.

**Related Topics**

Directory Toolbar Buttons
Using the Directory Toolbar
Transfer
Transferring Calls
Transfer a Call Using a Transfer Button

## Processing Secure Input

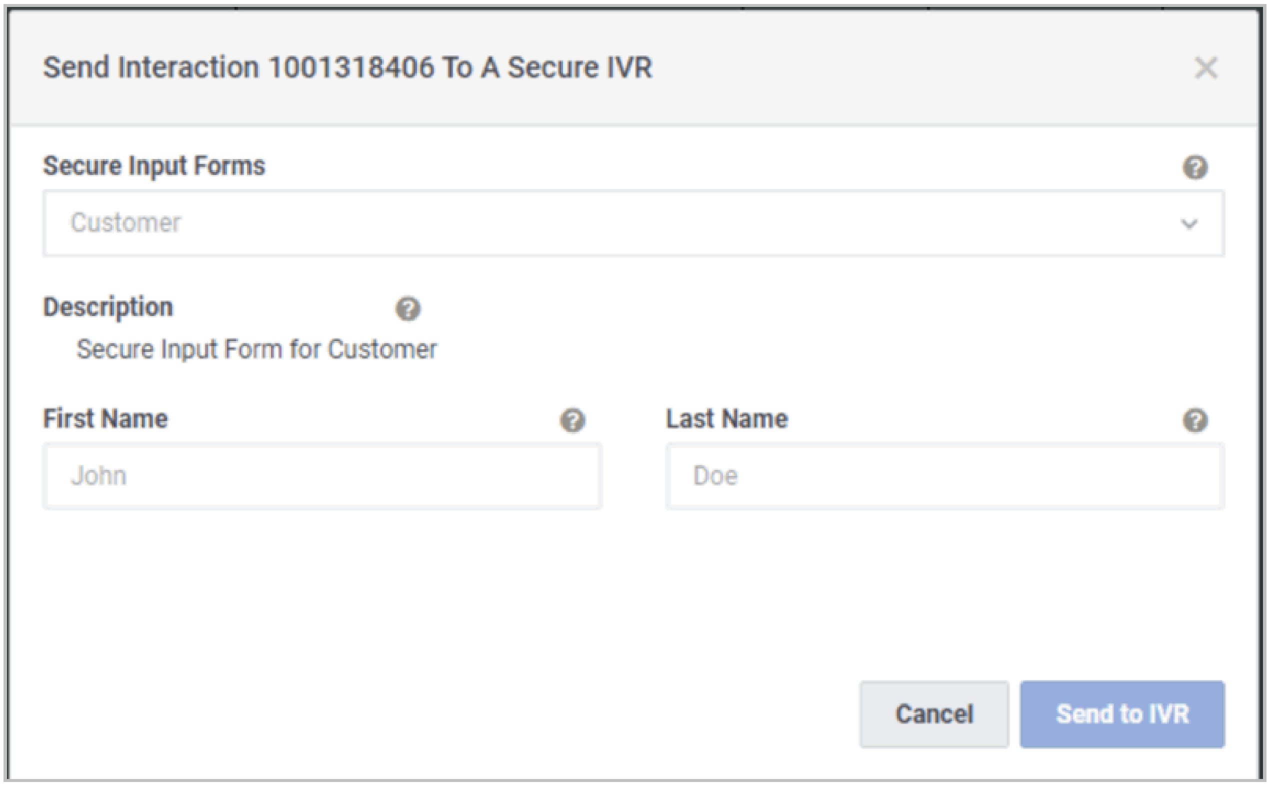
You can use the Secure Input to access and process the Secure Input details during a call. This procedure assumes you are currently connected to a call.

**To process the secure input:**

When you receive a call, click **Secure Input**  button. The **Send Interactions To A Secure IVR** window appears in the pane.

**Note:** The Secure Input button gets enabled based on the security rights for the status.

The below shown image is a sample of **Send Interactions To A Secure IVR** window.



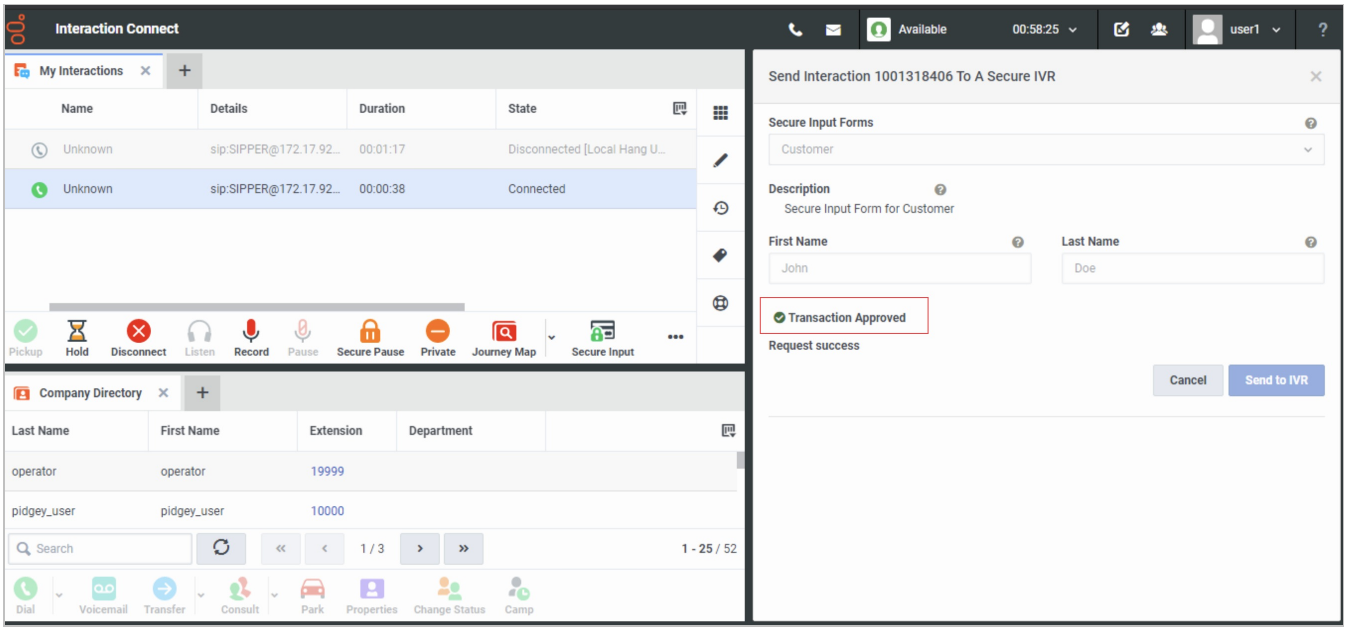

Click and select the secure input form the **Secure Input Form** drop-down.

Add the required information as per the form.

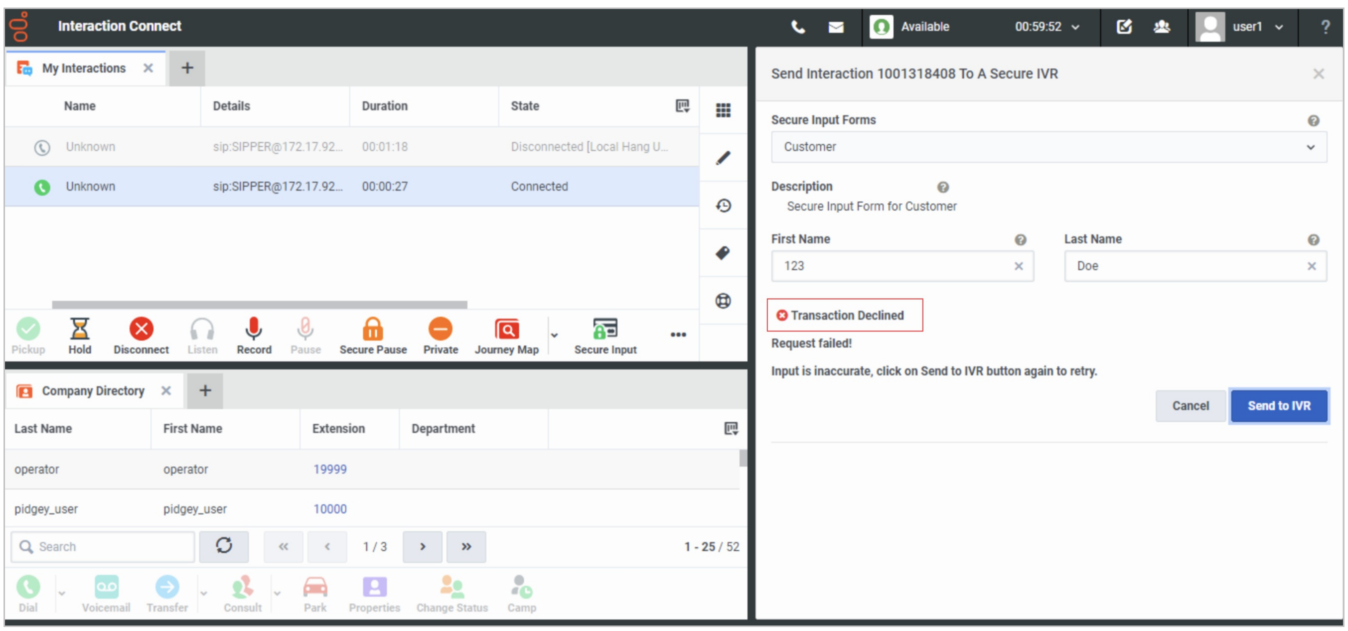
Click **Send to IVR** button. Then the IVR gets started.

Then based on the inputs given by the user, the transaction will be approved or declined.

For example, when the transaction is approved.




When the transaction is declined.




Notes:

The **Send Interactions To A Secure IVR** window in the pane remains open till you close it.

If the call is put on hold then also the **Send Interactions To A Secure IVR** window in the pane remains open.

In the same workgroup, if you receive another call, the initial **Send Interactions To A Secure IVR** window will still remain open, then you need to select the latest call and then click **Secure Input** button. The **Send Interactions To A Secure IVR** window gets refreshed for the new call interaction.

# 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 Customer 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 three types of chat sessions:

- A 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. Or, if your Customer Interaction Center system is appropriately configured, an incoming SMS text message can appear as a chat request. 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.

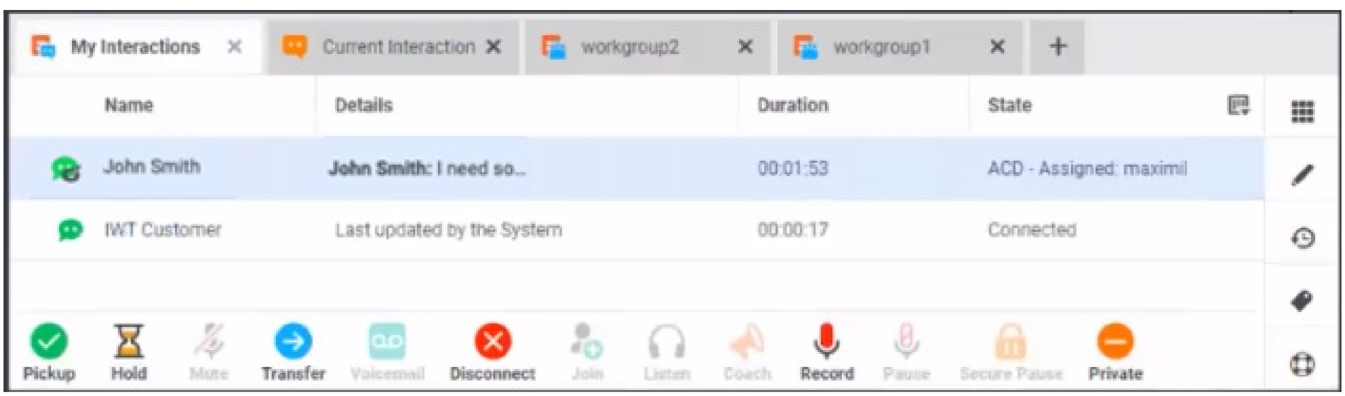
- A CIC user to CIC user chat is an **Intercom chat**. These internal chats can take place only between CIC users on the same CIC server. Intercom chats are not limited to two participants and can include several CIC users. Use Intercom chats to get a quick answer to a question or to pull a team together 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 CIC server. You cannot start a chat session with a user on a peer server. You also need the View Directory Status Columns Access Control right for the **Logged In** column. This enables the CIC client to determine if another CIC user is available for a chat.

- Chats initiated by **Genesys Predictive Engagement** appear in the Interaction Connect **My Interactions** view, just like PureConnect web chats. Predictive Engagement chats enable agents to display journey map information in the Predictive Engagement view. For more information, see Predictive Engagement view.

## Chat Interactions

A conversation bubble icon identifies web chats and intercom chat interactions. Predictive Engagement chat interactions are distinguished by a badge on the icon.




The display of a chat interaction has these other special features:

- The **Chat Response Time** column displays the time that has elapsed since anyone involved in the chat entered some text.
- If someone involved in the chat is currently typing, an **icon** appears in the **Details** column.

  > **Note**: You need the appropriate View Queue Columns Access Control rights to display the **Chat Response Time** and **Details** columns.

- The selected chat determines which chat session appears in the **Current Interaction** view. The currently selected chat interaction is highlighted.

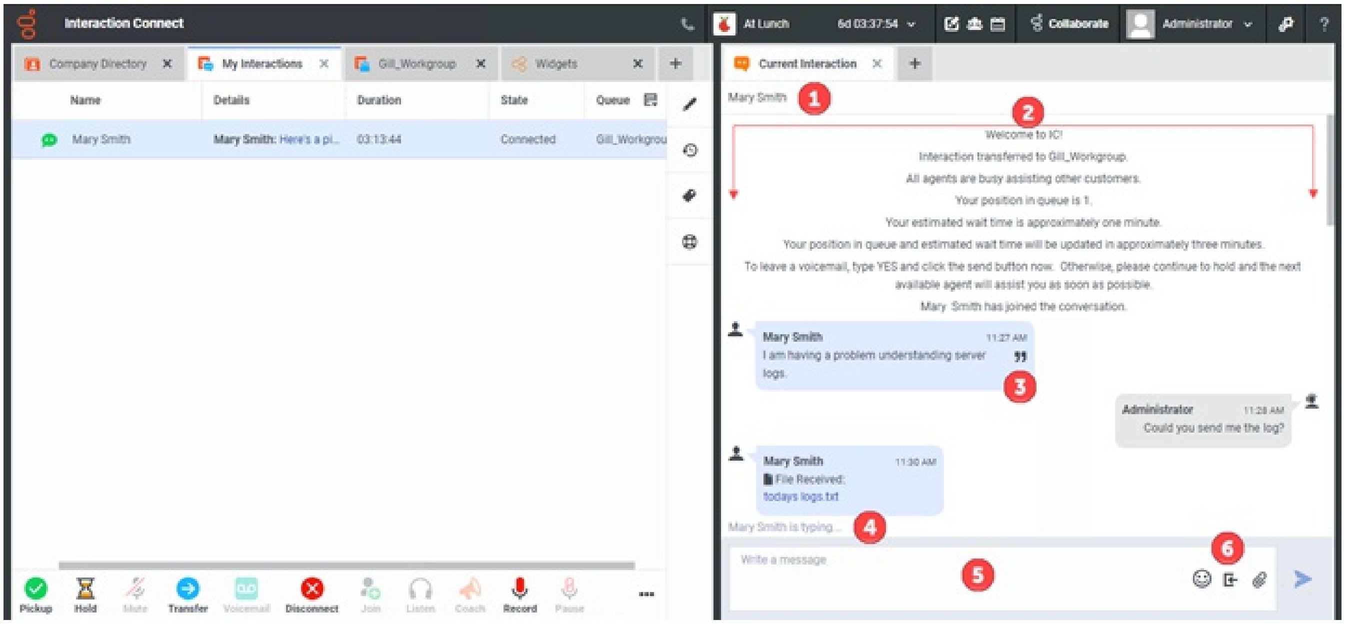
**Related Topics**

- Add Notes to an Interaction
- Assign Codes to an Interaction
- Copy and Paste Text during a Chat Session
- Determine if Someone is Listening to or Recording Your Interactions
- Disconnect 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

## Chats and the Current Interaction view

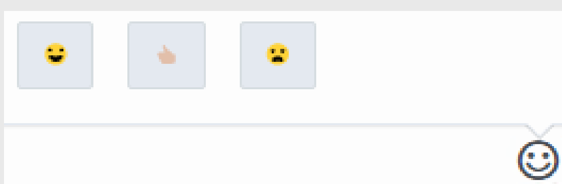
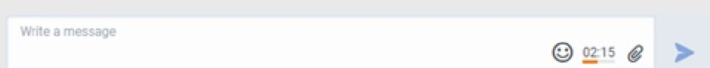
The **Current Interaction** view displays a Chat conversation. You can use the **Current Interaction** view to review the conversation and send text to the other chat participants.

> **Tip**: You can display the **Current Interaction** view in a side-by-side arrangement with **My Interactions**. The currently selected interaction appears in this view.



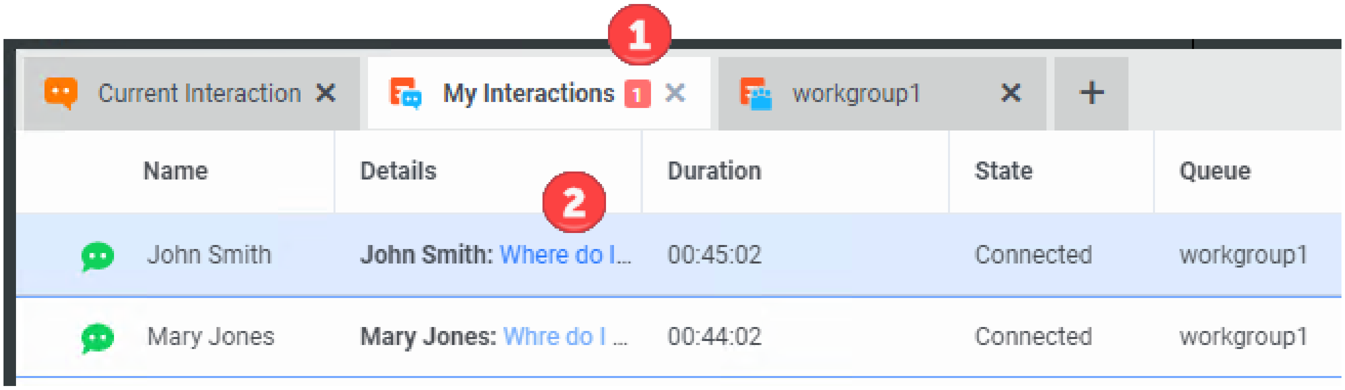

| | | |
|---|---|---|
| 1 | **Chat Members** | This section displays the names of the other chat participants. |
| 2 | **Conversation** | The conversation area displays the pre-configured automatic messages that CIC sends when the chat begins, plus all the chat messages from all the participants.<br><br>Your replies have a gray background. An icon with a headset indicates a PureConnect user. Icons without headsets indicate customers or other external chat participants. |
| 3 | **Quote** | To reply to a specific message in the chat conversation, point to the message and click the quotation marks icon. Type a reply and click the Send icon. The quoted message and your reply appear together in the conversation.<br><br>**Tip**: To remove the quote from your reply, click the **X** on the right side of the quote before clicking **Send**. |
| 4 | **Typing indicator** | This text shows you which other chat participant is typing a reply. |

<table>
<tr>
<td>5</td>
<td>Composition area</td>
<td>
Compose your reply to an ongoing chat, then click Send or press Enter.<br><br>
You can:
<ul>
<li>Type a response.</li>
<li>Copy and paste text to or from a Windows application.</li>
<li>Include a quote from an earlier message in your reply.</li>
<li>Use multimedia in your replies. Insert an https link to a video, an audio file, or an image. Interaction Connect embeds a video or audio file player or displays the image in your view of the chat.<br><br>
Note: The links are transmitted to chat participants. Visitors using the Interaction Web Tools chat or chat widget on your company website can click the link and open it in a separate browser tab.<br><br>
Example: An embedded video player appears in the Current Interaction view for supported formats like YouTube, Vimeo, and Imgur.<br>


</li>
</ul>
</td>
</tr>
<tr>
<td>6</td>
<td>Emoji, Accept file transfers, and Attach a file icons</td>
<td>
To insert a selected emoji in your reply, click the Emoji icon and make a selection.<br>
<br><br>
To enable the website visitor to send you a file, click the Accept file transfers icon. The invitation countdown appears. When the invitation expires, the website visitor can no longer send files.<br><br>
Note: Your administrator must enable inbound file transfers. Inbound and outbound file transfer works only with website visitors who use the Web Chat Widget. For more information, see Configure Inbound File Transfer Settings and Accept and Send Files During a Chat.<br>

<br>
To send a file, click the Attach a file icon (paperclip), select a file. The selected file name appears. Click the Send icon.<br>


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

## Message Indicator and link




| | | |
|---|---|---|
| 1 | **Message Indicator** | When both the **Current Interaction** and **My Interaction** view are **not** visible at the same time, a message indicator appears on the view tab. This alerts you that a chat conversation requires attention. |
| 2 | **Link to Chat** | To display the **Current Interaction** view for the selected chat, click the chat message in the **Details** column.<br>**Note**: New chat messages appear as bold text in the Details column. |

**Related Topics**

Add or Close Views
Sidebar

# 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 **Current Interaction** view to manage a chat. You can also use the **Interaction Notes** sidebar in **My Interactions** to add notes to a chat session.

**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
Record a Chat Session
Request Assistance from Your Supervisor
Sidebar
Transfer a Chat Session
Working with Chat Sessions

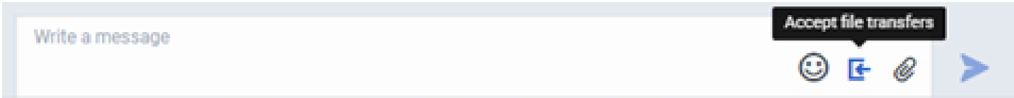
## Accept and Send Files During a Chat

If your administrator enables inbound file transfers, you can receive files from website visitors. Inbound file transfers work only for website visitors using the **Web Chat widget**. You are always able to send files to website visitors. For more information, see Configure Inbound File Transfer Settings and Widgets.

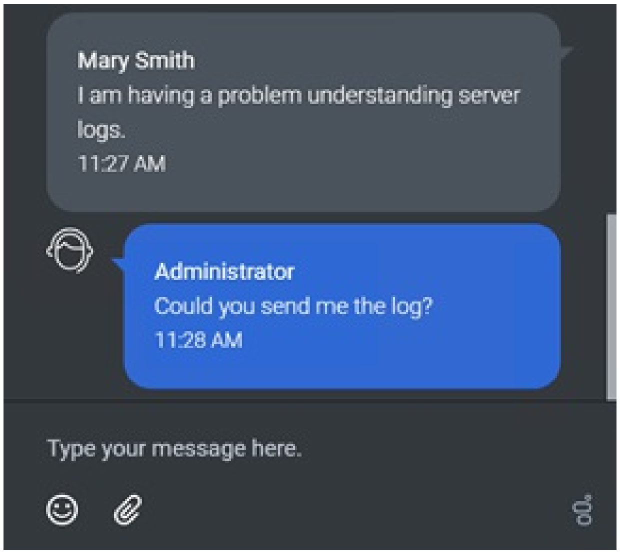
**To accept a file:**

You must invite a website visitor to send you a file. The types of files a website visitor can send you are limited to the types configured in Inbound File Transfer Settings.

1. During a chat, in the Current Interaction view, click the **Accept file transfers** icon in the composition area.




This action issues an invitation to the website visitor which makes an **Attach file** (paperclip) icon appear in the website visitor's Web Chat widget.



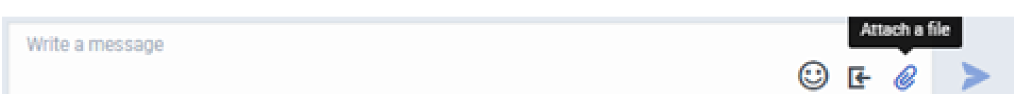

While the invitation is active, you see a countdown. When the invitation expires, the website visitor can no longer send files. The color of the countdown meter changes from green to yellow to red as the expiration time nears. Your administrator configures how long an invitation lasts in Inbound File Transfer Settings.


2. After the website visitor clicks the paperclip icon and selects a file, the web chat widget sends the file.
   Received images appear in the Current Interaction view. Other file types appear as download links. Your administrator can limit the types, number, and size of permitted files in Inbound File Transfer Settings.
3. To download a file, click the name of a received file.


**To send a file:**

**Note**: As an Interaction Connect user, you are able to send files of any type to a website visitor. You are not limited to the file types configured for inbound file transfers.

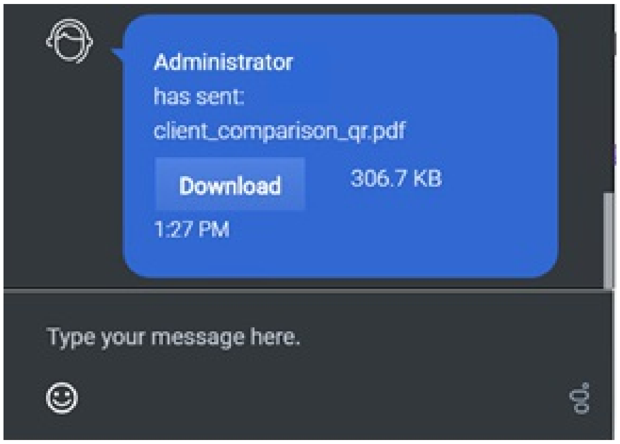
1. During a chat, in the Current Interaction view, click the **Attach a file** (paperclip) icon in the composition area.



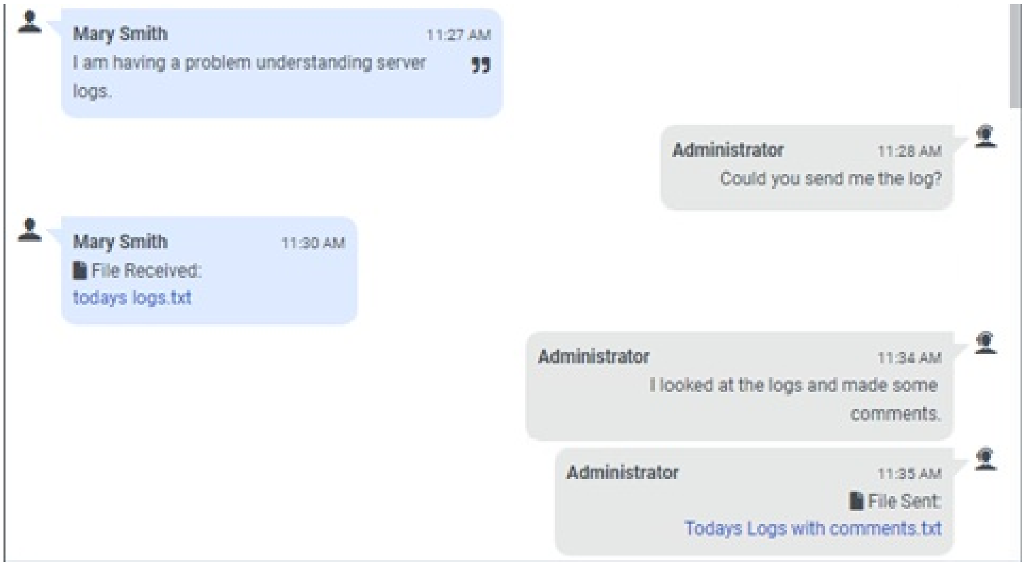

2. In the Windows Open dialog box, search for and select a file. Click **Open**.
3. The name of the selected file appears next to the paperclip icon.


4. Click the **Send** (arrow) icon.
   The name of the file disappears from the composition area.

The website visitor receives a **Download** link to the file in the Web Chat widget. When the website visitor clicks the link, the file downloads to the default download location on the visitor's system. From there, the website visitor can open the file.




The chat conversation displays a record of all files sent and files received.




## Add Notes to an Interaction

Use the **Interaction Notes** sidebar in **My Interactions** to add notes to the currently selected 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.

**To add notes to an interaction:**

1. In **My Interactions**, expand the **Interaction Notes** sidebar.
2. In the text box, type your observations or comments and click the **Add Note** icon (plus sign).

   **Result**: Your notes appear in the **Interaction Notes** sidebar.

**Related Topics**

Respond to a Callback Request
Manage a Chat Session
Sidebar
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:**

- When working with a callback request, chat, or email interaction, select the appropriate codes in the **Interaction Properties** sidebar.

  **Note**: Wrap-Up codes are not used for email message replies or forwarded email messages.

- When making a call, select a code in the Advanced Dialing Options dialog box.

**Related Topics**

Assign Codes to an Incoming Interaction
Assign Codes to an Outgoing Interaction
Manage a Chat Session
Sidebar
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.

**Note**: If you are using Accessibility Mode, see Create a Conference Chat in Accessibility Mode.

**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 Current Interaction view.
5. When the session is complete, click the **Disconnect** button in the My Interactions view to end the chat conference.

**Related Topics**

Chats and the Current Interaction view
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 **Current Interaction** view. Then click **Send**, just as if you'd typed the response.

> **Note**: If you have a standard reply to a frequently asked question stored in a document, you could use a pointer to this document in a stored Response. For more information, see Create Personal Responses.

**Related Topics**

Chats and the Current Interaction view
Manage a Chat Session
Working with Chat Sessions

## Disconnect a Chat Session

> **Requirements:** See Disconnect.

**To disconnect a chat session:**

- In **My Interactions**, select the chat interaction and click the **Disconnect** button.
- In **My Interactions**, select the chat interaction, right-click and choose **Disconnect** from the menu that appears.

**Related Topics**

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. You also need the View Directory Status Columns Access Control right for the **Logged In** column. This enables the CIC client to determine if another CIC user is available for a chat.

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 CIC 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. If the selected CIC user is logged in, click the Chat button in the Company Directory.

    **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:

- Select a chat and then in the queue control toolbar, click the **Private** button.
- Right-click the chat and choose **Private** from the menu that appears.

**Note**: This button is unavailable if the chat is not in a state in which this action can be performed.

**Related Topics**

Manage a Chat Session
Private Button
Working with Chat Sessions

## Monitor a Chat

**Requirements**: See Listen.

If you have the appropriate rights, you can monitor a chat without being a participant.

Some things to note about the process of monitoring a chat:

- If you monitor a chat, a **Lsns icon** appears on the line containing the interaction in the queue views for the participating CIC client users and your own queue views.

  **Tip**: For more information, see Determine if Someone is Listening to or Recording Your Interactions.

- The **Lsns icon** is not removed until you cease to monitor the interaction by closing the chat window on your workstation or clicking the **Listen** button a second time.
- You can stop monitoring a chat at any time.
- If you monitor a chat, you see the complete chat conversation as it occurs. The conversation includes text typed by participants, text or URLs incorporated from Personal Responses and the selected Account Code or Wrap-Up Code.

  **Note**: Files sent to chat participants are not visible to a user who monitors the chat.

In a typical example, another CIC client user (agent) picks up a chat from a workgroup queue. If you have the necessary rights to listen to (monitor) interactions and to monitor the queue on which the chat is appearing, you can view the chat.

**To monitor a chat:**

1. The agent picks up a chat.
2. You select the same chat interaction from the appropriate queue view and do one of the following:
   - Right-click the chat and choose **Listen In** from the menu that appears.
   - Select the chat and then click the **Listen** button.

   **Result**: The Chat appears in the Current Interaction view.

   **Note**: You can stop listening at any point in this process. You do not need to wait until the agent completes the chat or withdraws from participation by disconnecting.

**Warning**: Genesys 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**

Determine if Someone is Listening to or Recording Your Interactions
Manage a Chat Session

## 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.

**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.

**To pick up a chat session request:**

- Do one of the following:
  - In My Interactions select the chat request and click the **Pickup** button.
  - Click the desktop alert (toast popup) and then select the chat request in **My Interactions** and click **Pickup**.

    **Note**: Clicking a desktop alert pops the browser containing the CIC client to the top of all open applications. Desktop alerts appear in the lower right-hand corner of your Windows desktop.

**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:**

- In **My Interactions**, select the chat and click the **Hold** button.
- In **My Interactions**, right-click the chat and select **Hold** from the menu that appears.

**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 licenses and rights assigned to you in Interaction Administrator. Two types of recordings are available in the CIC client. For the **Record** button, see the Requirements for Ad hoc recordings. For the **Snip** button, see Requirements for Snippet recordings.

With the appropriate licenses and rights, 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.

You can make two types of recordings: **Ad hoc** and **Snippet**. Use the **Record** button to create an Ad hoc recording or the **Snip** button to create a Snippet recording. For more information about the differences between these types of recordings, see Recording Types.

**Tip**: You can make either an Ad hoc or a Snippet recording of an interaction. You cannot make both types of recordings of the same interaction. For more information, see Snippet Recording Precedence.

**Warning**: Genesys 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:**

- In My Interactions, select the chat and click the **Record** or **Snip** button.

> **Tip**: The Snip button does not appear on the Queue Control toolbar by default. If you have the appropriate rights and license, you can add it. See Customizing Queue Control Toolbars.

> **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 you start a recording:**

- Click the **Record** or **Snip** button again to stop the recording session for a chat.
- You can press the **Record** or **Snip** button more than once to stop or continue recording your chat.

**Pausing a recording**

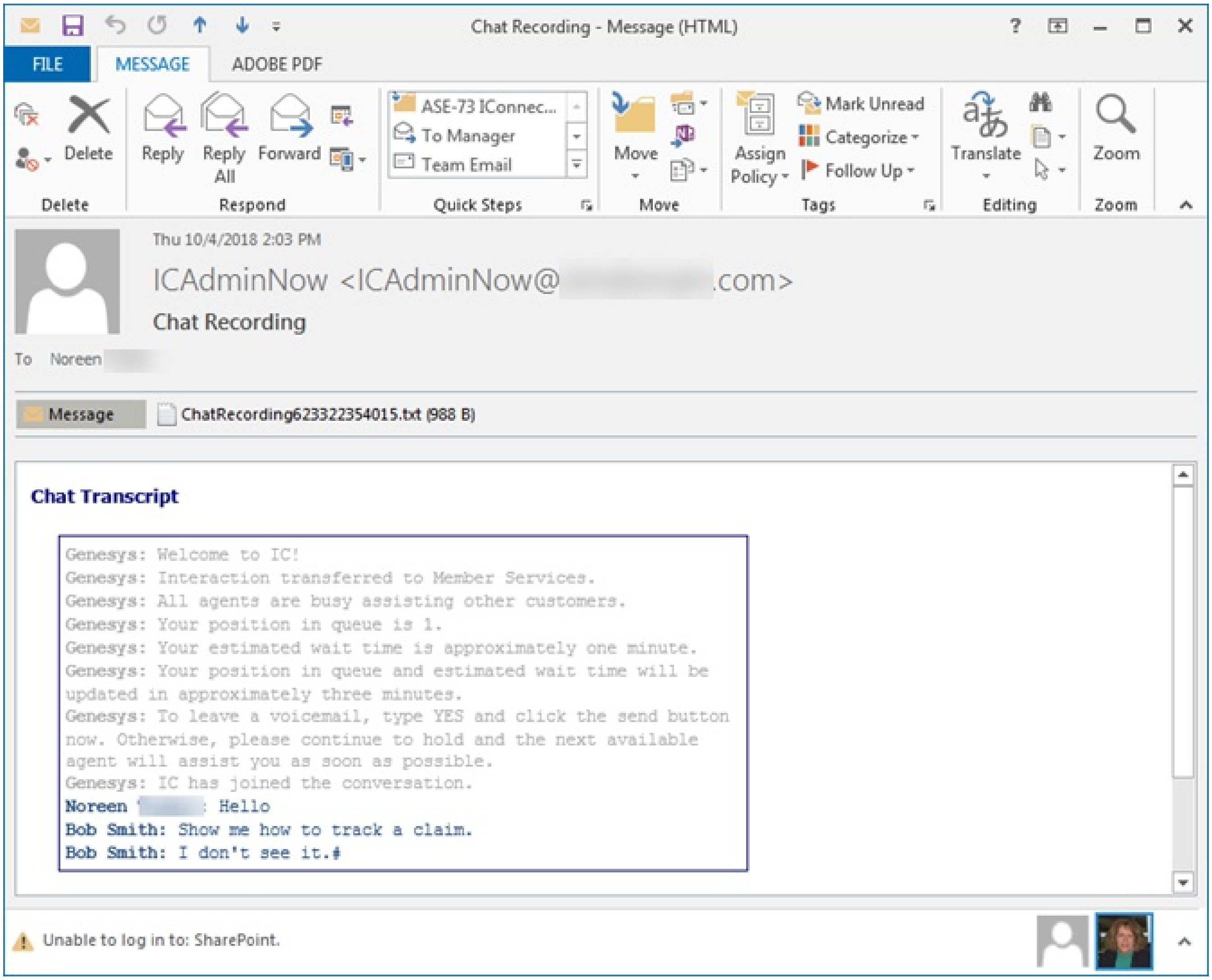
> **Note**: **Pause** is not available if you are making a Snippet recording. **Pause** is also not available if the interaction is not in a state in which this action can be performed.

- 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.

## After the chat session ends

**Record** and **Snip** save only the text entered in a chat session while you have the button pressed. After the chat session ends, CIC stores all parts of the recorded chat. Snippet recordings are stored in the CIC database and are available **only to Interaction Recorder users** - usually administrators and supervisors. Ad hoc recordings made using the Record button are stored in files that your CIC administrator can arrange for you to receive as email message attachments.

**Example of an ad-hoc recording sent to an agent**




**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**: The "Assistance" Interaction Command Right determines whether you can display the Request Assistance sidebar. The Request Assistance from Supervisors Security right enables you to request assistance from your supervisor.

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.

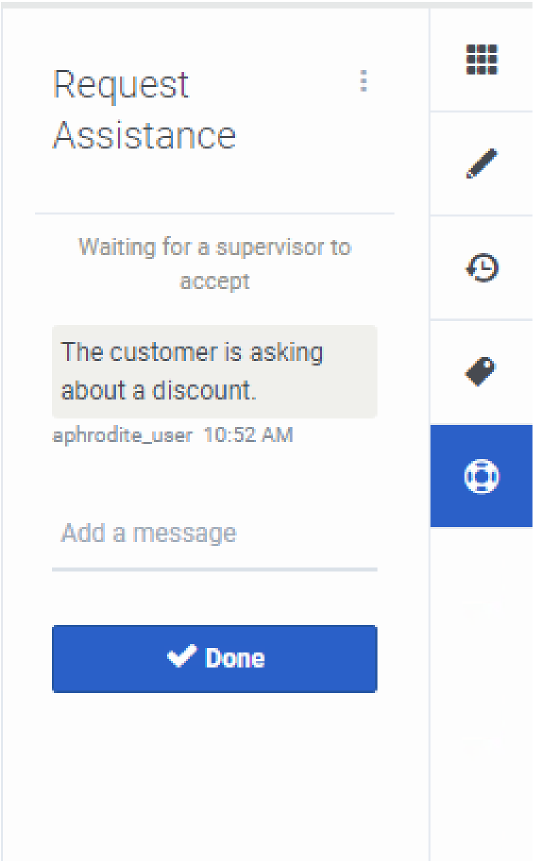
**Note**: At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

## Requesting Assistance

**To request assistance:**

1. In My Interactions, select the ACD-routed interaction for which you need help.
2. Expand the **Request Assistance** sidebar.
3. In the text box, type your observations or comments and press **Enter**.

   **Result**: The workgroup supervisor receives an assistance request. Also, all supervisors on the same CIC server see a pop-up toast assistance request. You can chat with your supervisor in the **Request Assistance** sidebar.

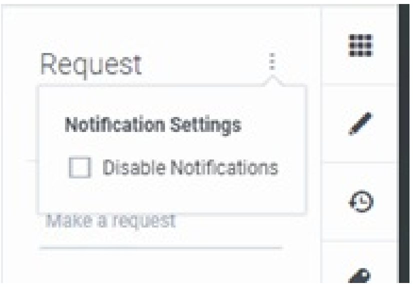
   
   

4. When you no longer need assistance and have finished your conversation with your supervisor, click **Done**.

   **Note**: Only the person who begins the Assistance Request process can end the request and the resulting conversation by clicking **Done**.

## Assistance Notification Settings

Use the **Notification Settings** icon in the **Request Assistance** sidebar to enable or disable assistance notifications. Assistance notifications occur when you supervisor responds to your assistance request.




- To pop open the Request Assistance sidebar, **clear** the **Disable Notifications** check box.
- To display a red badge over the Request Assistance icon while the sidebar is collapsed or opened to a different sidebar item, **select** the **Disable Notifications** check box.

**Related Topics**

Assistance Process
Manage a Chat Session
Sidebar
Working with Chat Sessions

## 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:**

- 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.

  **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 using a directory:**

1. In **My Interactions** or other queue view, select the chat session.
2. Do one of the following:
    - Select a name in the directory and press **Enter**.
    - Drag and drop the chat session onto a name in a directory.

> **Note**: You can transfer a chat session by dragging and dropping in on a selected recipient in the **Company Directory** or to a workgroup in the **Workgroup and Profile View**.

**To transfer a chat session using the Transfer dialog box:**

1. Pick up the chat request,
2. Do one of the following:
    - On the Queue Control toolbar, click the **Transfer** button.
    - Right-click the chat request and select **Transfer** from the shortcut menu.
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

## 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 can send a file to a visitor who starts an ACD-routed 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.

**To use a stored response when participating in a chat:**

1. Do one of the following:

   - In the Response Management view, search for and then select an appropriate response. Click **Insert**.
   - In the **Current Interaction** view, type the Response item Shortcut and press **Ctrl+Space**.

   > **Tip**: For more information, see Use a Response Shortcut.

   **Result**: The response appears in the Composition area of the **Current Interaction** view. 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 **Current Interaction** view. 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.

**Related Topics**

Chats and the Current Interaction view
Manage a Chat Session
Working with Chat Sessions

# Client Memos

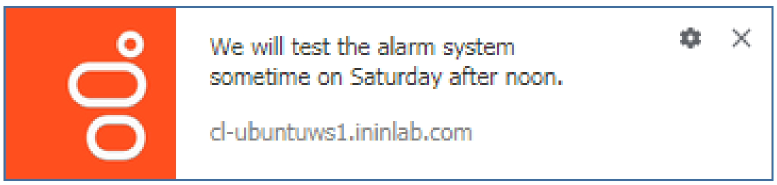
## Supervisor Client Memos

CIC administrators can easily communicate with selected users, workgroups or roles by means of brief messages (client memos). An administrator creates these client memos in Interaction Supervisor and they appear in the CIC client. There are two ways you can receive these client memos: desktop pop-ups and notifications.

### Desktop pop-ups

Desktop pop-ups (toast) appear in the lower right-hand corner of your Windows desktop. Pop-ups remain on the screen until you close them or the supervisor removes them.

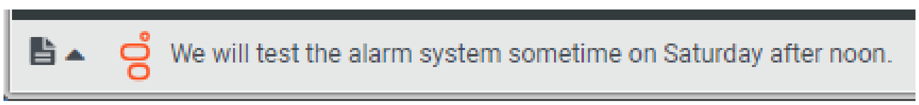
**Note**: You cannot retrieve a desktop pop-up after you close it.



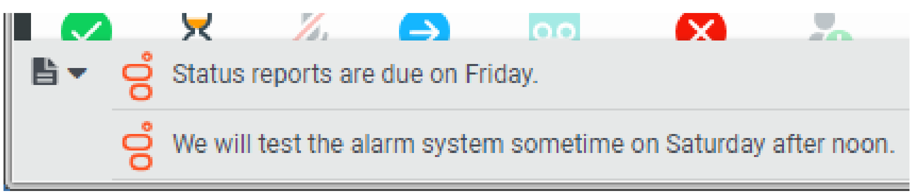

### Notification Area

Notifications appear in lower edge of the Interaction Connect interface. This notification area contains the text of the latest client memo. If you receive multiple client memos, the text of the client memos scroll one at a time into this area.

**Note**: Notifications do not appear in this area in Internet Explorer. However, they do appear as messages in the top part of the Interaction Connect interface.




**Tip**: Click the drop-down arrow in the notification area to display a list of your current notifications.



# Co-browse

Co-browse is a collaborative web browsing experience shared between a CIC agent and a visitor to your website. It enables the visitor to show an agent an issue or get direct assistance on a webpage. The agent can see and interact with the visitor's view of the webpage. The agent can direct the visitor to information or help resolve an issue. The limits of the agent's manipulation of the visitor's screen are at the customer's discretion. At the same time, the agent can talk to or chat with the visitor.

> **Note**: The CIC agent must be a Genesys Cloud Engage customer and also employ Interaction Connect to participate in the co-browse session. Your CIC administrator must also enable Genesys Cloud for PureConnect and complete the necessary Co-Browse Configuration and Setup procedures.

## User experience

A website visitor calls your company and is routed to a CIC agent or the visitor initiates a chat with one of your CIC agents. Once contact is made, the visitor clicks a button on your website to initiate a co-browse session with the agent. This generates a session code which the visitor can see. The visitor provides the agent with the necessary co-browse session code.

In Interaction Connect, the agent uses this code to join the co-browse session. Once joined, the agent can see everything the website visitor sees. The agent uses the Co-browse view to interact with the webpage currently displayed on the visitor's workstation. The agent can point, type, or click controls on the web page. The agent's activities are limited to this current webpage. Your website developer can mask sensitive data such as credit cards numbers which may appear on this webpage.

**Related Topics**


- Co-browse sidebar
- Co-browse view
- Transfer a Co-browse session
- Use Co-browse during an interaction
- Website Visitor's Co-browse toolbar
- Co-browse requirements
- Co-browse configuration and setup overview


## Co-browse Requirements

- **Genesys Cloud Engage 3**
  Co-browse is a billable Genesys Cloud service that requires a Genesys Cloud Engage 3 license. The Genesys Cloud service is available to PureConnect customers at a discounted rate. Contact a Sales representative to arrange for this discount.
- **Customer Interaction Center, version 2017 R2 or later.**
- **Interaction Connect, version 2017 R2 or later.**

# Co-browse Configuration and Setup Overview

1. Check the Co-browse requirements.
2. Sign up for Genesys Engage 3 and arrange for billing.
3. Set up the Genesys Cloud for PureConnect integration. See the Genesys Cloud for PureConnect Administrator's Guide in the PureConnect Resource Center.

   > **Note**: Setting up the Genesys Cloud for PureConnect integration automatically creates a Gensys Cloud organization that is paired with your CIC user information.

4. In Genesys Cloud Administration, assign the **Engage User** role to selected agents. Assign the **Engage Supervisor** role to one or more selected supervisors.

   > **Note**: For more information, see the Genesys Cloud Resource Center articles: Products, roles and permissions list, About People and Permissions, and Edit a user's profile.

5. In Interaction Administrator, assign the Customize Client Security right to selected CIC agents.

   > **Requirement**: In order to display the Co-Browse view in Interaction Connect, agents need the Customize Client Security right.

6. Enable the co-browse feature on your company website.
   This step includes creating a deployment key and adding a reference to the Gensys Cloud Co-browse JavaScript API to your webpage source. For examples of ways to mask sensitive data during a co-browse session, see also Mask data in co-browse.

# Co-browse view

> **Requirements**: You need the Customize Client Security right to add views. See Co-browse for requirements for the Co-browse feature.

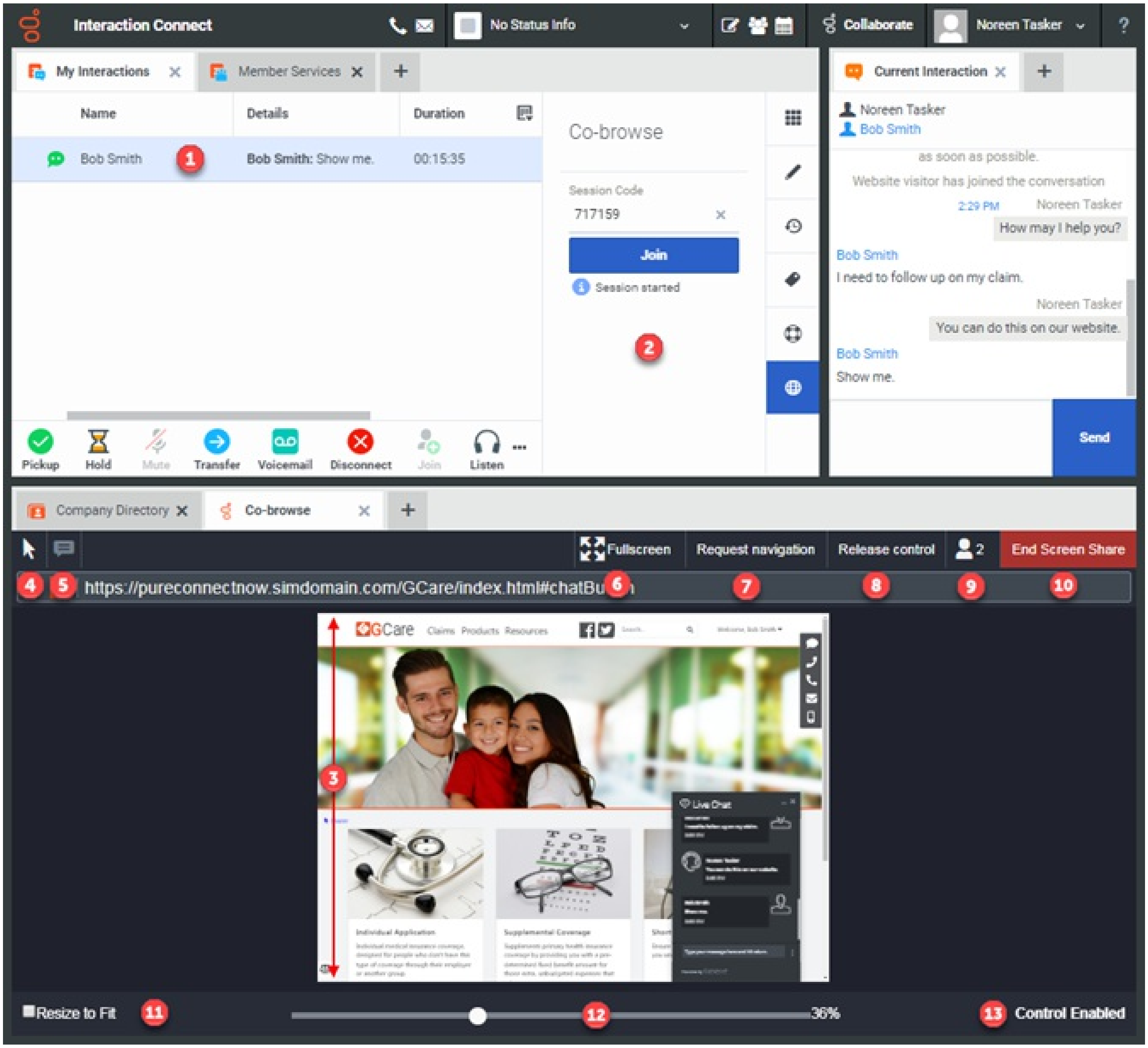
You join a Co-browse session by clicking the Co-browse sidebar button after a visitor to your company's website provides you with a Co-browse session code. For more information, see Use Co-browse during an interaction.

## Display the Co-browse view

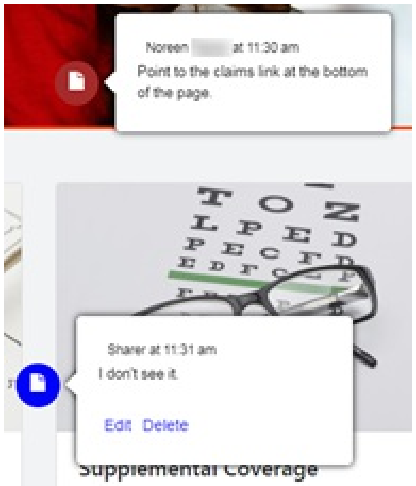
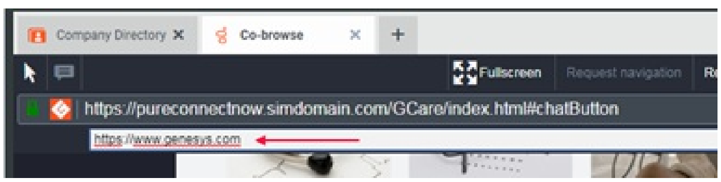
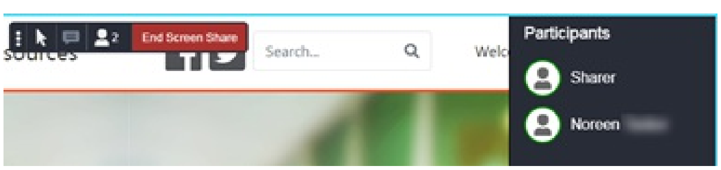
You add the Co-browse view to your CIC client as you would any other view. It is available on the **Quick Picks** list and in the **Add Views** dialog box. For instructions, see Add or Close Views. As with any other view, you also control where the view appears in your CIC client. For more information, see Change View Layout.

## Co-browse sidebar and view

The Co-browse sidebar enables you to join a Co-Browse session. You can see the visitor's view of your company's webpage. You can interact with the webpage to point the website visitor to information or guide them in resolving an issue.




| | | |
|---|---|---|
| 1 | **Selected interaction** | To join a Co-browse session, you must have a selected and connected interaction. |
| 2 | **Co-browse Sidebar** | To enter the Co-browse session code and join the Co-browse session, use the Co-browse Sidebar. |
| 3 | **Co-browse view** | After you join the Co-browse session, the visitor's webpage appears in your Co-browse view. See also Sidebar. |
| 4 | **Pointer** | To indicate specific parts or controls in the visitor's webpage, use the pointer The visitor sees a cursor and your name on the webpage.<br>**Note**: You also see the visitor's name and cursor in your Co-browse view. |

| | | |
|---|---|---|
| 5 | **Annotation** | To display text directly on the visitor's webpage, click the Annotation icon. You can position the annotation anywhere on the webpage.<br>The visitor has a similar control and can ask questions or respond. You and the visitor see all annotations made on this webpage.<br> |
| 6 | **Fullscreen** | This control does not apply to the Co-browse view in Interaction Connect. |
| 7 | **Request navigation** | To ask the website visitor to let you change to a different webpage, click this control and enter a URL when prompted.<br><br>The website visitor can allow or deny you the ability to navigate to a different webpage. |
| 8 | **Request Control** and **Release Control** | To ask the website visitor to let you control the webpage view, click **Request Control**. To enable you to take control, the visitor must click an **Allow** button in the visitor's Co-browse toolbar.<br>If you have control, you can relinquish it by clicking **Release Control**. |
| 9 | **Participants** | Other agents or supervisors can join a Co-browse session. To display the names of all the participants in the Co-browse session, click this control.<br> |
| 10 | **End Screen Share** | To end your participation in the co-browse session, click this control<br>**Note**: The website visitor can also end the co-browse session at will. |
| 11 | **Resize to Fit** | This control does not apply to the Co-browse view in Interaction Connect. |
| 12 | **Magnification slider** | Adjust the magnification of the webpage view. |

| | | |
|---|---|---|
| 13 | **View-only Mode**<br><br>or<br><br>**Control Enabled** | View-only Mode indicates that the website visitor is in control of the webpage.<br><br>Control Enabled indicates that you are in control of the webpage. |

## Website Visitor's Co-browse toolbar

During a Co-browse session, the website visitor sees a webpage toolbar that is similar to the controls available your Co-browse view. The visitor has the same Pointer, Annotation, Participants, and End Co-browse controls.


| | | |
|---|---|---|
| 1 | **Move** | The visitor uses this control to drag and drop the Co-browse toolbar in another location on their view of the webpage. |
| 2 | **End Screen Share** | The website visitor can end the Co-browse session at any time. |

# Use Co-browse during an interaction

**Requirements**: You need the Customize Client Security right to add views. See Co-browse for requirements for the Co-browse feature.

You can use the Co-browse feature to give direct assistance to a visitor to your company's website.

**To use Co-browse during an interaction:**

1. Ask the website visitor to click a special **Share Page** link (or similarly named link) on your company's website.

   > **Note**: Your company's website designer determines the name of the link the website visitor uses to request a Co-browse session code.

2. Request that the website visitor tell you the Session code.

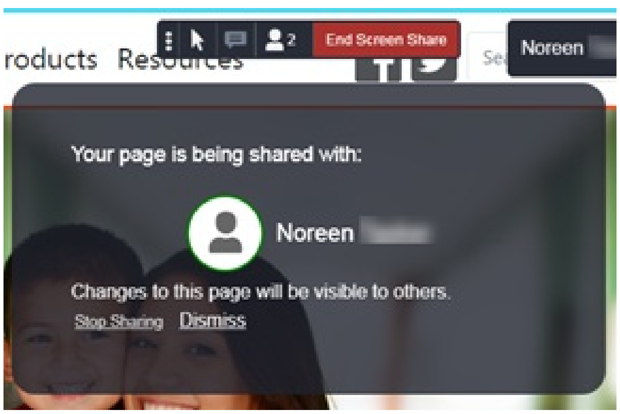
   > **Note**: A Co-browse session is always associated with an interaction. To join a Co-browse session, you must have a selected and connected interaction.

3. While keeping the Chat or Call connected and selected, click the **Co-browse** control in the My Interactions sidebar.

   > **Note**: You cannot start a Co-browse session without a connected and selected interaction.

4. Type the Session Code in the Co-browse sidebar and click **Join**.

   **Result**: In the Co-browse view, you see the website visitor's view of your company's webpage. The website visitor sees a message that they have shared their page with you.

5. Tell the website visitor to click **Dismiss** to close the message dialog box.

   **Result**: You see the visitor's name and cursor. The visitor can point to where they have a question or a problem. The visitor also sees your name and cursor as you point to areas or controls on the webpage. The visitor can give you control over the webpage so you can scroll, type in fields, click buttons, and make menu selections.

   > **Tip**: For a description of the controls available to you in a Co-browse session, see Co-browse view. The Website Visitor's Co-browse toolbar is similar to the one in your Co-browse view.

6. After you've assisted the website visitor, either of you can click the **End Co-Browse** control.
7. After the Co-browse session ends:

   - You disconnect the associated interaction.
   - The website visitor clicks **Dismiss** in the **Session Ended** dialog box.

# Transfer a Co-browse session

A Co-browse session is always associated with an interaction. You transfer a Co-browse session to another CIC agent by transferring the associated interaction. When you transfer the interaction, you transfer both the interaction and the Co-browse session.

> **Requirement**: The agent receiving the transferred co-browse session must have the appropriate rights and permissions in both CIC and Genesys Cloud to use the Co-browse feature. See Co-browse for requirements for the Co-browse feature.

**To transfer a Co-browse session:**

1. Select the interaction with the associated Co-browse session.
2. Do one of the following:
   - To blind transfer the interaction to another agent, select the agent's name in the Company Directory and then click **Transfer**.

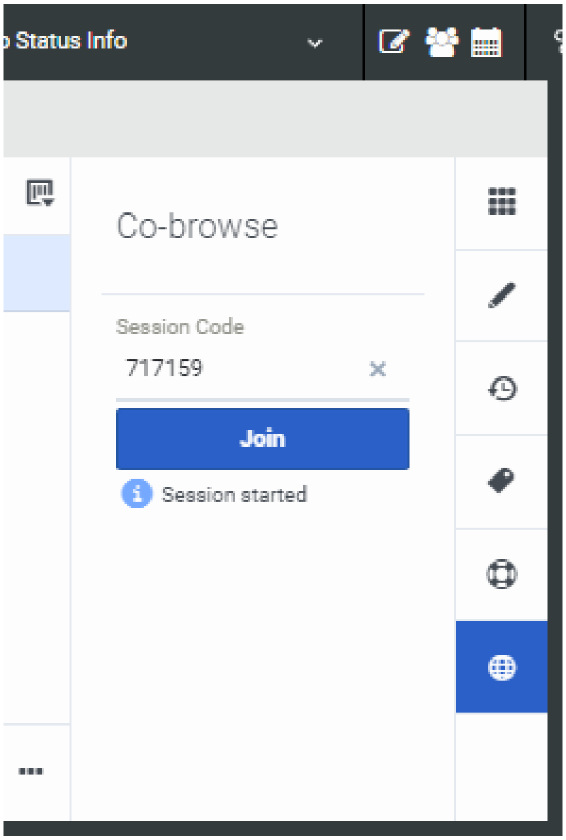
     For more information about blind transfers, see Transfer a Call to a Directory Entry or Transfer a Chat Session.
   - To transfer a call after consulting the other agent, in the My Interactions toolbar, click **Transfer**. After selecting the other agent in the Transfer dialog box, click the down arrow on the **Transfer** button and select **Consult**. After talking to the other agent, in the Consult Call dialog box, click **Transfer**.

     For more information about consult transfers, see Transfer a Call After Consulting the Recipient.

   **Result**: CIC transfers the call to the other agent.
3. The other agent picks up the interaction.

   **Result**: After CIC successfully transfers the interaction and the other agent picks it up, the other agent sees the session code in the Co-browse sidebar.

   > **Note**: If necessary, CIC prompts the other agent to add the Co-browse view. The Co-browse view is required for a Co-browse session.

   
   
4. The other agent clicks **Join** in the Co-browse sidebar.

   **Result**: The other agent now sees the transferred Co-browse session in the Co-browse view.

# 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. Regardless of rights or directory ownership, you cannot add or edit entries in an LDAP directory.

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.

## Private Directories

Some conditions apply when you want to add, edit or delete contacts in a **private** directory. These conditions include whether the directory is Read Only, whether you own the directory, and whether you have the Directory Administrator Security right.

**Note**: When an administrator defines a data source for the directory in Interaction Administrator, he or she can make it Read Only. The CIC user who creates a directory is its owner. When you add a view, private Speed Dial views and Directory views display a lock icon next to their name in the Available items list.

| Read-Only? | Directory owner? | Directory Administrator right? | Can you update the directory? | Reason |
|---|---|---|---|---|
| YES | YES | YES | NO | If the directory is read-only, you cannot update it. |
| YES | YES | NO | NO | |
| YES | NO | YES | NO | |
| YES | NO | NO | NO | |
| NO | YES | YES | YES | If the directory is writable and you are either the owner or have the Directory Administrator right, you can update it. However, even with sufficient permissions, **Access Rights for individual contacts** control whether you can change or delete a specific contact record. |
| NO | YES | NO | YES | |
| NO | NO | YES | YES | |
| NO | NO | NO | NO | If you are not the directory owner and don't have the Directory Administrator right, you cannot update it. |

## Access Rights for individual contacts

In addition to the conditions shown in **Private Directories**, Access Rights on each contact make the final determination of whether you can edit or delete a contact.


## Using Directories

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.
- 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.

> **Note**: This applies to IC Private and IC Public directories. You cannot edit Company Directory entries.

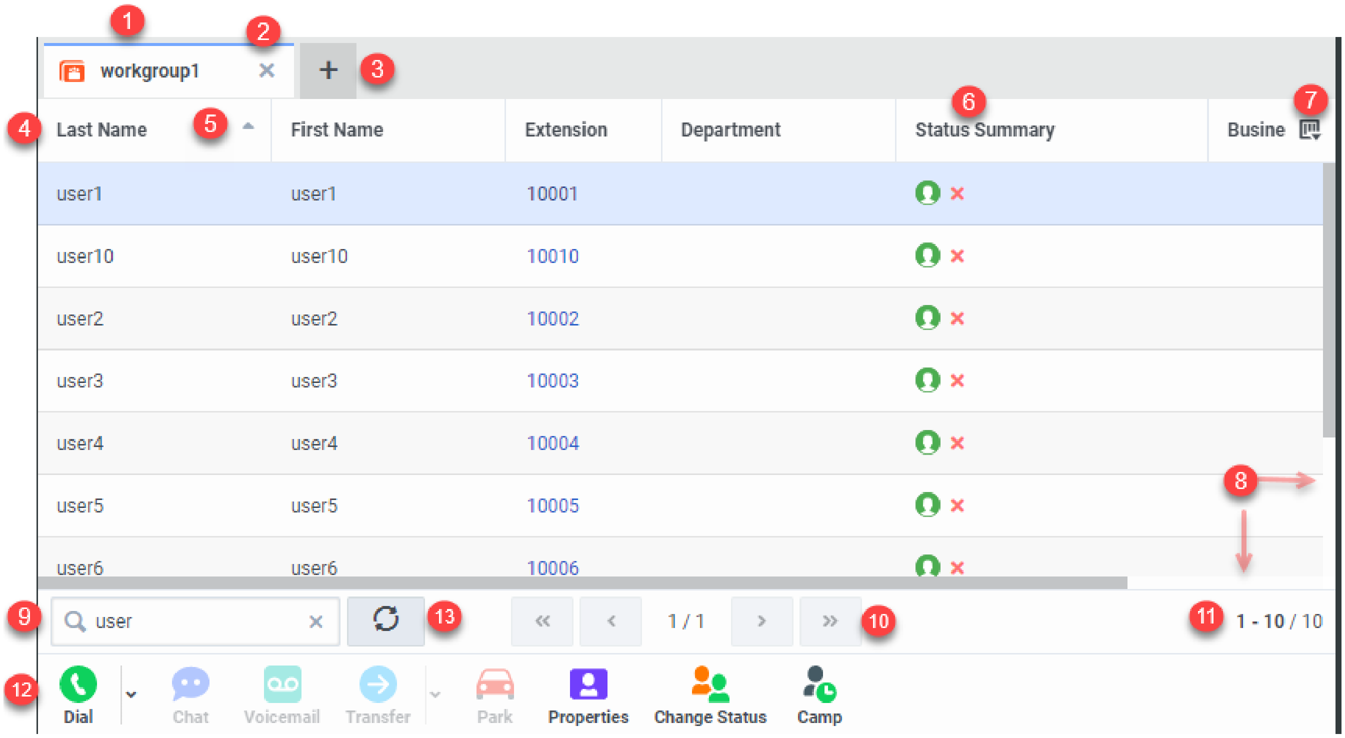
- View another user's status or change another user's status.
- Camp on another user's extension.
- Search for a contact.
- View a status summary for all users.

You control the appearance of your directories. You can:

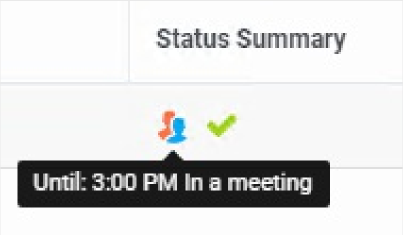
- Add or remove directory views
- Add or remove columns from a directory view.

> **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.



workgroup1
Last Name
First Name
Extension
Department
Status Summary
Busine
user1 user1 10001
user10 user10 10010
user2 user2 10002
user3 user3 10003
user4 user4 10004
user5 user5 10005
user6 user6 10006
user
1 / 1
1 - 10 / 10
Dial
Chat
Voicemail
Transfer
Park
Properties
Change Status
Camp

| | | |
|---|---|---|
| 1 | **Directory tab** | You can drop and drag the directory tab to move the directory view to a new location. |
| 2 | **Close** | Click the **X** on a tab to close the view. You have not removed the view and can be add it back to the CIC client interface. |
| 3 | **Add View** | Click the **Add View** icon (plus sign) to select and display a view. For more information, see Add or Close Views. |
| 4 | **Column headings** | You can drag and drop a column heading to move a column to a different position. For more information, see Customize Columns. |
| 5 | **Sort Direction** | Triangles indicate whether the contents of a column are sorted in ascending or descending order. For more information, see Sort a Directory. |
| 6 | **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.<br>**Tip**: Point to an icon in the **Status Summary** column to display a tooltip that explains its meaning. It can also display the Status Notes and Until Date and Time, if available.<br><br>**Note**: General directories contain external contacts. CIC status information is not available for external contacts. |
| 7 | **Choose Columns** | Use the Choose Columns control to add or remove view columns from the current directory. |
| 8 | **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.<br>A vertical scroll bar appears if all the entries in a single view cannot be displayed in the space available. |
| 9 | **Search** | Use the search field to locate a specific directory entry or group of entries. For more information, see Search a Directory. |
| 10 | **Paging controls** | A large directory or set of entries is displayed in a paged format. The arrows enable you to navigate from one page to another in the directory.<br>**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. |
| 11 | **View description** | This section describes the contents of the current view and lists the total number of entries in the directory or search results. |
| 12 | **Directory toolbar** | Use the Directory toolbar to manage your contacts and interactions with those contacts. For more information, see Using the Directory Toolbar.<br>**Note**: The Chat, Change Status, Camp and Voicemail commands are not available for external contacts in General Directories. |
| 13 | **Refresh button** | Use Refresh button to get the latest status of the Directory. |

**Related Topics**

- [Add or Remove View Columns]
- [Click to Dial a Directory Contact]
- [Customize Columns]
- [Display a Speed Dial View]
- [Drag and Drop a Call on a Name in a Directory]
- [Directory Properties Dialog Box]
- [Search a Directory]
- [Transfer a Call to a Directory Entry]
- [Working with Other Directories]
- [Working with the Company Directory]

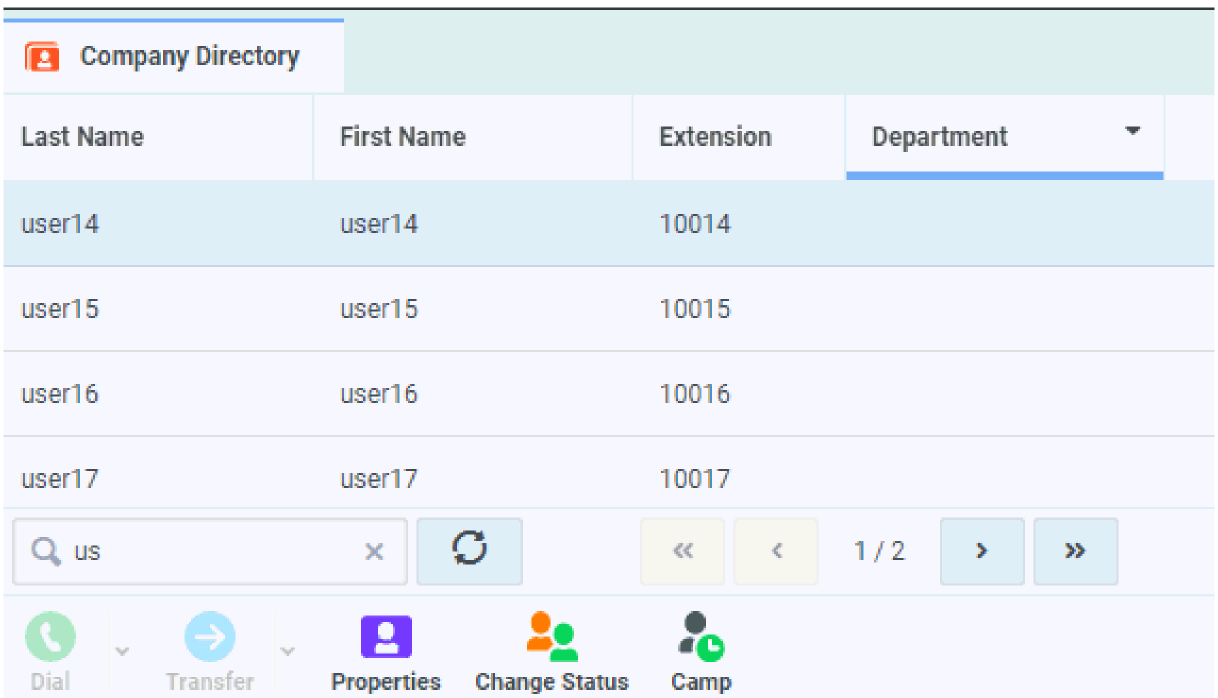
# Search a Directory

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 the **Search** field on the directory tab.




- 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.
- Click Refresh button to get the latest Directory.

## Search in status-related columns

You can search in most of the status-related columns in the Company directory and Workgroup directories. This is not supported in General directories (public and private contacts) where the status columns are unlikely to have meaning.

- Columns containing only icons are not searchable.
- Wildcard searches return matches in all status columns containing text, not just Status Notes.
- To search in the Logged In column, add a wildcard (*) at the beginning.

**Note**: The **Activated** column appears only in Workgroup directories.

| Column Name | Content Type | Searchable |
|---|---|---|
| On Phone | Icon | No |
| Logged In | Icon and text | Yes |
| Status Summary | Icons | No |
| Time in Status | Date Time | No |
| Status | Icon and text | Yes |
| Status Notes | Text | Yes |
| Until | Text | Yes |
| Forward Number | Text | Yes |
| Activated | Icon | No |

**Related Topics**


[Add or Remove View Columns]
[Sort a Directory]
[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.

---

## Sort by status-related columns

You can sort by most of the status-related columns in the Company directory and Workgroup directories. This is not supported in General directories (public and private contacts) where the status columns are unlikely to have meaning.

**Note**: The **Activated** column appears only in Workgroup directories.

| Column Name | Content Type | Sortable |
|---|---|---|
| On Phone | Icon | Yes |
| Logged On | Icon and text | Yes |
| Status Summary | Icons | No |
| Time in Status | Date Time | Yes |
| Status | Icon and text | Yes |
| Status Notes | Text | Yes |
| Until | Text | Yes |
| Forward Number | Text | Yes |
| Activated | Icon | Yes |

**Related Topics**

Add or Remove View Columns
Search a Directory
View and Edit Directory Entries
Working with Directories

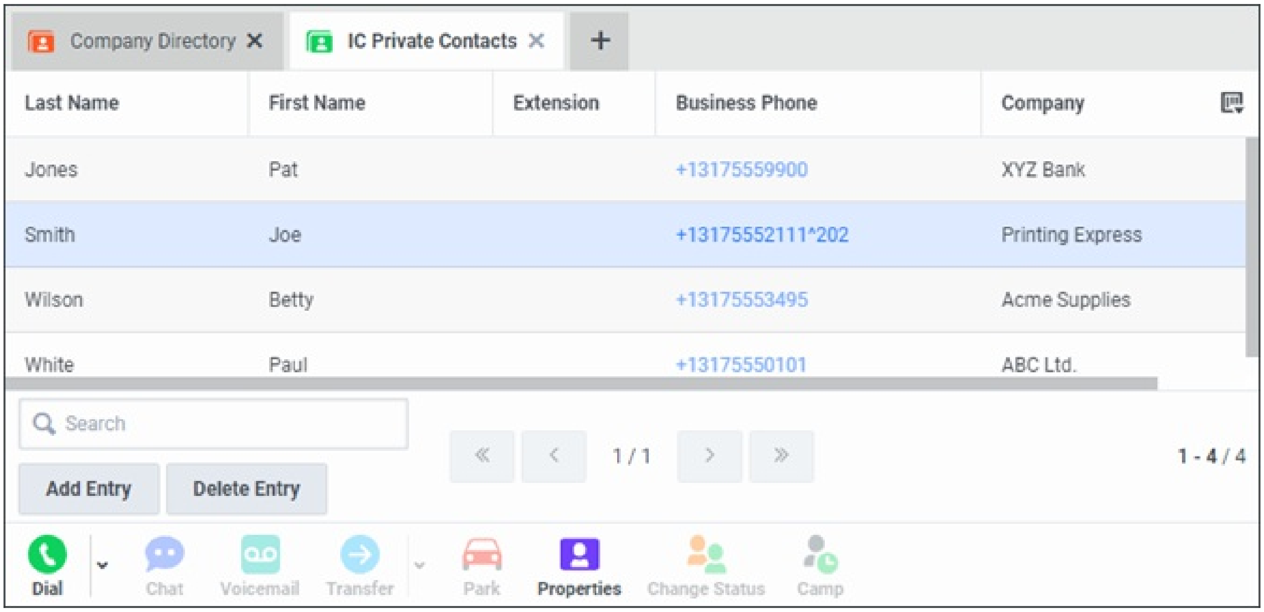
# Insert and Delete Directory Entries

**Requirements**: See Working with Directories.

When you have the appropriate rights, as in the IC Private Contacts directory, you can insert and delete directory entries.

**To insert a directory entry:**

1. In a directory view, click **Add Entry**.




2. In the **Properties for New Entry** dialog box, enter the necessary information.

   **Phone Numbers**

   **Tip**: The CIC client verifies phone numbers against the dial plan for your organization or region. Verification ensures that the phone numbers are correctly formatted and can be dialed. As soon as you enter a valid phone number on a new contact record, the **Dial** button is available. You can immediately dial the contact's number and save or discard changes to the contact record.

   - 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.
   - If you want to auto dial both the phone number and extension in this Properties dialog box, click the **Ext.** hyperlink.

3. Click **Save**.

**To delete a directory entry:**

1. In a directory view, select a contact and click the **Delete Entry** button.
2. Confirm that you are sure you want to delete the contact by clicking **OK** when prompted.

   **Result**: The directory entry is deleted.

**Related Topics**

View and Edit Directory Entries
Working with Other Directories

# View and Edit Directory Entries

**Requirements**: See Working with Other Directories.

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

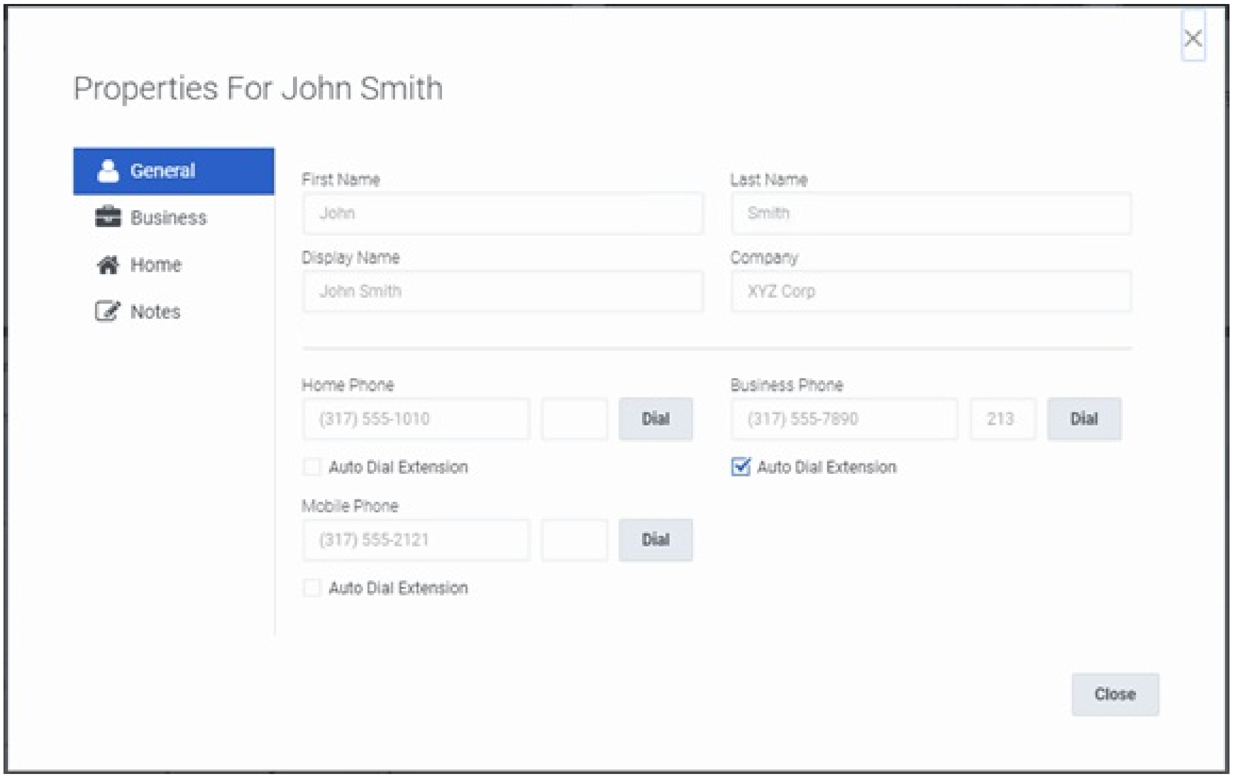
In some cases, where you have sufficient rights, as in the IC Private Contacts directory, you can edit directory entries.

**To view or edit directory entries:**

1. Select a directory entry.
2. In the directory toolbar, click the **Properties** button.

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

   > **Note**: If you have the Directory Administrator Security right, the **Access Rights** tab appears in the Properties dialog box for IC Public Contacts: These Access Rights enable a user to change or delete IC Public Directory entries.




3. Make any necessary changes and click **Save**.

   **Phone Numbers**

   > **Note**: The CIC client verifies phone numbers as you enter them 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.

- 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 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
- Drag and Drop a Call on a Name in a Directory
- Another User's Status
- Transfer a Call to a Directory Entry
- View and Edit Directory Entries
- Working with Directories

## 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. The Directory Administrator Security right enables you to edit public directories created by another user. It also enables you to see the **Access Rights** tab in the Directory Properties dialog box for IC Public Contacts.

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
- Drag and Drop a Call Onto a Name in a Directory
- 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

# MS Teams Integration with CIC

As Microsoft is making a push to MS Teams and is now officially included in their Office 365 suite, we have built the PureConnect integration with MS Teams.

With this integration, we are providing the following features:

- To receive calls on PureConnect and transfer them to a user of MS Teams
- To see the presence of a user on MS Teams

MS Team View

MS Teams to CIC status mappings

Cal Transfer to MS Teams

Speed Dial View for MS Teams

MS Teams as Login Station

# MS Teams View

**Requirements**: You need the **MS Teams directory** Security right to add views. Your CIC administrator assigns your Security rights. Contact your CIC administrator if you have questions about your Security rights.

To add **MS Teams View**, Select **Microsoft Teams** under Directories and Click **Add View**. For more information on Adding View , see Add or remove directory views .

| | | |
|---|---|---|
| 1 | **Mirosoft Teams tab** | You can drag and drop the directory tab to move the directory view to a new location. |
| 2 | **Close** | Click the X on a tab to close the view. You have not removed the view and can be add it back to the CIC client interface. |
| 3 | **Add View** | Click the Add View icon (plus sign) to select and display a view. For more information, see Add or Close Views. |
| 4 | **Column headings** | You can drag and drop a column heading to move a column to a different position. For more information, see Customize Columns. |
| 5 | **Sort Direction** | Triangles indicate whether the contents of a column are sorted in ascending or descending order. For more information, see Sort a Directory.<br>**Note:**<br>Sorting is not applicable on Status and On Phone columns of MS teams view |
| 6 | **Status** | Use the default Status column to determine if a contact is available to take a call. For more information, see Customize Columns and MS Teams user to CIC status mapping |
| 7 | **Choose Columns** | Use the Choose Columns control to add or remove view columns from the current directory. |
| 8 | **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.<br>A vertical scroll bar appears if all the entries in a single view cannot be displayed in the space available. |
| 9 | **Search** | Use the search field to locate a specific directory entry or group of entries. For more information, see Search a Directory. |
| 10 | **Paging controls** | A large MS Teams directory or set of entries is displayed in a paged format. The arrows enable you to navigate from one page to another in the directory.<br>**Note**<br>: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. |
| 11 | **View description** | This section describes the contents of the current view and lists the total number of entries in the directory or search results. |
| 12 | **Directory toolbar** | Use the Directory toolbar to manage your contacts and interactions with those contacts. For more information, see Using the Directory Toolbar. |
| 13 | **Refresh button** | Use Refresh button to get the latest status. |

# MS teams to CIC status mappings

Customer Interaction Center uses the status information of MS Teams to determine if users are available to participate in a chat or to pick up a call or other interaction.

This table explains the mapping of MS Team Status to CIC Status.

**Note**

: (MS Teams -> CIC) indicates the CIC status that is used for the corresponding MS Teams presence state. For example, if you change your status to **Busy** in MS Teams, then your CIC status is synchronized and set to **In a meeting**.

| MS Teams Status | CIC Status |
|---|---|
| Available | Available |
| Busy/In Call | In a meeting |
| Do not disturb | Do not Disturb |
| Be right back | Away from desk |
| Appear away | Away from desk |
| Appear offline | Gone Home |

# Call Transfer to MS Teams

CIC Agent can transfer call to MS Teams user from Transfer dialog. For more information on Call transfer, see Transfer a call to MS Teams user or Transfer a Call Using a Transfer Button.

**Note:**

If MS Teams user does not have business phone number, the MS Teams user will not be listed in Transfer dialog.

# Speed Dial View for MS Teams

Speed Dial views provide a quick way to dial frequently called contacts. You can add MS Teams users to the speed dial view by using drag and drop option like other views. For more information, see Speed Dial.

**Note:** Status won't be displayed for MS teams user added to speed dial

# MS Teams as Login Station

PureConnect supports the integration with Microsoft Teams and using it as **Login Station**. To enable this feature, CIC Administrator needs to configure MS Teams DID as Remote stations in Interaction Administrator. Then the CIC Agents will be in a position to select MS Teams as a **Login Station** while logging into Interaction Connect. By this selection, CIC Agent can pick up the calls from the MS Teams application, also assign the wrap-up code for the interaction using Interaction Connect/MS Teams.

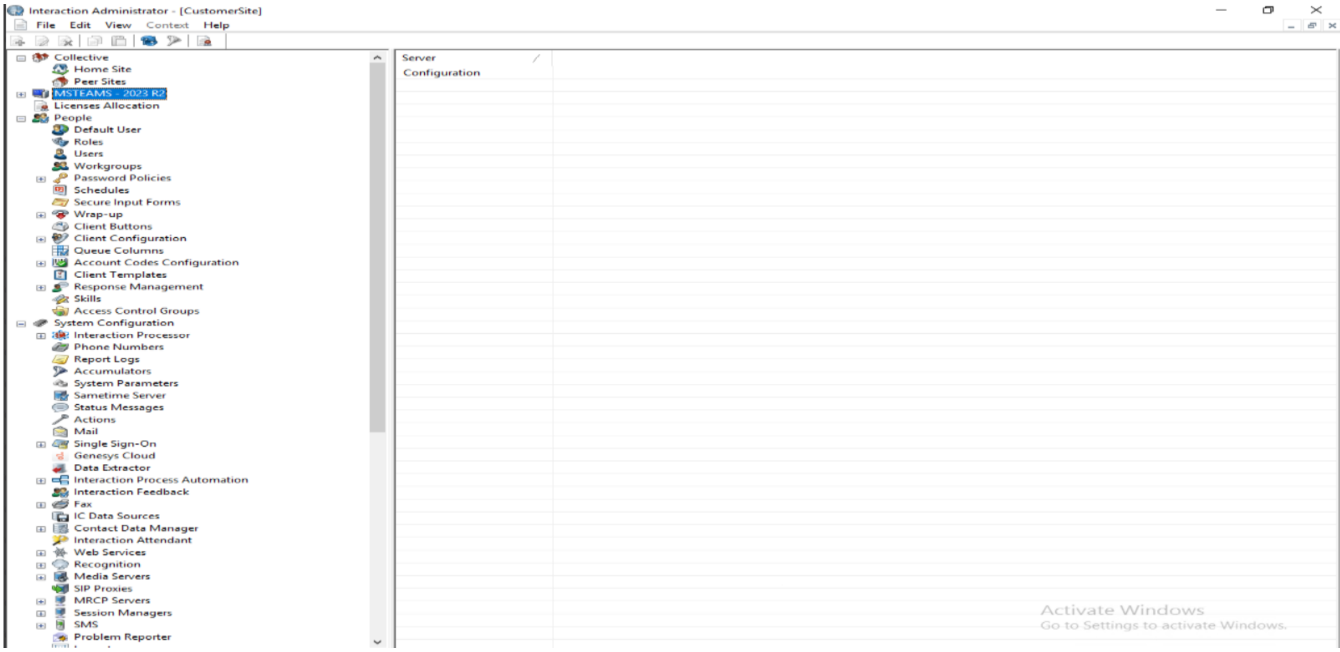
**Pre-Requisites to enable this feature**

MS Teams Integration with CIC is available from the PureConnect release of 2023 R1. Therefore, the customer is expected to have a valid MS Teams License, and the DID number to create the Remote Station with that DID number.

**Note**: For details of the feature in earlier release and configuration, refer the topics in "ms_teams_integration_with_cic"

Follow the steps given below to create '**Remote Station**'

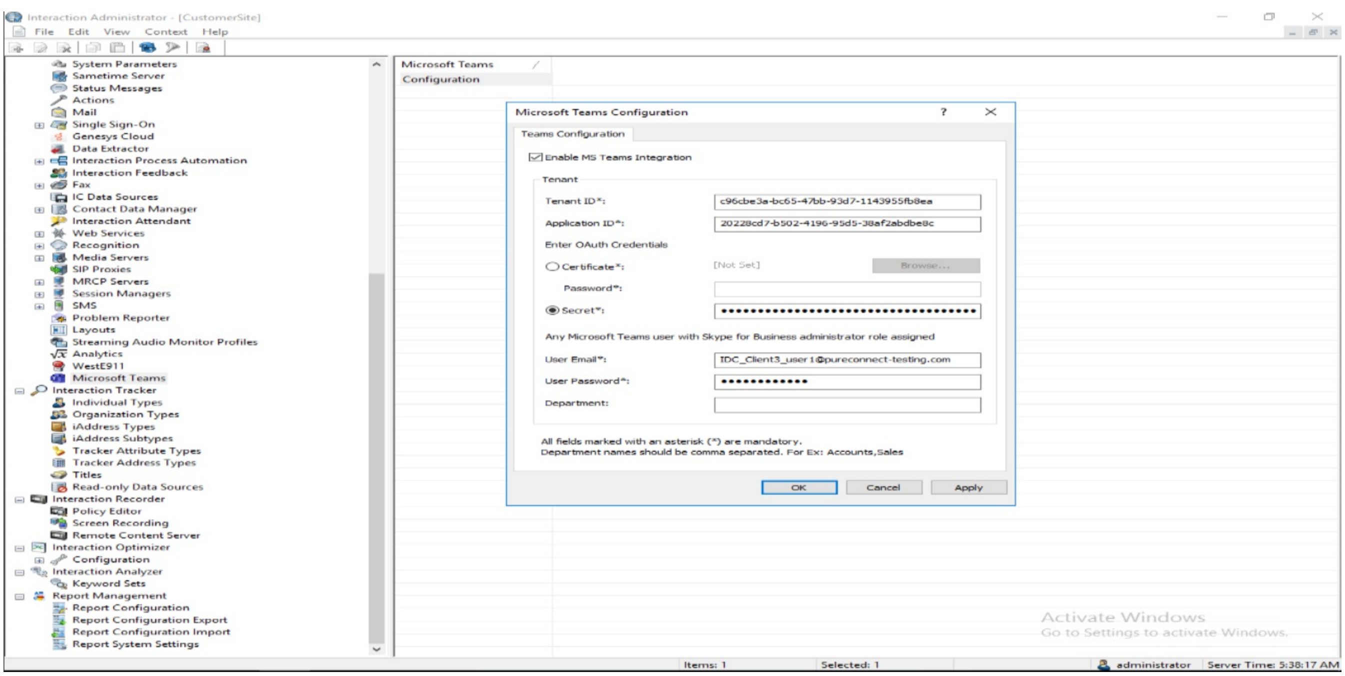
Connect to the 'CIC Server', then open "Interaction Administrator" as given in the image.




Then, go to 'Microsoft Teams' and verify the MS Teams Configuration by enabling the check mark in "Enable MS Teams Integration"

Now, enter all the details such as 'Tenant ID', 'Application ID', 'Secret Key', 'User Email' and 'User Password' as shown in the image.

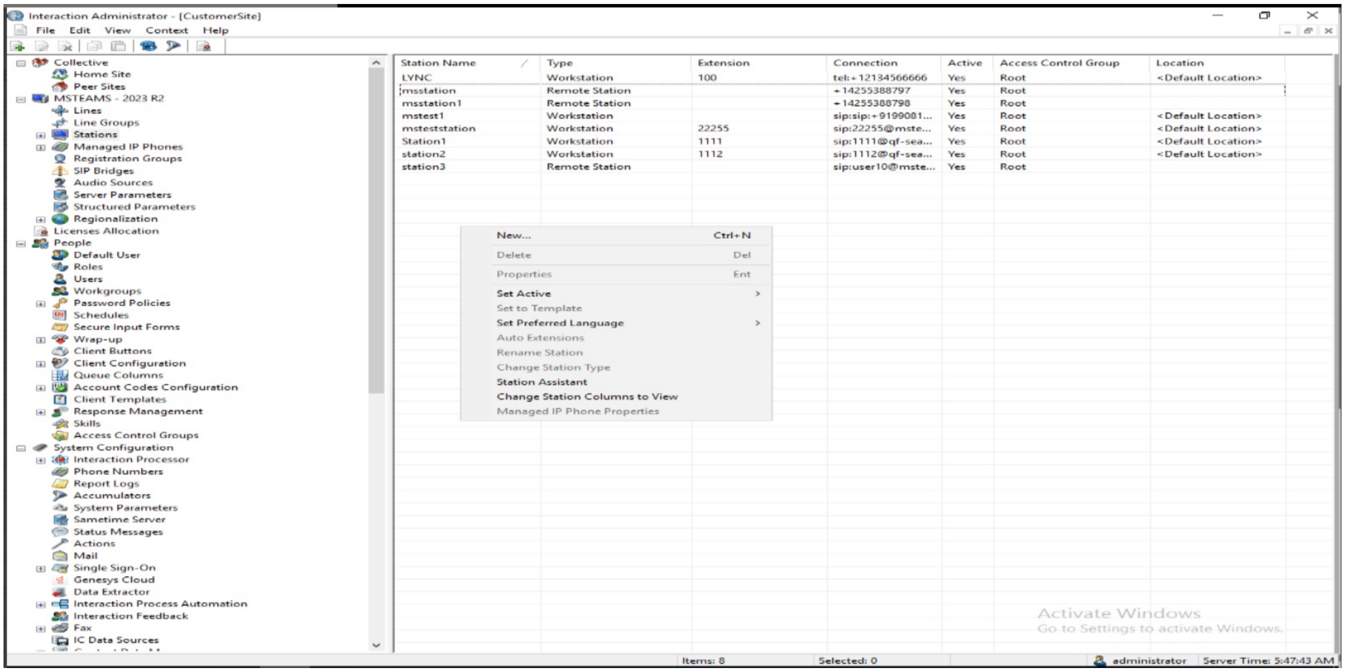
**Note**: Make sure to have the valid user credentials for the details mentioned above.




Follow the steps to create a 'station' as Remote Station with the DID number.

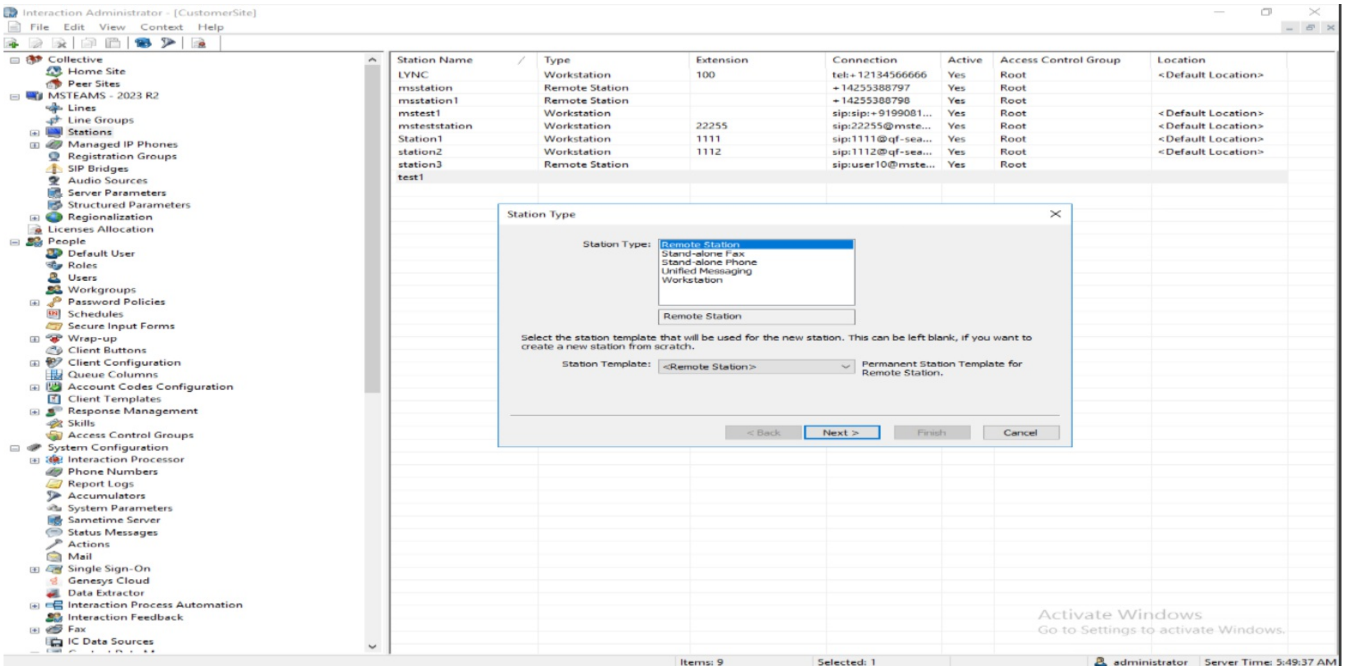
To create a "Remote Station", select "Stations" from the IA

Then,  right-click 'stations' and select "New" as shown in the screen.

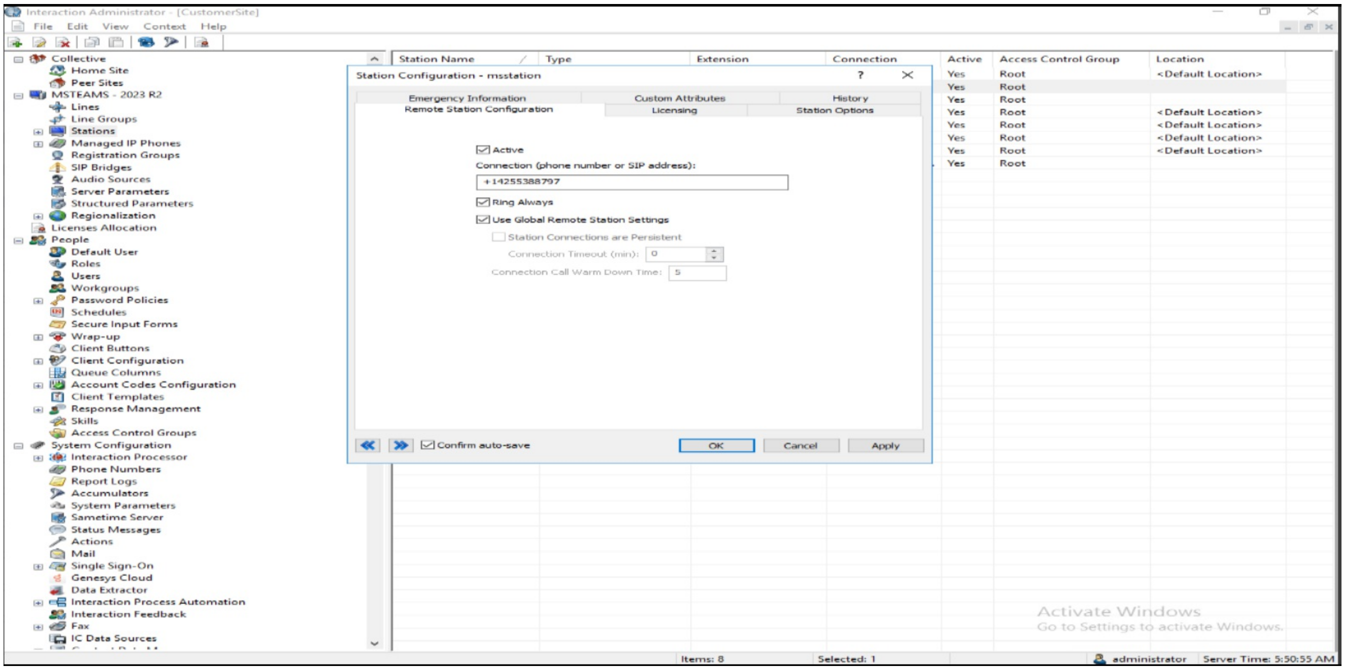


In the screen 'Station Type', select the type as 'Remote Station' as shown in the screen below.

Then, proceed further by clicking the button "Next".

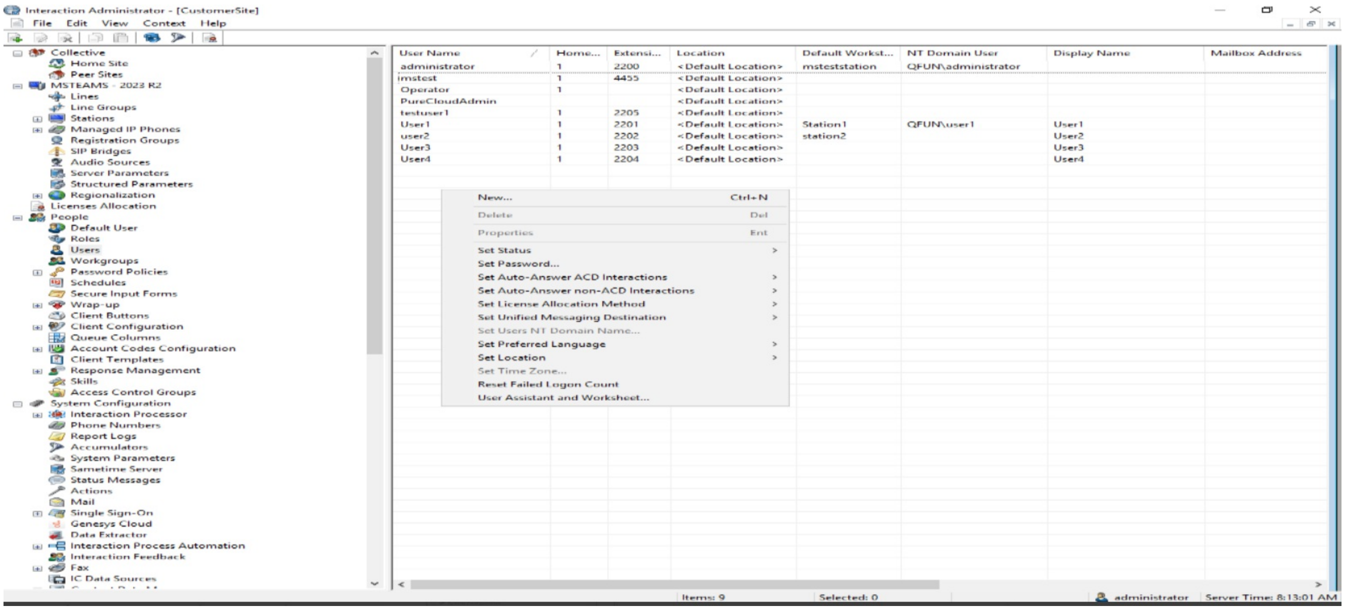


Add the 'DID number' in the following screen 'Remote Station: Configuration' as given in below, to complete the configuration of Remote Station.

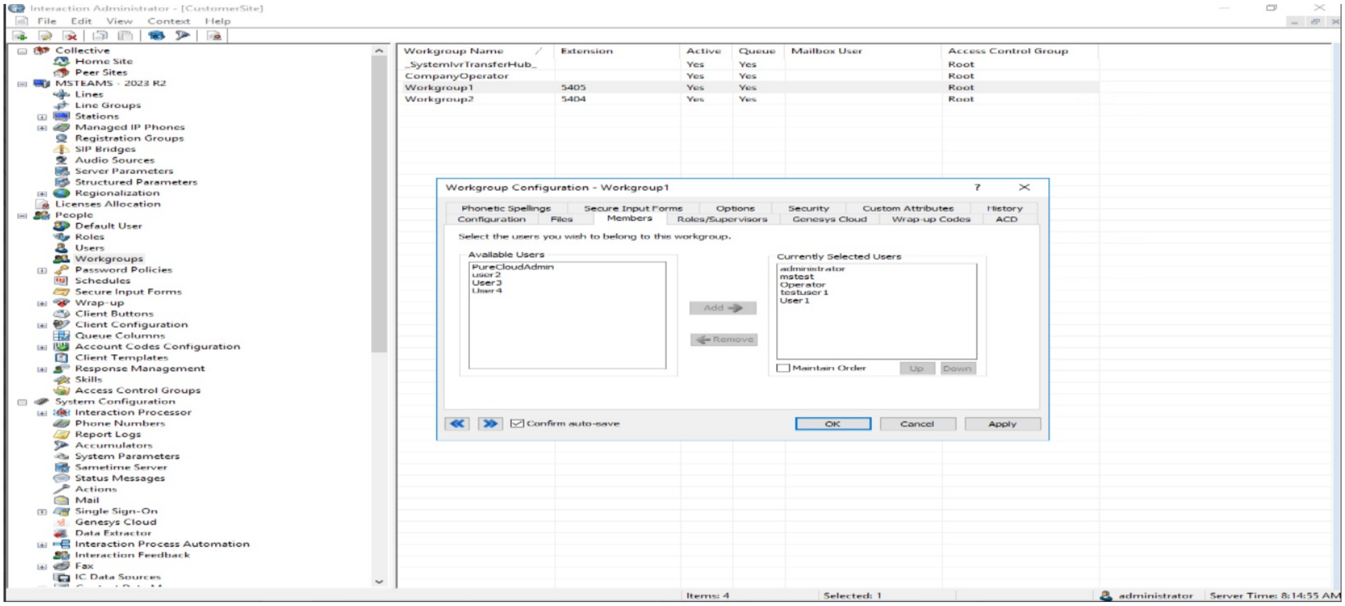


Follow the steps to create '**User Configuration**'

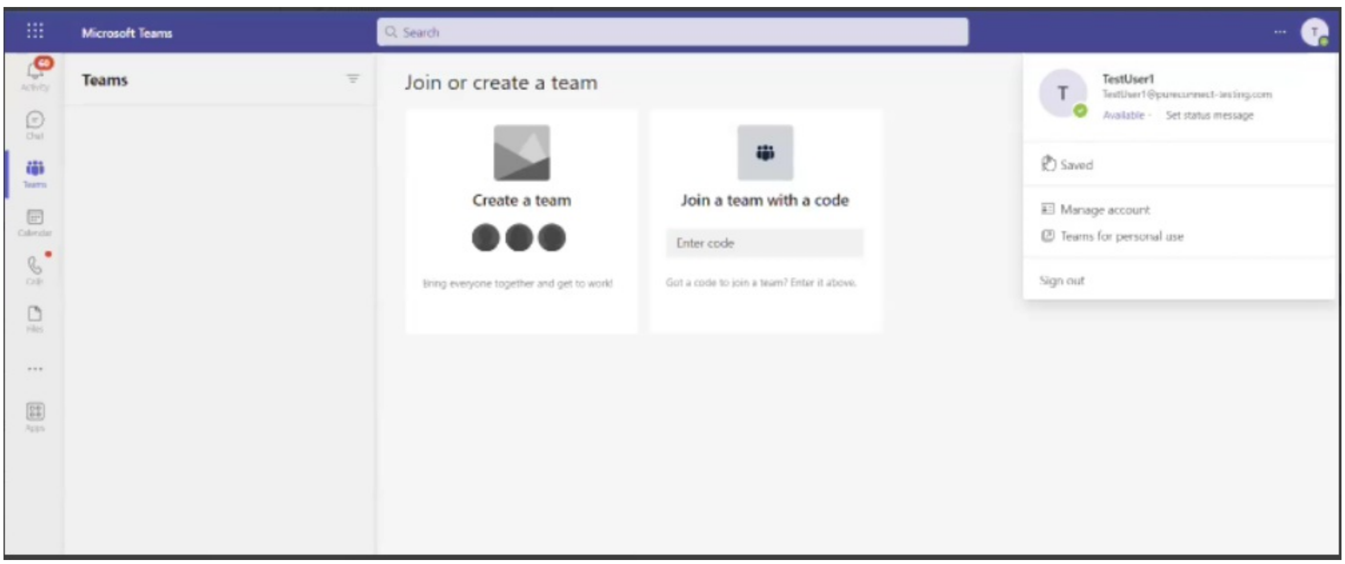
First, create a 'User' by selecting 'Users' from the IA list and right-click 'Users'. Then select 'New' from the opening screen as shown in the image.



In the following screen, as shown below, assign the workgroup to the 'User', which is already created. (This will facilitate the user to receive the call in Interaction Connect, when dialed with the workgroup extension number).

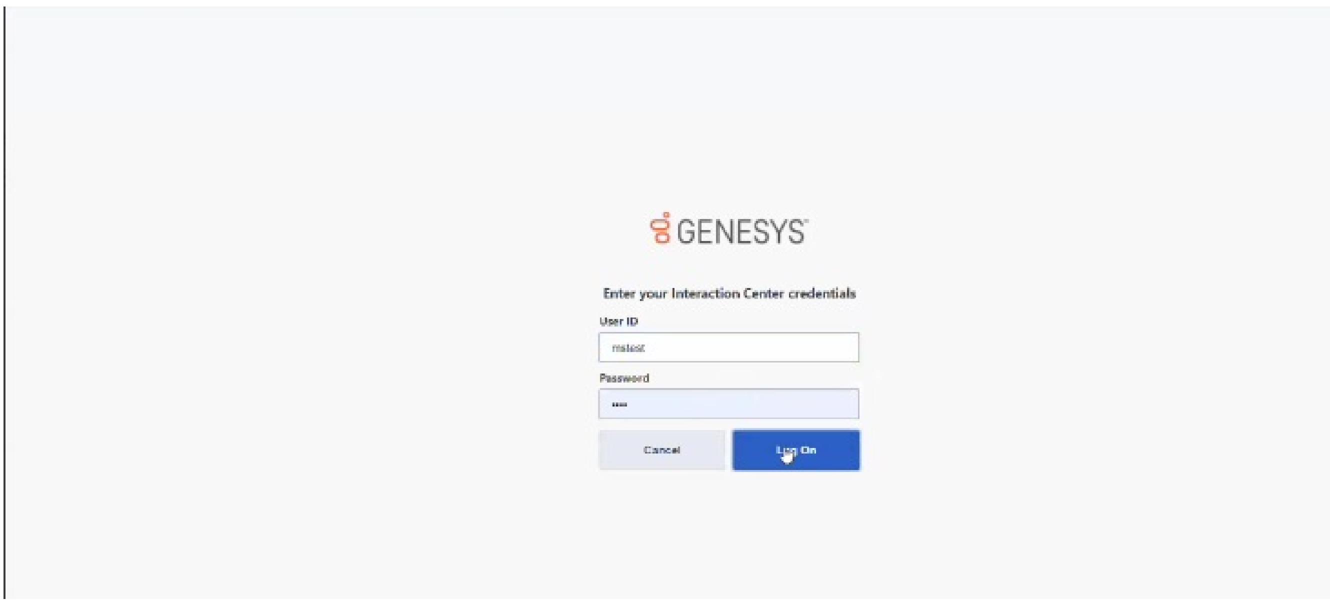



Once the user configuration is completed, user is expected to Login to the MS Teams with the MS Teams user credentials.

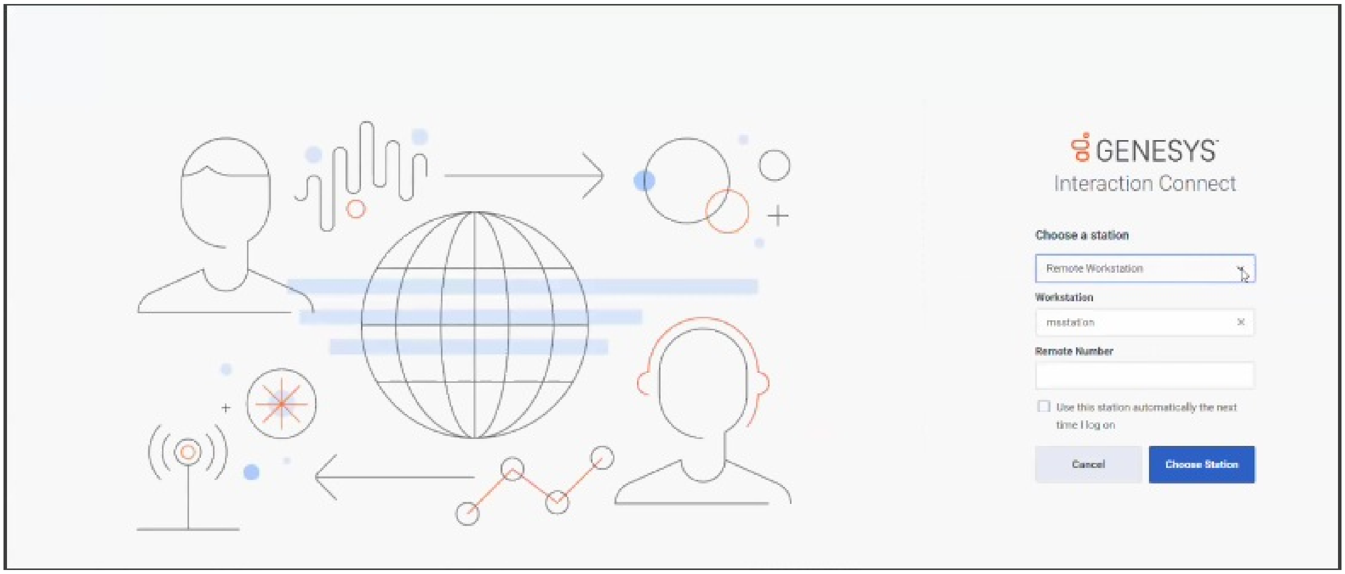



Now, open the Interaction Connect and connect to the respective "Interaction Center Server'

Then, enter the Interaction Center User credentials and login to the Interaction Connect application.

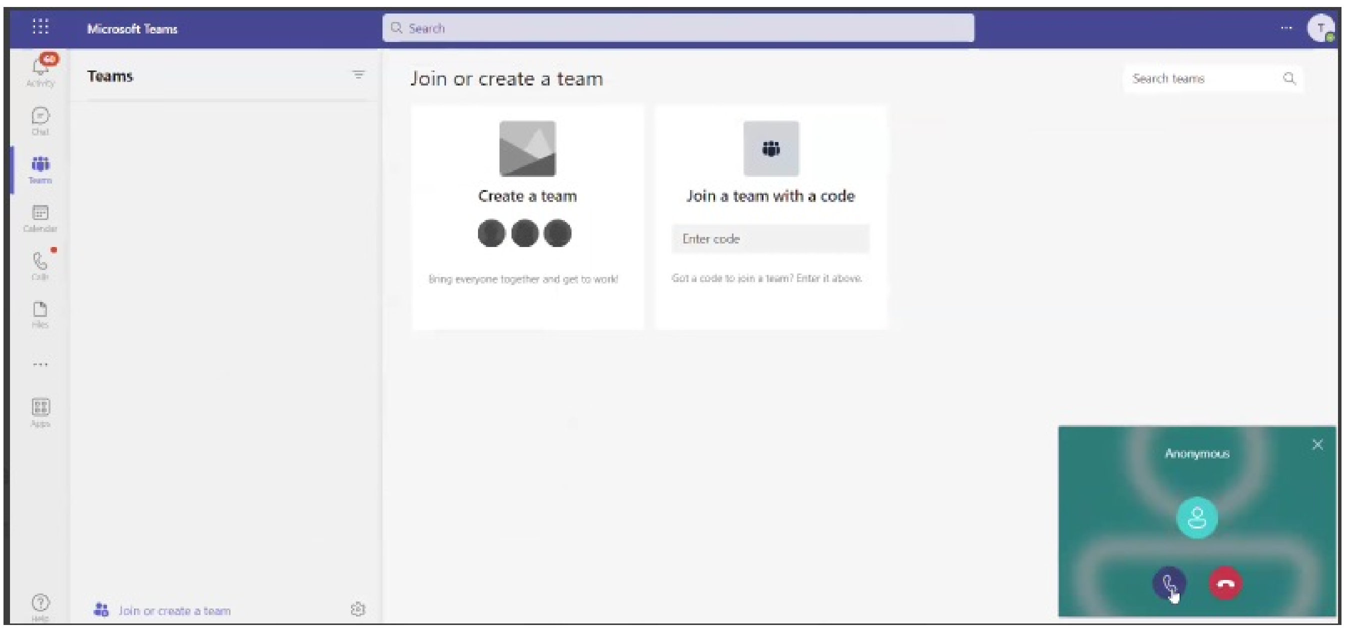




In the following screen to choose a station "select the workstation as 'Remote Station', which was created earlier.




Now the agent can open MS Teams as login station and observe that all the Agent calls are redirected to MS Teams application.

This will facilitate the Agent to handle the calls in the MS Teams application as shown in the following image



# 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. 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.

- 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.

**Related Topics**


Email Configuration
Email Interactions

# Email Interactions

An email icon identifies an email **interaction**. The reply to an ACD-routed interaction is linked to the original email interaction and appears on the following line.

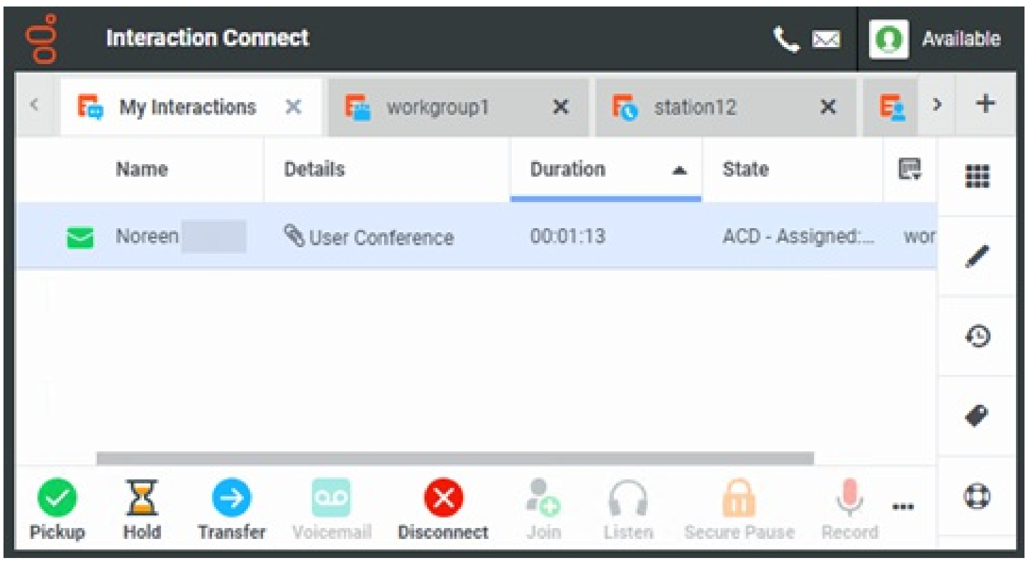
Several columns are available in My Interactions that are useful for email interactions.

> **Note:** The View Queue Columns Access Control right determines whether you can display the Attachments, Details, Importance, or Subject columns in **My Interactions**.

- An icon appears in the **Attachments** column if an email interaction has an attachment.
- In My Interactions, the **Details** column displays the email message subject. It can also display an importance icon and an attachments icon.
- The **Importance** column displays an icon indicating whether an email message is of high or low importance. It is blank for usual importance.
- The **Subject** column displays an email message subject.

> **Tip**: You can sort and group your email interactions by clicking the appropriate column heading.

### Email interaction in My Interactions




- 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**

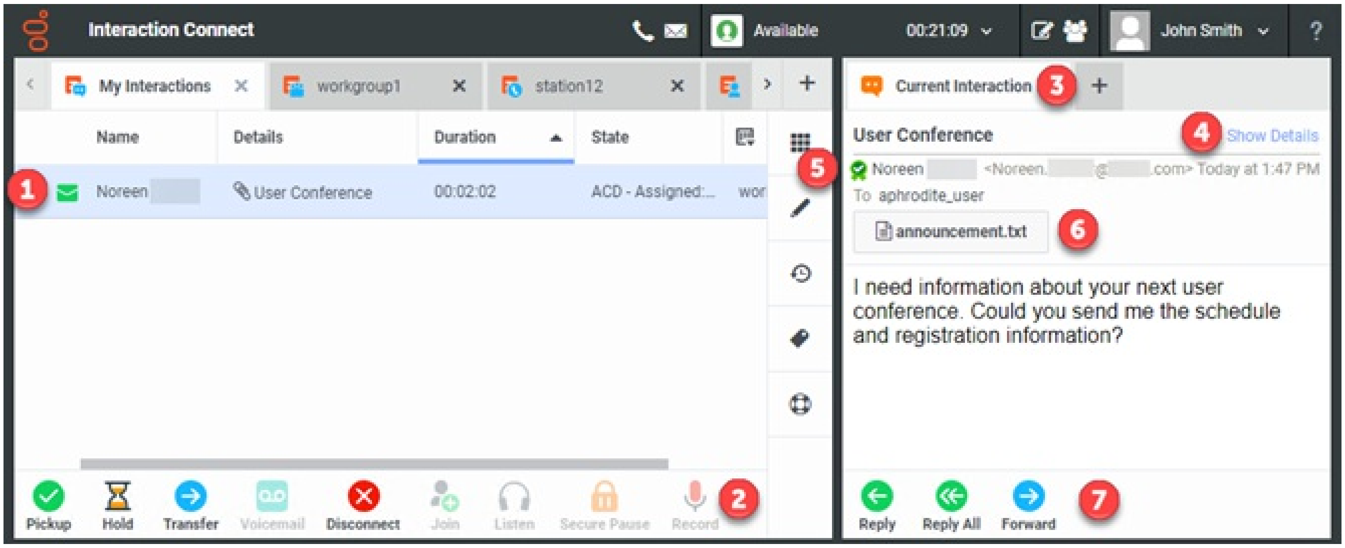
Working with Email Messages

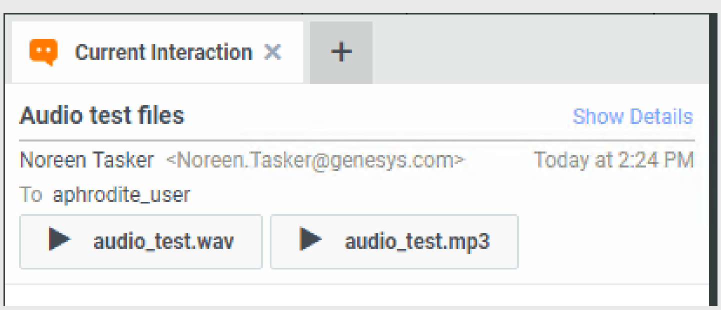
# Email and the Current Interaction view

Your currently selected email interaction appears in the **Current Interaction** view. Use this view to preview the content of an incoming interaction without picking it up. You also compose email messages or replies to email interactions in this view.

---

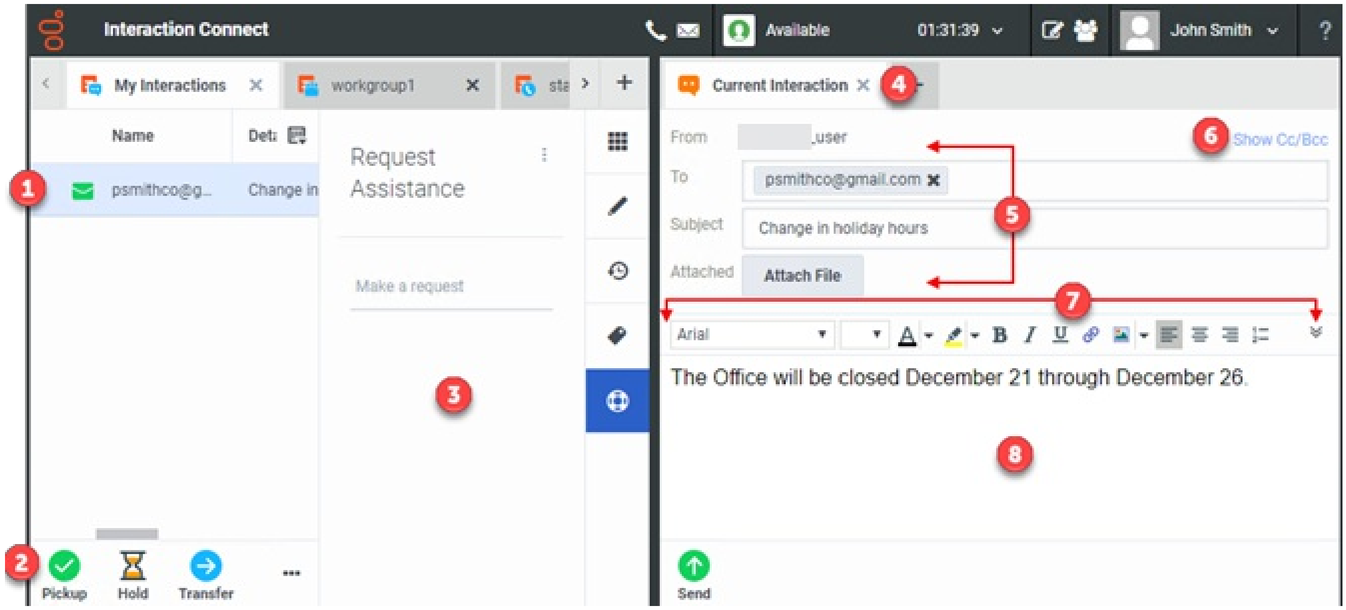
## Incoming Interaction

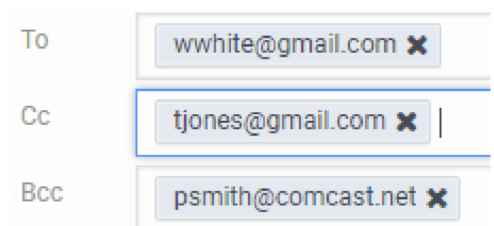



<table>
<tr><td>1</td><td>Incoming Email</td><td>To display or preview an ACD-routed email interaction, select it in My Interactions. Click Pickup to accept the email interaction.<br>Note: An Email configuration option controls whether inline images and other linked content appear in incoming email messages.</td></tr>
<tr><td>2</td><td>My Interactions toolbar</td><td>Use the My Interactions toolbar to manage the original ACD-routed interaction. For example, you can place the interaction on Hold and reply at a later time.</td></tr>
<tr><td>3</td><td>Selected Email</td><td>View and manage the selected email interaction in the Current Interaction view.</td></tr>
<tr><td>4</td><td>Show / Hide Details</td><td>Click Show Details to display the complete email addresses in the To, Cc, and Bcc fields. Click Hide Details to display only the addressee names.</td></tr>
<tr><td>5</td><td>Secure Email icon</td><td>The icons for secure email interactions identify whether CIC verified the email message's digital signature.</td></tr>
<tr><td>6</td><td>Attached file(s)</td><td>Any files attached to the email interaction appear here. Depending on the browser you use, you can click on the attachment to download, open, or save the file.<br>Note: If your browser supports playing a particular type of audio file, a Play button appears in place of the file type icon. Click Play to play the complete audio file. During playback, a Stop button replaces the Play button.<br>
</td></tr>
<tr><td>7</td><td>Current Interaction toolbar</td><td>Use the Current Interaction toolbar buttons to reply to or forward the ACD-routed interaction.<br>Note: This creates a new interaction linked to the original interaction.</td></tr>
</table>

## Outgoing Email Interaction

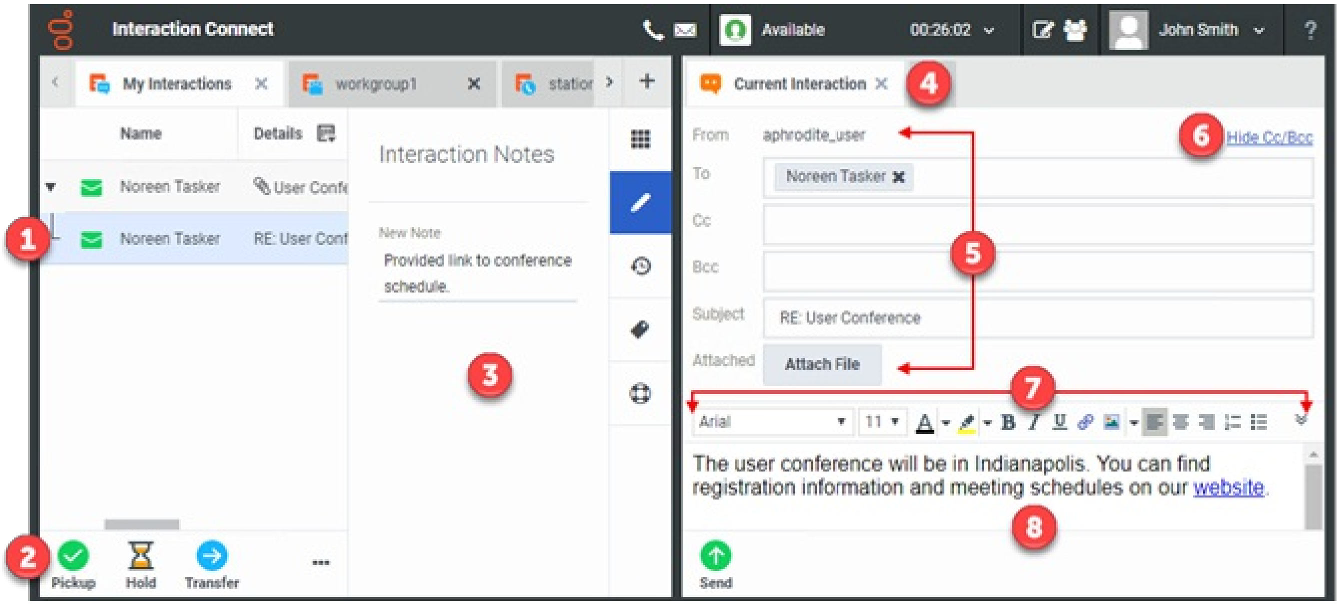
The Current Interaction view changes to an email editor when you send an email message on behalf of a workgroup.



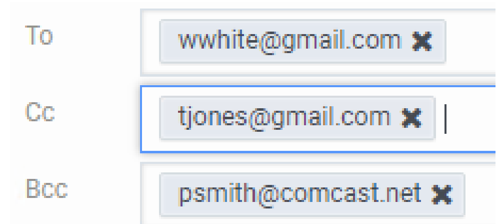
<table>
<tr><td>1</td><td>Email interaction</td><td>When you select an email message in My Interactions, it appears in the Current Interaction view.</td></tr>
<tr><td>2</td><td>My Interactions toolbar</td><td>The My Interactions toolbar contains buttons for the basic functions for managing an email interaction: picking up, holding, transferring and disconnecting.</td></tr>
<tr><td>3</td><td>Sidebar</td><td>Use the My Interactions sidebar area to add notes or assign codes to this email message.</td></tr>
<tr><td>4</td><td>Current Interaction</td><td>The Current Interaction view becomes an email editor when you create an email message.</td></tr>
<tr><td>5</td><td>From<br>To, Cc, Bcc<br>Subject<br>Attached</td><td>This area contains the standard email message address fields.<br>
• When you send an email message on behalf of a workgroup, the From address defaults to the selected mailbox address for that workgroup.<br>
• Click the To. Cc, or Bcc buttons to add addresses. Use commas to separate multiple addresses.<br>
Address tokens: Notice that after you finish typing an address, it changes from plain text to an address token. An address token represents the address. You cannot edit an address token, but you can delete it by clicking the X.<br>

<br>
• Supply a Subject.<br>
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.<br>
• The Attached section displays the names of attached files. The Attach File button enables you to attach additional files.<br>
Note: You cannot attach an empty file (a file with a size of 0).</td></tr>
<tr><td>6</td><td>Show Cc/Bcc<br>Hide Cc/Bcc</td><td>Click this control to display or hide the Cc and Bcc address fields.</td></tr>
<tr><td>7</td><td>Current Interaction toolbar</td><td>Use the toolbar to format text, insert hyperlinks or upload images. For a description of the Current Interaction toolbar, see Reply to an HTML Email Message.</td></tr>
<tr><td>8</td><td>Composition area</td><td>Compose your reply to the email message here.<br>
You can:<br>
• Type a response.<br>
• Copy and paste text to or from a Windows application.<br>
• Locate and insert a Favorite Response or a system-wide response in your reply.<br>
Tip: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press Shift+Enter to create a new line. Press Shift+Enter twice to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.</td></tr>
</table>

## Email Reply

The Current Interaction view changes to an email reply view when you select the email reply in My Interactions.




| | | |
|---|---|---|
| 1 | **Email reply** | An email reply is linked to the original incoming ACD-routed email interaction. When you select a reply in My Interactions, it appears in the Current Interaction view. Notice that more than one email interaction can be associated with the original email interaction. |
| 2 | **My Interactions toolbar** | The My Interactions toolbar contains buttons for the basic functions for managing an email interaction. |
| 3 | **Sidebar** | Use the **My Interactions** sidebar area to add notes or assign codes to this email reply. |
| 4 | **Current Interaction view** | Compose your reply in this view. |

| | | |
|---|---|---|
| 5 | **From**<br>**To, Cc, Bcc**<br>**Subject**<br>**Attached** | This area contains the standard email message address fields.<br>• The **To** field defaults to the sender of the original email message. Click the **To. Cc,** or **Bcc** buttons to add additional addresses. Use commas to separate multiple addresses.<br>**Address tokens**: Notice that after you finish typing an address, it changes from plain text to an address token. An address token represents the address. You cannot edit an address token, but you can delete it by clicking the **X**.<br><br>**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.<br>• **Subject** defaults to the subject of the original email message.<br>**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.<br>• The **Attached** section displays the names of attached files. The **Attach File** button enables you to attach additional files.<br>**Note**: You cannot attach an empty file (a file with a size of 0). |
| 6 | **Show Cc/Bcc**<br>**Hide Cc/Bcc** | Click this control to display or hide the **Cc** and **Bcc** address fields. |
| 7 | **Formatting toolbar** | The text formatting toolbar appears in the E-mail Reply window under certain conditions:<br>• 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 more information, see the toolbar description in Reply to an HTML Email Message.<br>• If you are creating an email message to send on behalf of a workgroup, the text formatting tools are always available to you.<br>• If the original email message was sent in **plain text** (no formatting), the formatting toolbar does not appear. Your email reply is sent in plain text. |
| 8 | **Reply area** | Compose your reply to the email message here.<br>You can:<br>• Type a response.<br>• Copy and paste text to or from a Windows application.<br>• Locate and insert a Favorite Response or a system-wide response in your reply.<br>**Tip**: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press **Shift+Enter** to create a new line. Press **Shift+Enter twice** to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.<br>When you select a reply or forwarded email in **My Interactions**, **Send** is available in the Current Interaction view toolbar. |

**Related Topics**

[Add or Close Views]
[Add Notes to an Interaction]
[Assign Codes to an Interaction]
[Email Configuration]
[Reply to an HTML Email Message]
[Secure Email Messages]
[Use Response Management in an Email Message]

# Secure Email Messages

The Secure Email Messages feature supports signatures for incoming queued email messages. If the workgroup to which you belong is properly configured in Interaction Administrator, your workgroup's mailbox can process a secure email message and route it to you for reply. Or an Interaction Attendant mailbox can be configured to receive and route secure email messages.

The Secure Email Message feature in Interaction Connect supports **cryptographic signatures**. A cryptographic signature prevents anyone from modifying the contents of an email message while it is in transit. An email signature can also provide authentication of the sender of a message and verify they are who they say they are.

The Secure E-mail Message feature **does not**:

- Enable you to send a signed response to a secure email message.
- Enable you to listen to an encrypted email message in Interaction Mobile Office. However, you can listen to a signed email message.
- Work with monitored mailboxes set up in Interaction Administrator.
- Provide any email tools that can be used to customize the handling of secure email messages.

## Overview of Secure E-mail Messages

An email message is primarily routed over the Internet using the Simple Mail Transfer Protocol (SMTP) and is formatted using the Multipurpose Internet Mail Extensions (MIME). An extension of MIME, known as Secure/Multi-part Internet Mail Extensions (S/MIME), enables MIME data to be sent and received securely.

S/MIME primarily provides two methods related to the security of email messages: **digital signatures** and **encryption**. Digital signatures and encryption are achieved through the use of the public key infrastructure (PKI) and digital certificates.

> **Note**: The current release of Interaction Connect **does not support email message encryption**. Your CIC administrator uses Interaction Administrator to configure the secure email feature. The CIC administrator also sets up and stores the appropriate email certificates and private keys used to verify digital signatures and establish secure email provider connections.

Support for S/MIME by Customer Interaction Center enables a signed email message to be sent to the email address associated with a workgroup's email queue or an Attendant mailbox.

In a typical scenario, one of your customers obtains a digital certificate for your workgroup's email address. The customer may use that digital certificate to sign and send an email message containing confidential information such as an account number to the workgroup's email address. CIC validates the digital signature and routes it to an available agent in your workgroup.

## Secure E-mail Interaction Icons

The icons for secure email interactions identify whether the interaction was signed.

> **Tip**: Click the icon to display details about the associated signature.

| Icon | Description |
|---|---|
|  | Digital signature was verified. |
|  | A digital signature is present, but Customer Interaction Center experienced one of the following problems:<br>• The signer's certificate is not trusted.<br>• The email message was modified in transit.<br>• The "From" address in the email header does not match the digital signature. |

**Related Topics**

Working with E-mail Messages

# Manage Email Messages

CIC client users can manage ACD-routed email message. You use the **Current Interaction** view to view incoming email messages and also to compose replies. You can use the **Response management** view to add stored responses to your replies.

**Related Topics**

- Add Notes
- Assign Codes
- Forward an Email Message
- Park an Email Message on Another Person's Queue
- Pick Up or Reopen an Email Message
- Reply to an Email Message
- Reply to an HTML Email Message
- Transfer an Email Message
- Use Response Management in an Email Message
- Use Response Management for an Incoming Interaction

## Add Notes to an Interaction

Use the **Interaction Notes** sidebar in **My Interactions** to add notes to the currently selected 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.

**To add notes to an interaction:**

1. In **My Interactions**, expand the **Interaction Notes** sidebar.
2. In the text box, type your observations or comments and click the **Add Note** icon (plus sign).

   **Result**: Your notes appear in the **Interaction Notes** sidebar.

**Related Topics**

- Respond to a Callback Request
- Manage a Chat Session
- Sidebar
- 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:**

- When working with a callback request, chat, or email interaction, select the appropriate codes in the **Interaction Properties** sidebar.

  > **Note**: Wrap-Up codes are not used for email message replies or forwarded email messages.

- When making a call, select a code in the Advanced Dialing Options dialog box.

**Related Topics**

- Assign Codes to an Incoming Interaction
- Assign Codes to an Outgoing Interaction
- Manage a Chat Session
- Sidebar
- 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.

> **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.

> **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.

**To forward an email message:**

1. Pick up or reopen an email message.
2. In the Current Interaction view, click the **Forward** button.
3. In the **My Interactions** view, expand the incoming email interactions. Select the new email interaction associated with the original email message.

   > **Tip**: Forwarding an email is similar to an email reply. See Email and the Current Interaction View.

4. In the **Current Interaction** view, address the email message by doing one of the following:

   > **Tip**: Click **Show Cc/Bcc** to display carbon copy or blind carbon copy address text boxes.

   - 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.

5. 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 File** link to attach a file to the forwarded email message.
6. In the reply area in the **Current Interaction** view, 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.

7. Optionally, assign an Account code in the **Interaction Properties** sidebar.

   > **Tip**: For more information, see Assign Codes to an Interaction.

8. Optionally, add notes or comments in the My Interactions **Interaction Notes** sidebar.

   > **Tip**: For more information, see Add Notes to an Interaction.

9. Do one of the following:
   - To send this email to the addressed recipients, in the **Current Interaction** view, click **Send**.

     **Result**: The forward email message is sent and its state changes to **Disconnected** in **My Interactions**.
   - To save this email message, in **My Interactions**, click **Hold**.

     **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. After you forward the email message by clicking **Send**, select the original email interaction in **My Interactions** and click **Disconnect**.

**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** and appears in the selected user's queue.

**Related Topics**

Monitor Two or More Queues at the Same Time
Park a Call on Another Person's Extension

## 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.

**To pick up or reopen an ACD-routed email message, do one of the following:**

- Select the email message and click the Pickup button in the Queue Control toolbar.
- Select the email message and click **Pickup** in the Current Interaction view.

**Tip**: To create, view, or reply to an email message, you must display the Current Interactions view. For more information, see Email and the Current Interaction View.

**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

## Record an Email Message

**Requirements**: This feature may or may not be available to you, depending on the licenses and rights assigned to you in Interaction Administrator. See Requirements for Snippet recordings.

You can use the **Snip** button to make a recording that is stored in the CIC database. Snippet recordings of email interactions are available only if your CIC administrator separately enables this feature. Snippet recordings of email interactions are not available by default.

**Note**: Ad-hoc recordings of email interactions are not supported. Snippet recordings of email interactions are available only if your CIC administrator separately enables this feature.

**Warning**: Genesys 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 an Email Message

You can record either or both the incoming email interaction and your reply or forwarded email message. Some special considerations and limitations apply to snippet recordings of email interactions. For more information, see Snippet recordings of Email messages.

**Tip**: The **Snip** button appears on the Queue Control toolbar only if you have the appropriate rights and license. See the Requirements for Snippet Recordings.

1. Select and pick up the incoming email interaction (parent).
2. (Optional) To record the incoming email interaction click **Snip** in the **Queue Control** toolbar.

   **Result**: A snippet recording is made of the incoming email interaction. All of the text in the original email interaction is included in the snippet recording.
3. In the **Current Interaction** view, click **Reply**, **Reply All**, or **Forward**.
4. (Optional) To record the reply or forwarded email message, select the reply or forward email in the queue view and click **Snip**.

   **Result**: A snippet recording is made of the reply or forwarded email message. Again, all of the text in the reply or forwarded email interaction is included in the snippet recording.
5. Send the reply or forward the email.

   **Important**: The Snippet recording of this reply or forwarded email is not saved until you click **Send**.

6. Ensure that any email reply or forwarded email is disconnected before you disconnect the original email interaction.

**Related Topics**

Determine if Someone is Listening to or Recording Your Interactions
Email and the Current Interaction View
Queue Control Toolbar Buttons

## 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 is associated with the original incoming email interaction in an Email Conversation. These associated interactions appear below the original interaction and are linked to it.

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.

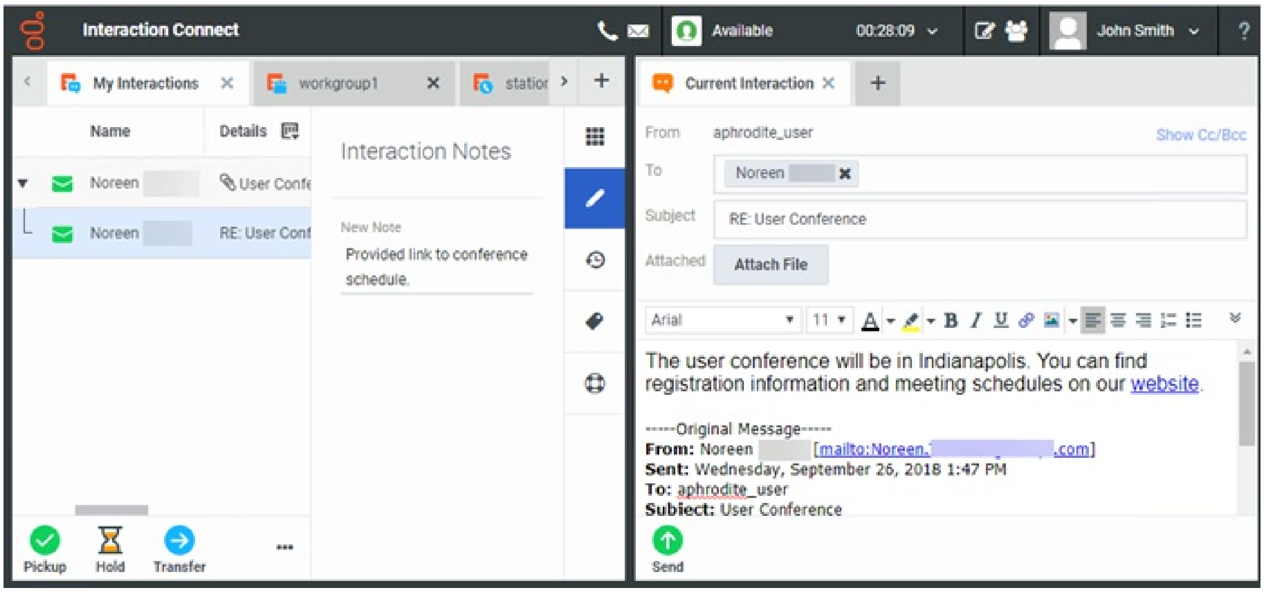
**Tip**: All of the associated **outgoing** email interactions must be disconnected, transferred or forwarded before you can disconnect the original incoming email interaction.

**To reply to an email message:**

1. Pick up or reopen an email message.
2. In the Current Interaction view, click the **Reply** or **Reply all** button.
3. In the **My Interactions** view, expand the incoming email interaction. Select the new email interaction associated with the original email message.

   **Result**: The email reply appears in the **Current Interaction** view.

   **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.




4. In the **Current Interaction** view, optionally, add addresses to the email reply by doing one of the following:

   **Tip**: Click **Show Cc/Bcc** to display carbon copy or blind carbon copy address text boxes.

   - 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.

5. 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.
   - To attach a file to the forwarded email message, click **Attach File**.
6. In the reply area in the **Current Interaction** view, 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.

7. Optionally, assign an Account code in the My Interactions **Account Codes** sidebar.

   **Tip**: For more information, see Assign Codes to an Interaction.

8. Optionally, add notes or comments in the My Interactions **Interaction Notes** sidebar.

   **Tip**: For more information, see Add Notes to an Interaction.

9. Do one of the following:
    - To send this email to the addressed recipients, in the **Current Interaction** view, click **Send**.

      **Result**: The forward email message is sent and its state changes to **Disconnected** in **My Interactions**.
    - To save this email message, in **My Interactions**, click **Hold**.

      **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. After you send the email message reply, select the original email interaction in **My Interactions** and click **Disconnect**.

**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

> **Tip**: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press **Shift+Enter** to create a new line. Press **Shift+Enter twice** to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.

The Current Interaction view includes a text formatting toolbar.


| | | |
|---|---|---|
| 1 | **Font** | Use the font controls to bold, underline or italicize selected text. You can also select text color, font and size. |
| 2 | **Insert Link** | Use the hyperlink control to create a working hyperlink in your email reply. |
| 3 | **Upload Image** | Use the image control to insert a picture in your email reply. You can insert an image from your local drive or insert a URL pointing to the image's location.<br>**Tip**: You can drag and drop an image into an HTML email reply in any browser where you are using Interaction Connect. You can also cut and paste images from the Windows clipboard in all browsers except for Internet Explorer 10 and Safari which do not support this feature. |
| 4 | **Paragraph** | Use the paragraph controls to set left, right and center text alignment. You can also create bulleted or numbered lists. |
| 5 | **Text Indent** | Use text indent controls to increase or decrease the space between the selected text and the left margin. |
| 6 | **Undo and Redo** | Use the Undo and Redo controls to reverse the last change you made to your reply or to reverse an Undo action. |

### Create a Hyperlink

You can include a working hyperlink to a webpage in your email reply.

**To create a hyperlink in the Current Interaction view:**

1. Click the **Insert Link** toolbar button.

Result: The URL dialog box appears.

2. In the **URL** text box, type the URL for a webpage.

   **Result**: The URL text defaults to the Text box.

3. Optionally, in the **Text** box, replace the URL with a word or phrase to appear as the hyperlink text.
4. Click **Insert Link**.

### 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. Insert an image in-line by doing one of the following:
   - Click the **Upload Image** toolbar button. Locate an image on your workstation and click **Open**.
   - **Insert Image URL** toolbar button. In the text box, type the URL for the image and click **Insert Image**.
   - Copy and paste an image from the Windows clipboard.
   - Drag and drop an image file.

   **Result**: The selected image appears in the email reply message.

3. Optionally, resize the image by selecting and dragging a corner.

### Drag and Drop

You can drag and drop images, text, and files to your HTML email replies.

**Tip**: Internet Explorer and Edge security settings can disable the drag and drop feature. Contact your IT administrator for assistance in modifying these settings.

- Images and text from Web browsers, Microsoft Word, Microsoft Outlook and Word Pad are incorporated in your reply.

  **Note**: In plain text email replies, text appears as plain text, but image files are not copied.

- Image files from Windows Explorer appear inline, while text files become attachments.

  **Note**: In plain text email replies, both image files and text files become attachments.

**Related Topics**

[Assign Codes to an Interaction]
[Pick Up or Reopen an Email Message]
[Reply to an Email Message]
[Secure Email Messages]
[Use Response Management in an Email Message]
[Working with Email Messages]

## 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.

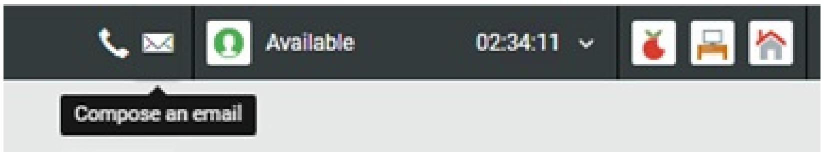
An outbound email interaction is an email message you send **on behalf of a workgroup**. It can be included in Customer Interaction Center reports and statistics. Additionally, as an interaction, it could be processed by any custom email handlers that are added to your Customer Interaction Center installation.

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.

**To start an email interaction:**

1. Click the **Compose an email** icon.




2. If you belong to more than one workgroup configured with one or more outbound mailboxes, in the New Email Message dialog box, select the appropriate workgroup and mailbox. Click **Create Email Message**.

> **Note**: Your workgroup status does not have to be **Active** in order for you to send an email message.

3. In the Current Interaction view, 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 composition 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, insert images, or insert hyperlinks. For a description of these tools, see Reply to an HTML Email Message.

7. Optionally, assign an Account code in the **Interaction Properties** sidebar.

> **Tip**: For more information, see Working with Account and Wrap-Up Codes.

8. Optionally, add notes and comments about this interaction in the **Interaction Notes** sidebar.

> **Note**: For more information, see Add Notes to an Interaction.

9. To send this email message, click **Send**.

**Related Topics**

Email and the Current Interaction View
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.

> **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.

**To transfer an email message:**

1. Pick up or reopen an email message.
2. Do one of the following:
   - On the Queue Control toolbar, click the **Transfer** button.
   - Right-click the email message and select **Transfer** from the shortcut menu.

   **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.**

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

   > **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.

**To transfer an email message using a directory:**

1. In My Interactions, select the email message.
2. In the Company Directory, select a CIC user and click the **Transfer** button.

**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. Do one of the following:
   - In the Response Management view, search for and then select an appropriate response. Click **Insert**.

     **Tip**: You can use full-text searching by entering terms in the **Search for a response** text box in the Response Management view. For more information, see Search for a Response.

   - In the **Current Interaction** view, type the Response item Shortcut and press **Ctrl+Space**.

     **Tip**: For more information, see Use a Response Shortcut.

     **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.

     **Note**: To use the information indirectly when composing a reply to an email message, view a selected Response in the **Response Management** view.

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.

**Related Topics**

Search for a Response
Use Response Management for an Incoming Interaction
Working with E-mail Messages

# 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, PNG, or PDF files and use the default Windows application for these file types to view and print faxes.

  > Note: Contact your CIC administrator if you do not have Interaction Fax installed and your faxes are being attached to email messages as I3F files.

- If you display the Fax View, you can view or download faxes and save them as files.

**Related Topics**

Delete Faxes
Download a Fax
Fax View
Open a Fax From Your Inbox
Send a fax
Use the Fax View
View a Fax

## 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**: One of the following happens:

   - 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*.

   - If Interaction Fax is not installed on your workstation, the default Windows application for the format of the attached file displays the fax.

     > **Note**: The CIC administrator must configure your User rights in Interaction Administrator to enable you to receive faxes as TIF files. The **Web Client fax format option** on your user account can enable you to receive faxes as PDF or PNG files.  Contact your CIC administrator if you do not have Interaction Fax installed and your faxes are not being attached to your email messages in a format you can display.

**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 View

The Fax view displays a list of your current faxes. It enables you to view, download, or delete faxes.

**To display the Fax view:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. In the **Quick Picks** list, click **Show All Views**.
3. In the **Add Views** dialog box, in the **Extras** category, select the **Fax** check box.
4. In the Add Views dialog box, click **Add View**.

    **Result**: The Fax view appears.

**Related Topics**


Change View Layout
Use the Fax view
Working with Faxes


## Use the Fax View

> **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.

The Fax view contains a list of your current received faxes.  You can view, download, or delete any of these faxes.

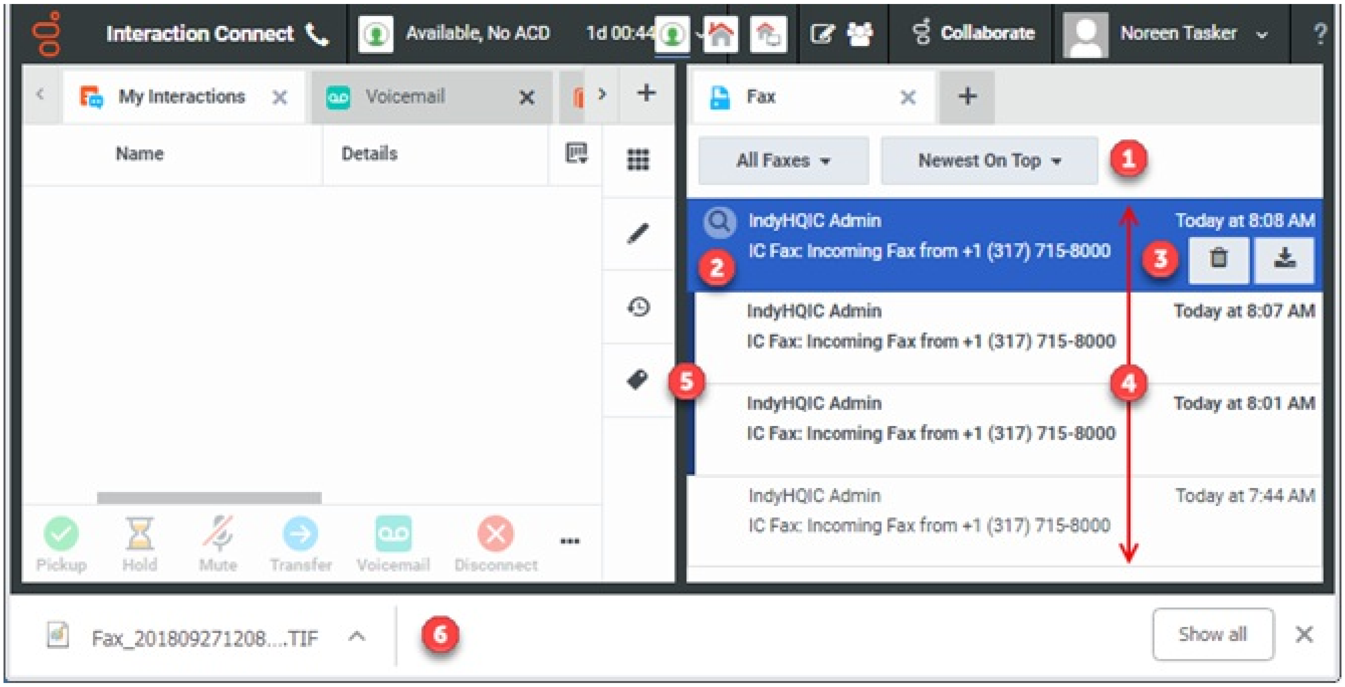
### Fax Formats

Your CIC administrator determines the format in which you receive or view faxes.

- Faxes appear as **email attachments** in your email Inbox.
- 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 | You can select and sort the faxes that appear in the Fax view.<br>• Select all, unviewed, or viewed faxes.<br>• Sort the faxes by newest or oldest on top. |
| 2 | Click the **View** button (magnifying glass) to display a PNG or PDF format fax in your browser.<br>If the **View** button is disabled, this means your browser does not support the fax format.<br>• You can use Interaction Fax to view faxes in the I3F format.<br>• You can download faxes in the TIF format and view them in the default Windows application for that format. |
| 3 | **Delete** and **Download** buttons appear when you select a fax.<br>**Note**: The currently selected fax appears highlighted. |
| 4 | The Fax view contains the Faxes list. This list contains the faxes you have not yet deleted, including both previously viewed and unviewed faxes. |
| 5 | A dark bar indicates a fax you have not yet viewed. |
| 6 | Downloaded faxes appear in your browser's File Download location. Click to view the fax. |

**Related Topics**


Fax View
Open a Fax From Your Inbox

## 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 View displays a list of your current faxes. You can use the Fax View to download a fax as a file.

**To download a fax:**

1. In the Fax view, select a fax.
2. Click the **Download** button in the Fax Viewer.

   **Result**: The fax appears in the File Download location in your browser.
3. Click the filename in the File Download location.

   **Result**: The fax appears in the default Windows application for this file type.
4. Optionally, use the Windows application to save the file to your workstation.

**Related Topics**

Fax View
Use the Fax View
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 View and view it in a browser window. Contact your CIC administrator.

The Fax View 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 View:**

1. In the Fax view, select a fax.
2. Do one of the following:
   - Click the **View** button (magnifying glass) to display a PNG or PDF format fax.

     **Result**: The fax appears in your browser.
   - If the fax is in TIF or I3F format, click the **Download** button. Then click the fax filename in the File Download location in your browser.

     **Result**: The fax appears in your default Windows application for the appropriate format.

**Related Topics**

Download a Fax
Fax View
Use the Fax view
Working with Faxes

## Delete Faxes

You can delete old or unneeded faxes from the Fax view.

**To delete faxes, do one of the following:**

- In the Fax view, select a single fax or press and hold the **Ctrl** key, then select multiple faxes. Press the **Delete** button. Confirm you are sure you want to delete these faxes by clicking **Delete** when prompted.
- In your email Inbox, delete the email message with the fax attachment.

> **Note**: Interaction Connect removes the corresponding fax the next time it automatically updates the Fax view.

**Related Topics**

Use the Fax view

# 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.

# Interaction Optimizer

Interaction Optimizer is a Workforce Management (WFM) application that enables administrators to effectively schedule resources. Interaction Optimizer is an optional component of Customer Interaction Center (CIC).

> **Note**: Interaction Optimizer is enabled only if your CIC system has the appropriate feature licenses. Interaction Optimizer administrative features are available in IC Business Manager. For more information, see the *Interaction Optimizer Technical Reference*.

Interaction Optimizer also enables you as an agent to view your schedule, submit time off requests, and trade shifts with other agents. Your CIC administrator determines whether you have access to these Interaction Optimizer features inside Interaction Connect.

## Agent Optimizer Features and Requirements

This section describes the rights and licenses required to access these agent-oriented features. Agents can use Interaction Connect for the following features, if they:

- Have an **Interaction Optimizer Schedulable** license.

  > **Note**: You need this license to **use** the Interaction Optimizer views. You don't need this license to display these views.

- Have an **Interaction Optimizer Client Access** license.
- Have the Customize Client Security right which enables them to display Interaction Optimizer views inside Interaction Connect and customize settings.
- And meet the other requirements listed below.

| Feature | Other Requirements |
|---|---|
| Display your schedule | View Plug-ins Access Control right for the **Optimizer Schedule**. |
| Display the My Shift Trading view | Shift Trading Access Control right. |
| Submit, edit, or cancel time off requests | Agent can submit time off Interaction Optimizer Security right<br>Also, the agent must belong to an Optimizer Scheduling Unit and be assigned to a Shift Definition.<br>**Note**: Administrators configure Scheduling Units and Shift Definitions in Interaction Center Business Manager. |
| Trade shifts with other agents | Agent can trade shifts Security Right and<br>CIC administrator must enable Shift Trading in ICBM. |

## My Schedule

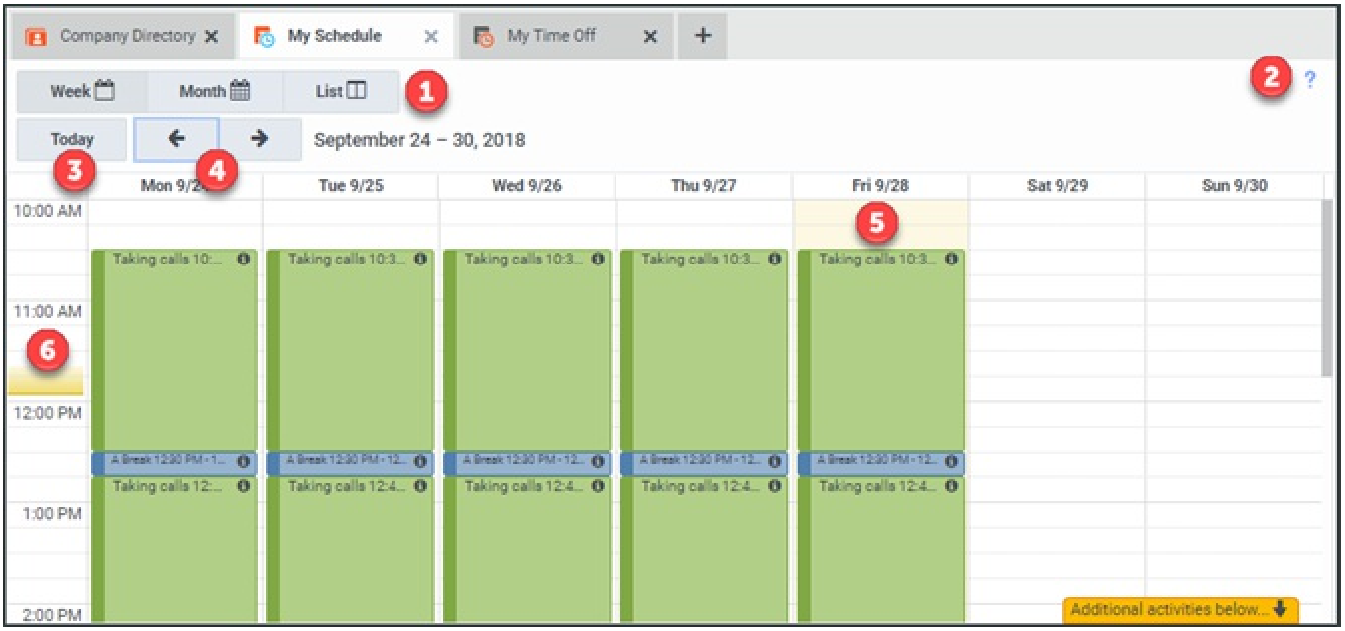
> **Requirements**: You need the Customize Client Security right to display the **My Schedule** view. For additional requirements, see Agent Optimizer Features and Requirements.

> **Tip**: To display the **My Schedule** view, see Add or Close Views.

The **My Schedule** view enables you to view your schedule in Week, Month, or List modes.

### Week view

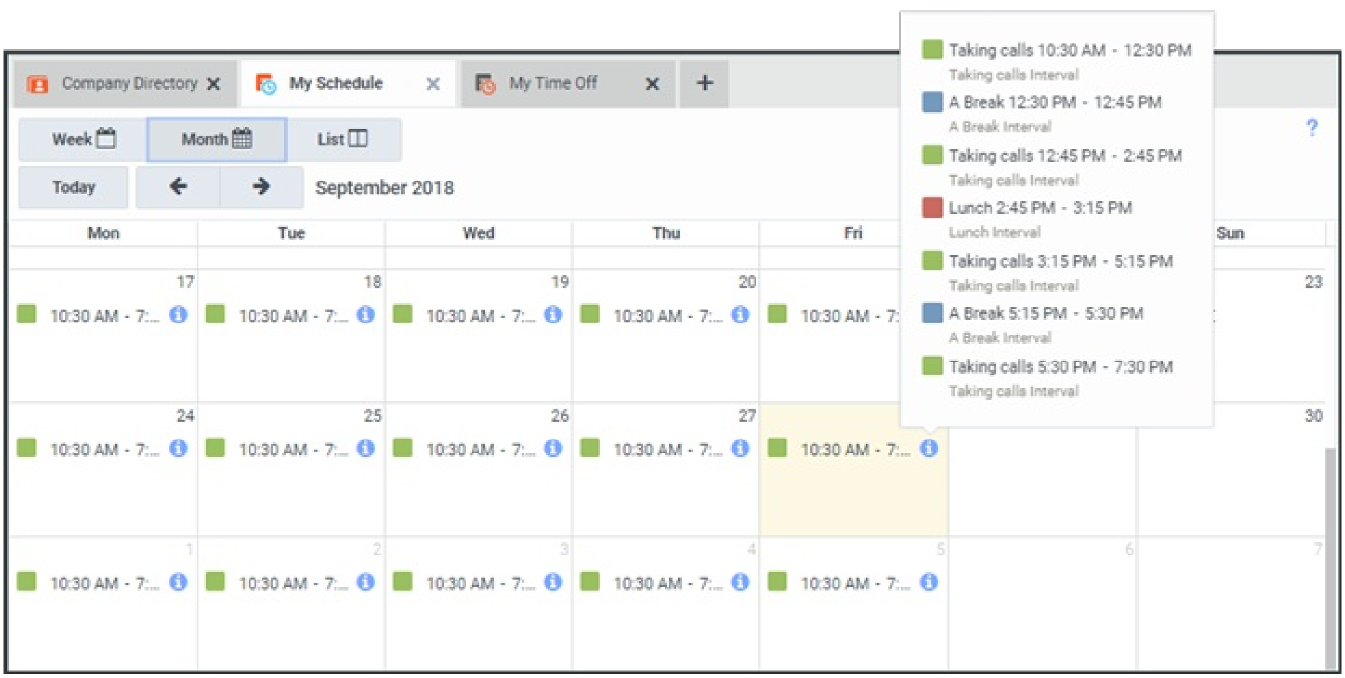
See your schedule for a week at a glance.




| | | |
|---|---|---|
| 1 | **Alternate views** | To display a week, month, or list view of your schedule, click one of these controls. |
| 2 | **Help for current tab** | To display help for the Schedule tab, click this help icon. |
| 3 | **Today** | To return to today’s schedule, click this control. |
| 4 | **Previous and next controls** | To navigate through views of past, current, and future schedules, click these controls. |
| 5 | **Current day** | A contrasting background indicates the current day’s schedule. |
| 6 | **Current time** | A bar indicates the current time. |

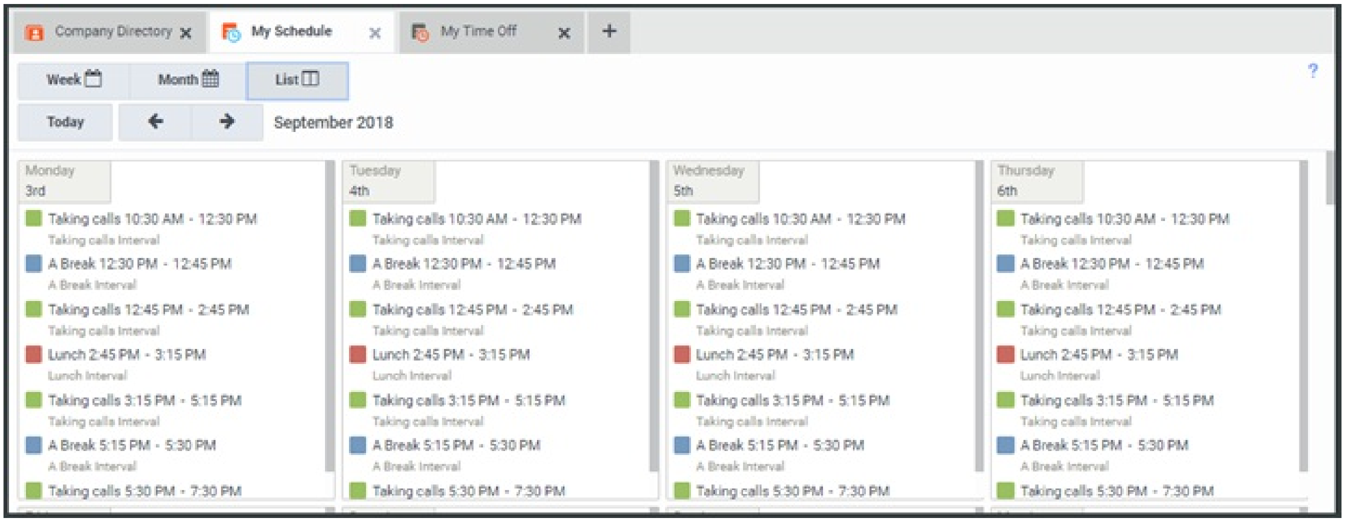
## Month view

The Schedule Month view displays the start and end times for your shift on each day. To display schedule details for a selected day, click the information icon in the selected day.



## List view

The Schedule List view displays schedule details for each day.




### Related Topics

[Configure Schedule Reminders]
[Use Schedule Reminders]

## Use Schedule Reminders

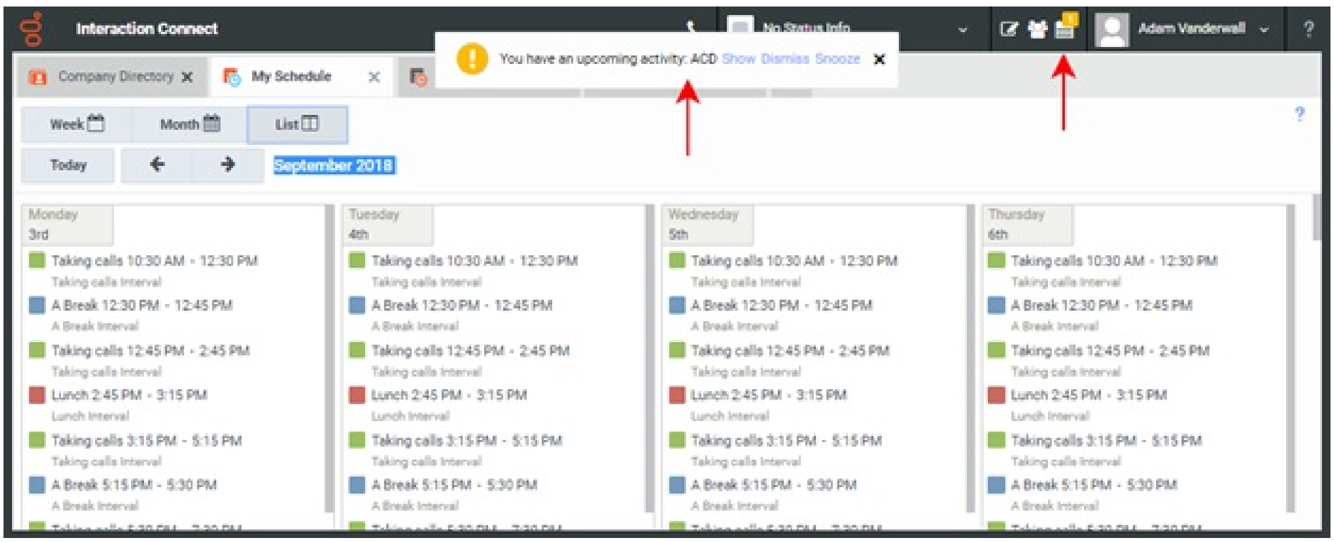
**Requirements**: The Interaction Optimizer Activity Feed icon appears in Interaction Connect if you have an **Interaction Optimizer Schedulable** license.

Schedule reminders help you maintain schedule adherence. Schedule adherence is the real-time tracking of whether your status is consistent with your scheduled activity. Schedule reminders alert you before a scheduled activity change. You control how far in advance these schedule reminders appear. See Schedule Reminders.

**Warning**: It is very important that you set your status accurately whenever your status changes. For more information, see Set Your Status.

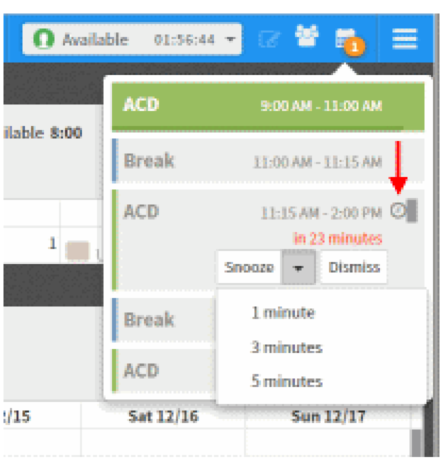
Schedule reminders appear as both desktop alerts and as badges on the **Activity Feed** icon. If the My Schedule view is not visible when an alert occurs, the desktop alert remains visible until you close it. This ensures that you are alerted when you are out of adherence if you are away from your desk when the alert occurs.

**Note: Orange** badges on the Activity Feed icon indicate schedule reminders. A **red** badge warns you that you are not adhering to your schedule. Your current status does not match your currently scheduled activity. A **blue** badge alerts you to a schedule change.




**To use Schedule Reminders:**

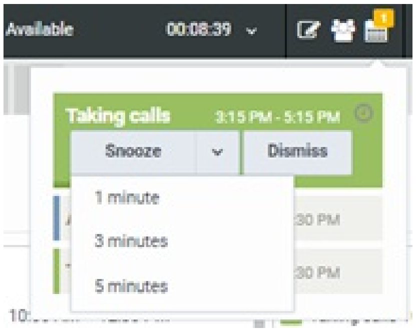
- Click **Show, Dismiss**, or **Snooze** in the desktop alert.
- Click the **Activity Feed icon**. Click the clock icon for the activity, then **Dismiss** the alert or set a **Snooze** interval.



## Schedule Reminders

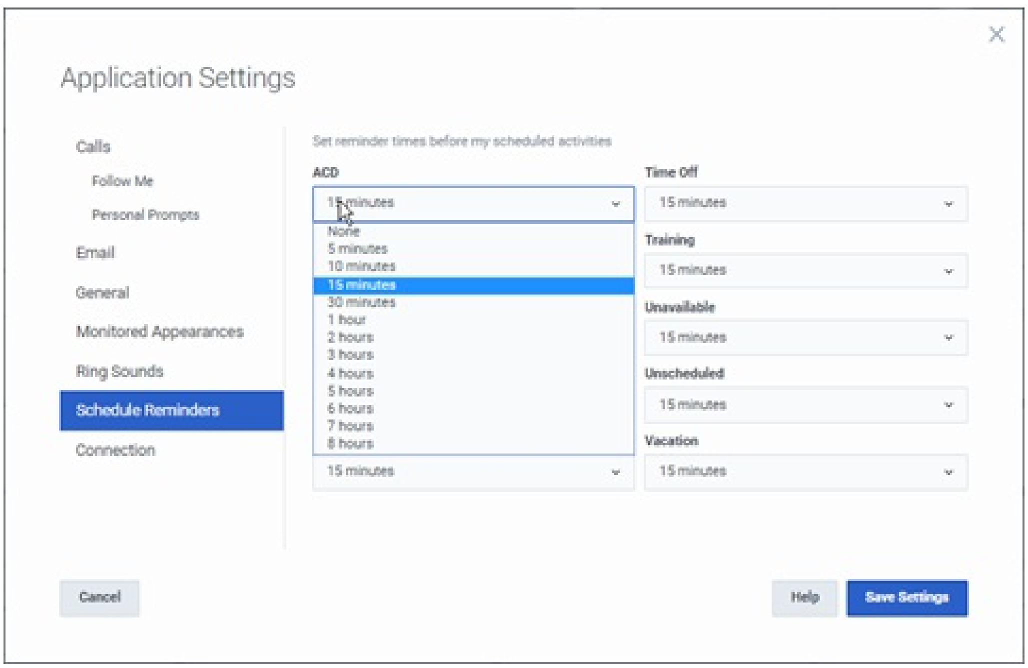
**Requirements**: You need the Customize Client Security right to customize your personal CIC client configuration settings. For other requirements, see Agent Optimizer Features and Requirements.

You can set reminder times for each type of scheduled activity. These setting control how far in advance you are alerted to changes in your scheduled activity. You display these schedule reminders by clicking the **Activity Feed** icon.




**To set schedule reminders:**

1. In the Application Settings Dialog Box, click **Schedule Reminders**.
2. Change the current interval under any type of scheduled activity and select a different time.




3. Click **Save Settings** to save these new settings and close the Applications Settings dialog box.

**Related Topics**

Understanding the Application Settings Dialog Box

# Time Off Requests

This section explains how to request time off.

- Request Time Off
- Edit a Time Off Request
- Cancel a Time Off Request

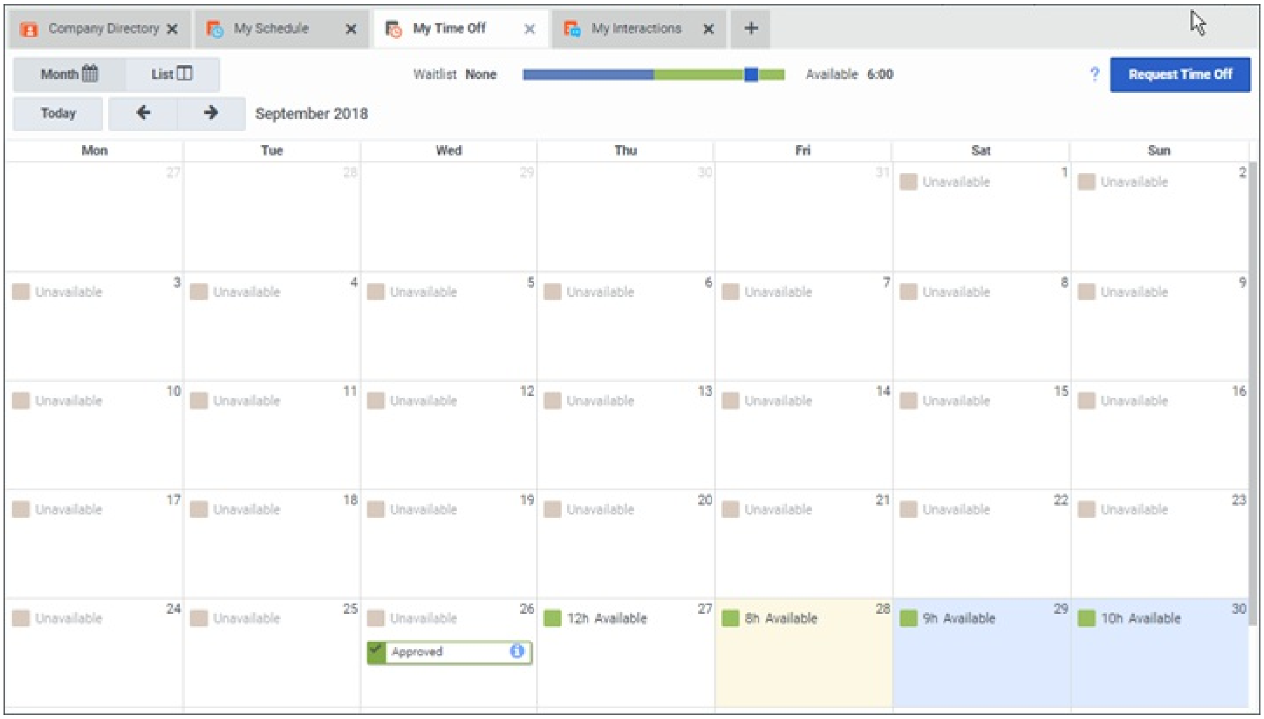
## Request Time Off

**Requirements**: You need the Customize Client Security right to display the **My Time Off** view. For additional requirements, see Agent Optimizer Features and Requirements.

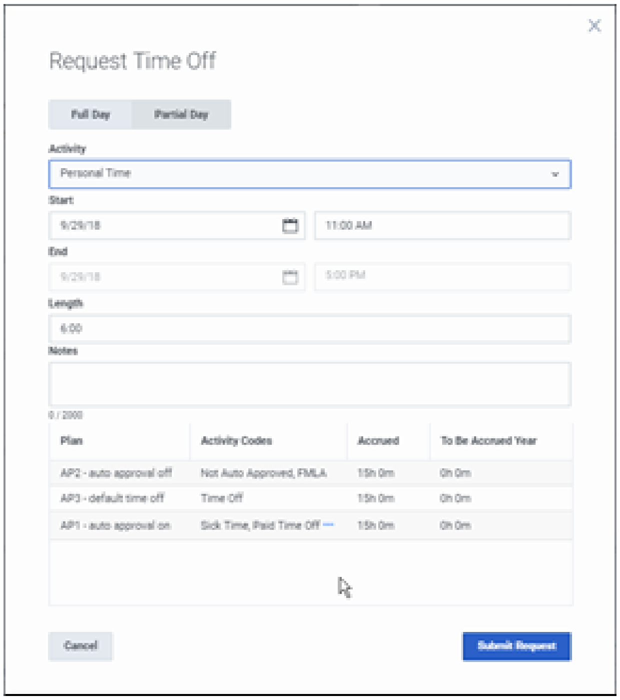
**Tip**: To display the **My Time Off** view, see Add or Close Views.

**To request time off:**

1. Select the **My Time Off** view.




2. In the **Month** view, adjust the slider control to indicate how much time off you want to request.
3. Select a day or range of days.
4. Click **Request Time Off**.




5. In the **Request Time Off** dialog box, click **Full Day** or **Partial Day**.
6. In the **Activity** drop-down list, select the appropriate type of time off (Sick Leave, Paid Vacation, Personal Time, and so on.)

   *Note*: Your organization's time off plans determine the available selections. You can check how much time off you have accrued in the **Plan** table at the bottom of the **Request Time Off** dialog box.
7. If necessary, adjust the **Start** date and time.
8. If you are requesting one or more Full Days of time off, adjust the **End** date as needed.
9. To set the **End** date and time appropriately, make any necessary adjustment to **Length** of time per day.
10. Optionally, in the **Notes** text box, add details about the reason for the time off request.
11. Click **Submit Request**.

## Edit a Time Off Request

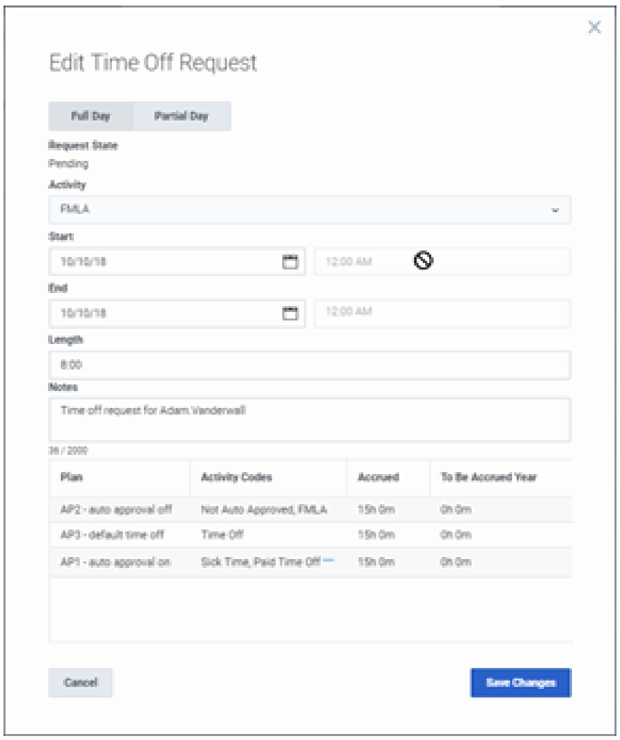
**Requirements**: You need the Customize Client Security right to display the **My Time Off** view. For additional requirements, see Agent Optimizer Features and Requirements.

**Tip**: To display the **My Time Off** view, see Add or Close Views.

You can edit any of your **Pending** time off requests.

1. Select the **Time Off** tab.
2. Select the **List** view.
3. Click the **Edit this time off request** button (pencil icon) for a selected **Pending** time off request.
4. In the **Edit Time Off Request** dialog box, make any necessary changes.

> **Note**: You cannot edit any of the information in the **Plan** table. This table enables you to check how much time off you have accrued.




5. Click **Save Changes**.

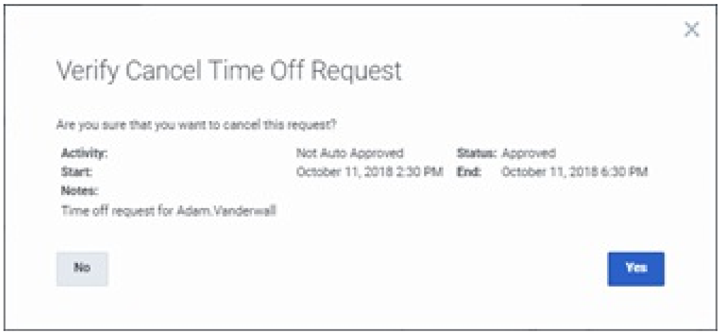
## Cancel a Time Off Request

**Requirements**: You need the Customize Client Security right to display the **My Time Off** view. For additional requirements, see Agent Optimizer Features and Requirements.

**Tip**: To display the **My Time Off** view, see Add or Close Views.

You can cancel any of your **Pending** time off requests. If the time off request **Start** date is **after today's date**, you can also cancel **Approved** or **Denied** time off requests.

1. Select the **Time Off** tab.
2. Select the **List** view.
3. Click the **Cancel this time off request** button (X icon) for a selected **Pending** time off request.
4. In the **Verify Cancel Time Off Request** dialog box, click **Yes**.




# Shift Trading

**Requirements**: You need the Customize Client Security right to display the **My Shift Trading** view. For additional requirements, see Agent Optimizer Features and Requirements.

You can trade all or part of your scheduled shift with another agent. Your CIC administrator can set configuration options in ICBM to control or limit shift changes. These configuration options include:

- **Business rules** can automatically approve some trades. For example, your CIC administrator can allow automatic approval for trades of the same amount of time between agents with the same skill set and workgroup membership. At the same time, your CIC administrator can manually review, approve, or deny any trade request.
- **Shift trade requirements** control such factors as how far in the future the shift trade must occur and the minimum number of hours you can trade.
- **Agent matching criteria** determine which agents can trade with each other. For example, the administrator can require that both agents belong to the same ACD workgroup or scheduling unit.
- **Activity rules** determine what happens to the activity type when agents trade shifts. You may not be able to trade shifts containing certain activities. Or the activities in a traded shift can remain unchanged or be replaced by an ACD activity.

**Note**: For specific details about the rules and other configuration options that control how shift trades work in your organization, contact your CIC administrator.

This section explains how to trade shifts.

- Request a Shift Trade
- Manage Trades

## Request a Shift Trade

**Requirements**: You need the Customize Client Security right to display the **My Shift Trading** view. For additional requirements, see Agent Optimizer Features and Requirements.

You can indicate the shift you want to trade and search for a trade request that matches. If you don't find a match, you can post a trade request that other agents can view.

**Note**: Interaction Optimizer does not automatically adjust for mandated breaks or meal times when you trade a shift. Also, the activities in the shift for which you trade can remain unchanged or be replaced by ACD activities. This is controlled by CIC configuration options.

1. In the **My Shift Trading** tab, click **Search Trades**.
2. In the **Trade away Time on** section, select the date and times you are scheduled to work and want to trade away.

   **Note**: You can adjust the **Start** and **End** times to trade all or part of your shift.
3. In the **Select a day to work** section, select the day you want to work instead.

   **Note**: Matches for your proposed trade are indicated in the **Exact Matches** and **Recommended Matches** columns.
4. Do one of the following:
   - Select an acceptable matching trade in the **Select a day to work** section and click **Accept Trade.**

     **Result**: The trade is either approved automatically or set to wait for administrator review. You are finished with this trade request.
   - If there are no acceptable matching trades, click **Post New Trade**.

     **Result**: The **Post New Trade** dialog box appears. Continue to the next step.
5. Indicate the type of match you will accept.
   a. Verify the **Trade away time on** date is correct.
   b. Select one of the following:

| | |
|---|---|
| **Exact match** | You want only to trade for a shift with exactly the selected **Start** and **End** times. |
| **Variable start time** | You will accept a trade for a shift that **starts later** than your regularly scheduled shift. |
| **Variable end time** | Select this if you will accept a trade for a shift that ends at a different time than your regularly scheduled shift. |

   c. If needed, adjust variable start and end times as needed for an acceptable trade:

| | |
|---|---|
| **Min Start** | Earliest shift start time |
| **Max Start** | Latest shift start time |
| **Min End** | Earliest shift end time |
| **Max End** | Latest shift end time |

6. In the **Select a day to work** section:
   a. Select the check boxes for days you would work in trade.
   b. If needed, adjust the **Min Start** and **Max Start** times for a selected day.
7. In the **Request expires on** section, set an expiration date and time for your shift trade request.
8. Click **Submit Request**.

## Manage Trades

> **Requirements**: You need the Customize Client Security right to display the **My Shift Trading** view. For additional requirements, see Agent Optimizer Features and Requirements.

You can view and manage your trade requests and traded shifts in the My Shift Trading view.

1. In the My Shift Trading tab, click **My Trades**.

   **Result**: A list of your trade requests and accepted trades appears.

2. For trade requests that are **Unmatched** or **Pending review**, you can do any of the following:
   - Select the **Search** icon (magnifying glass) to search again for a match to this shift trade request.
   - Select the **Edit** icon (pencil) to change requested date, time, or type of match for this trade request.
   - Select the **Cancel** icon to cancel the shift trade request.

     > **Note**: Both the offering and accepting agent can see this cancelled request in the **My Trades** view.

# Interaction Process Automation

> **Requirements**: Only agents with the appropriate licenses and rights can use Interaction Process Automation. For more information, see IPA User Licenses and IPA User Rights. Also, IPA is available to Interaction Connect users only by special arrangement. To unlock this feature, the CIC administrator must contact Support for instructions.

Interaction Process Automation (IPA) is a communications-based process automation system that manages business processes by routing work items to qualified and available members of your organization in a defined and controlled manner.

For example, a customer could place an order, service request, loan application, or insurance claim by completing a form on your company website. Or, an agent could take preliminary information over the phone and start the appropriate process. IPA then routes the form to the first available agent who is qualified to process it or to the most appropriate workgroup queue. Work items routed to you appear in My Interactions view, just like any other ACD-routed interaction. If an agent does not pick up the work item (form) within a defined period of time, CIC routes it to the next available and qualified agent or workgroup. After an agent picks up the work item and completes the necessary task for processing it, IPA could then forward the application to an available supervisor for approval.

## Using IPA

If your PureConnect administrator assigns you the appropriate license and user rights in Interaction Administrator, you can:

- pick up a work item and complete a necessary task
- start a process that routes work items to other members of your organization

> **Note**: You do not need an IPA license to transfer a work item. For more information, see Transfer a Work Item.

## IPA Integration Differences

There are differences between IPA support in Interaction Connect and Interaction Desktop.

> **Warning**: One important difference is that clicking the **X** to close the Work Item Viewer in Interaction Connect does not save any data you entered or changed. It puts the Work Item in a state where you cannot work on it or disconnect it until the session times out which can take several minutes.

### Interaction Connect

- Work Items appear in My Interactions.
- Can filter work items by multiple work item categories
- The Work Item viewer website control will not load websites that specify that they cannot be hosted in an iframe.

### Interaction Desktop

- Work Items appear in the Work Item view.
- Can associate an interaction with a process.
- Can search for an already launched process.
- Can display Process Details.
- Automatically picks up a work item routed to you after launching a process.
- Can add Notes to a Process instance.
- Displays Work Item Reminders.
- Displays Work Item Warnings.

## User Licenses

The following licenses enable you to use IPA features. The PureConnect administrator assigns these licenses in Interaction Administrator.

> **Note**: Each license in this list enables you also to **use the IPA features included in all the previous licenses in the list**. That is, the Group Routed Work Items license includes the Direct Routed Work Items license. The Process Monitor license includes both of the Routed Work Items licenses. The Process Designer license includes all the other licenses.

- **Direct Routed Work Items** (I3_ACCESS_IPA_USER) license: Enables you to start any process to which you have rights. It also enables you to receive Work Items that are directly routed to you.
- **Group Routed Work Items** (I3_ACCESS_IPA_USER_ACD) license: Enables you to receive Work Items that are either routed to you directly or as a member of a workgroup (similar to an ACD queue).
- **Process Monitor** (I3_ACCESS_IPA_MONITOR) license: Enables you to view process status and details in the Process Monitor or to use Process Reporting in IC Business Manager Applications.
- **Process Designer** (I3_ACCESS_IPA_DESIGNER) license: Enables you to use the Process Designer to create and modify IPA processes or to use Process Reporting in IC Business Manager Applications.

> **Note**: For more information about designing processes, see the *Interaction Process Automation Technical Reference* and the *Interaction Process Automation Designer Help*.

## User Rights

Your PureConnect administrator can assign the following Processes Access Control rights to you in Interaction Administrator. These rights control which IPA functions you can use.

> **Note**: The View Queue Columns Access Control right determines whether you can display the Associated Process column in My Interactions or other queue view.

You can be assigned these rights for all process instances created from all or selected process definitions. For example, your process designer may create process definitions for a car loan, a new account, and a home improvement loan. You could be assigned the rights to start all of these processes or have the right only to start a car loan process.

These rights are independent of each other, not cumulative like IPA licenses. For example, you could be able to manage a process, but be unable to start it in the CIC client if you had only the Manage Process right to that process.

## Types of Access Control Rights for Processes

- **Launch Processes**: Enables you to start processes in the CIC client.

  > **Note**: The process designer must first create and publish the process.

- **Manage Processes**: In the Process Monitor, it enables you to manage and modify processes. Managing a process includes canceling a process or changing data elements in a process.

  > **Note**: Process Monitor is a separate application and is not part of the CIC client. It is an IC Business Manager module and an IC Server Manager module that an administrator can use to monitor, track, or interact with running process instances. For more information, see the *Interaction Process Automation Designer Help*.

## User Status

In order to receive ACD-routed work items, you must set your status to a type that indicates you are available for ACD (Automatic Communication Distribution). Your CIC system administrator determines in Interaction Administrator which user statuses indicate ACD availability. For example, an "Available" status may indicate you are available for ACD, but an "Available, Follow-Me" status could indicate you are not available for ACD. You can receive direct-routed or transferred work items regardless of your status.

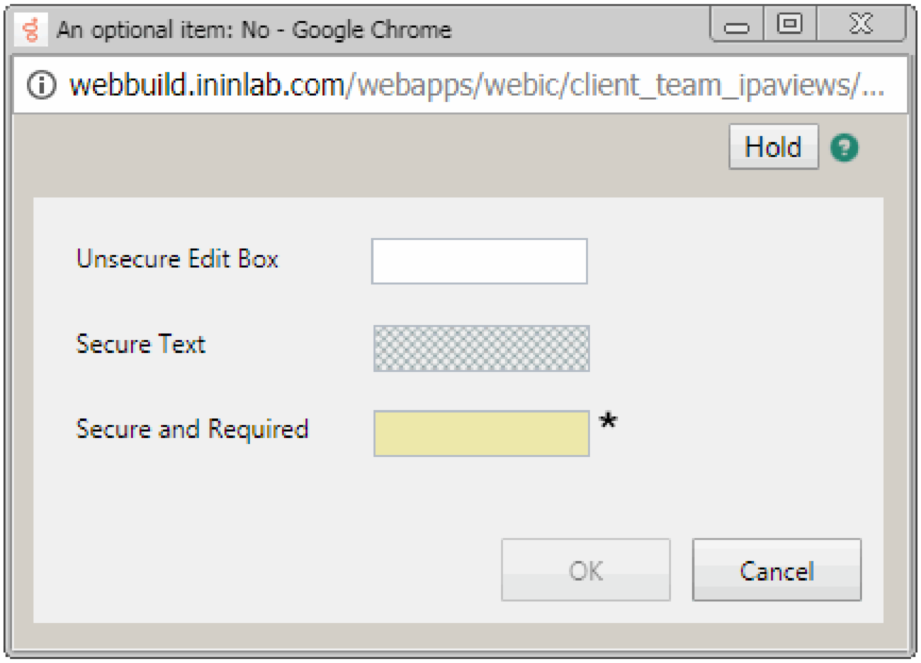
## IPA Security Specifications

IPA security specifications control access to secured data in work items. For example, the ability to view or edit social security numbers or credit card numbers can be restricted to users who are members of the appropriate IPA security specification.

> **Note**: Your CIC administrator configures IPA security specifications and assigns them to users in Interaction Administrator. Contact your CIC administrator if you have questions about IPA security specifications.

When a work item containing secured data is routed to you, one of the following can happen:

- If you **belong** to the necessary IPA security specifications for all the **required** data fields or controls in the work item, you see the work item. Any **non-required** data fields that call for a security specification to which you do not belong are obscured.




- If you **do not belong** to the necessary IPA security specification for any of the **required** data in the work item, the work item is placed on **hold**.

> **Tip**: You can transfer the work item to a user who belongs to the appropriate security specification or ask your CIC administrator to assign you to the necessary security specification.

**Related Topics**

[Interaction Process Automation Terminology]
[Processes]
[Work Items]

# Interaction Process Automation Terminology

**Requirements**: See Interaction Process Automation.

This topic defines Interaction Process Automation (IPA) terms that apply to using IPA. Terms that apply to designing and modifying IPA processes are discussed in the *Interaction Process Automation Designer Help*.

- **Action**: The smallest unit of work. A process consists of structured groups of actions. Actions can include completing a work item, accessing a database, invoking a Web service, calling a handler, interfacing with a mainframe or third-party application, sending email, queuing work items for groups of people, and more.
- **Active**: A process is either active or inactive. A process becomes active when it is published. An administrator can deactivate a process to stop people from using it. The CIC administrator or an IPA process designer can reactivate a process.
- **Form**: The user interface displayed when you pick up a work item. It also includes the work item category, description, and due date of the assigned work.
- **Launch a process**: A process can be initiated (launched) in different ways depending on how it is designed. For example, processes can be launched by a CIC client user or a handler.
- **Process Definition**: A Process Designer creates a process definition. A process is defined first in terms of states. A process is a group of states, running like an assembly line. States define the pipeline through which work flows. Each state is comprised of a series of tasks and actions.
- **Process Instance:** When a process is launched, a new process instance is created from the selected process definition. An instance is a running process. Multiple instances of the same process can run at the same time.
- **Task**: A sequence of actions performed by the CIC server and/or CIC client users to achieve a specified result.
- **Work Item:** A work item is a form that is presented to a CIC client user to gather information. When the corresponding process is launched, work items appear in **My Interactions**.
- **Work Item Interaction**: A related interaction, such as a call or fax, which is associated with a work item.
- **Work Item State**: The current condition of a work item. A work item state is similar to an interaction state. For more information, see Work Item States.

**Related Topics**

Interaction Process Automation

# Processes

**Requirements**: See Interaction Process Automation.

A process is a defined, ordered series of actions taken by Customer Interaction Center and CIC client users to achieve a specific end result. CIC client users are prompted to complete work as part of a process. Processes can also perform actions that involve accessing web sites. For example a process could access a website to look up required information, such as a vehicle's VIN number. The administrator who designs a process determines what actions occur during a process.

For example, your company could have a loan application process that requires several steps. These steps are performed by different CIC client users or automated Customer Interaction Center functions. The process includes actions for collecting, verifying, and evaluating information in the loan application, making a decision to accept or reject the application, and finally notifying the applicant of the decision.

If you have an IPA User License and the appropriate IPA User Rights, you can Start a Process.

**Related Topics**

Working with Interaction Process Automation
Interaction Process Automation Terminology
Work Items

## Start a Process

**Requirements**: See Interaction Process Automation.

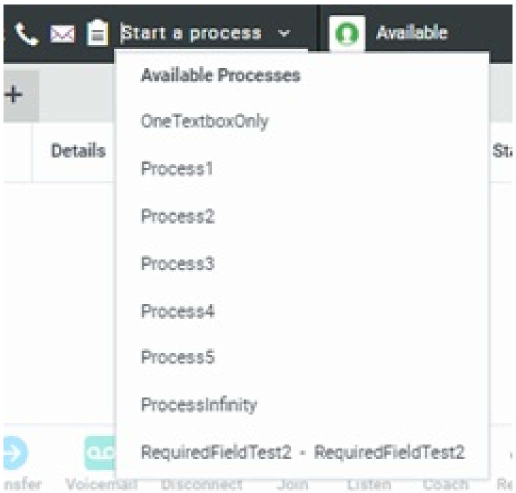
Properly licensed and authorized CIC client users can start a process. Customers may also be able to start a process from your company's website, if this option is available and appropriately configured.

**Tip**: Set your status to an "Available" type before starting a process.

**To start a process:**

Click the **Start a process** icon and do one of the following:

- Begin to type the name of the process, then select it from the Processes drop down list.
- Click the down arrow next to **Start a Process**. From the lists of **Recent Processes** or **Available Processes**, click a process name.




**Result**: Interaction Process Automation routes the first work item in the process. If IPA routes the first work item back to you, IPA alerts you to pick up a work item.

**Related Topics**

Processes

# Work Items

**Requirements:** See Interaction Process Automation.

When the corresponding process is launched, work items appear in My Interactions. A work item is a form where CIC client user records information.

If you have an IPA User License, the appropriate IPA User Rights, and the appropriate IPA Security Specification for all required data on the form, you can do any of the following:

- Pick Up a Work Item
- Put a Work Item on Hold
- Transfer a Work Item

## Work Item States

A work item state is the current condition of a work item. A work item state is similar to an interaction state. Possible work item states are:

- **New**: This is the state of a work item that has been routed by CIC to an agent or transferred by one agent to another, but not yet picked up by the recipient.

  **Note**: If this is an ACD-routed Work Item, you have a limited time to pick it up before it is re-routed to another agent or workgroup.
- **ACD - Wait Agent**: This is the state of a work item routed by CIC to a workgroup or transferred by an agent to a workgroup. It has not yet been picked up by an agent.
- **In Progress**: This is the state of a work item after you pick it up. It remains in this state while you view or work on the work item.
- **Held**: If you close a work item (i.e. click the red “x” or select the Hold action in its various locations), the work item is placed on hold. It is still assigned to your queue and you have looked at it, but you have not yet completed the work item.

  **Note**: A work item can be placed on Hold automatically if you do not belong to the necessary IPA security specification for any of the required data in the work item.
- **Completed**: This is the state of a work item after you finish working on it. After a certain amount of time, around 30 seconds, a Completed work item disappears from the queue and the My Work Items view.

**Related Topics**

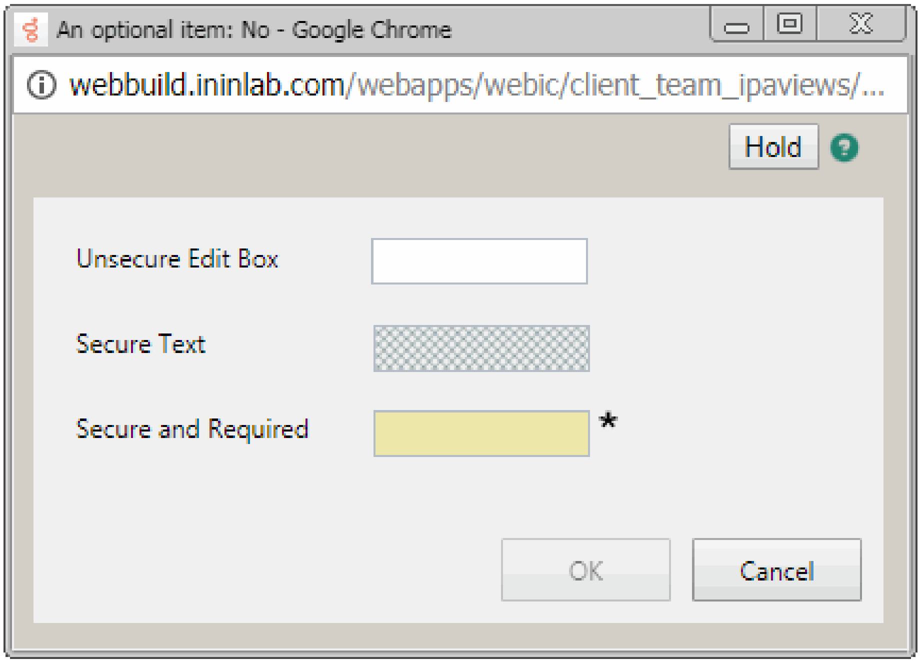
Monitor Two or More Queues at the Same Time
Processes
Work Item Alerts
Work Item Viewer

## Work Item Viewer

**Requirements:** See Interaction Process Automation.

A work item is a form used to gather information. It represents one step in a process. Work items can contain multiple pages. Clicking **OK** or a similarly named button can either close a work item or display the next page. After you complete an assigned work item, the process could generate a new work item and send it to the appropriate agent or workgroup to continue the process.

When you pick up a work item, it appears in the IPA Work Item Viewer. Your organization’s process architect designs the forms and controls the content of a work item. The form type and content also depend on the process that generates the work item.




**Warning**: Do **not** click the X in the Work Item Viewer to close it. It does not save any data you entered or changed. It also puts the Work Item in a state where you cannot work on it or disconnect it until the session times out which can take several minutes.

### Work Item Tips

Although work items vary in form and content, here are some tips for completing a work item:

### Hold

- Putting a work item on **hold** saves the current data.

  **Note**: Putting a work item on hold does not save **invalid** data. The last known valid value, if any, for a field containing an error appears when you pick up the work item again.

### Closed

- A work item could seem to close on its own for various reasons. For example, a supervisor can transfer a work item from you to another agent while you are working on it.

### Data

- A background color indicates a **required** field.
- An asterisk (*) indicates an empty **required** field.
- IPA security specifications can restrict access to some data.
- Highlighting and an exclamation point indicate a data entry **error**.

  **Tip**: Pointing your cursor to this exclamation point reveals a tooltip that can help you correct the error.

  **Note**: The IPA Work Item Viewer can indicate errors while you make an entry or only after you move to the next field.

### Buttons

- **Cancel** or similarly named buttons are always enabled.

- **Submit**, **OK**, or similarly named buttons are enabled only when all the required fields contain valid entries.

## Pick Up a Work Item

**Requirements**: See Interaction Process Automation.

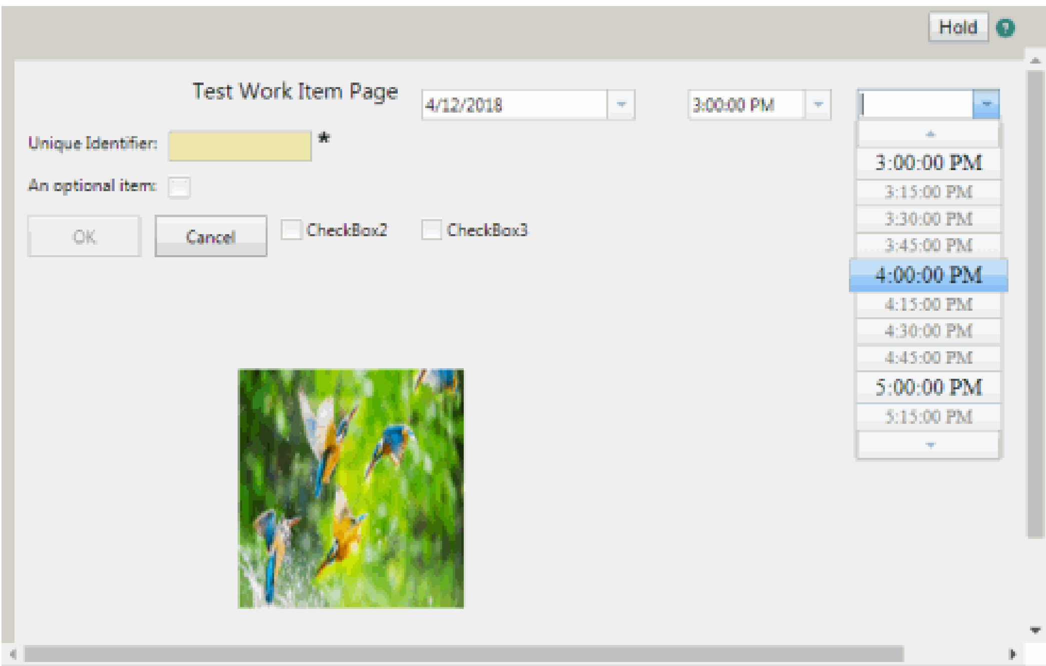
A work item represents one step in a process. You pick up a work item to complete part of a process. After you complete an assigned work item, the process may generate a new work item and send it to the appropriate agent or workgroup to continue the process.

Work items routed to you appear in **My Interactions**. Work Item Category, Work Item Description, and Work Item Due Date columns are not displayed by default in My Interactions, but you can add these columns. This helps you identify the types of work items in these queues. For more information, see Add or Remove View Columns.

**To pick up a work item:**

1. In **My Interactions**, select a work item that is in a New, ACD - Wait Agent, or Held state, and click **Pickup**.

   **Result**: The work item appears in the Work Item Viewer.




   **Tip**: Click the **Help** icon in the Work Item Viewer for more information.

2. Do one of the following:

- Perform the required action.

  **Result**: The work item state changes to **Completed**. After you complete a work item, it continues to appear in **My Interactions** for a limited time.

  **Note**: Picking up a work item prompts you to perform a step in the workflow process. You may need to enter data on a form or you might be required to click a button on a form that indicates you have reviewed or approved some step in a process. The type of action depends entirely on how your organization's designer constructed the process.

- Put the work item on hold.
  **Result**: The work item state changes to **Held**. It remains in the **My Work Items** view.

## Tips for Completing Work Items

- Putting a work item on hold **saves the current data.**

> **Note**: Invalid data is not saved if you put a work item on hold. The last known good value, if any, for a field containing an error appears when you pick up the work item again.

- Work item required fields are indicated by a background color. **Empty required fields** are indicated by asterisks (*).
- Access to some IPA data can be restricted. For more information, see IPA Security Specifications.
  - If you don't have the necessary IPA security specification to view a **non-required field or control** on the work item, it is obscured.
  - If you do not have the necessary IPA security specification for any of the **required data** in the work item, you see an error message that explains you cannot see the work item because you do not have access to the required data.
- Press **Tab** to move from field to field in a work item.

> **Tip**: If the work item contains a **multi-line text box**, first press **Insert** to turn off automatic insert, then you can tab through all the fields on the form.

- **Cancel** buttons are always enabled. **Submit** or **OK** buttons are enabled only when all required fields contain valid entries.
- Data entry errors are highlighted and are also indicated by an arrow. If you point to this arrow, a tool tip appears that can help you correct the error.

> **Note**: Depending on the type of control and type of data, data entry errors can be indicated while you are making an entry or only after you move to the next field.

**Related Topics**

Put a Work Item on Hold

## Put a Work Item on Hold

> **Requirements**: See Interaction Process Automation.

You can put a work item on hold and later pick up this work item to continue working with it. If you place a work item on hold, it remains on hold until you pick it up again. This applies both to ACD-routed work items and directly-routed work items.

**To put a work item on hold, do one of the following:**

- In My Interactions, select a work item that is in a New, ACD - Wait Agent, or In Progress state and click the **Hold** button.
- In My Interactions, right-click a work item that is in a New, ACD - Wait Agent, or In Progress state and choose **Hold** from the shortcut menu.
- In the Work Item Viewer, click the **Hold** button.

> **Warning**: Do **not** click the X in the Work Item Viewer to close it. It does not save any data you entered or changed. It also puts the Work Item in a state where you cannot work on it or disconnect it until the session times out which can take several minutes.

**Related Topics**

Pick Up a Work Item

## Transfer a Work Item

> **Requirements**: The Transfer Interactions Security right enables you to transfer an interaction appearing in My Interactions. Interaction Process Automation.

You can transfer a work item to another user or workgroup queue.

### Licenses and Other Conditions

You do not need an IPA license to transfer a work item. You can transfer a work item to another user or workgroup under certain conditions:

- You need the Transfer Interactions Security right to transfer an interaction appearing in My Interactions.
- You can transfer work items only to other IPA-licensed users or to a workgroup with at least one IPA-licensed user.

- If you transfer a work item to a workgroup, the target workgroup must have an associated queue.
- You can transfer only work items that are in a New, ACD - Wait Agent, or Held state. You cannot transfer a completed work item or a work item you are viewing or revising (**In Progress** state).

> **Note**: Interaction Supervisor users can transfer work items that are not on Hold, if necessary to continue a process. If a supervisor transfers a work item while an agent has that work item open, then any data changed or entered by the agent since the work item was picked up may be lost.

## Work Item Transfer Dialog Box

Transferring a Work Item uses the same basic Transfer dialog box as transferring an interaction, with some minor differences.

- The **Options** drop-down list limits your search for a transfer recipient to either users or workgroups or both. You cannot transfer a work item to a phone, station, station group or attendant profile, so these search criteria do not appear.
- The **Transfer** button dropdown list is disabled. The **Transfer to Voicemail**, **Park**, and **Consult** options do not apply to work items.

**To transfer a work item:**

1. In My Interactions, select a work item that is in a New, ACD - Wait Agent, or Held state.
2. Do one of the following:
   - On the view toolbar, click the **Transfer** button.
   - Right-click the work item and choose **Transfer** from the shortcut menu.

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

   **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. You can search by user or workgroup name or both.
4. From the drop-down list, select the appropriate recipient.

   **Result**: Status information appears for the selected user or workgroup, including whether a selected user is logged onto a CIC client and is available to accept the transferred work item. If the selected recipient is a workgroup, it shows how many interactions are in the workgroup queue, how many agents are logged on and how many agents are available. For more information, see Status Information for Transfer recipient.
5. Click the **Transfer** button.

   **Result**: The work item is removed from your My Work Items view or other queue where you selected it and is routed to the selected agent or workgroup.

   > **Important**: Certain work item settings are no longer in effect after a transfer. For example, work items can have a timeout setting that controls how much time a CIC user has to pick up an alerting work item before it is routed to another user. This pickup time limit no longer applies to the transferred work item because the transfer signals the work item is "being handled" or "under an agent's control."

**Related Topics**

Work Items

## Remove a Work Item

**Requirements:** See Interaction Process Automation.

You can remove a completed work item from **My Interactions** if you don't want to wait for it to disappear automatically after you complete it.

**Note**: You can remove only **completed** work items from a queue.

**To remove a work item from My Interactions:**

- Right-click a work item and select **Remove from Queue** from the shortcut menu.

**Related Topics**

Work Items

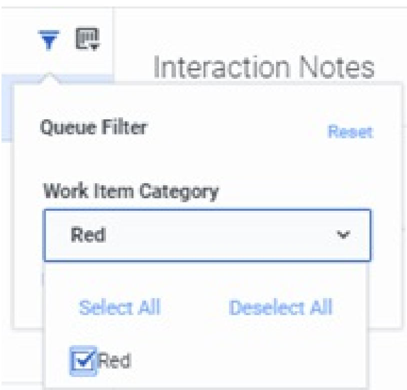
## Filter by Work Item Category

**Requirements:** See Interaction Process Automation.

If the My Interactions view contains Work Items, you can filter this view by Work Item Category.

**To filter My Interactions:**

1. Click the Configure Queue Filter control in the upper right corner of **My Interactions**.
2. Select the check boxes for the categories of Work Items.




3. To apply the filter and close the Queue Filter dialog, click anywhere outside the dialog.

   **Result**: My Interactions displays only Work Items assigned to those categories plus any other active interactions, such as Chats or Calls.

**Related Topics**

Filter a Queue View

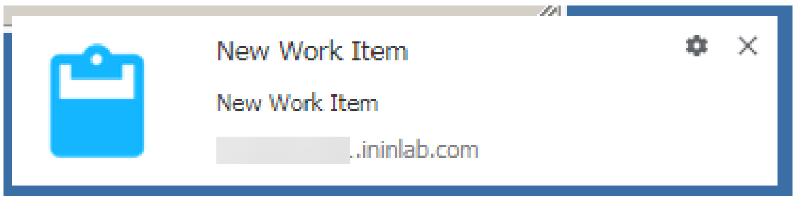
## Work Item Alerts

**Requirements**: See Interaction Process Automation.

When an ACD-routed work item is sent to you, you have a limited time to pick it up before it is re-routed to another agent or workgroup. Because of this time constraint, you are alerted to the arrival of **any new work item** (even one that is not ACD-routed):

- If you are occupied with a direct-routed work item (one that was sent to you specifically), you are always alerted to the arrival of any **new ACD-routed work item** in My Interactions.

- A Work Item Alert (toast message) can also appear on your desktop.




**Note**: whether this desktop alert appears is controlled by same configuration setting that determines if a desktop alert appears for alerting interactions and camped calls. The amount of time it takes for the desktop alert to fade away is also controlled by a configuration setting. For more information, see Desktop Alerts.

- Normally, you see the alert when the work item arrives in My Interactions. However, if you are not logged onto the CIC client at the time the work item is routed to you, you see the alert the next time you log on to the CIC client if the work item is **still in your queue**. There is no sound associated with this alert.

**Related Topics**

Pick Up a Work Item
Work Items

# Interaction Quality

The My Quality Results view in Interaction Connect provides secure access to scorecards and their associated recordings. You can review recordings of your interactions and acknowledge scorecards for these interactions in the My Quality Results view.

**Requirements**: To view and use the My Quality Results view, you need the **Interaction Quality Monitoring Agent** license. To play back recordings from this view, you also need the **Interaction Recorder Client Access** license. To properly generate and assign these licenses, the CIC administrator should follow the instructions in License Agents for the My Quality Results View in Interaction Connect.

**Important**: The My Quality Results view also requires that the PureConnect administrator use **HTTPS certificates signed by a third-party certificate authority** for the CIC server and any associated Interaction Recorder Remote Content Service servers and for proxies forwarding traffic by HTTPS. If these servers do not use an HTTPS certificate signed by a third-party certificate authority, Interaction Connect users can encounter a certificate warning from a web browser that requires the user to accept or bypass the warning to view playback recordings.

For more information, see the following documents in the PureConnect Documentation Library. For the CIC server, see "Create Signing Requests and Import Third-Party Signed Certificate" in the *PureConnect Installation and Configuration Guide*. For the Remote Content Service, see "Create an HTTPS certificate signed by a certificate authority for viewing playback recordings" in the *Interaction Recorder Remote Content Service Installation and Configuration Guide*.

**Related Topics**

- Acknowledge Scorecards
- Call Scorecard
- Chat Scorecard
- Email Scorecard
- My Quality Results
- Social Conversation Scorecard

# Acknowledge Scorecards

As an agent, your part of the quality management process is to review your interactions after your supervisor or other manager scores them. To show that you have completed this task, you acknowledge the associated scorecards.

**To acknowledge a scorecard:**

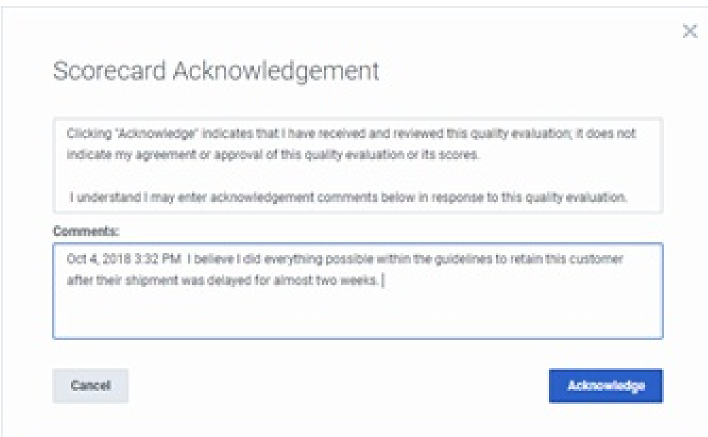
1. In the My Quality Results view, search for scorecards by setting Filter by criteria and clicking **Search**.
2. Review your scorecard by doing one of the following:

- Select a scorecard in the search results, set **Preview** to ON then review the scorecard in the Scorecard Preview.
- Double-click a scorecard or click the blue scorecard ID link in the search results, then review the scorecard
- Select a row and click the **View button**, then review the scorecard in the Call Scorecard, Chat Scorecard, or Email Scorecard.

- When you finish your review, click **Acknowledge Scorecard**.

> **Note**: The Acknowledge Scorecard button does not appear if no acknowledgement is required. If you have already acknowledged this scorecard, you can click **View Acknowledgement** to review any comments you made when acknowledging this scorecard.

4. In the **Scorecard Acknowledgement** dialog box, you can optionally enter any comments relevant to this scorecard.



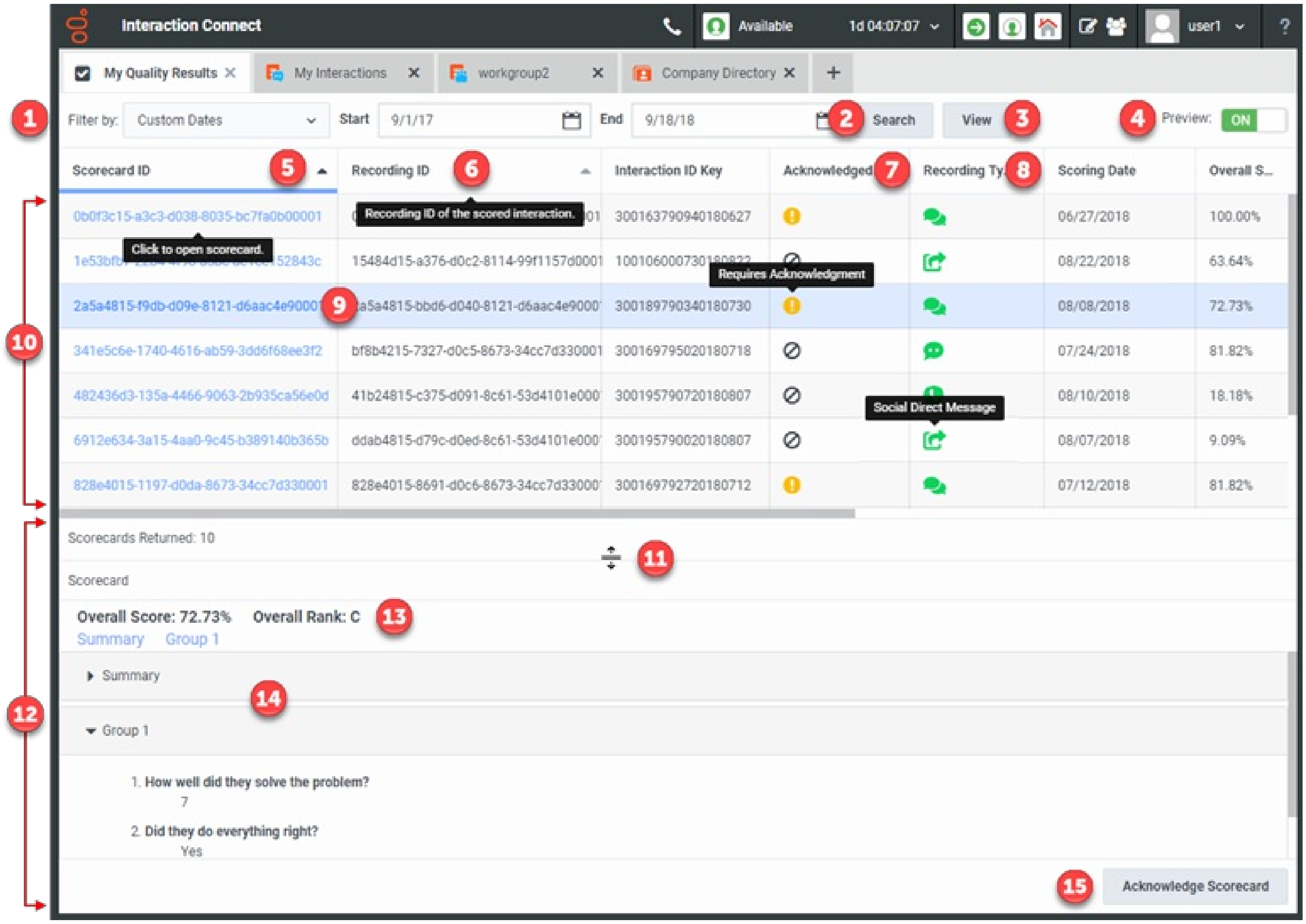

5. Click **Acknowledge**.

# My Quality Results

> **Requirement**: See Interaction Quality.

The My Quality Results view provides secure access to scorecards and their associated recordings of your interactions. The My Quality Results view can display a list of scorecards or a selected scorecard. When required, you can acknowledge that you reviewed these scorecards.

- The scorecard list displays a list of scorecards that match your search criteria. You can also display a preview for the selected scorecard.
- The selected scorecard view displays both the scores and survey results. It also enables the agent to listen to or view a recording of the interaction. The view varies slightly depending on recording type.
  - Chat scorecard
  - Call scorecard
  - Email scorecard
  - Social Conversation Scorecard
  - Social Direct Message Scorecard




## Scorecard List

You can display a list of scorecard for selected dates or display only scorecards that require acknowledgment.

| | | |
|---|---|---|
| 1 | **Filter by** | You can search by date or for scorecards that require acknowledgment. |
| 2 | **Search** | The view is blank until you click **Search** to find Scorecards that match your search filter. |
| 3 | **View** | Display the Scorecard view for the selected Scorecard and<br>• see Media Details<br>• listen to a call recording<br>• read a chat recording<br>• view Scorecard details<br>• acknowledge the Scorecard |
| 4 | **Preview** | Turns the Scorecard Preview pane on or off. |
| 5 | **Sort by column** | Click any column heading to sort the search results. Click once for ascending order, twice for descending order. |
| 6 | **Column tooltip** | Hover over a column heading to display a tooltip. |
| 7 | **Acknowledged** | Icons indicate whether you have acknowledged a scorecard or if acknowledgment is not required. Hover over an icon to display a tooltip that identifies it. |
| 8 | **Recording type** | Icons indicate the type of recorded interaction. Hover over an icon to display a tooltip that identifies it. |
| 9 | **Selected Scorecard** | The currently selected scorecard is highlighted. Click the Scorecard ID or double-click anywhere in the row to display a selected scorecard. |
| 10 | **Search results** | Displays the Scorecards that match your search criteria. **Scorecards returned** displays the number of scorecards that were found. |
| 11 | **Splitter** | Adjust the relative heights of the scorecard list and preview sections in the My Quality Results view. |

## Scorecard Preview

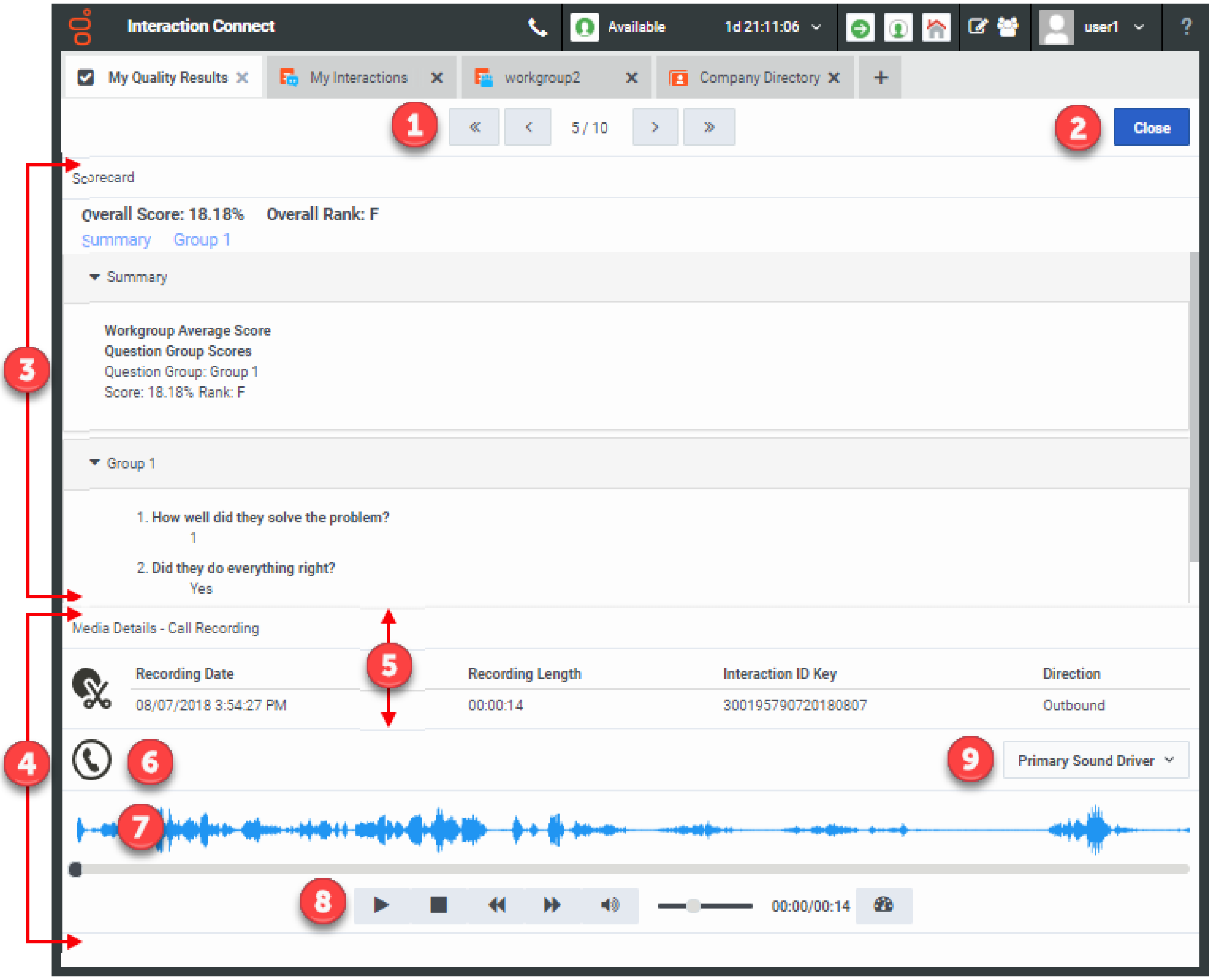
This Scorecard preview section displays scorecard scoring and questions. It provides the details of how your supervisor or manager scored this interaction. You can acknowledge the scorecard in this view or open the scorecard in a more detailed view before signing off on it.

| | | |
|---|---|---|
| 12 | **Scorecard Preview** | View scorecard details here or in the Scorecard view. The **Preview** button turns this Scorecard Preview on and off. |
| 13 | **Scores and Rank** | Supervisors and other managers score recordings in Interaction Recorder for IC Business Manager. They also use Interaction Quality Manager to create the questionnaires used to score recordings. For more information, see the PureConnect Documentation Library.<br>• **Overall Score**: A calculated average of the scores for all the question groups in the scorecard.<br>• **Overall Rank**: A ranking for the scorecard based on a percentage scale for scores as defined in Interaction Quality Manager. For example, A could stand for 90-100 percent, B for 80-89 percent, and so on.<br>• **Critical Score:** The number of critical questions with passing grades over the total number of critical questions. |
| 14 | **Question Groups** | Expand a Question Group to review the answers in detail.<br>**Note**: A chat icon indicates that at least one question in this group has a comment. Comments are highlighted. |
| 15 | **Acknowledgement button** | Click **Acknowledge Scorecard** to display the **Scorecard Acknowledgement** dialog box where you can indicate you have reviewed the selected scorecard and enter comments.<br>If you have already acknowledged this scorecard, you can click **View Acknowledgement** to review any comments you made when acknowledging this scorecard.<br>**Note**: If no acknowledgment is required, no button appears. |

## Call Scorecard

You can acknowledge a scorecard and review a recording in the Call Scorecard.

**Requirement**: See Interaction Quality.

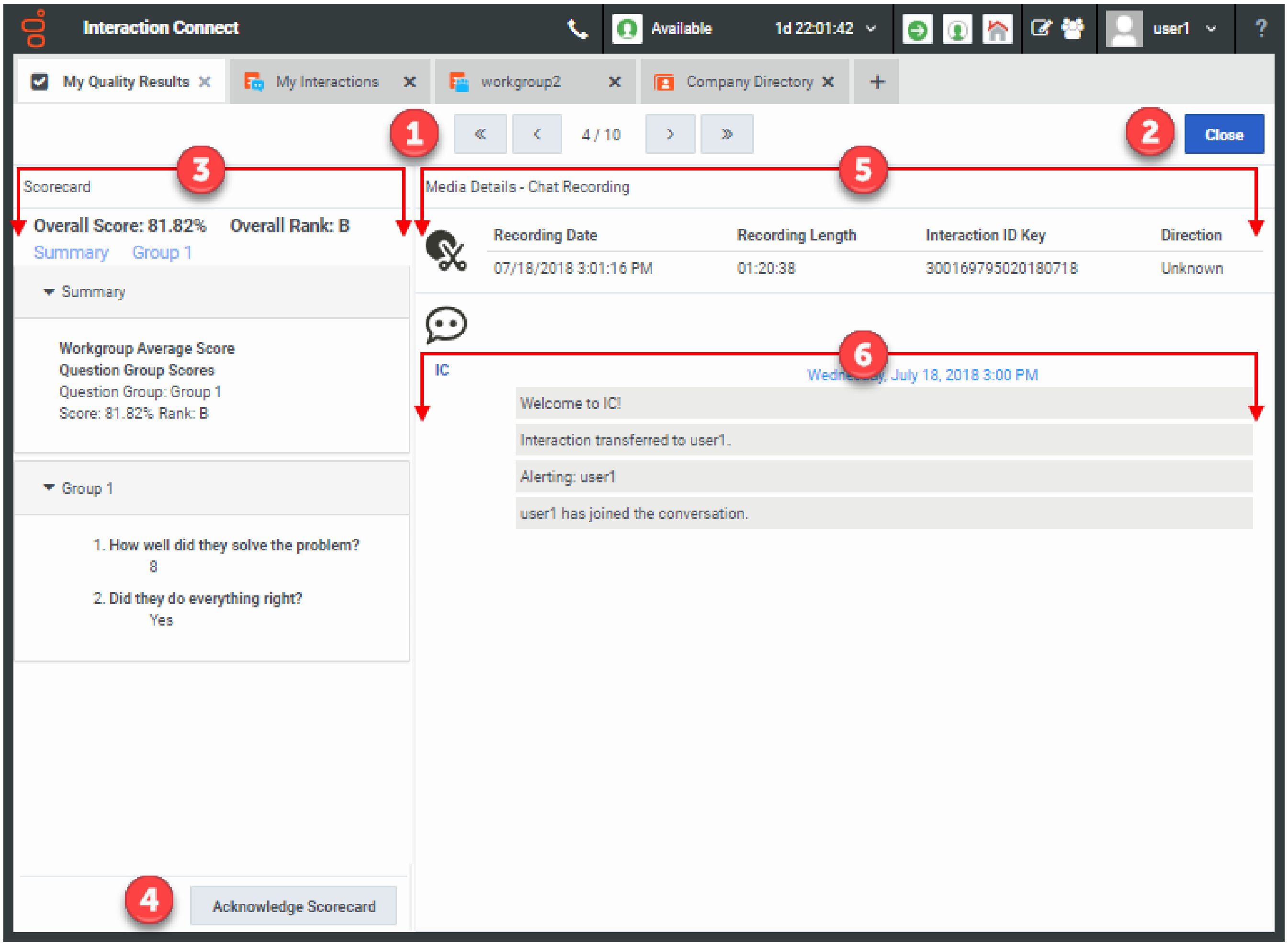

Interaction Connect
Available
1d 21:11:06
user1
My Quality Results
My Interactions
workgroup2
Company Directory
5 / 10
Close
1
2
3
4
5
6
7
8
9
Scorecard
Overall Score: 18.18%
Overall Rank: F
Summary
Group 1
Summary
Workgroup Average Score
Question Group Scores
Question Group: Group 1
Score: 18.18% Rank: F
Group 1
1. How well did they solve the problem?
1
2. Did they do everything right?
Yes
Media Details - Call Recording
Recording Date
08/07/2018 3:54:27 PM
Recording Length
00:00:14
Interaction ID Key
3001957907201808 07
Direction
Outbound
Primary Sound Driver
00:00/00:14

| | | |
|---|---|---|
| 1 | **Navigation controls** | Use these controls to view other scorecards found by the Scorecard search. |
| 2 | **Close** | Click **Close** to return to the My Quality Results Scorecard list and preview. |
| 3 | **Scorecard** | Use this section to review the scores for this interaction. See Scorecard for a description of the information available here. |
| 4 | **Interaction recording** | This section includes media details and controls for playing back the recorded call. |
| 5 | **Media Details** | This section displays the date of the recording and its length. It also displays Interaction ID for the recorded interaction. Interaction direction can be Inbound or Outbound for calls.<br>An icon indicates recording type.<br>• **Policy-based recording**<br>This is a recording made automatically based on criteria set in the Interaction Recorder Policy Editor.<br><br>• **Snippet recording**<br>This is a user-initiated recording. It is stored in the CIC database. For more information about Snippet recordings, see Recording Types.<br> |
| 6 | **Call Recording** | A Call recording is indicated by both a label and an icon.<br> |
| 7 | **Waveform** | A single waveform indicates a Mono Channel recording.<br>Two waveforms indicate a Dual Channel recording where two distinct channels, one per party in the conversation, are recorded separately on same audio recording. |
| 8 | **Playback controls** | The playback controls include:<br>• Audio Seek bar<br>• Play/Pause toggle<br>• Stop<br>• Forward (5 secs)<br>• Backward (5 secs)<br>• Mute toggle<br>• Volume Slider (0 - 100)<br>• Playback speed gauge (0.5x, 1x, 1.1x, 1.2x, 1.3x, 1.4x, 1.5x, 2x, 4x)<br>**Note**: The selected playback speed remains constant for the current scorecard while you pause, stop or perform any other recording action. Playback speed resets to 1x when you change to another scorecard. |
| 9 | **Device for playback** | Select the device to play the call recording.<br>• **Primary Sound Driver**<br>Play back the recording through your computer speakers.<br>• **Telephone Handset**<br>Play back the recording to your CIC extension and listen using your telephone handset.<br>**Note**: Your CIC administrator can set **Telephone Handset** as the default playback device in Interaction Recorder configuration in Interaction Administrator. |

## Chat Scorecard

You can acknowledge a scorecard and review a chat recording (transcript) in the Chat Scorecard.

**Requirement**: See Interaction Quality.

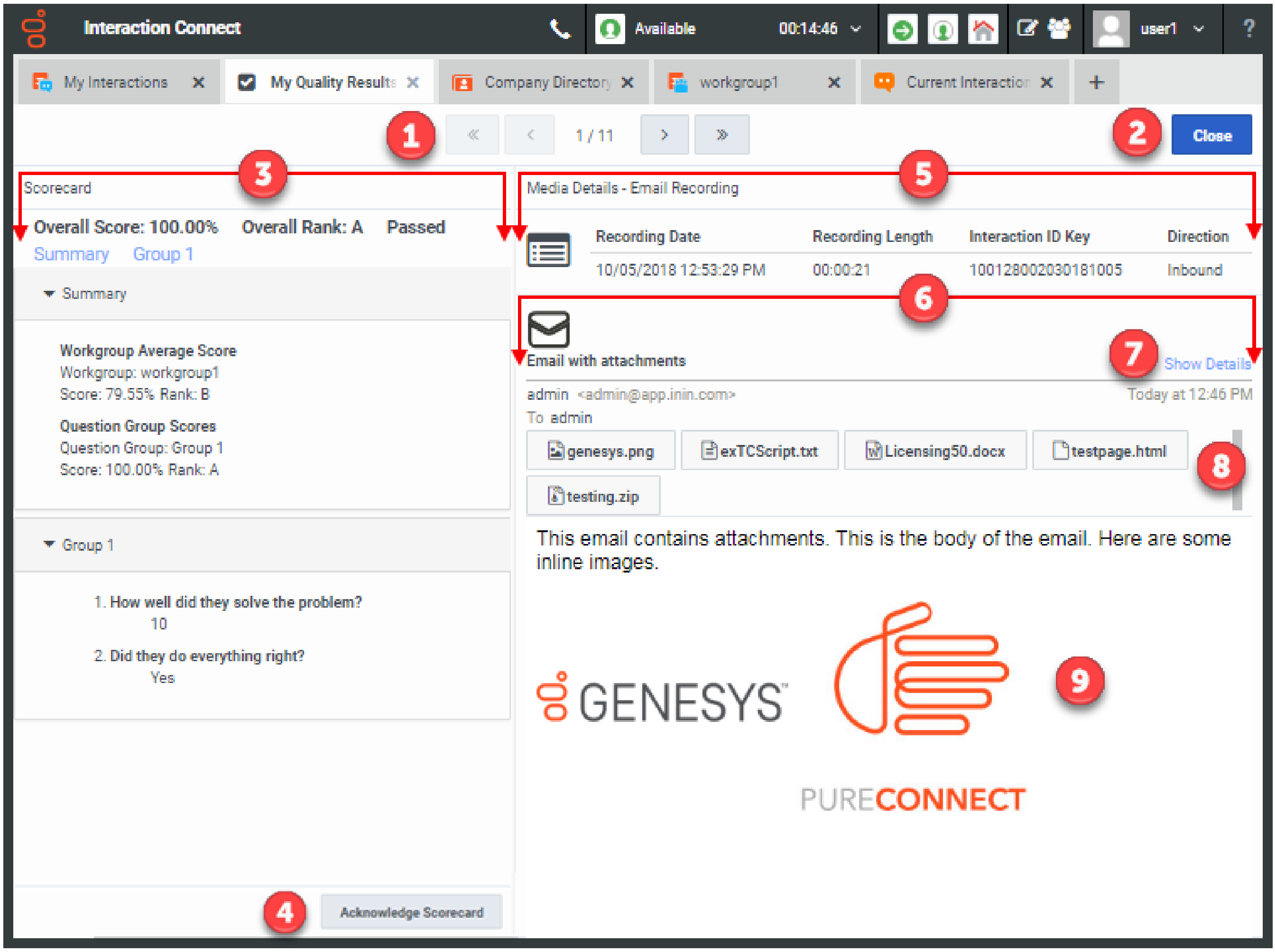


| | | |
|---|---|---|
| 1 | **Navigation controls** | Use these controls to view other scorecards found by the Scorecard search. |
| 2 | **Close** | Click **Close** to return to the My Quality Results Scorecard list and preview. |
| 3 | **Scorecard** | Use this section to review the scores for this interaction. See Scorecard for a description of the information available here. |
| 4 | **Acknowledgement** button | Click **Acknowledge Scorecard** to display the **Scorecard Acknowledgement** dialog box where you can indicate you have reviewed the selected scorecard and enter comments.<br>If you have already acknowledged this scorecard, you can click **View Acknowledgement** to review any comments you made when acknowledging this scorecard.<br>**Note**: If no acknowledgment is required, no button appears. |
| 5 | **Media Details** | This section displays the date of the recording and its length. It also displays Interaction ID for the recorded interaction. Interaction direction is always Unknown for chats.<br>An icon indicates recording type.<br>• **Policy-based recording**<br>This is a recording made automatically based on criteria set in the Interaction Recorder Policy Editor.<br><br>• **Snippet recording**<br>This is a user-initiated recording. It is stored in the CIC database. For more information about Snippet recordings, see Recording Types.<br><br>A Chat recording is indicated by an icon. The names of the Chat participants appear here.<br> |
| 6 | **Chat conversation** | A Chat recording is a text record of the Chat conversation. |

# Email Scorecard

You can acknowledge a scorecard and review an email recording in the Email Scorecard.

**Requirement**: See Interaction Quality. You also need Interaction Connect version 2018 R4 or later.

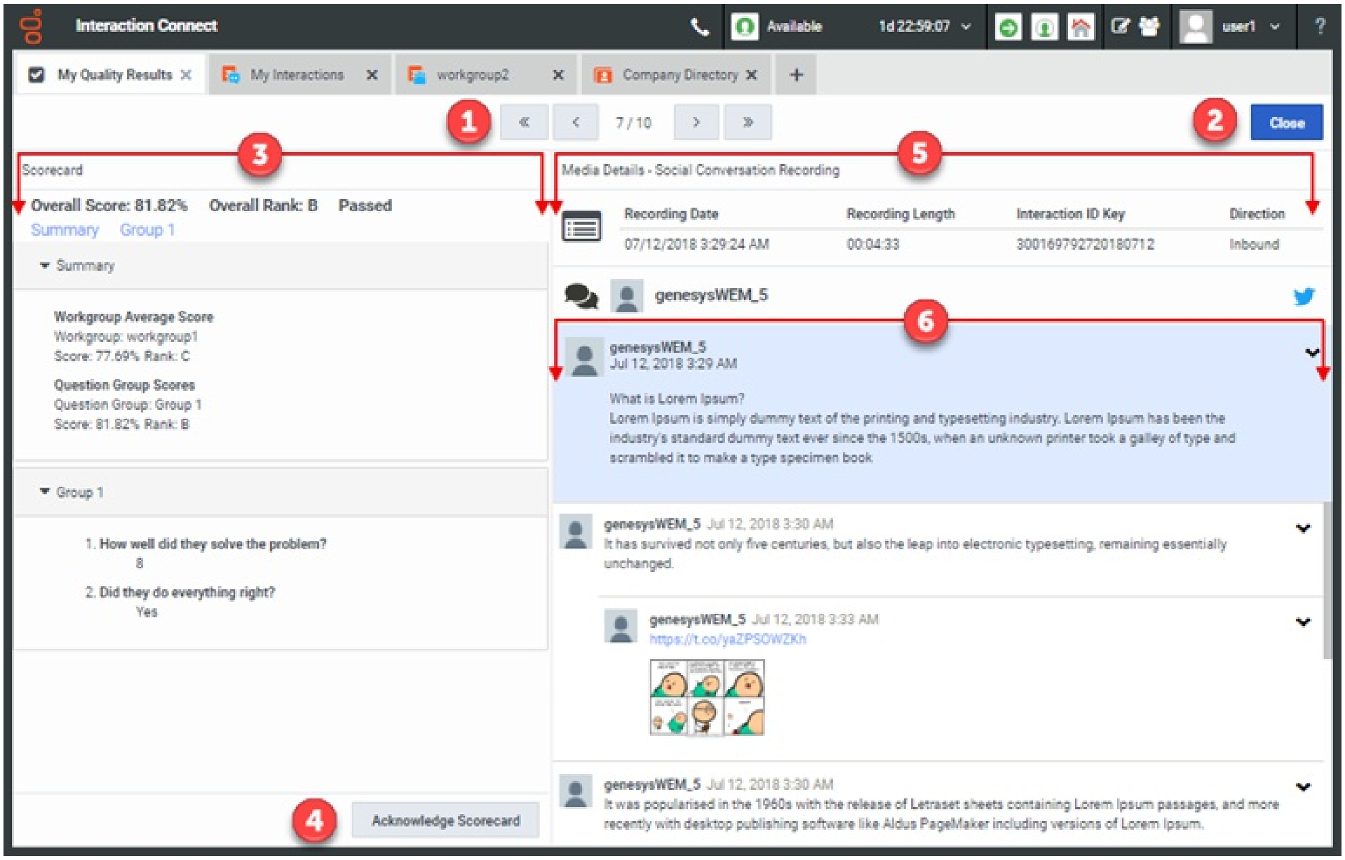

Interaction Connect
Available
00:14:46
user1
My Interactions
My Quality Results
Company Directory
workgroup1
Current Interaction
1 / 11
Close
Scorecard
Overall Score: 100.00% Overall Rank: A Passed
Summary Group 1
Summary
Workgroup Average Score
Workgroup: workgroup1
Score: 79.55% Rank: B
Question Group Scores
Question Group: Group 1
Score: 100.00% Rank: A
Group 1
1. How well did they solve the problem?
10
2. Did they do everything right?
Yes
Acknowledge Scorecard
Media Details - Email Recording
Recording Date
Recording Length
Interaction ID Key
Direction
10/05/2018 12:53:29 PM
00:00:21
100128002030181005
Inbound
Email with attachments
Show Details
admin <admin@app.inin.com>
Today at 12:46 PM
To admin
genesys.png
exTCScript.txt
Licensing50.docx
testpage.html
testing.zip
This email contains attachments. This is the body of the email. Here are some inline images.
GENESYS
PURECONNECT
1
2
3
4
5
6
7
8
9

| | | |
|---|---|---|
| 1 | **Navigation controls** | Use these controls to view other scorecards found by the Scorecard search. |
| 2 | **Close** | Click **Close** to return to the My Quality Results Scorecard list and preview. |
| 3 | **Scorecard** | Use this section to review the scores for this interaction. See Scorecard for a description of the information available here. |
| 4 | **Acknowledgement** button | Click **Acknowledge Scorecard** to display the **Scorecard Acknowledgement** dialog box where you can indicate you have reviewed the selected scorecard and enter comments.<br>If you have already acknowledged this scorecard, you can click **View Acknowledgement** to review any comments you may have made when acknowledging this scorecard.<br>**Note**: If no acknowledgement is required, no button appears. |
| 5 | **Media Details** | This section displays the date of the recording and its length. It also displays Interaction ID for the recorded interaction.<br>An icon indicates recording type.<br>• An icon indicates recording type.<br>• **Policy-based recording**<br>This is a recording made automatically based on criteria set in the Interaction Recorder Policy Editor.<br><br>• **Snippet recording**<br>This is a user-initiated recording. It is stored in the CIC database. For more information about Snippet recordings, see Recording Types.<br> |
| 6 | **Email recording** | An Email recording is indicated by an icon.<br> |
| 7 | **Show / Hide Details** | Click **Show Details** to display the complete email addresses in the To, Cc, and Bcc fields. Click **Hide Details** to display only the addressee names. |
| 8 | **Attached file(s)** | Any files attached to the email interaction appear here. Click the attachment to download the file. Then you can view or play back the files in the associated desktop application. |
| 9 | **Inline images** | Email recordings display inline (embedded) images. |

## Social Conversation Scorecard

You can acknowledge a scorecard and review a recording of a social conversation interaction in the Social Conversation Scorecard.

**Requirement**: See Interaction Quality.



Interaction Connect
Available
1d 22:59:07
user1
My Quality Results
My Interactions
workgroup2
Company Directory
7 / 10
Close
Scorecard
Overall Score: 81.82%
Overall Rank: B
Passed
Summary
Group 1
Summary
Workgroup Average Score
Workgroup: workgroup1
Score: 77.69% Rank: C
Question Group Scores
Question Group: Group 1
Score: 81.82% Rank: B
Group 1
1. How well did they solve the problem?
8
2. Did they do everything right?
Yes
Acknowledge Scorecard
Media Details - Social Conversation Recording
Recording Date
Recording Length
Interaction ID Key
Direction
07/12/2018 3:29:24 AM
00:04:33
300169792720180712
Inbound
genesysWEM_5
genesysWEM_5
Jul 12, 2018 3:29 AM
What is Lorem Ipsum?
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book
genesysWEM_5 Jul 12, 2018 3:30 AM
It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged.
genesysWEM_5 Jul 12, 2018 3:33 AM
https://t.co/yaZPSOWZKh
genesysWEM_5 Jul 12, 2018 3:30 AM
It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.
1
2
3
4
5
6

| | | |
|---|---|---|
| 1 | **Navigation controls** | Use these controls to view other scorecards found by the Scorecard search. |
| 2 | **Close** | Click **Close** to return to the My Quality Results Scorecard list and preview. |
| 3 | **Scorecard** | Use this section to review the scores for this interaction. See Scorecard for a description of the information available here. |
| 4 | **Acknowledgment** button | Click **Acknowledge Scorecard** to display the **Scorecard Acknowledgment** dialog box where you can review the selected scorecard and enter comments.<br>If you have already acknowledged this scorecard, you can click **View Acknowledgment** to review any comments you made when acknowledging this scorecard.<br>**Note**: If no acknowledgment is required, no button appears. |
| 5 | **Media Details** | This section displays the date of the recording and its length. It also displays Interaction ID for the recorded interaction.<br>An icon indicates recording type.<br>• An icon indicates recording type.<br>• **Policy-based recording**<br>This is a recording made automatically based on criteria set in the Interaction Recorder Policy Editor.<br><br>• **Snippet recording**<br>This is a user-initiated recording. It is stored in the CIC database. For more information about Snippet recordings, see Recording Types.<br> |
| 6 | **Social conversation** | A Social conversation recording displays the entire conversation as it appeared in the Current Interaction view. For more details, see Facebook conversations and Twitter conversations. |

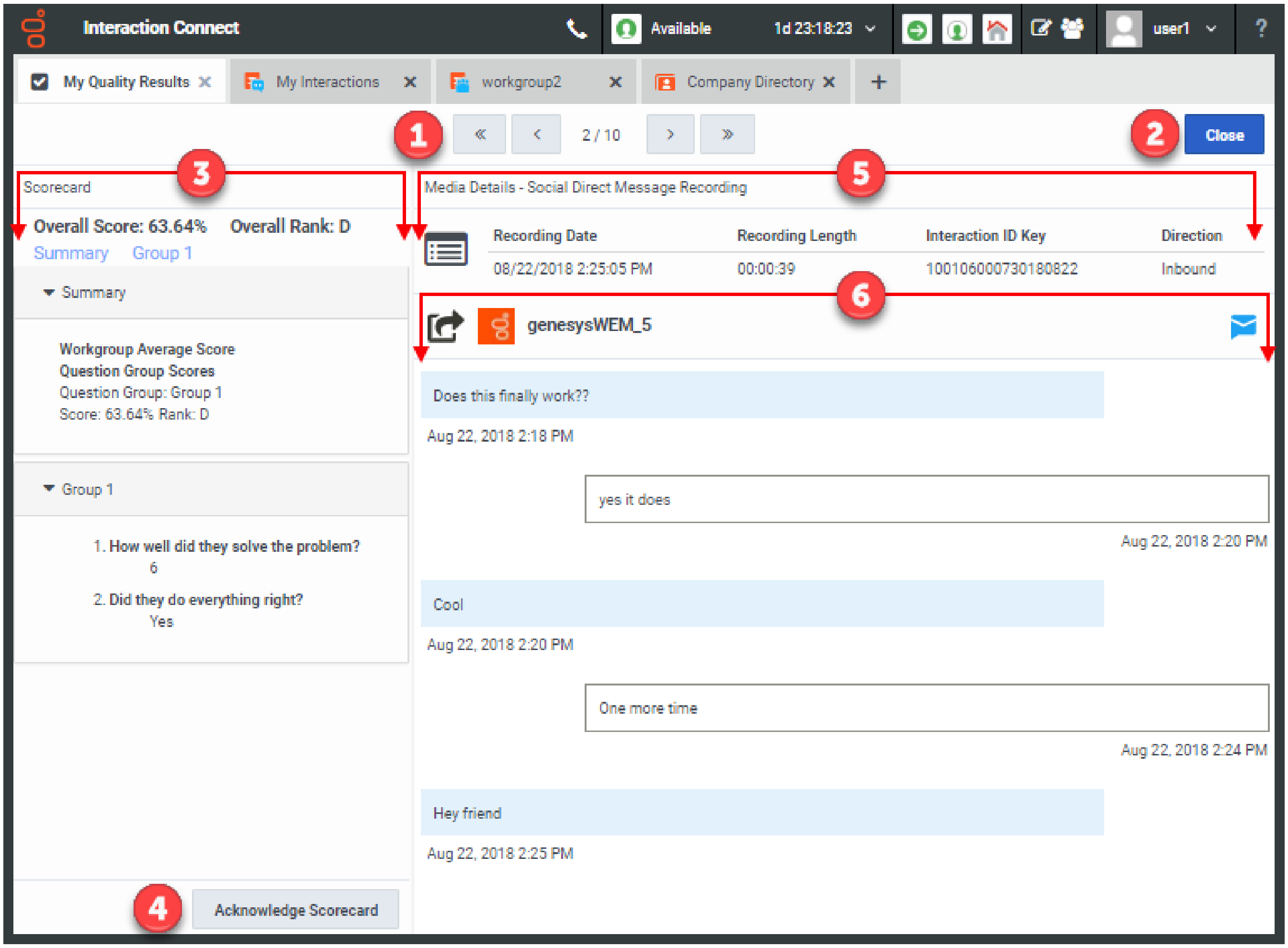
**Related Topics**

Acknowledge Scorecards
Managing Social Media
My Quality Results

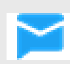
# Social Direct Message Scorecard

You can acknowledge a scorecard and review a recording of a social direct message interaction in the Social Direct Message Scorecard.

**Requirement**: See Interaction Quality.



Interaction Connect
Available
1d 23:18:23
user1
My Quality Results
My Interactions
workgroup2
Company Directory
1
2 / 10
2
Close
3
Scorecard
Overall Score: 63.64%
Overall Rank: D
Summary
Group 1
Summary
Workgroup Average Score
Question Group Scores
Question Group: Group 1
Score: 63.64% Rank: D
Group 1
1. How well did they solve the problem?
6
2. Did they do everything right?
Yes
4
Acknowledge Scorecard
5
Media Details - Social Direct Message Recording
Recording Date
Recording Length
Interaction ID Key
Direction
08/22/2018 2:25:05 PM
00:00:39
100106000730180822
Inbound
6
genesysWEM_5
Does this finally work??
Aug 22, 2018 2:18 PM
yes it does
Aug 22, 2018 2:20 PM
Cool
Aug 22, 2018 2:20 PM
One more time
Aug 22, 2018 2:24 PM
Hey friend
Aug 22, 2018 2:25 PM

| | | |
|---|---|---|
| 1 | **Navigation controls** | Use these controls to view other scorecards found by the Scorecard search. |
| 2 | **Close** | Click **Close** to return to the My Quality Results Scorecard list and preview. |
| 3 | **Scorecard** | Use this section to review the scores for this interaction. See Scorecard for a description of the information available here. |
| 4 | **Acknowledgment** button | Click **Acknowledge Scorecard** to display the **Scorecard Acknowledgment** dialog box where you can review the selected scorecard and enter comments.<br>If you have already acknowledged this scorecard, you can click **View Acknowledgment** to review any comments you made when acknowledging this scorecard.<br>**Note**: If no acknowledgment is required, no button appears. |
| 5 | **Media Details** | This section displays the date of the recording and its length. It also displays Interaction ID for the recorded interaction.<br>An icon indicates recording type.<br>• An icon indicates recording type.<br>• **Policy-based recording**<br>This is a recording made automatically based on criteria set in the Interaction Recorder Policy Editor.<br><br>• **Snippet recording**<br>This is a user-initiated recording. It is stored in the CIC database. For more information about Snippet recordings, see Recording Types.<br> |
| 6 | **Social Direct Message** | This icon indicates a direct message recording.<br><br>The name of the Twitter account or Facebook page to which customer sent the message appears here.<br>These icons indicate Twitter and Facebook direct messages.<br>• Twitter <br>• Facebook <br>A Social Direct Message recording displays the entire interaction as it appeared in the Current Interaction view. For more details, See Facebook Direct Messages and Twitter direct messages. |

**Related Topics**

Acknowledge Scorecards
Managing Social Media
My Quality Results

# Interaction Scripter

**Requirements**: To use the Interaction Scripter integration with Interaction Connect, you need the **Interaction Scripter** and **Interaction Dialer Add-On** licenses. To select the campaigns in which you want to participate, you need the **Logon Campaign** Security right. Agents without this right automatically log on to all active campaigns associated with the workgroups to which the agent belongs.

You use Interaction Scripter to process outbound calls placed by Interaction Dialer. These outbound calls are **campaign** calls. A campaign is a collection of properties that tell Interaction Dialer how to process the database table that contains telephone numbers and other information.

## Scripts

Every campaign has a script that controls what you see in the Interaction Scripter view when a call is sent to you. The Interaction Scripter view supports both **basic** and **custom** campaign scripts.

Your CIC administrator defines basic campaign scripts in Interaction Administrator. Basic scripts display columns from the contact list, and may offer textual prompts for the agent to read to the contact. Basic scripts provide simple page-to-page navigation controls and call disposition options.

Custom scripts also provide screen pop, navigation controls, and disposition options, but with any desired appearance and layout. Custom scripts require web development expertise to create.

**Note:** Custom scripts written to run in Interaction Scripter .NET Client must be modified to run in Interaction Connect. Developers can find information about the required modifications in the Interaction Scripter Developer's Guide in the PureConnect Documentation Library.

## Interaction Scripter view

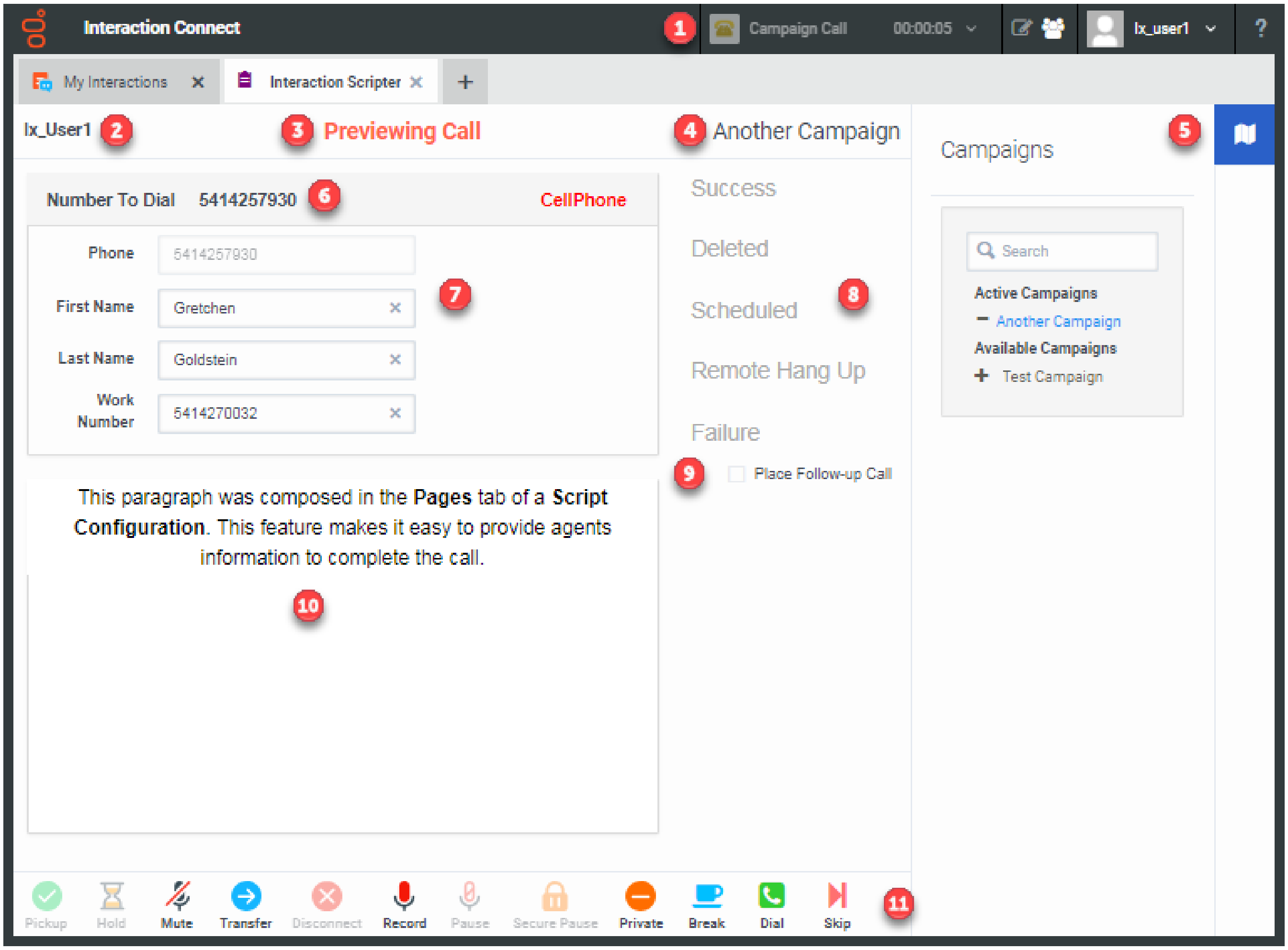
**Requirements**: You need the Customize Client Security right to add views. You need the appropriate My Interaction Rights to use the standard queue control toolbar buttons. For more requirements, see Interaction Scripter.

The Interaction Scripter view contains information pertaining to the call, the customer, and the campaign, based on behavior defined in a script. This information appears in a form that you complete. All information that you collect or modify during the call is routed back to database tables. The features available in the Interaction Scripter view are similar to Interaction Scripter .NET Client features (sometimes called the Dialer client).

### Display the Interaction Scripter view

You add the Interaction Scripter view to your CIC client as you would any other view. For instructions, see Add or Close Views. You also control where the view appears in your CIC client. For more information, see Change View Layout.

### Use the Interaction Scripter view




| | | |
|---|---|---|
| 1 | **Agent status and time in status** | Interaction Scripter automatically changes your status. |
| 2 | **Agent name** | Your name or user ID appears here. |
| 3 | **Call type** | **Regular Call**<br>Interaction Dialer places the call for the agent. You can disposition the call.<br>**Preview Call**<br>This presents you with information about the connected party. You can disposition or reschedule the call.<br>**Previewing Call**<br>This presents you with information about the targeted party. The call is not yet connected. If the countdown time is enabled, you can connect when ready or skip to the next data pop. When the countdown timer expires, Dialer automatically connects the call. If the countdown timer is not enabled, the call remains in a previewing state until you click **Dial** or **Skip**.<br>**Waiting for Call**<br>This occurs when you are in Follow Up or Available status and ends when the next call alerts. |
| 4 | **Campaign name** | You can be active in multiple campaigns. This label identifies the campaign associated with this call. |
| 5 | **Campaigns icon** | To choose the campaigns in which you want to be active, click this icon. You must disposition your current call before you can log on or log off campaigns. |

| | | |
|---|---|---|
| 6 | **Number to dial** | In Regular calling mode, this is the number already dialed for you.<br><br>In Preview calling mode, this is the number Interaction Dialer dials for you after a set interval. |
| 7 | **Form** | Forms display columns from the ContactList as fields, controls, or lists. Your job is to fill out fields and make selections before using a disposition button to wrap up the call. Read-only fields have a dimmed background. Anything entered or selected in the form is saved to the ContactList database when you disposition the call.<br><br>In preview mode, Interaction Scripter presents information to you before the call is placed. You can review the contact record and decide whether to call the contact or skip to the next contact. |
| 8 | **Disposition** | To close out (disposition) the call, click one of these controls. For example, if a call reaches an answering machine, you press **Machine** to hang up and reenter an available status.<br><br>Call disposition buttons are inactive unless you are connected to a party. The buttons highlight automatically as the cursor passes over them. These buttons record whether or not the call reached the contact, and whether or not the campaign objective was met.<br><br>You can press only one disposition button per call. Most calls are disconnected immediately when you press a disposition button. |
| 9 | **Place Follow-up Call** | To schedule a follow-up call, select this check box |
| 10 | **Script** | This section of the form provides prepared text that guides you in interacting with the connected party. |
| 11 | **Call control toolbar** | Client call controls appear here. For example, you can use these controls to transfer the call to a finishing agent or record the call. For the most part, these controls function exactly like their CIC client Queue Control toolbar equivalents. See Queue Control Toolbar Buttons. These buttons also require the same My Interaction Rights.<br><br>The buttons are unique to the Interaction Scripter view:<br><br>**Dial**<br><br>Immediately place a call to the contact by pressing this button. This button appears in **Preview** mode only. Preview mode pops information about the contact, but does not immediately call the contact. This gives you a chance to review information from the database.<br><br>**Skip**<br><br>Press this button when you do not want to call a contact. You are immediately returned to an available status. This button appears in **Preview** mode only.<br><br>**Note**: The **Preview Skip Button** Interaction Dialer Script option controls whether the **Skip** button appears on the toolbar. Your CIC or Dialer administrator can set this option in Interaction Administrator.<br><br>**Break**<br><br>The Break button works as a toggle switch. See Request a Break.<br><br>**Note**: The **Request Break Button** Interaction Dialer Script option controls whether the **Break** button appears on the toolbar. Your CIC or Dialer administrator can set this option in Interaction Administrator. |

## Log on to Campaigns

**Requirement**: See Interaction Scripter.

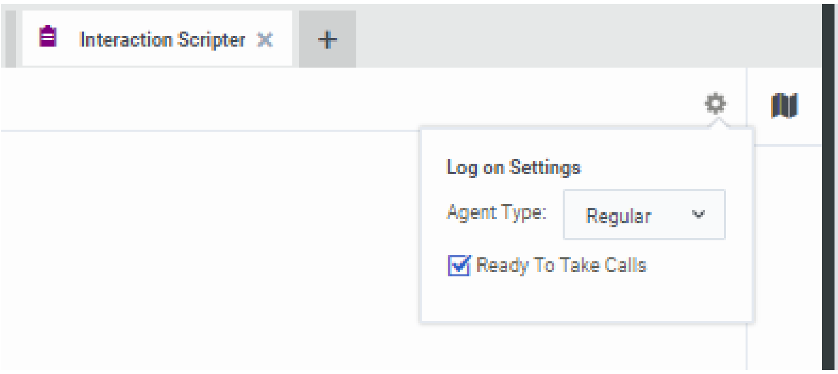
**Note**: When you log on to a campaign using a basescript and also to a campaign using a custom script, calls placed by the custom script take precedence.

The Interaction Scripter view is blank until you log on to at least one campaign.

## Logon and select campaigns

If you have the **Logon Campaign** Security right, you can logon to Interaction Scripter and select campaigns:

1. To select your agent settings, click the **Logon Settings** icon.




2. Select the appropriate **Agent Type**.

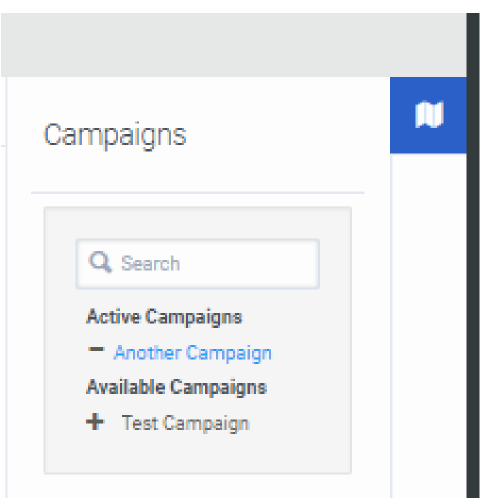
| | |
|---|---|
| **Regular** | Regular Agents receive new outbound calls. These agents pitch a product, idea, or service, or perform some other front-end process. Once this up-front work is complete, the campaign's custom script transfers calls to an ACD queue for follow-up processing by Finishing Agents. A custom campaign script must perform the actual call transfer. |
| **Finishing** | Finishing Agents receive agent-owned callbacks and calls transferred by regular agents. Finishing agents perform a back-end process, such as validation of credit cards, surveys, or data entry—after a regular agent has finished speaking with the targeted party. Finishing agents receive screen pops exactly like regular agents. The difference is that finishing agents do not receive regular campaign calls. |
| **Composite** | An agent who is both a Regular and a Finishing agent. |

3. Do one of the following:

- Start receiving calls immediately after logging on to campaigns, by **selecting** the **Ready to Take Calls** check box.
- Delay receiving calls after logging on to campaigns by **clearing** the **Ready To Take Calls** check box.

**Note**: This setting does not apply to base scripts. It applies only to custom scripts. This setting affects all campaigns with custom scripts to which you log on. Clearing this check box prevents you from receiving calls until you click Start Receiving Calls in the Campaigns sidebar or a script carries out the IS_Action_StartReceivingCalls action. This script action has the same function as clicking Start Receiving Calls. For more information about base and custom scripts, see Scripts view in the Interaction Dialer Manager help.

4. Click the **Campaigns** icon.
5. In the Campaigns sidebar, search for available campaigns. Click the **Plus** sign (+) for each campaign in which you want to participate.



6. If you cleared the **Ready to Take Calls** check box in Log on Settings, click **Start Receiving Calls** after you select your campaigns.
7. Click the **Campaigns** icon again to close the Campaigns sidebar.

   **Result**: Calls placed by Interaction Dialer for the selected campaigns start to appear in the Interaction Scripter view.

## Logon to all campaigns

If you do not have the Logon Campaign Security right, you are automatically logged on to all campaigns.

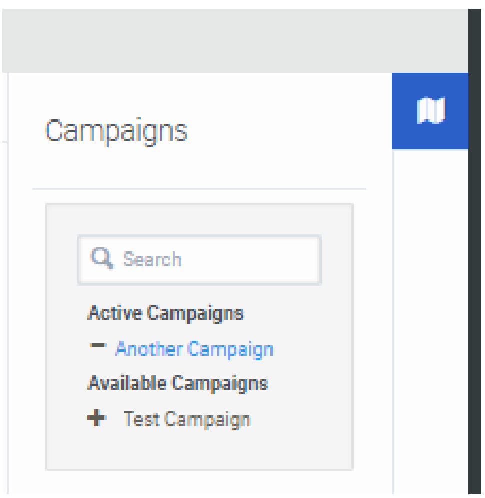
1. To check your agent settings, click the **Logon Settings** icon. Select the appropriate **Agent Type**.
2. Click the **Campaigns** icon.
3. Click **Global Logon**.
4. If you cleared the **Ready to Take Calls** check box in Log on Settings, click **Start Receiving Calls**.

   **Result**: Calls placed by Interaction Dialer for any active campaigns start to appear in the Interaction Scripter view.

# Log off Campaigns

You must disposition your current call for a campaign before you can log off that campaign. You must log off all your active campaigns before you can log off Interaction Connect or close the Interaction Scripter view.

1. Click the **Campaigns** icon.
2. Do one of the following:
   - If you do not have the Logon Campaign Security right, click **Global Logout**.
   - If you have the right, in the Active Campaigns section, click the **Minus** sign (-) before the campaign nae.m




**Result**: You log off all or selected campaigns after you disposition (finish) your current call. Otherwise, you log off immediately, unless a scheduled callback is pending.

> **Note**: If a scheduled callback is pending, you cannot log off. Interaction Scripter displays a message indicating that you have a callback pending. Once you disposition the scheduled call and return to an available status, CIC logs you off automatically.

# Disposition a Call

Call disposition buttons make it easy to close out (disposition) the current call. For example, if a call reaches an answering machine, you can press **Machine** or similarly named button to hang up and reenter an available status.

> **Note**: Your Dialer administrator configures call disposition buttons and determines their actions in the campaign script. Contact this administrator if you have questions about which call disposition button to use.

Call disposition buttons are inactive unless you are connected to a party. The buttons highlight automatically as the cursor passes over them. This makes it easier to see which button is selected. These buttons record whether or not the call reached the contact, and whether or not the campaign objective was met.

You can press only one disposition button per call. Most calls are disconnected immediately after you select a call disposition button. If you select a **Call Back Later** or similarly named button, the call is disconnected when the callback is successfully scheduled. If you transfer a call, you can be disconnected from the call immediately or after you disposition the call. For more information, see Blind Transfer a Scripter Call or Consult Transfer a Scripter Call.

## Wrap-Up Codes

When you select a disposition button, CIC can assign the appropriate **wrap-up code** automatically. You must be a member of a workgroup for which Wrap-Up codes are configured and active. Also, your Interaction Scripter administrator must map Page Dispositions to Wrap up Codes in the Dialer script.

> **Note**: By default, you are not prompted for a wrap-up code if the interaction was a Dialer call that was transferred to an ACD workgroup. However, your CIC administrator can set the **Eic_DialerAllowInboundWrapUp** interaction attribute to allow a wrap-up code prompt. For more information, see the Interaction Attributes Technical Reference.

# Blind Transfer a Scripter Call

> **Requirements**: Access Control Rights determine which Attendant Profiles, User Queues, 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, User Queues, Workgroup Queues, and Station Queues for matching names and numbers.

Transferring a call without speaking to the intended recipient is called a *blind transfer*.

1. Inform the caller that he or she is going to be transferred.
2. In the Interaction Scripter view, 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.

    > **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**: Status information appears for a selected CIC user. 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. If you are transferring the call to an agent who is not participating in the campaign, check **Disposition this contact record after transfer**.

    **Result**: The form remains in the Interaction Scripter view until you select a disposition.
6. Click the **Transfer** button.

    **Result**: If you did not select **Disposition this contact record after transfer**, the Interaction Scripter view clears. The transferred call disappears from My Interactions or other queue and is routed to the selected recipient.
7. If you selected **Disposition this contact record after transfer**, select a Disposition button in the Interaction Scripter view.

# Consult Transfer a Scripter Call

**Requirements**: Access Control Rights determine which Attendant Profiles, User Queues, 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, User Queues, Workgroup Queues, and Station Queues for matching names and numbers.

Transferring a call after speaking to the intended recipient is called a *consult transfer*.

1. Inform the caller that he or she is going to be transferred.
2. In the Interaction Scripter view, 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.

   **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:

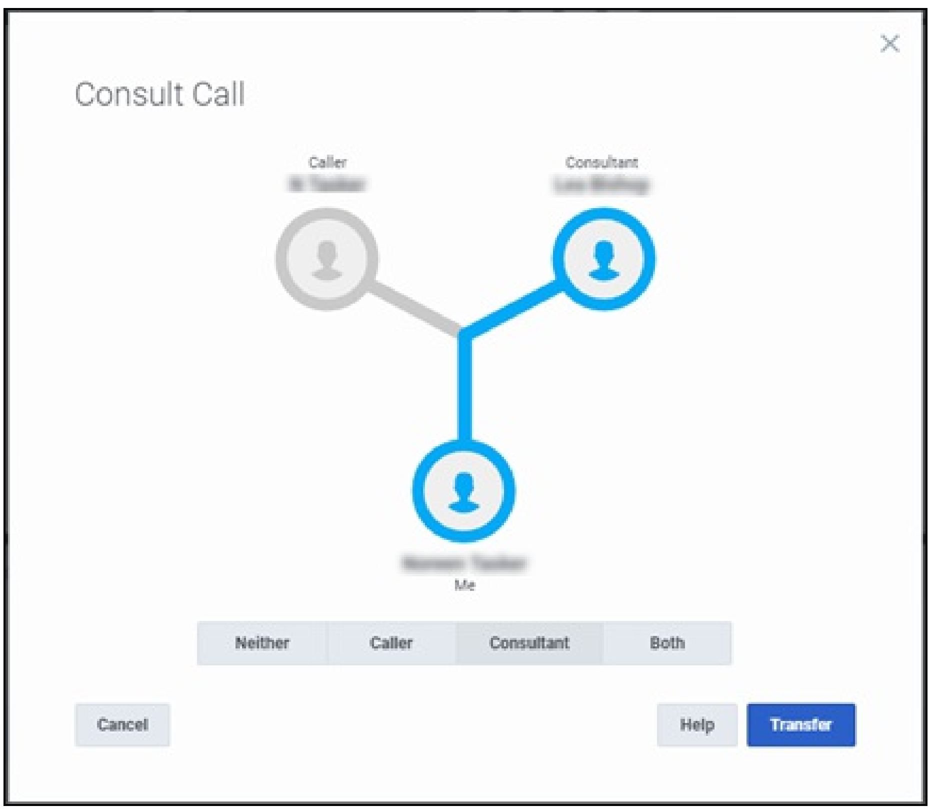
   - Select "Dial [your entry] as Digits" to convert a text entry into numbers.
   - Select the appropriate name and associated extension number.

   **Result**: Status information appears for a selected CIC user. 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. If you are transferring the call to an agent who is not participating in the campaign, check **Disposition this contact record after transfer**.

   **Result**: The form remains in the Interaction Scripter view until you select a disposition.
6. Click the down arrow on the **Transfer** button and select **Consult**.

   **Result**: The Consult Call dialog box appears. The original caller is placed on hold. A call is placed to the intended transfer recipient.

   **Note**: The highlighted line indicates the parties who are connected and can speak to each other.




6. Do one of the following:

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

**Result**: The call is transferred to the Consultant and is removed from your queue. If you did not select **Disposition this contact record after transfer**, the Interaction Scripter view clears.

- To speak to the caller again without exiting the transfer operation, click **Caller**.

> **Note**: This puts the call to the Consultant on hold. 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.

- To speak to the Consultant again without exiting the transfer operation, click **Consultant**.
- To enable a three-way conversation with the Caller, Consultant and you, click **Both**.

> **Note**: This creates a conference call. You can now speak to both the Caller and the Consultant. If you later complete the transfer, the conference call is replaced by a standard two-party call.

- To put both parties on hold, click **Neither**.

> **Tip**: This enables you to talk to someone else or make another call without involving the caller or consultant.

- 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. Or 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.

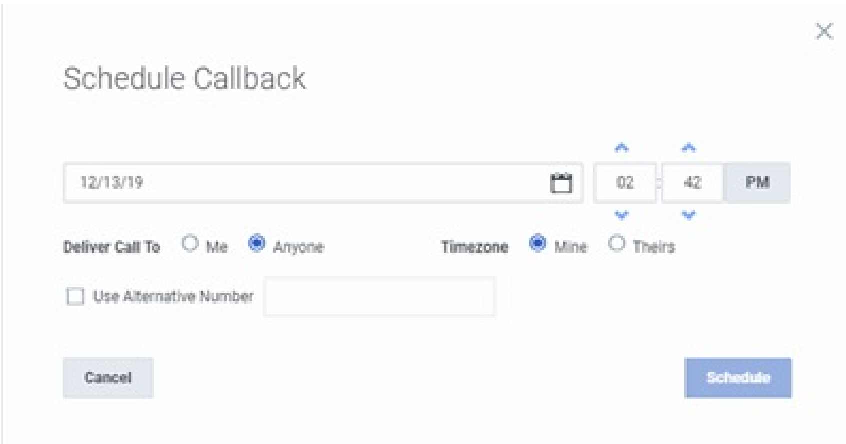
7. If you selected **Disposition this contact record after transfer**, select a Disposition button in the Interaction Scripter view.

# Schedule a Callback

If the contact asks to be called back at a specific time and date, press the **Callback** or similarly named button. This opens the **Schedule Callback** dialog, so that you can set the date and time when the system will call the contact back.

> **Note**: The CIC system disconnects the call after you successfully schedule a callback.

1. In the Interaction Scripter view, press the **Scheduled** or similarly named disposition button.




2. In the **Schedule Callback** dialog box, select a future date and time.
3. Select one of the **Deliver Call to** options.
   - If you want to receive the call when it occurs, select **Me**.
   - If you want the call routed to any available agent, select **Anyone**.
4. Select a **Time zone**.

   > **Note**: To see the Time zone option, your system administrator must configure the Interaction Dialer **Timezone Map Data** option and configure a **Zone Set**. See Configure Time Zone Maps and Assign Them to Campaigns, Where Applicable and Zone Sets.

   - To use the Central Campaign Server (CCS) time zone, select **Mine**.
   - To use the contact's time zone, select **Theirs**.

2. Optionally, select the **Use Alternative Number** check box and enter a telephone number in the accompanying text box.

   > **Note**: This option is available only when the Dialer Administrator enables the **Entry of Callback Number** option for this campaign script.

6. Click **Schedule**.

# Place Follow Up Calls

**Requirements**: The Dialer Administrator selects the **Allow agents to make additional calls to same record** option on the campaign script. This enables the Follow Up Call feature for that campaign.

The Follow Up Call feature enables Interaction Scripter agents to place multiple, consecutive calls within a campaign to a single contact. When the Follow Up Call feature is available, you see the **Place Follow-up Call** check box in the Interaction Scripter view.

For example, suppose you dial a number, reach the contact, but the contact asks you to call back on another number. This other number could already be on the contact record. Or the contact could give you a new number. Using the Follow Up Call feature, you can make additional calls from the Interaction Scripter view. These calls are logged and fall under Interaction Dialer's compliance controls.

1. Select the **Place Follow-up Call** check box
2. Disposition the call by selecting the appropriate Call Disposition button.

   **Result**: Your status is set to an Additional follow up type and calling mode changes to **Waiting for Call.**
3. In the **Additional Follow Up** section, note the following:

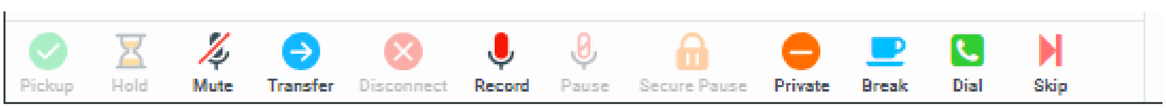
   - If the Dialer administrator enables the **Allow editing of Phone Number** option for this campaign script, you can enter a phone number in the **Manual** text box.
   - Numbers that can be dialed immediately, have a **dial** button (phone icon)
   - Numbers that are blocked, due to DNC block or time zone block, have an **Override** button.

   **Note**: You can dial a blocked number only if the Dialer Administrator selects the **Permit override to DNC check** or **Permit override to TimeZone check** options on the campaign script.
4. Do one of the following:

- Click the dial button for one of the available numbers.
- Click **Cancel**.

# Request a Break

Press the **Break** button in the Interaction Scripter view toolbar to request a break, or to resume work after taking a break.




Breaks are not always granted immediately. Whenever an agent requests a break, the system checks to see if agents are available to handle any outstanding calls. The button label changes to **Pending** when you request a break. You must complete your current call before a break can be granted.

When there are enough agents the break request is granted, the button label changes to **End Break** and your CIC status is set to an unavailable type. The last agent logged into a campaign is granted a break after pending calls for the agent are completed.

# Journey Map

**Requirements**: Some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights.

Journey Mapping is a history of interactions between PureConnect client users and outside contacts. It tracks various types of interactions (phone, fax, email, web chat.)

Use Journey Mapping to:

- View an interaction history related to your currently selected interaction.

  The **Related Interactions** tab of the Journey Map view can include past interactions with the current caller, or with anyone in the caller's organization or with anyone at the same location.
- View the details of any interaction listed in the **Related Interactions** tab of the Journey Map view.
- Play a recording, if one exists, of any interaction listed in the **Related Interactions** tab of the Journey Map view.
- Match your current interaction to a contact if the match does not occur automatically or if more than one possible match is found.
- Add a new contact or organization to the Journey Mapping database.

## Journey Map Licensing and Rights

Journey Mapping in Interaction Connect uses the same database as the Interaction Tracker feature in Interaction Desktop. The following licenses, Access Control Rights, and Security Rights are required for Journey Map features.

**Note**: The Tracker Administrator Security right gives you all of the Tracker Policy rights. Contact your CIC administrator if you need a Tracker license or additional rights.

- Your **company** must have a **Tracker Feature** license in order to create and maintain the Tracker database of interaction histories, contacts, organizations, and locations.
- You need a **Tracker Access** license to:
  - Find a Contact or Find an Organization.
  - Display the Journey Map view.

    **Note**: You also need the Customize Client Security right control to add views to Interaction Connect.
- To Play Back a Recorded Interaction, you need a Tracker Access license and a Recorder Client Access license. The CIC administrator must also assign you an **Interaction Recorder Policy** with the rights to **play recordings** and **retrieve recordings**.
- To add or modify contacts and organizations, you need a **Tracker Access** license and the appropriate Tracker Policy Security rights.
- The Related Interactions Page Security right and Customize Client Security right control whether you can display the Related Items View.
- The View History Users Access Control right determines whose interactions appear in the Related Items view. Additionally, you need the View Other People's Private Interactions Security Right to view other users' private interactions in the Interactions tab. The CIC administrator can grant you rights to the interactions belonging to all or selected users.
- The Tracker Policy Security rights control which Tracker functions are available to Interaction Connect users.

## Recording License and Rights

To play back a recorded interaction, you need the **Recorder Client Access** license. You also need to be assigned an Interaction Recorder Policy with the rights to **play recordings** and **retrieve recordings**.

**Related Topics**

Associate an Interaction with a Contact
Play Back a Recorded Interaction

# Journey Map View

**Requirements**: You need a Tracker Access License to display the Journey Map view. You also need the Customize Client Security right in order to add a new view to Interaction Connect. The View History Users Access Control right determines whose interactions appear in the **Related Interactions** tab of the Journey Map view. Optionally, you need the View Other People's Private Interactions Security Right to view other users' private interactions in the Interactions tab.

**Note**: To display related interactions correctly in the Journey Map view, the CIC administrator must configure data sources in a particular way in the RWP lookup sequence. The "I3 Tracker Rwp" data source must come **before** or be **used instead of** the "IC Tracker Contacts" data source. This is controlled by Contact Data Manager Configuration in Interaction Administrator. For more information, see Add the source to the RWP Lookup Sequence in the Reverse White Pages Technical Reference.

The Journey Map view contains:

- **Related Interactions**
  Related Interactions enables you to view a list of interactions associated with the contact for your currently selected interaction. Your CIC administrator controls the types of interactions that can appear in this tab. For more information, see Use the Journey Map View
- **Recording Playback**
  If you have the appropriate licenses and rights, you can play back the recording of a related interaction. You can play back recordings of calls, chats, and email interactions. The type of recording depends on the type of interaction. For example, a chat session recording is a transcript of the chat.

**To display the Journey Map view:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. In the **Quick Picks list**, click **Show All Views**.
3. In the **Add Views** dialog box, in the **Interactions** category, select the **Journey Map** check box.
4. Click **Add View**.

**Related Topics**

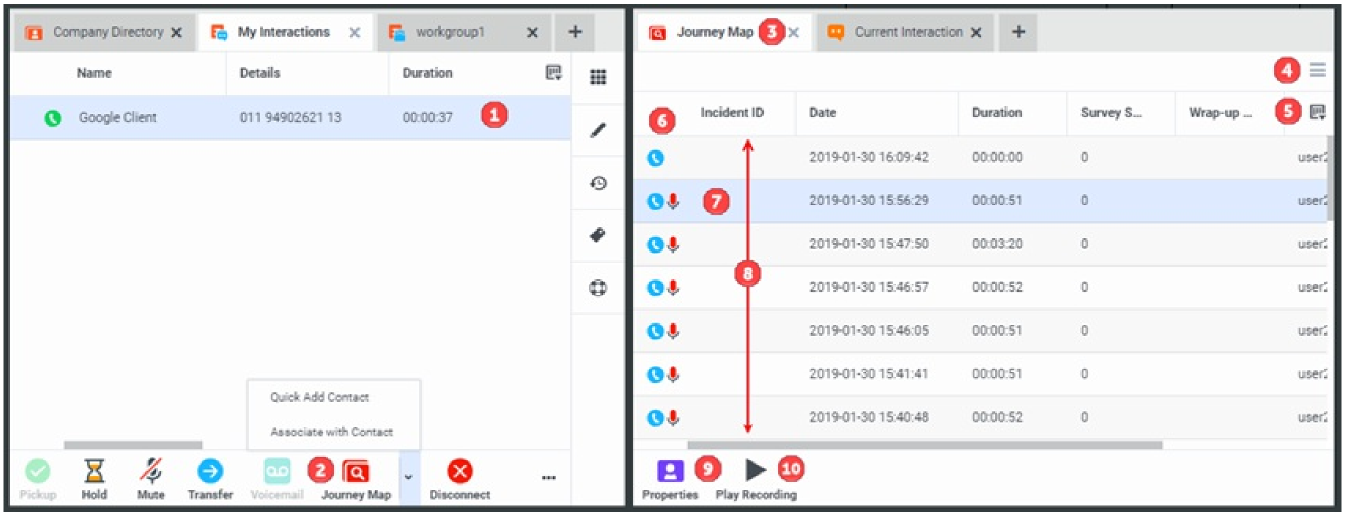
Add or Remove View Columns
Change View Layout
Use the Journey Map View

# Use the Journey Map view

**Requirements**: To display the Journey Map view, you need a Tracker Access License and the Related Interactions Page Security right. You also need the Customize Client Security right in order to add a new view to Interaction Connect. The View History Users Access Control right determines whose interactions appear in the **Related Interactions** tab of the Journey Map view. Additionally, you need the View Other People's Private Interactions Security Right to view other users' private interactions in the Interactions tab.

## Tips for using the Journey Map view

- To View Interaction Properties, double click an interaction or select an interaction and click the **Properties** button.
- To sort the list of related interactions, click a column heading .
- To Play Back a Recorded Interaction, select an interaction and click the **Play Recording** button.




| | | |
|---|---|---|
| 1 | **Active interaction** | The currently selected interaction is highlighted. |
| 2 | **Journey Map button** | If Interaction Connect does not automatically associate the current interaction with a contact, you can Quick Add a Contact or Associate an interaction with a Contact from the **My Interactions** view. |
| 3 | **Journey Map view** | The Journey Map view enables you to view interactions related to the contact for your currently selected interaction.<br>**Tip**: For more information about on enabling this view to appear in the CIC client, see Journey Map view. |
| 4 | **Menu** | You can Add a Contact, Find a Contact, Add an Organization, or Find an Organization from this menu. |
| 5 | **Choose columns** | Click this control to select the information displayed for each interaction in the **Journey Map** view. For more information, see Add or Remove View Columns. |
| 6 | **First column** | • The type of interaction is indicated by an icon. You can hover over an icon to display the name of the type.<br>• The **Record** icon indicates a recording is available for this interaction. |
| 7 | **Selected related interaction** | You can View Interaction Properties and Play Back a recording (if one exists) for the currently selected related interaction. |
| 8 | **List of related interactions** | This is a list of interactions related to the contact for the currently selected interaction. |
| 9 | **Interaction Properties** | To View Interaction Properties, double-click an interaction or select and interaction and click Interaction Properties. |
| 10 | **Play Recording** | To Play Back a Recorded Interaction, select an interaction and click **Play Recording**. |

# Contact Resolution

**Requirements**: The Journey Map feature in Interaction Connect uses the Interaction Tracker database. Contact Resolution is available to all users in organizations that maintain an Interaction Tracker database. However, some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights.

Contact Resolution is a process that matches interactions with contacts listed in Interaction Tracker public and private data sources. Contact Resolution matches an Individual's ID for the current interaction with a contact in the Interaction Tracker database.

After an Interaction Tracker contact is associated with an interaction, Interaction Tracker Server saves a record of the interaction in the Interaction Tracker database. Contact Resolution helps ensure more accurate data for trend analysis or other research.

## Contact Resolution Process

If the contact resolution process results in a match, the contact is considered resolved and you don't need to do anything. If an appropriate contact is not found, you can search for another match or add a new contact.

Contact resolution uses the following rules to determine if a contact match is made:

- If only one match is found, the interaction is resolved.
- If one private contact match and one public contact match are found, then the private contact match is used and the interaction is resolved.

  **Note**: Interaction Contact list sources are defined as either public or private by the administrator of the Interaction Tracker database. Private Interaction Contact list sources are searched only for *inbound* interactions. For more information, contact your CIC administrator.

- If the number of private and public contact matches is greater than one, and the number of private contact matches is **not exactly one**, then the interaction is considered unresolved. You are prompted to Associate an Interaction with a Contact.

**Related Topics**

Add a Contact
Find a Contact
Modify Contact Information

# Quick Add a Contact

**Requirements**: You need the Add Individuals Security right to quick add a contact. Other Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights.

If the Contact Resolution process does not find the contact that you want, and you are unable to find the appropriate contact using your own search criteria, you can create a new contact. For more information about this feature or your right to use it, see your CIC administrator.

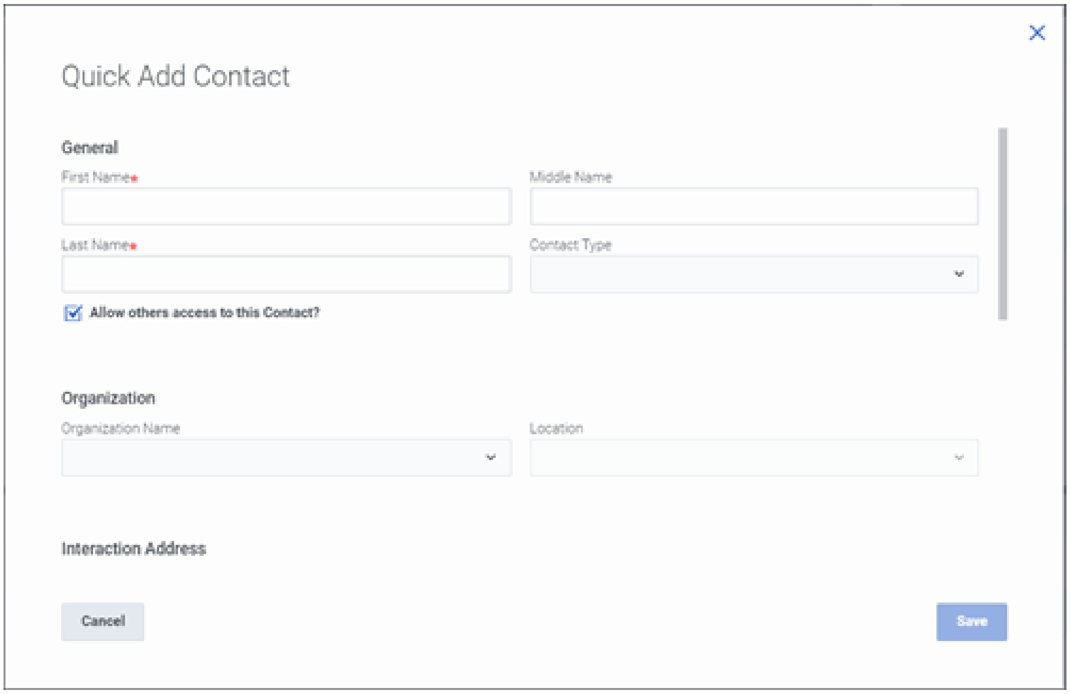
When you "quick add" a new contact for the current interaction, you need to specify only the most important contact information.

**Note**: To add a contact at any time, you can use the menu on the Journey Map view.

**To quick add a contact:**

1. Do one of the following:
   - Right-click the interaction and select **Journey Map** > **Quick Add Contact**.
   - Select the current interaction and click the down arrow on the **Journey Map** button and select **Quick Add Contact**.

   **Result**: The Quick Add Contact dialog box appears.

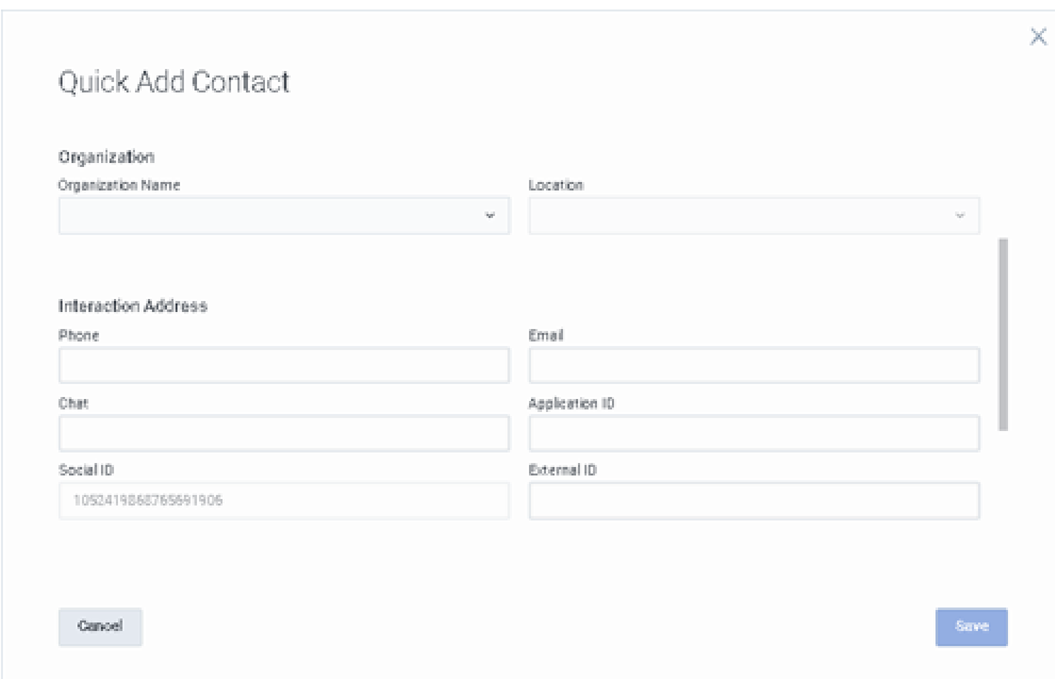



2. Complete the required information and as much of the optional information as you deem necessary.

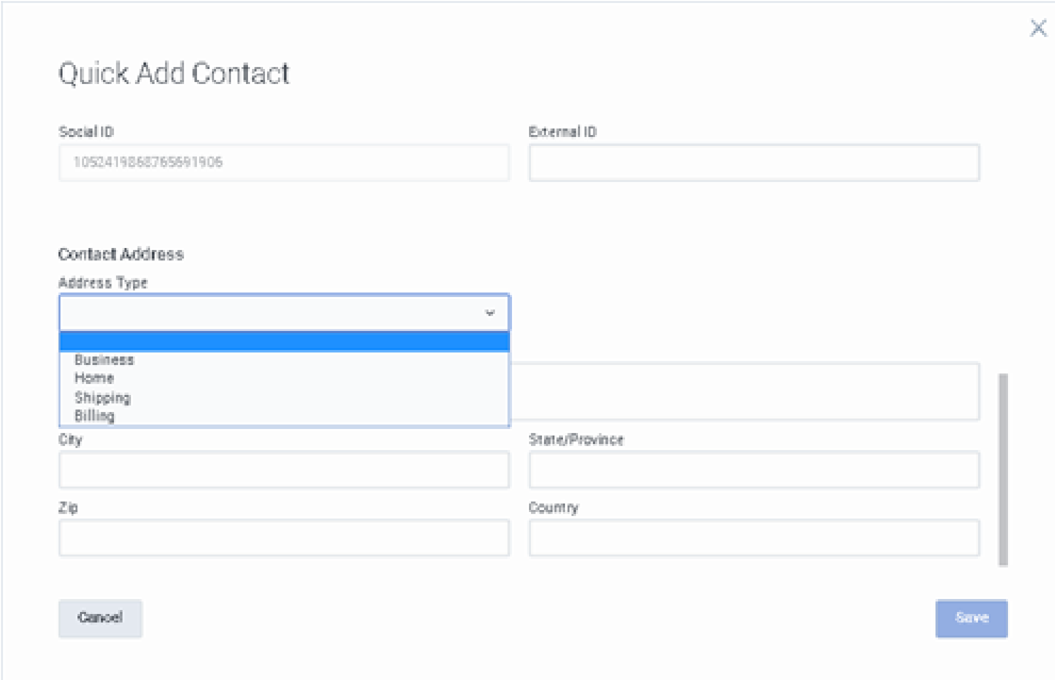
**Tip**: Required information is indicated by an asterisk (*).

3. In the **General** section, supply basic identity information. See Add a Contact for details.
4. In the **Organization** section, you can associate this contact with an existing organization and location.
5. In the **Interaction Address** section, an address field corresponding to interaction type is pre-filled by information on the selected interaction.

**Note**: An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. The type of address corresponds to the type of interaction: for example, a phone number for a call, an email address for an email message, or the Social ID associated with a Twitter or Facebook profile for a social media message.




6. In the **Contact Address** section, you can supply a **Business**, **Home**, **Shipping**, or **Billing** address for this contact.




7. Click **Save**.
   **Result**: PureConnect saves the contact information and associates the interaction with this new contact.

**Related Topics**

  Add a Contact

# Associate an Interaction with a Contact

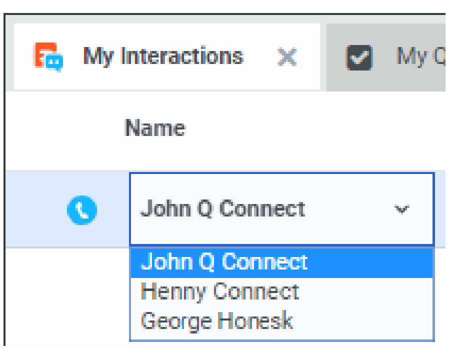
> **Requirements**: Contact Resolution is available to all users in organizations that maintain a Journey Map database. However, some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights.

Contact resolution matches your current interaction to a contact in the database. The contact is matched against all public contacts and your private contacts. This automatic process does not attempt to match the contact to private contacts belonging to other users.

You are prompted to associate an interaction with a contact manually only when it cannot be resolved automatically. An unresolved contact occurs when contact resolution cannot find a match to the telephone number associated with the current interaction in any of your private or public Interaction Tracker contact list sources. It can also occur if contact resolution locates more than one contact with a matching telephone number. For more information, see Contact Resolution.

**To associate an interaction with a contact:**

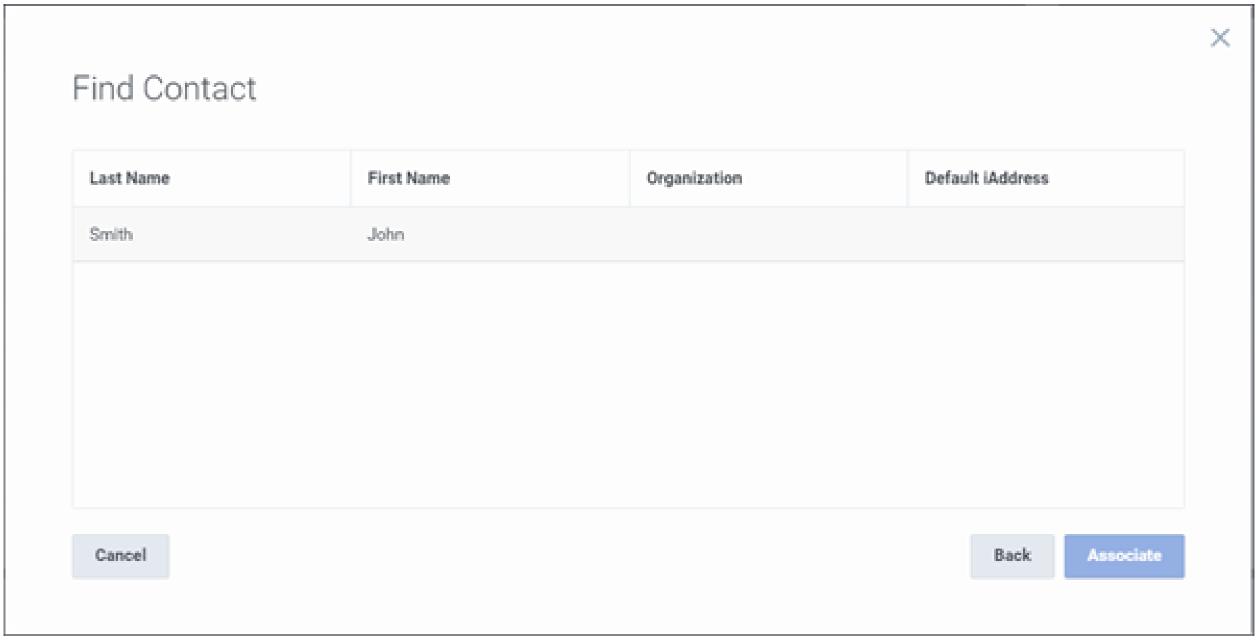
1. Click the down arrow after the name associated with the interaction.
   **Result**: The Contact Resolution list appears.




2. Do one of the following:

- Select the appropriate contact from the list of matches.
  **Result**: CIC associates the selected contact with the interaction.
- Find a contact and manually associate the interaction with it.

> **Tip**: Right-click the interaction and select **Journey Map** > **Associate with Contact**. Orselect the current interaction and click the down arrow on the **Journey Map** button, then select **Associate with Contact**. Search for the appropriate contact and click **Associate** in the **Find Contact** dialog box. For more information, see Find a Contact.




- You can also Quick add a contact, then find the contact, and manually associate the interaction with it.

**Related Topics**

Contact Resolution
Add a Contact
Find a Contact
Quick Add a Contact

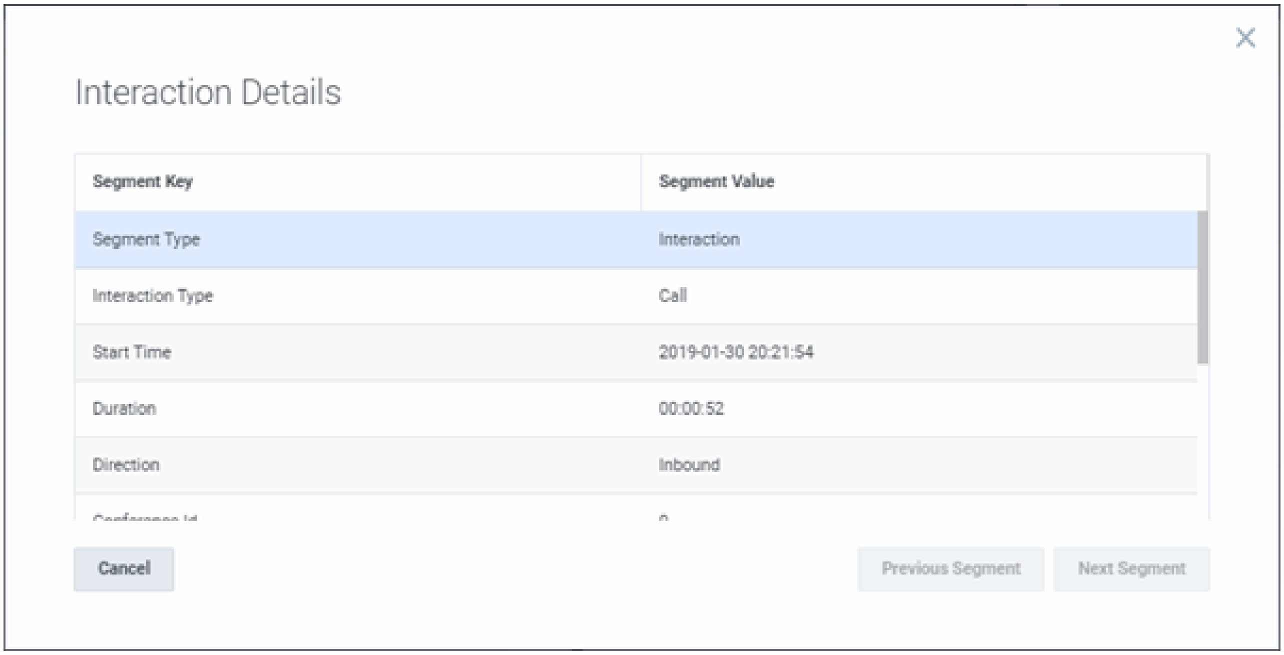
# View Interaction Properties

**Requirements**: Some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights.

You can review interaction details stored for any interaction previously associated with a contact.

**To view interaction properties, do one of the following:**

- In the Journey map view, double-click a selected interaction.
- In the Journey Map view, select an interaction and click the **Properties button**.



# Play Back a Recorded Interaction

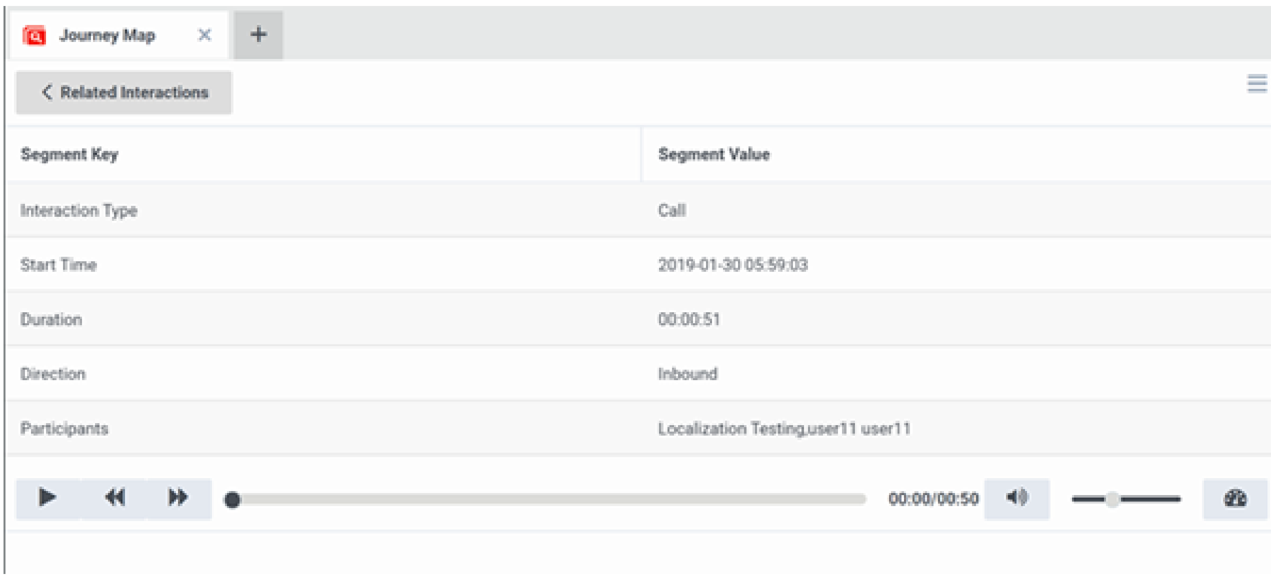
**Requirements**: To play back a recorded interaction, you need the **Recorder Client Access license.** The CIC administrator must also assign you an **Interaction Recorder Policy** with the rights to **play recordings** and **retrieve recordings**. To display the **Journey Map** view and locate and select the appropriate recording, you need a **Tracker Access** license and the necessary rights to display the needed view. For more information, see Journey Map Licensing and Rights.

If you have the appropriate licenses and rights, you can play back a recorded interaction. You can play back recordings of calls, chats, and email interactions. The type of recording depends on the type of interaction. For example, a chat session recording is a transcript of the chat. Recorded interactions appear in the Journey Map view.

**To play back a recording:**

1. Display the **Journey Map** view.
2. Select a related interaction with an associated recording as indicated by the **Record** icon.

   **Tip**: For more information, see Use the Journey Map view.
3. Click **Play Recording**.




## Play Back a Call

- Calls play back on your default audio device.
- The Playback controls include buttons for **Play/Pause**, **Stop**, **Backward**, **Forward**, **Mute/Unmute**, and **Playback Speed**.

# Contacts

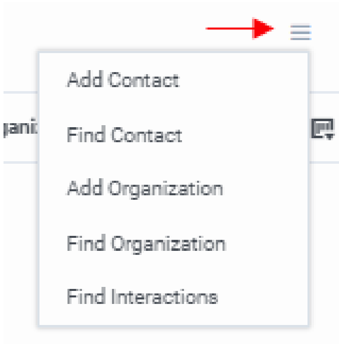
## Add a Contact

**Requirements**: You need a Tracker Access license and the Add Individuals Security right to add a Contact. Other Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights and your PureConnect administrator.

**Note**: You can also Quick Add a Contact.

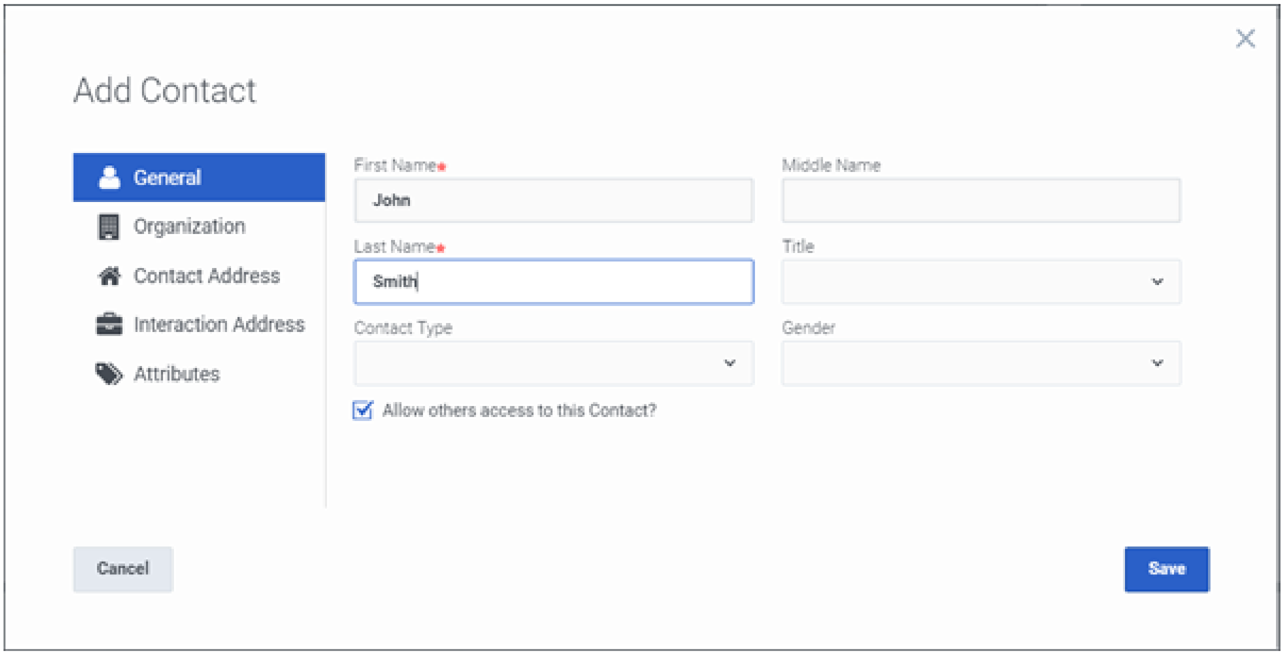
**To add a contact:**

1. From the menu in the Journey Map view, select **Add Contact**.




**Result**: The **Add Contact** dialog box appears.

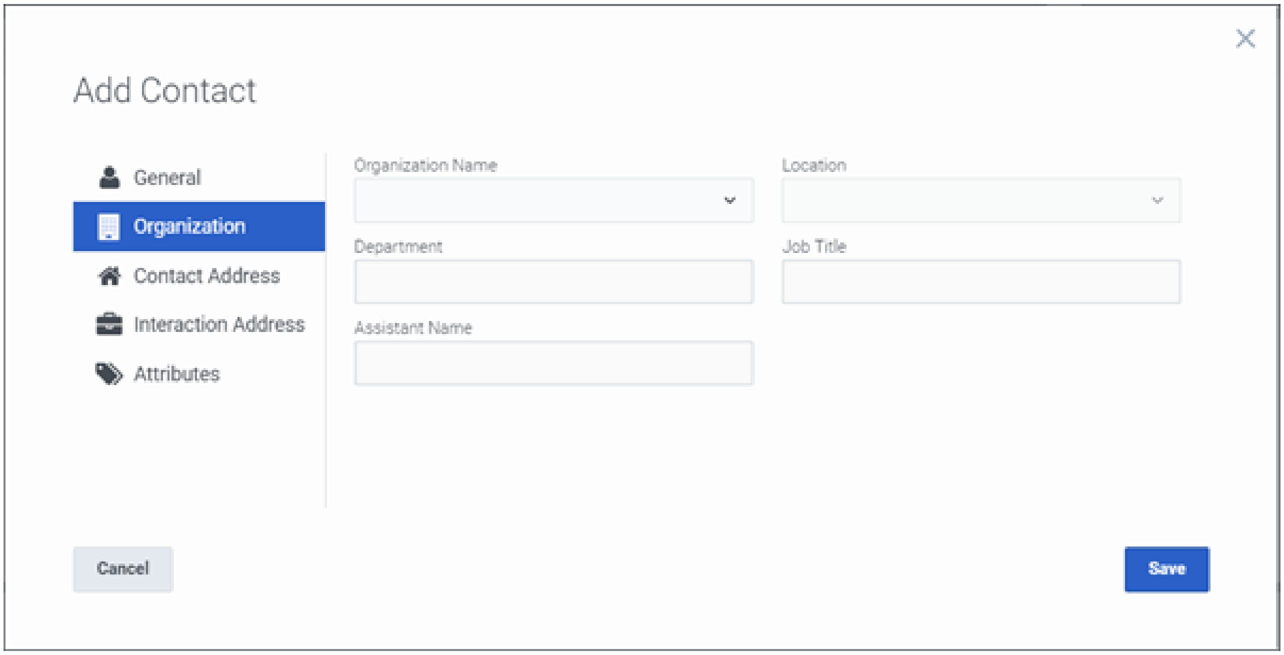
2. In the **General** view, complete the necessary information and then select **Organization**.




**Note**: Fields with a red asterisk (*) are required.

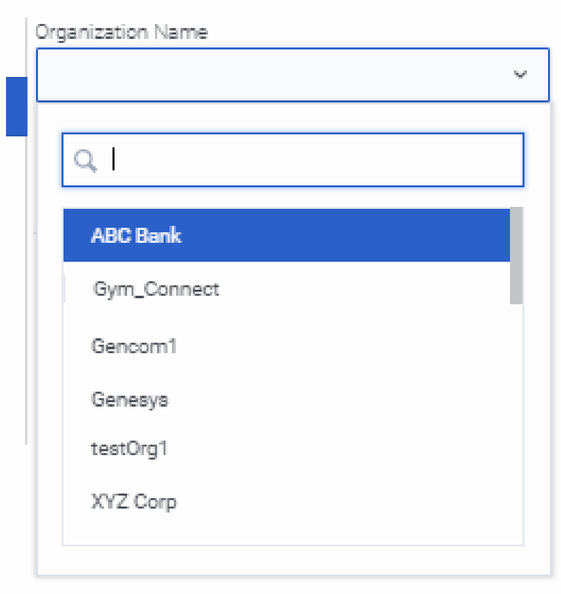
| | |
|---|---|
| **First Name**<br>**Middle Name**<br>**Last Name** | Enter the contact's first, middle, and last names in the appropriate text boxes. |
| **Title** | Use the arrow to select a title from the drop-down list. |
| **Contact Type** | Use the arrow to select a type from the drop-down list.<br>Examples of contact types include **System**, **IC User**, **External**, **Internal**, **Customer**, **Partner**, **Vendor**, and **Public Relations**. |
| **Gender** | Use the arrow select a gender. |
| **Allow others access to this Contact?** | Select **Yes** or **No** to control whether others can view or use this Contact information.<br>Selecting **No** indicates that this contact is private.<br>**Rights**: To indicate that a contact is private, you must have created the contact and have the Have Private Contacts Security right or the Tracker Administrator Security right. |

3. In the **Organization** view, complete the necessary information and then select **Contact Address**.


Add Contact
General
Organization
Contact Address
Interaction Address
Attributes
Organization Name
Location
Department
Job Title
Assistant Name
Cancel
Save

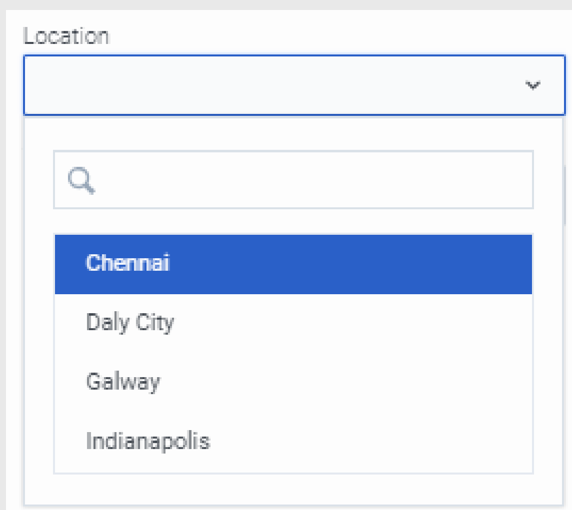
<table>
<tr><td>Organization Name</td><td>Type all or part of the organization's name in the search box or scroll to the organization's name , then select it.

**Note**: If the Organization does not appear in this list, **Save** the contact. Add the Organization, then return here and complete the Contact information.



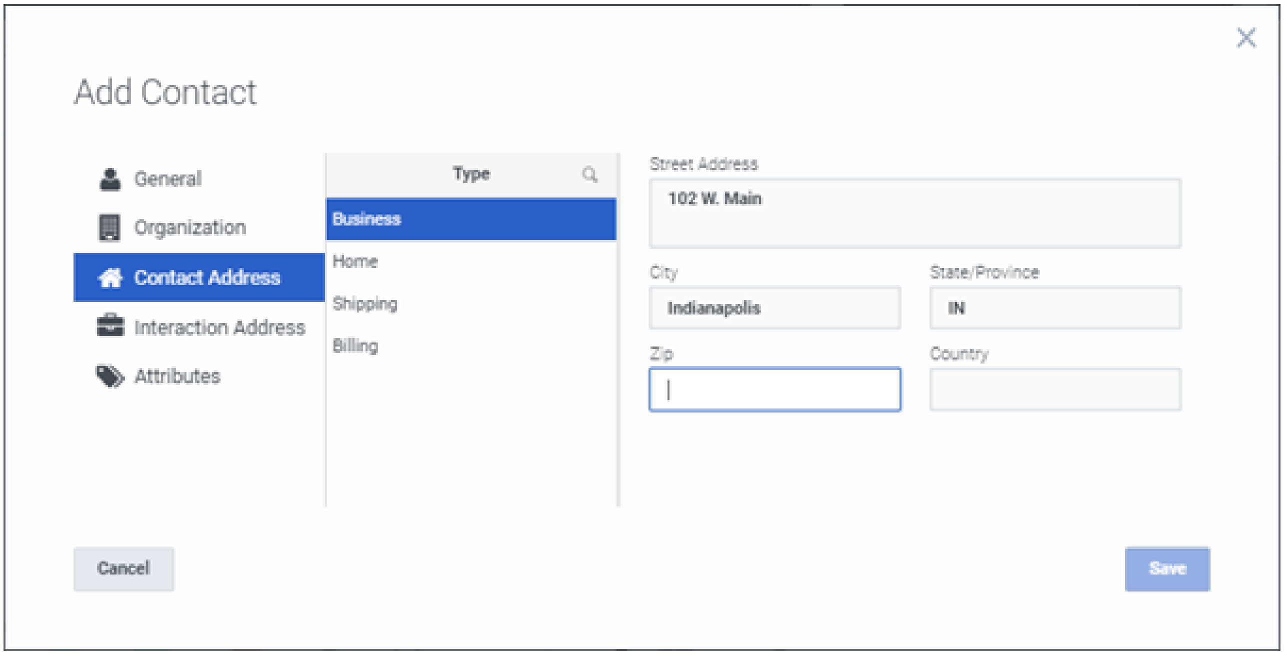
</td></tr>
<tr><td>Location</td><td>In the Location text box, if an organization has more than one location, type all or part of the location name or scroll to the location name, then select it.

**Note**: If the appropriate Location for the selected Organization does not appear here, **Save** the contact. Modify the Organization information, adding the location, then return here and complete the Contact information.



</td></tr>
<tr><td>Department</td><td>Type the name of the department to which this contact belongs.</td></tr>
<tr><td>Job Title</td><td>Type the contact’s job title.</td></tr>
<tr><td>Assistant</td><td>Type the name of this contact's assistant.</td></tr>
</table>

4. In the **Contact Address** view, complete the necessary information and then select **Interaction Address**.

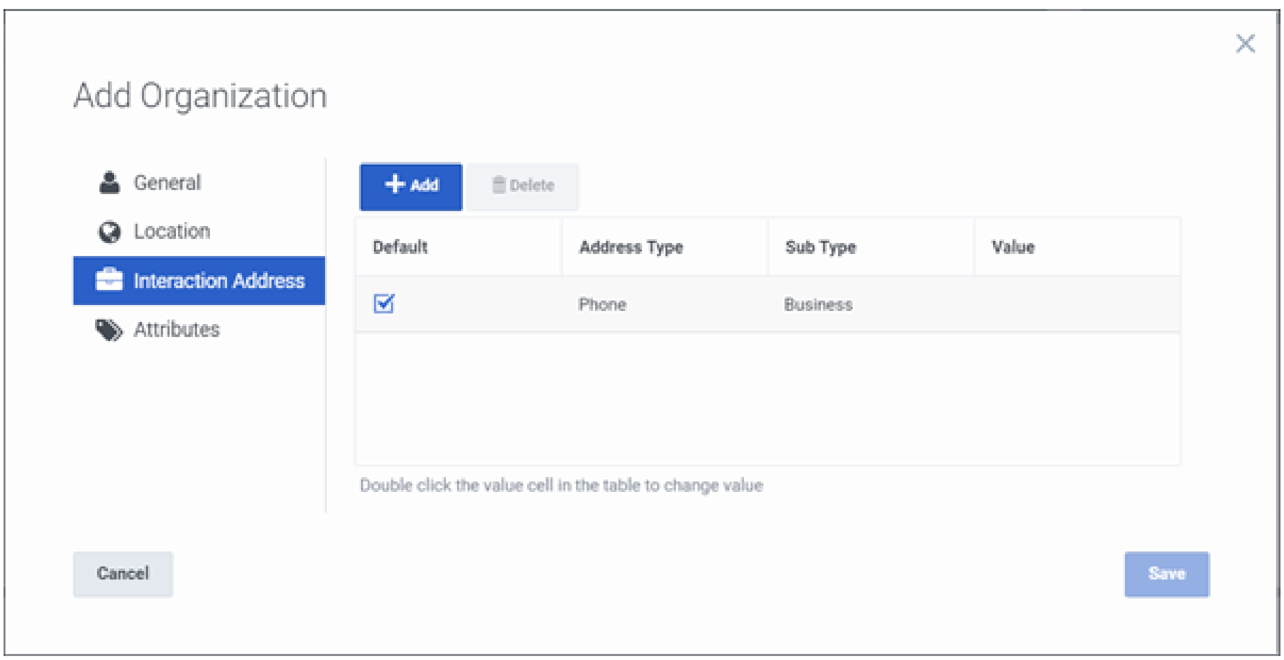



Select an address **Type** and then enter the address information. You can enter a contact address for each type.

**Tip:** You can type the name of any state or province in the **State/Province** text box or the name of any country in the **Country** text box.

**Note:** **Business**, **Home**, **Shipping**, and **Billing** are default Interaction Tracker address types. Your CIC administrator can define different or additional address types. If you have any questions about address types, see your administrator.

5. In the **Interaction Addresses** view, complete the necessary information for one or more addresses, then select **Attributes.**

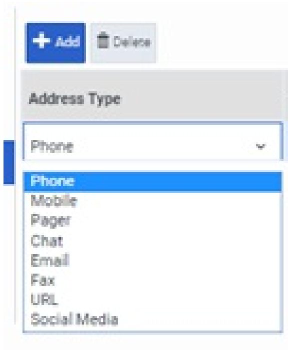



Repeat these instructions for as many interaction addresses as needed:

**Note:** An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. The type of address corresponds to the type of interaction: for example, calls or email messages among other supported interaction types.

a. Click the **Add** button.

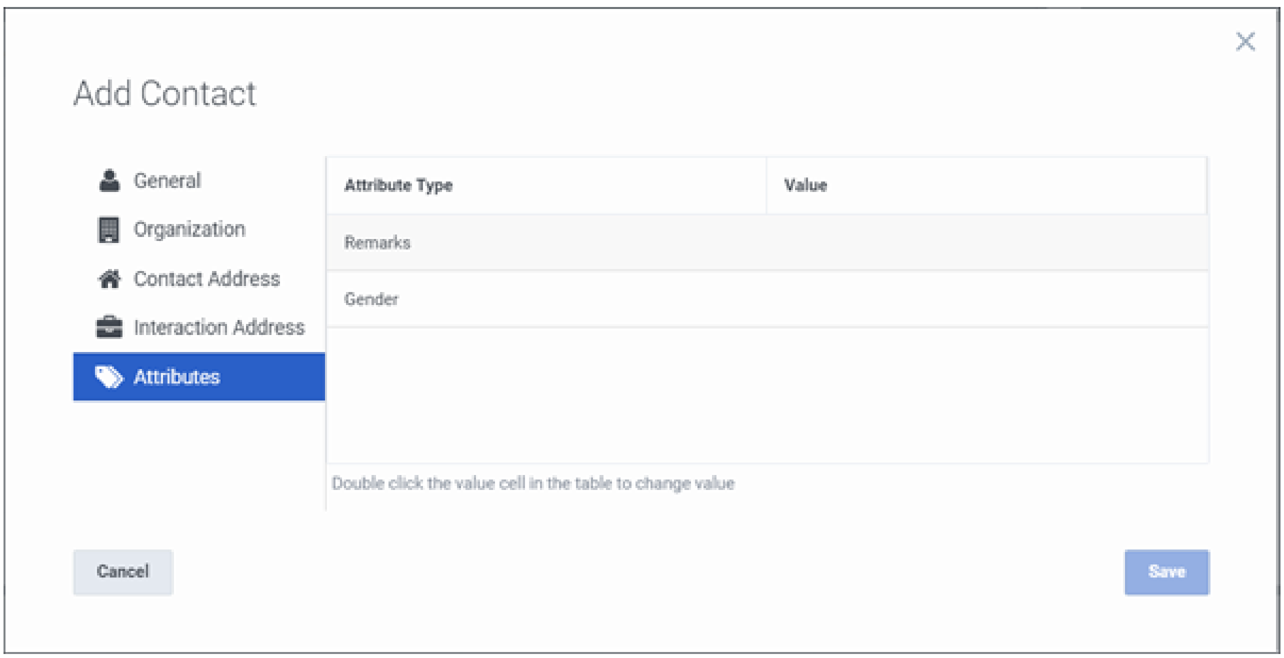
b. Click in the **Address Type** field, then select the appropriate type.




   c. Click in the **Sub Type** field, then select the appropriate subtype.
   d. Click in the **Value** field, then enter the appropriate address (phone number, email address or other) according to the Address Type you selected.

6. In the **Attributes** view, double-click the appropriate table cell and supply a **Value** for the selected **Attribute Type**.

   > **Note**: The Journey Map feature enables you to store attributes for contacts and organizations. These attributes can include such information as personal characteristics, historical notes about a particular situation, or other significant details. Your CIC administrator defines these attributes in Interaction Administrator. Contact your CIC administrator if you have any questions about these custom attributes.




7. When you finish adding this contact, click **Save**.
   **Result**: This saves the contact's information and closes the dialog box. To add another contact, repeat this procedure.

**Related Topics**

Contact Resolution
Find a Tracker Contact
Modify Tracker Contact Information
Delete a Tracker Contact
Resolve a Contact

---

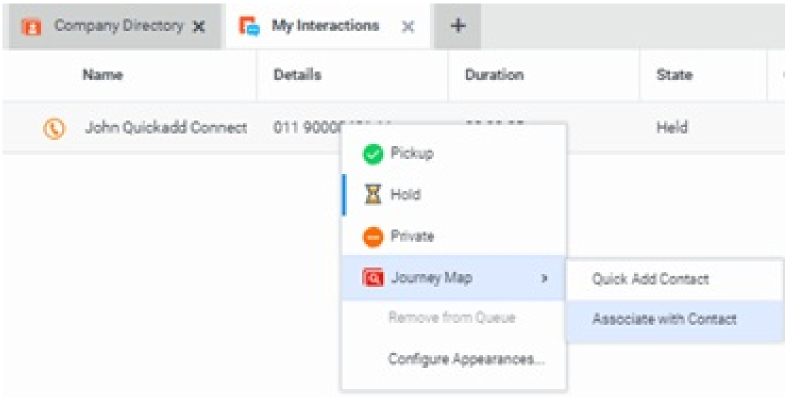
## Find a Contact

> **Requirements**: Some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights.

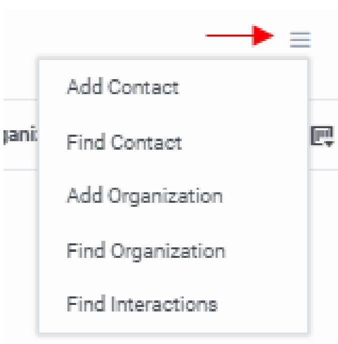
If the automatic contact resolution process does not find the contact that want to associate with an interaction, you can conduct your own search for a contact if you have a **Tracker Access** license. You can use a variety of selection criteria to find the appropriate contact. You can also use the menu in the Journey Map view to find a contact at anytime outside of the Contact Resolution process.

**To find a contact:**

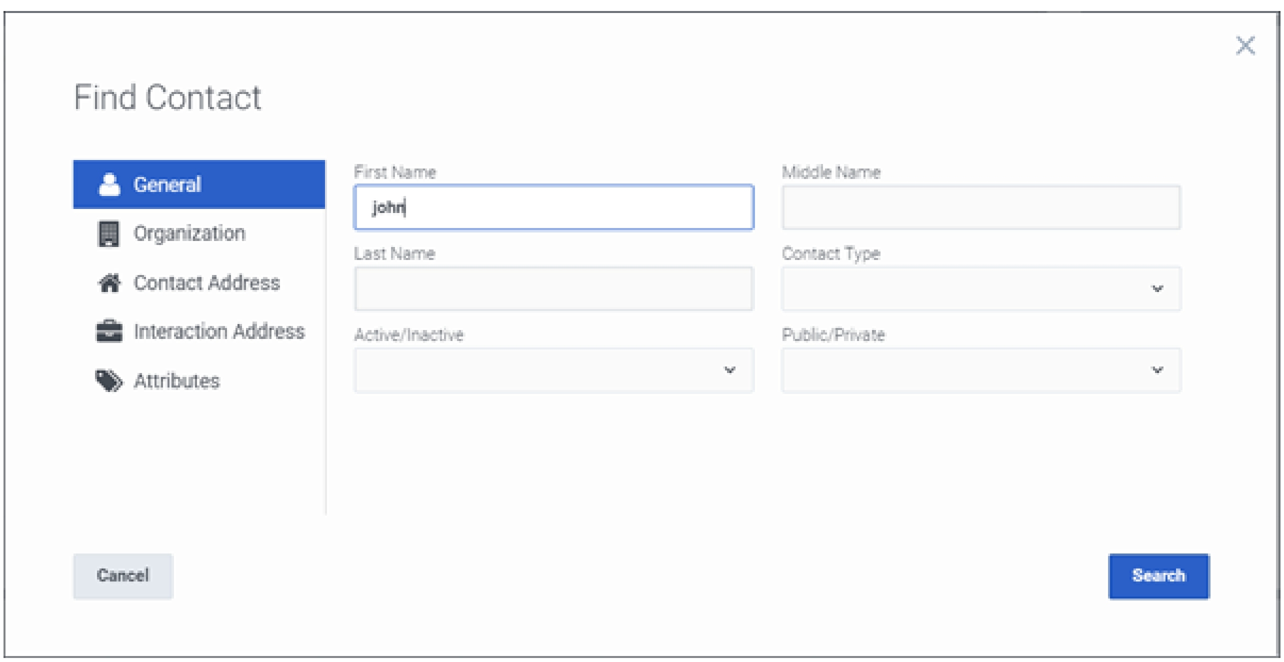
1. Do one of the following:
   - If you are in the middle of the contact resolution process, keep the current interaction selected.
     Right-click the interaction and select **Journey Map** > **Associate with Contact**. Or click the down arrow on the **Journey Map** button, then select **Associate with Contact**.

   - If you want to locate and review or edit a contact's information, from the menu in the Journey Map view, select **Find Contact**.

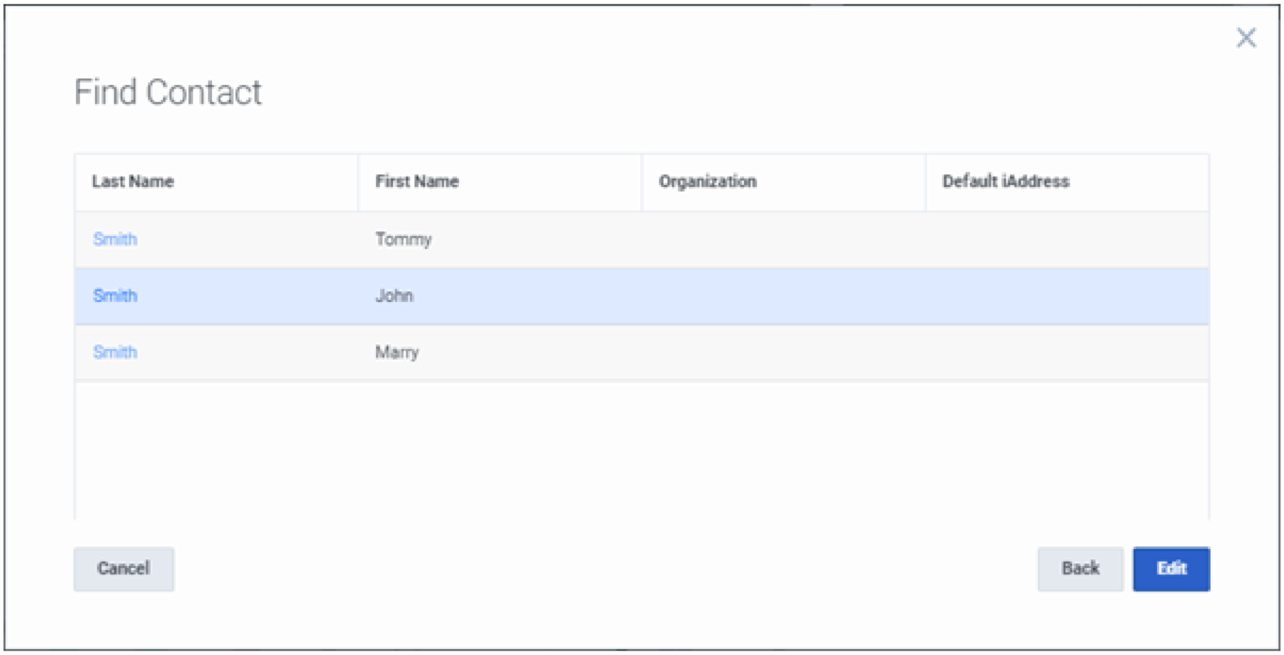
     
     

2. In the **Find Contact** dialog box, enter your search criteria and click **Search**.



**Note**: If you have Tracker Administrator user rights, you have the right to search Private Tracker databases. The **Owner ID** text box appears and you can enter the Owner ID for the appropriate database(s). This is optional.

3. In the **Find Contact** dialog box search results page, do one of the following:




- To complete the contact resolution process, select an entry and click **Associate**.
- To review or modify contact information, click the last name hyperlink or click anywhere in the row and click **Edit**.
- To further refine your search, click **Back** and enter additional search criteria.

**Related Topics**

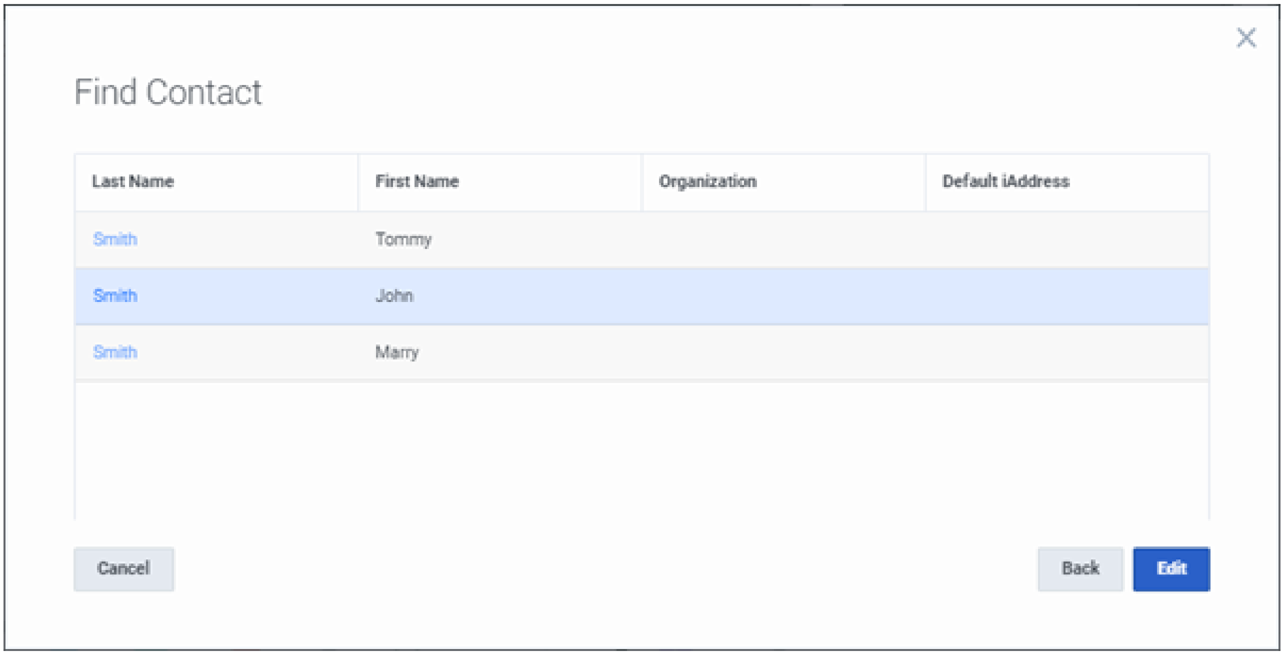
Associate an Interaction with a Contact
Modify Contact Information

## Modify Contact Information

**Requirements**: Some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights and your PureConnect administrator.

**To modify contact information:**

1. Find a Contact.
2. In the **Find Contact** search results page, click a Contact Name. Or click anywhere in the row and click **Edit**.




3. Modify any of the Contact's information as necessary.

   **Tip**: See Add a Contact for additional details.

4. Click **Save**.

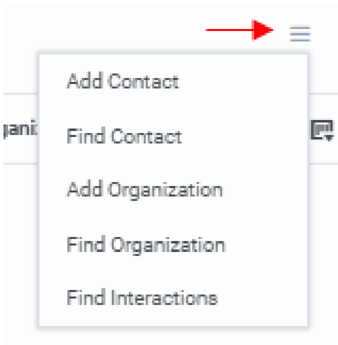
# Organizations

## Add an Organization

**Requirements**: You need the Add Organizations Security right to add a Tracker Organization. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

**To add an organization:**

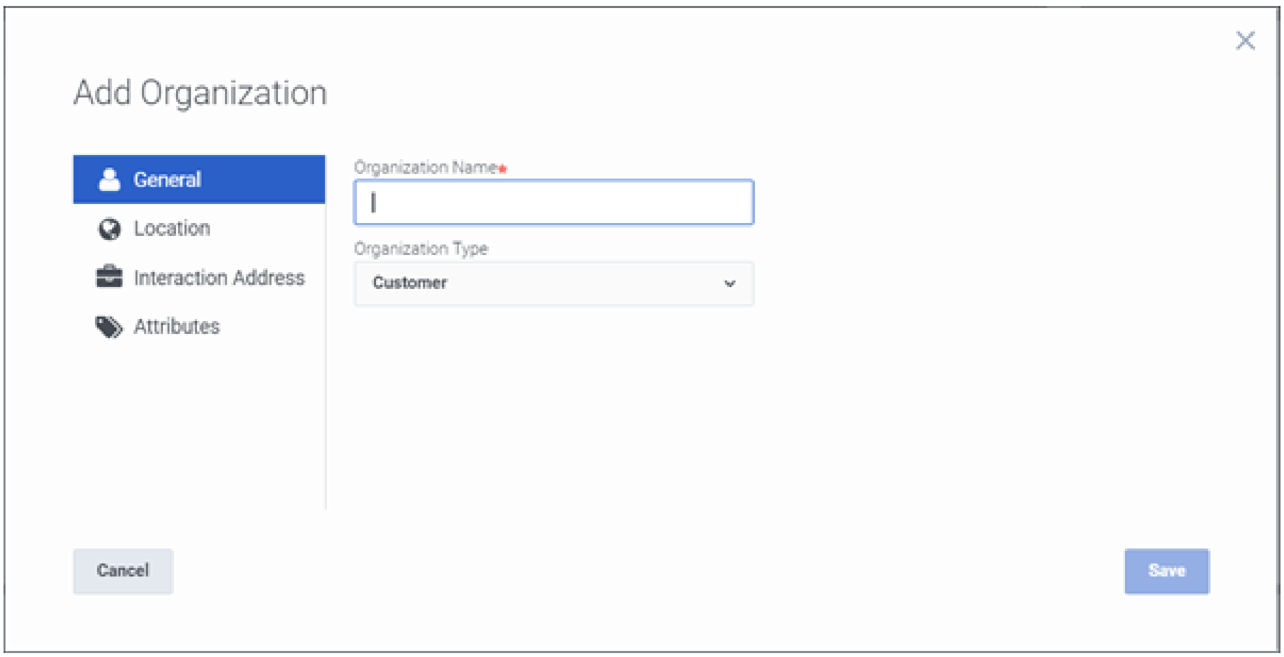
1. From the menu in the Journey Map view menu, select **Add Organization**.




**Result**: The **Add Organization** dialog box appears.

> **Note**: Fields with a red asterisk (*) are required.

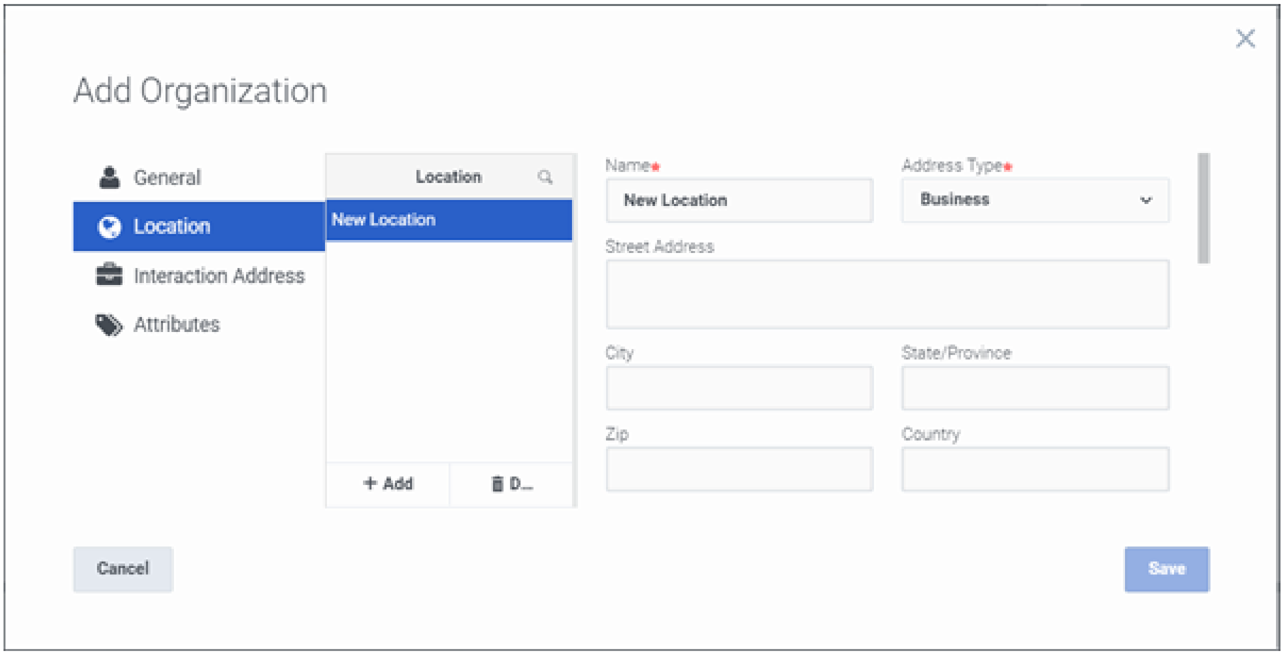
2. In the **General** view, complete the necessary information and then select **Location**.




| | |
|---|---|
| **Organization Name** | Enter an organization name.<br>**Note**: Each organization must have a unique name. |
| **Organization Type** | Use the arrow to select a type from the drop-down list.<br>Examples of organization types include **Customer**, **Partner**, **Vendor**, and others. |

3. In the **Location** view,complete the necessary information for as many locations as needed and then select **Interaction Address**.

> **Tip**: You can search for an existing location for this Organization by clicking the **Search** icon (magnifying glass) and typing part of the location name. You can delete a location associated with this Organization, by selecting it and clicking the **Delete** icon (trash can). If you delete a location while a search is underway (enabled), the location is marked for deletion. The **Delete** icon changes to a **Restore** icon, giving you the option of restoring the location.



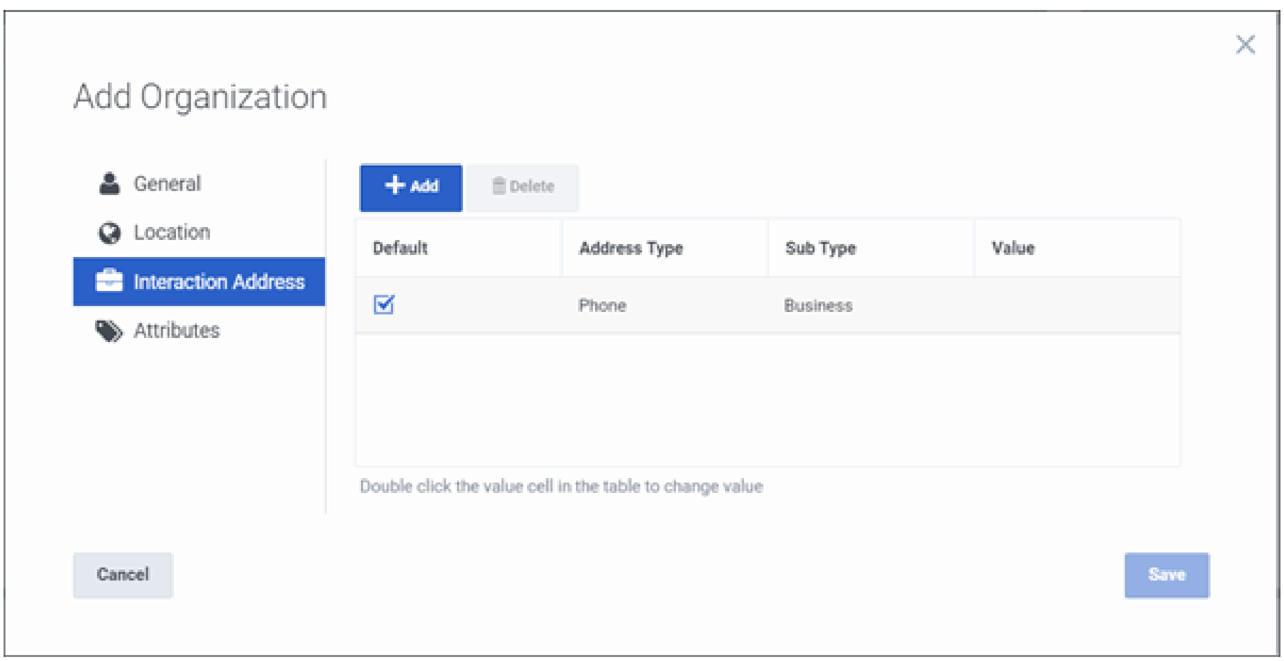

Repeat these instructions for as many locations as needed:

a. Click the **Add** button.
b. Click in the **Name** field, enter a location name.
c. Select an appropriate address type from the **Address Type** drop down list.
d. Enter the address information.

> **Tip:** You can type the name of any state or province in the **State/Province** text box or the name of any country in the **Country** text box.

4. In the **Interaction Address** view, complete the necessary information for one or more addresses, then select **Attributes**.

> **Note**: An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. The type of address corresponds to the type of interaction: for example, calls or email messages among other supported interaction types.

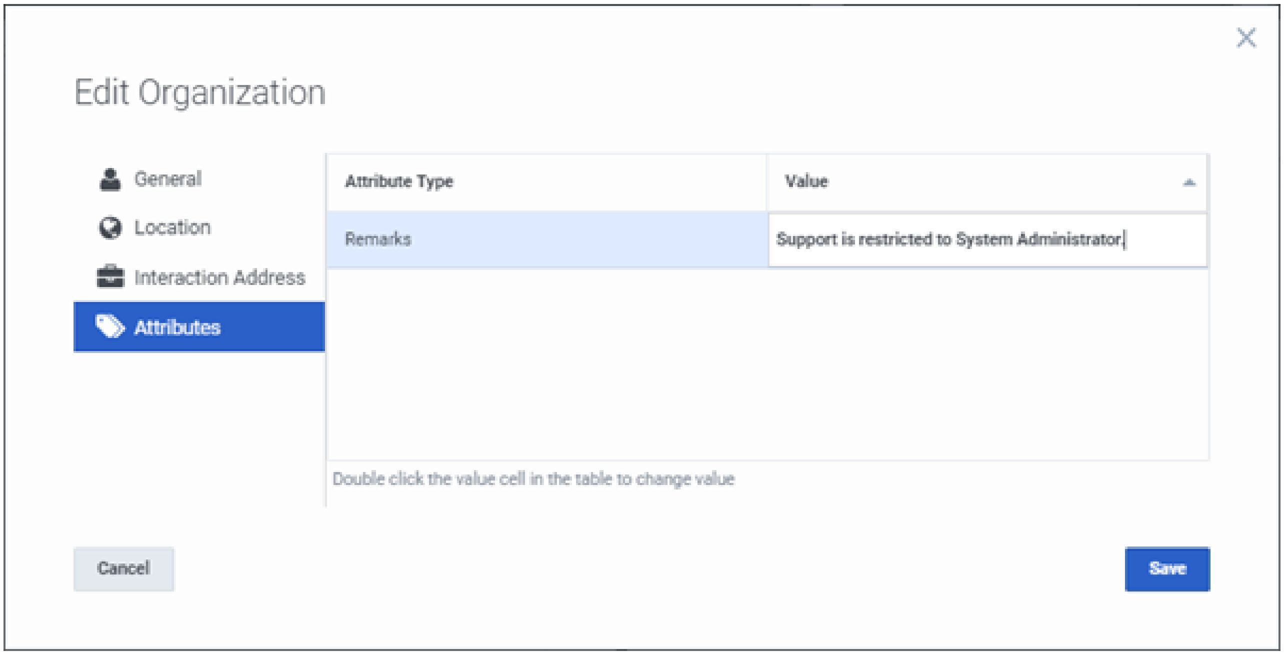



Repeat these instructions for as many interaction addresses as needed:

a. Click the **Add** button.
b. Click in the **Address Type** field, then select the appropriate type.

c. Click in the **Sub Type** field, then select the appropriate subtype.
d. Click in the **Value** field, then enter the appropriate address (phone number, email address or other) according to the Address Type you selected.

5. In the **Attributes** view, double-click the appropriate table cell and supply a **Value** for the selected **Attribute Type**.




**Note**: The Journey Map feature enables you to store attributes for contacts and organizations. These attributes can include such information as personal characteristics, historical notes about a particular situation, or other significant details. Your CIC administrator defines these attributes in Interaction Administrator. Contact your CIC administrator if you have any questions about these custom attributes.

6. When you finish adding this organization click **Save**.

   **Result**: This saves the organization's information and closes the dialog box. To add another organization, repeat this procedure.

**Related Topics**

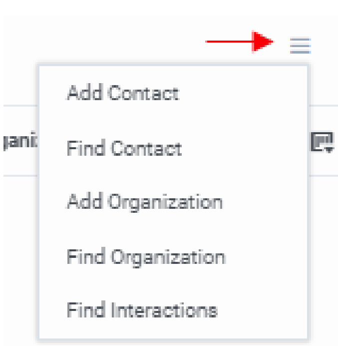
[Find an Organization](#)
[Modify Organization information](#)

## Find an Organization

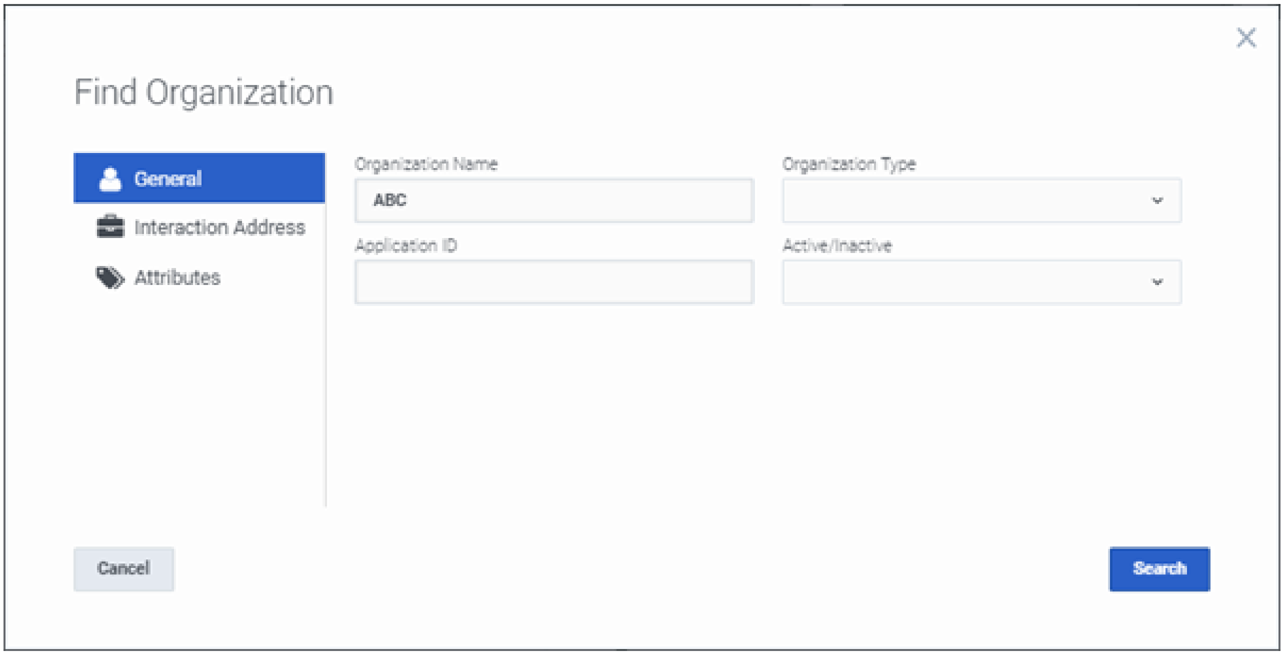
**Requirements**: Some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights and your PureConnect administrator.

**To find an organization:**

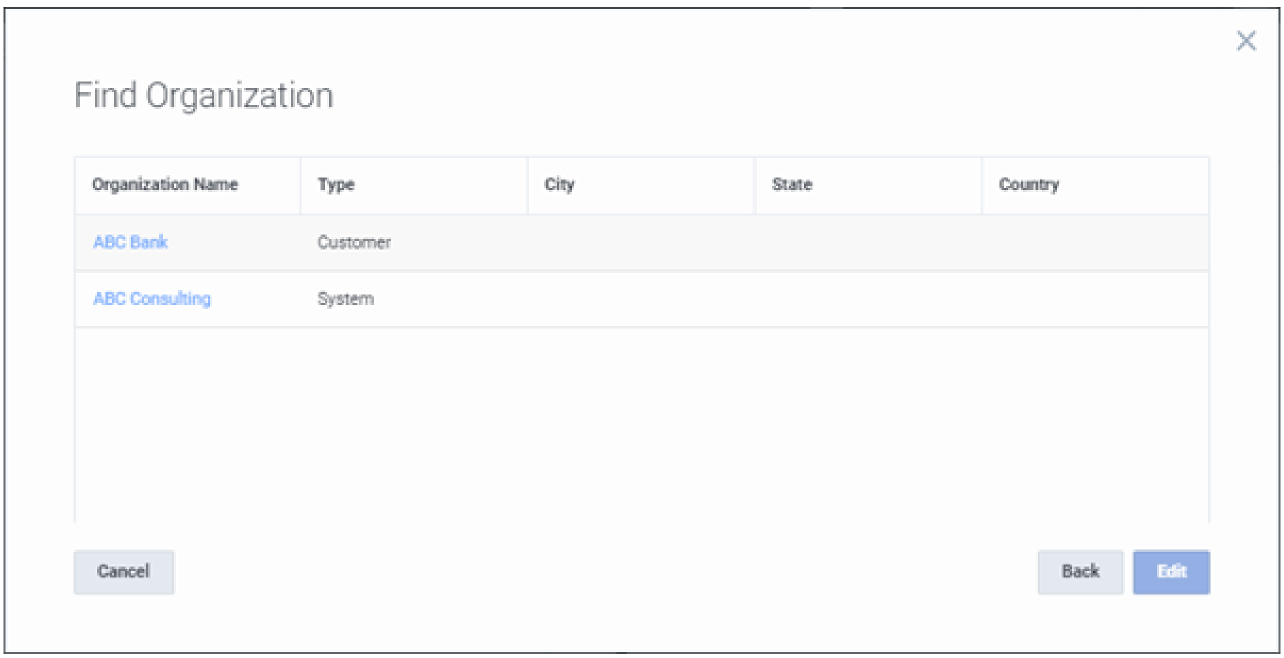
1. From the menu in the Journey Map view menu, select **Find Organization**.




2. In the **Find Organization** dialog box, enter your search criteria and click **Search**.




3. In the **Find Organization** dialog box search results page, so one of the following:




- To edit an organization's information, click an **Organization Name** or click anywhere in the row and click **Edit**.
- To further refine your search, click **Back**.
- To cancel the search, click **Cancel**.

### Related Topics

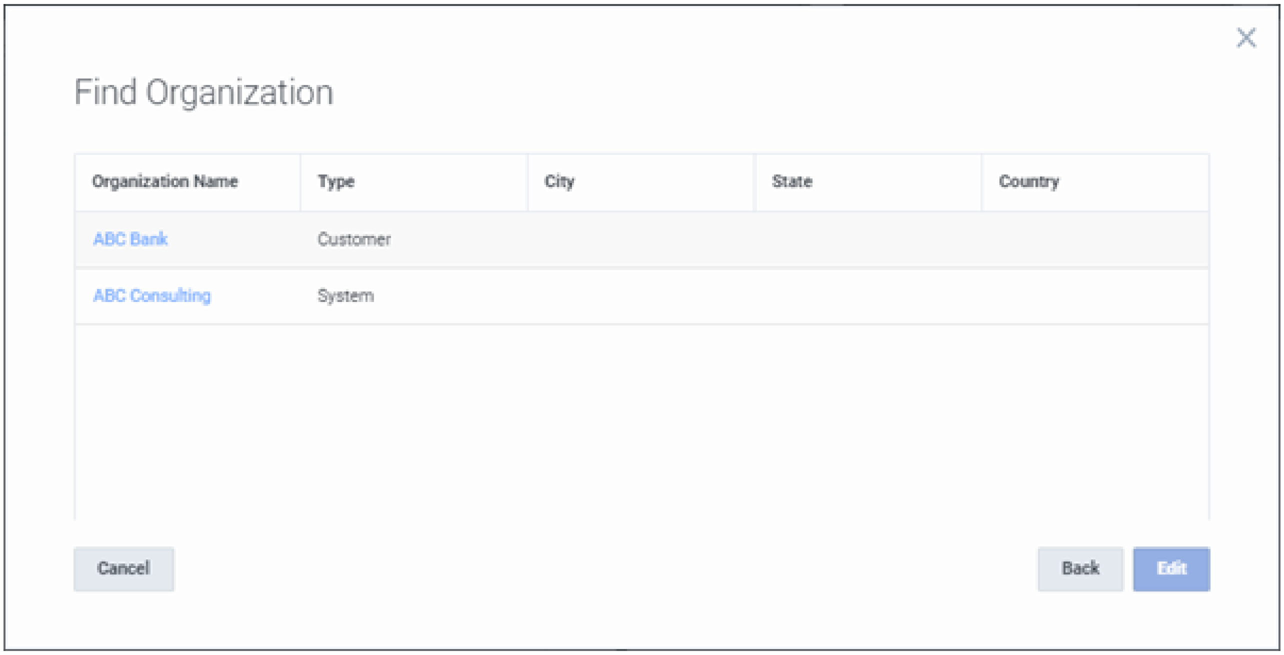
[Modify Organization information]

## Modify Organization information

**Requirements**: Some Journey Map functions are available only if you have the appropriate licenses and security rights. For more information, see Journey Map Licensing and Rights and your PureConnect administrator.

**To modify organization information:**

1. Find an Organization.
2. In the **Find Organization** search results page, click an Organization Name. Or click anywhere in the row and click **Edit**.




3. Modify any of the Organization's information as necessary.

   **Tip**: See Add an Organization for additional details.

4. Click **Save**.

# Working with Monitored Appearances

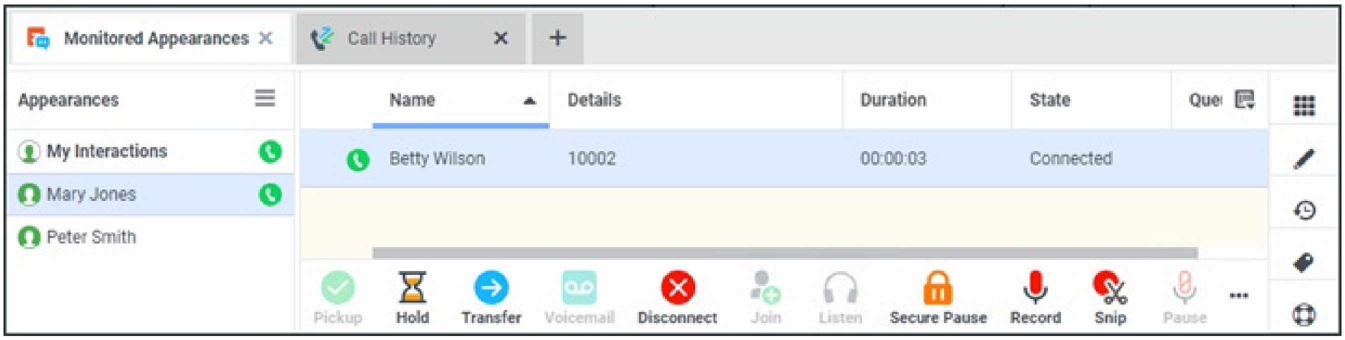
**Requirements:** Access Control rights determine which queues you can view and what actions you can perform on the interactions in these queues. For more information about the required rights, see the description of the Access Control Rights for User Queues. In addition, Client templates can contain configuration settings that determine which monitored appearances you see and control whether you can alter configuration settings.

You can set up Monitored Appearances to observe the **call activity** of several personnel at the same time. This feature is particularly helpful if you manage calls for a number of other users.

For example, receptionists or assistants can use Monitored appearances to continuously observe a manager's queue, control interactions, and perform tasks on the manager's behalf, such as picking up or transferring calls and creating conferences.

## Monitored Appearances View

Monitored Appearance entries appear on the same view as My Interactions. A monitored appearance has a different background color than My Interactions to help you view and facilitate interactions for that monitored user.




You can see the status of monitored users at-a-glance, as well as set distinguishing characteristics to alert when a monitored user performs particular tasks, such as engaging in a telephone call. These alerts can include visual pop-ups, audible alerts, or both. For more information, see Configure Monitored Appearances.

**Tip**: You can transfer an interaction by simply dragging it from a Monitored Appearance and dropping it on My Interactions, if you have the Transfer type of the Modify User Queues right for that queue.

**Related Topics**

- Activate and Deactivate Monitored Appearances
- Configure Monitored Appearances
- Customize Monitored Appearance Alerts

# Activate and Deactivate Monitored Appearances

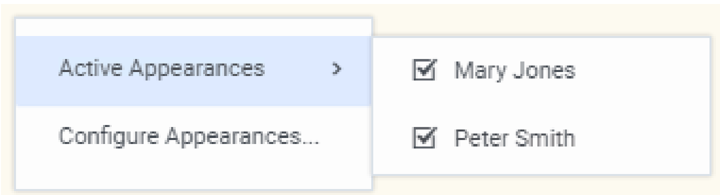
**Requirements**: For more information about required rights, see Working with Monitored Appearances. Note also that a Monitored Appearance is automatically removed if you lose the rights to view the associated user queue.

Activity is monitored only for appearances listed on the Monitored Appearances view. You can turn monitoring off and on for a selected appearance without having to delete it.

**To activate or deactivate a monitored appearance:**

**Note**: You can also activate and deactivate previously configured monitored appearances by clearing or selecting the **Active** check box in the Monitored Appearances node of the Applications Setting dialog box. See Configure Monitored Appearances.

1. If you have at least one monitored appearance displayed, in the Monitored Appearances view, right-click in the right side pane. Expand the **Active Appearances** option.




2. Do one of the following:
   - To activate a monitored appearance, select the name of a previously configured appearance.

     **Result**: This places a check mark next to the name. Monitoring starts for the selected person's interactions.
   - To deactivate a monitored appearance, select a check marked name.

     **Result**: This clears the check mark. Monitoring stops for the selected person's interactions.

**Related Topics**

Configure Monitored Appearances
Customize Monitored Appearance Alerts
Delete a Monitored Appearance
Working with Monitored Appearances

# Configure Monitored Appearances

**Requirements**: For information about required rights, see Working with Monitored Appearances. Also, you should set up monitored appearances only for users at **your site**. You should not configure a monitored appearance for a user configured on a separate site (on another CIC server) or for multi-site users.

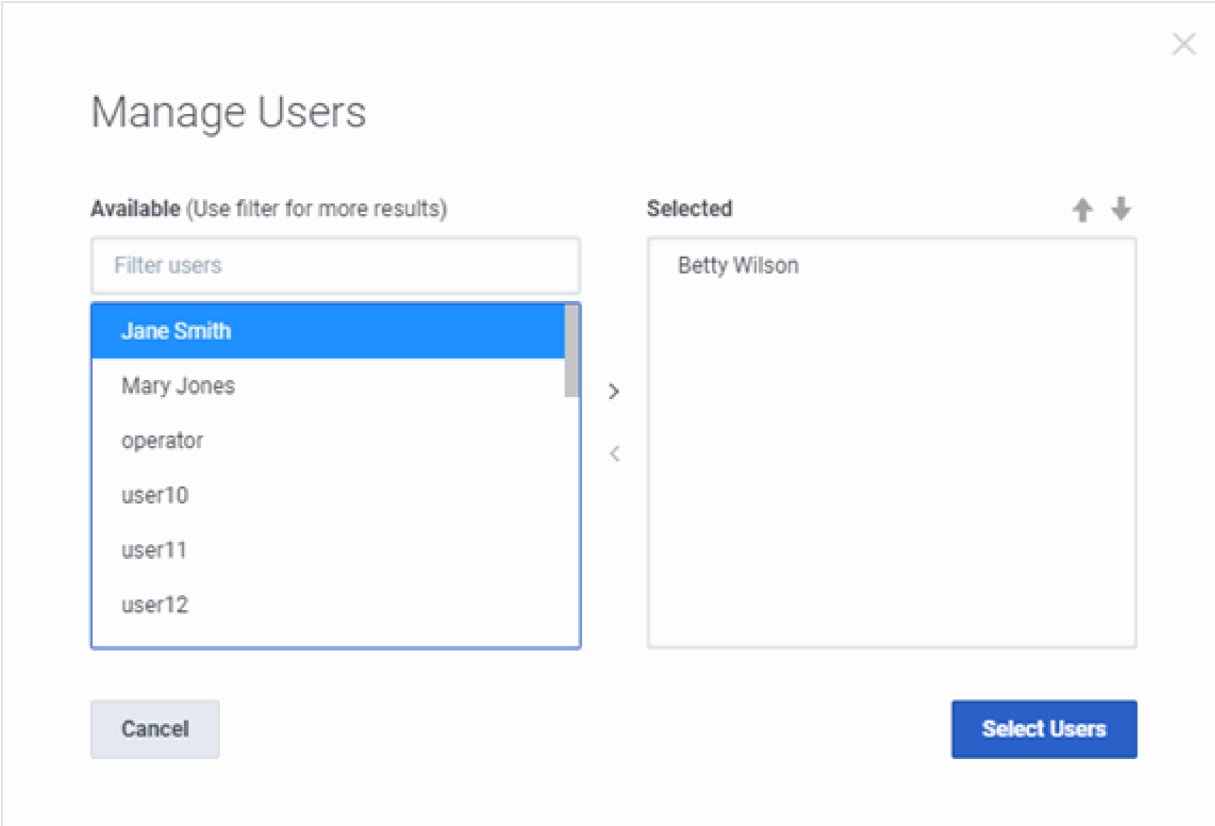
Use the Monitored Appearances property details pane to add, remove, and change the order of user queue in the Monitored Appearances view.

**Tip**: If you have the appropriate rights, you can also drag and drop a user from the Company Directory to the Monitored Appearances view to create a monitored appearance.

**To add a monitored appearance:**

1. Do one of the following:
   - If you have not yet configured a monitored appearance, open the Applications Settings dialog box.
   - If you already have one monitored appearance, in the Monitored Appearances view, right-click in the right side pane and select **Configure Appearances**.
2. If not already selected, in the Application Settings dialog box, click the **Monitored Appearances** node.
3. In the Application Settings dialog box, click **Manage Users**.

   **Result**: The Manage Users dialog box appears.




4. Create a list of selected User queues by doing any of the following:

   - To add a user queue, In the **Available** list, select a name and click **>**.
   - To remove a user queue, in the **Selected** list, select a name and click **<**.
   - To rearrange the order in which the user queues appear in the **Monitored Appearances** view, select a name and use the up and down arrows in the **Selected** list.

5. When the **Selected** list contains the names of the user queues you want to monitor, click **Select Users**.

   **Result**: The Application Settings dialog box reappears.
6. To change the name that appears on the Monitored Appearances view for a user, double-click its **Label** cell. Type a unique name for that monitored appearance.
7. To change whether this monitored appearance appears in the Monitored Appearance view, double-click its **Active** cell. Select the **Active** check box to display the Monitored Appearance, clear the check box to hide the Monitored Appearance.
8. To change the behavior of alerts for a Monitored Appearance queue, select a Monitored Appearance from the list and adjust its settings.

> **Note**: If all the users who are monitoring a user queue and the monitored user are all in a **Do Not Disturb** status, CIC doesn't alert any station. The call goes directly to voice mail. If any of the monitoring users or the monitored user are in an **Available** status, only that agent's station rings.

| | |
|---|---|
| **Ring telephone for calls** | Select this to ring your telephone when a new interaction arrives on the monitored queue.<br>**Note**: The **Modify User Queues** Access Control Right is required to enable the **Ring telephone for calls** or the **Ring application** alerting options for a monitored appearance. |
| **Ring application**<br>**Ring when on phone** | Select **Ring application** to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.<br>**Tip**: If you also check the **Ring when on phone** check box, incoming calls for the monitored user ring on your computer even if you are already on the phone. For more information about the ways the CIC client can notify you of incoming interactions, see Answer an Incoming Interaction. |
| **Display desktop alerts** | Display a desktop alert for alerting interactions on this monitored appearance.<br>**Note**: Desktop alerts are not supported for all browsers. |
| **Call Ring Sound** | Next to the **Call Ring Sound** text box, click the controls to select and then preview the distinctive sound played when new calls arrive on this monitored user queue.<br>**Note**: This setting enables you to select a different sound for each of your monitored queues. |

9. After you finish configuring monitored appearances, click **Save Settings**.

**Related Topics**

Activate and Deactivate Monitored Appearances
Configure Monitored Appearances
Delete a Monitored Appearance
Working with Monitored Appearances

# Customize Monitored Appearance Alerts

> **Requirements**: See Working with Monitored Appearances.

You can control the name displayed for each user queue in the Monitored Appearances view and determine how you are alerted when there is new activity on a monitored appearance.

1. Do one of the following:
   - If you have not yet configured a monitored appearance, open the Application Settings dialog box.
   - If you already have one monitored appearance, in the Monitored Appearances view, right-click in the right side pane and select **Configure Appearances**.
2. If not already selected, in the Application Settings dialog box, click the **Monitored Appearances** node.
3. In the Application Settings dialog box, select a Monitored Appearance from the list.
4. To change the name that appears on the Monitored Appearances view for a user, double-click its **Label** cell. Type a unique name for that monitored appearance.
5. To change whether this monitored appearance appears in the Monitored Appearance view, double-click its **Active** cell. Select the **Active** check box to display the Monitored Appearance, clear the check box to hide the Monitored Appearance.
6. To change the behavior of alerts for a Monitored Appearance queue, select a Monitored Appearance from the list and adjust its settings.

   > **Note**: If all the users who are monitoring a user queue and the monitored user are all in a **Do Not Disturb** status, CIC doesn't alert any station. The call goes directly to voice mail. If any of the monitoring users or the monitored user are in an **Available** status, only that agent's station rings.

| | |
|---|---|
| **Ring telephone for calls** | Select this to ring your telephone when a new interaction arrives on the monitored queue.<br>**Note**: The **Modify User Queues** Access Control Right is required to enable the **Ring telephone for calls** or the **Ring application** alerting options for a monitored appearance. |
| **Ring application**<br>**Ring when on phone** | Select **Ring application** to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.<br>**Tip**: If you also check the **Ring when on phone** check box, incoming calls for the monitored user ring on your computer even if you are already on the phone. For more information about the ways the CIC client can notify you of incoming interactions, see Answer an Incoming Interaction. |
| **Display desktop alerts** | Display a desktop alert for alerting interactions on this monitored appearance.<br>**Note**: Desktop alerts are not supported for all browsers. |
| **Call Ring Sound** | Next to the **Call Ring Sound** text box, click the controls to select and then preview the distinctive sound played when new calls arrive on this monitored user queue.<br>**Note**: This setting enables you to select a different sound for each of your monitored queues. |

7. After you finish configuring monitored appearances, click **Save Settings**.

**Related Topics**

Activate and Deactivate Monitored Appearances
Configure Monitored Appearances
Delete a Monitored Appearance
Working with Monitored Appearances

# Delete a Monitored Appearance

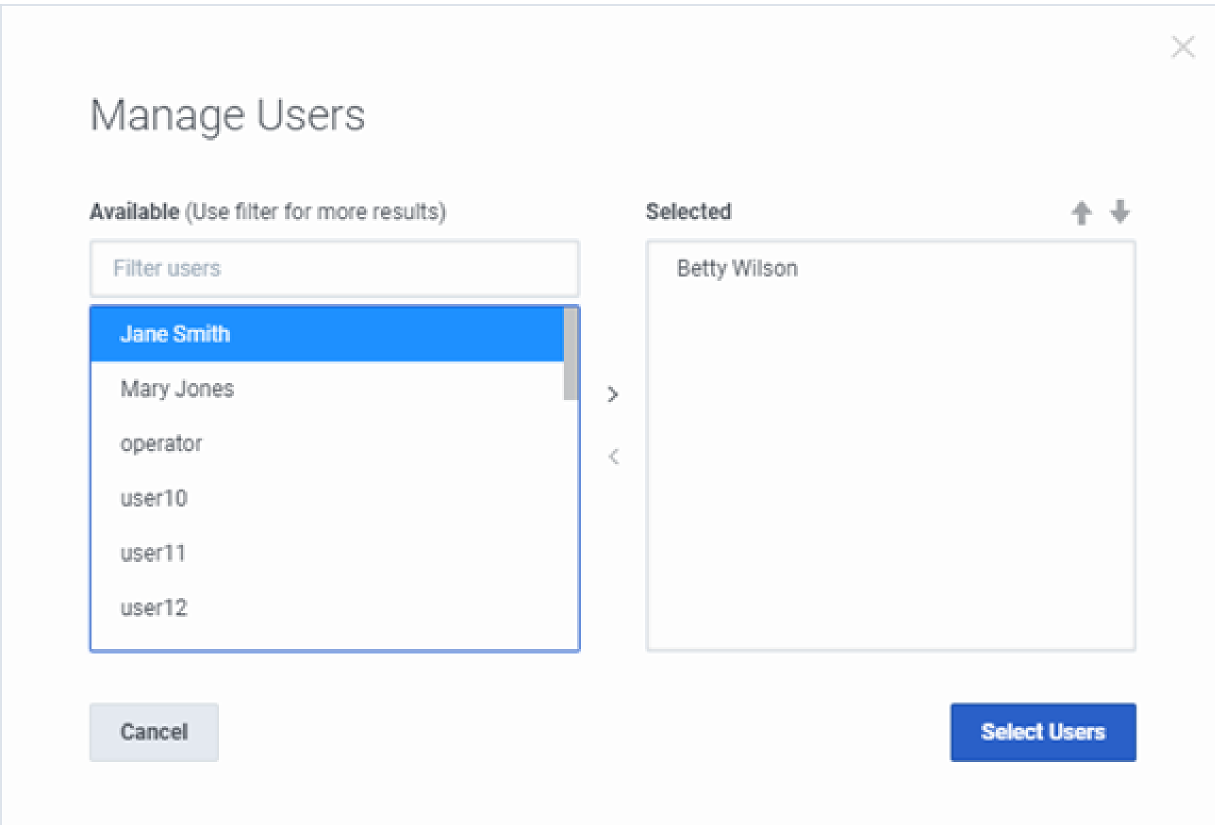
You can permanently delete a monitored appearance from the Monitored Appearances view.

**Note**: If you want only to suspend monitoring for a selected user, see Activate and Deactivate Monitored Appearances

**To delete a monitored appearance:**

1. Do one of the following:
   - If you have not yet configured a monitored appearance, open the Application Settings dialog box.
   - If you already have one monitored appearance, in the Monitored Appearances view, right-click in the right side pane and select **Configure Appearances**.
2. In the Application Settings dialog box, click the **Monitored Appearances** node.
3. In the Monitored Appearances property details pane, select **Manage Users**.

   **Result**: The Manage Users dialog box appears.




4. In the Manage Users dialog box, in the **Selected** list, select the user you no longer want to monitor and click< to move the name back to the **Available** list.
5. Click **Submit**.

   **Result**: The Monitored appearance for the selected user is deleted.

**Related Topics**

Activate and Deactivate Monitored Appearances
Configure Monitored Appearances
Customize Monitored Appearance Alerts
Working with Monitored Appearances

# Introduction to Queues

> **Requirements:** You need the appropriate Access Control rights to view or work with queues other than your own. To display a queue view, you need the View Station Queues, View User Queues, or View Workgroup Queues right. To manage interactions on a displayed queue, you need the Modify Station Queues, Modify User Queues, or Modify Workgroup Queues right. The rights to **Disconnect**, **Hold**, **Mute**, **Pickup** and **Transfer** interactions can be individually assigned for a selected queue. To perform monitoring functions in a displayed queue, you need the Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues right. The rights to **Coach**, **Join**, **Listen**, **Record**, or **Snip** interactions can be individually assigned for a selected queue.

A queue is collection of interactions related to a user, station or workgroup. The CIC client has the ability to monitor **My Interactions** and other station, user or workgroup queues.

You can see additional queues and the interactions in these queues by adding a view for each queue to the CIC client. The Create New View dialog box displays a list of all the queues which you are able to add to the CIC client. For more information, see Add or Close Views.

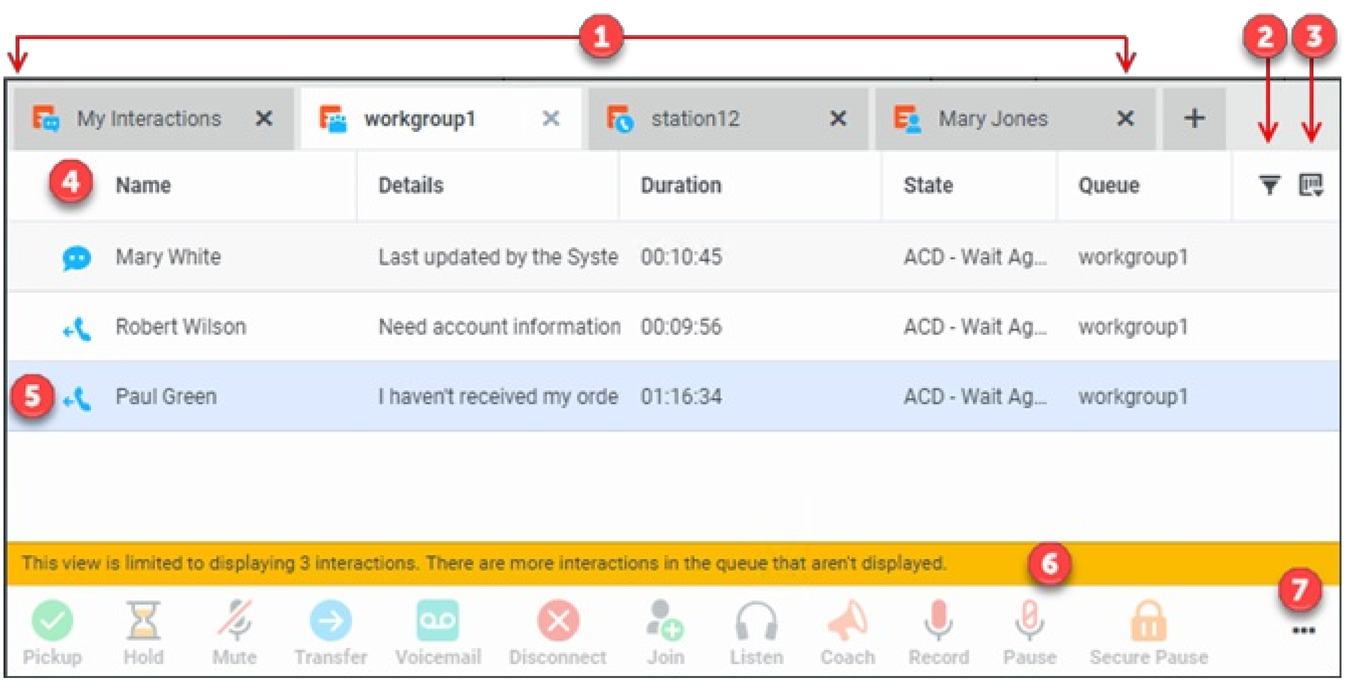
New interactions added to a queue can be automatically selected if there isn't another interaction selected or if the interaction that is currently selected is disconnected. When you use the Auto Select Interactions After Disconnect configuration option, the client automatically searches for and selects the oldest connected interaction in the queue when the currently selected interaction leaves the queue.

> **Note**: If the tab containing a monitored queue view 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 a hibernating tab, it "wakes up" and re-populates itself with interactions.

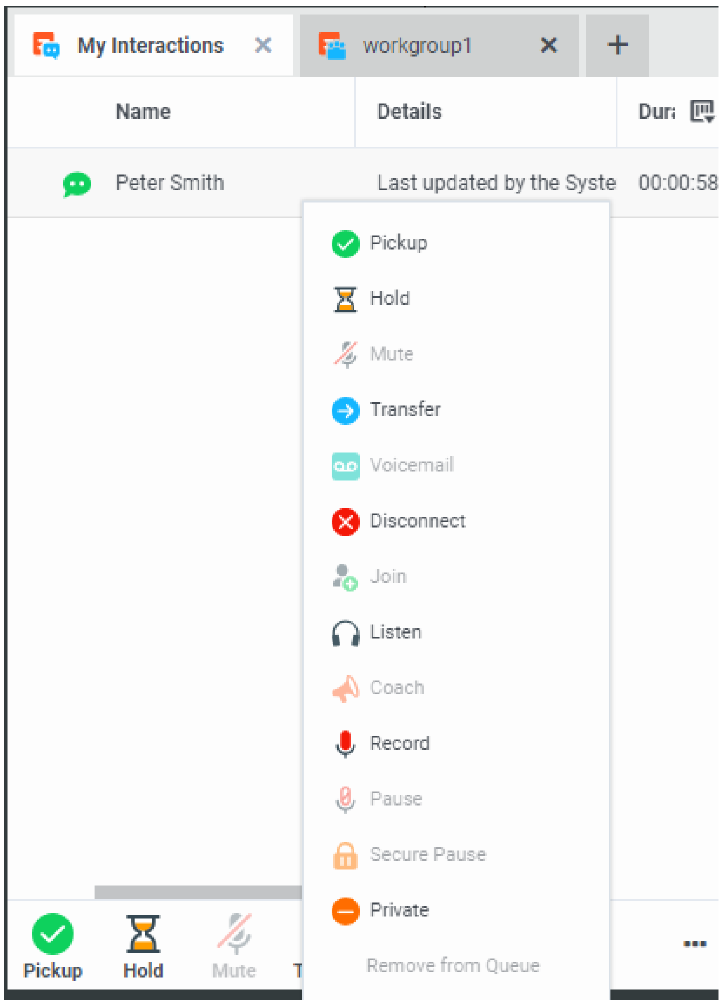
> **Note**: A maximum of 10 Queue views is supported from the **2020R1** version onwards.

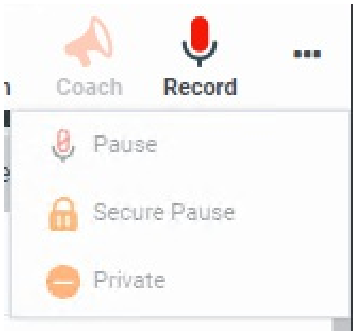
## Queue View Features

Queue views have these standard features.




| | | |
|---|---|---|
| 1 | **Queue view icons** | The queue view tabs have distinctive icons. The icon badges distinguish My Interactions, Workgroup queues, User queues, and station queues.<br>Click the **X** on a tab to close the view.<br>**Note**: This does not delete a view. You can add back closed views. |

| | | |
|---|---|---|
| 2 | **Configure Queue Filter** | To filter interactions in a queue view by type, state, and assigned user, click this control.<br>**Note**: This applies to workgroup, station, and user queue views. You cannot filter the My Interactions view. For more information, see Filter a Queue View. |
| 3 | **Choose columns** | To select the information displayed for each interaction in the queue view, click this control. For more information, see Add or Remove View Columns. |
| 4 | **Queue columns** | The Queue columns organize the information about each interaction in a queue. For more information, see Queue Contents and Understanding an Interaction's State. |
| 5 | **Selected interaction** | Queue views can contain more than one interaction. The currently selected interaction is highlighted.<br>You can use toolbar buttons to manage an interaction or you can right-click an interaction and choose an action from the shortcut menu.<br> |
| 6 | **Queue limit warning** | If the number of interactions in a queue exceeds its limit, a warning appears here.<br>There is a default limit of 50 interactions in queues other than My Interactions. There is also a hard limit of 200 interactions in queues other than My Interactions. Your CIC administrator can use server parameters to adjust these limits. If you have an **Interaction Supervisor Plug-In: Workgroup** license and enable Supervisor Features in Interaction Connect, you can change the default limit for a queue view. For more information, see Filter a Queue view. |

| | | |
|---|---|---|
| 7 | **Queue Control Toolbar** | The type and state of the currently selected interaction determine which actions are available to you. Available actions are indicated by enabled toolbar buttons. In narrow queue views, click the ellipsis at the end of a toolbar to expose the remaining toolbar buttons. For more information, see Using the Queue Control Toolbar.<br><br>**Tip**: You can add, remove, or rearrange buttons on the CIC client toolbars. For more information, see Customizing Queue Control Toolbars. |



**Related Topics**

Monitor Two or More Queues at the Same Time
Pick Up a Call From a Queue
Workgroup Statistics

# Monitor Two or More Queues at the Same Time

**Requirements**: You need the appropriate Access Control rights to view or work with queues other than your own. For more information, see Introduction to Queues.

With the CIC client, you can monitor more than one queue at the same time. You can monitor your own queue (My Interactions), and several user queues and station queues at the same time. The CIC client notifies you any time that a call comes into My Interactions.

By default, there is a limit of 50 interactions in queues other than My Interactions. Your CIC administrator can use server parameters to adjust this limit. If you have an **Interaction Supervisor Plug-In: Workgroup** license and enable Supervisor Features in Interaction Connect, you can also change the default limit.

**Note**: You can also monitor selected user queues by creating Monitored Appearances. For more information, see Configure Monitored Appearances.

### To monitor additional queues:

1. Click the **Add View** icon (plus sign) next to any tab.
2. Click **Show All Views**.
3. In the **Queues** category, select the type of queue.
4. In the **Search views** drop-down list, search for and select one or more queues.
5. In the **Add Views** dialog box, click **Add views**.

    **Result**: After CIC verifies that you have the appropriate Access Control rights, an additional queue view appears for each queue you selected.

**Related Topics**

Access Control Rights
Introduction to Queues

# Pick Up a Call From a Queue

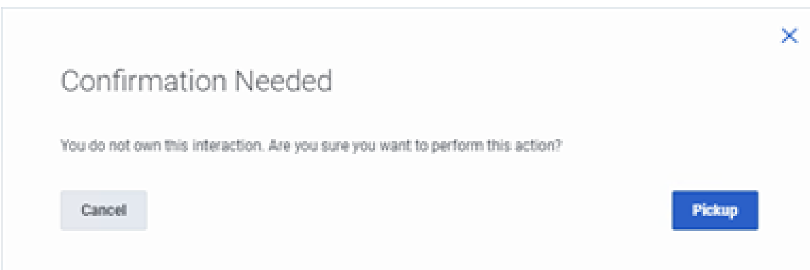
**Requirements**: See Pickup. Also, you need the appropriate Access Control rights to view or work with queues other than your own. For more information, see Introduction to Queues.

You can pick up a call in any displayed queue if you have the rights to modify calls in that queue.

**Note**: If your status is Available, Forward but you are still using the CIC client and you see an incoming call, you cannot pick up the call from the client window. You must let the call forward operation complete, and pick up the call from the ringing phone where the call was forwarded.

### To pick up a call from a queue:

1. Click the queue tab that contains the call you want to pick up.
2. Do one of the following:
   - Right-click a call in the queue and choose **Pickup** from the shortcut menu.
   - Select the call, then click the **Pickup** button.
3. At the **Confirmation Needed** prompt, click **Pickup**.




**Note**: When you work with queues other than My Interactions, CIC prompts you to confirm your action.

**Result**: You are now connected to the call.

**Related Topics**

Introduction to Queues
Monitor two or more queues at the same time
Pick Up a Call from Voice Mail
Pickup Button

# Filter a Queue View

You can filter interactions in a workgroup, station, and user queue views by type, state, and assigned user. To filter the My Interactions view, see Filter by Work Item Category.

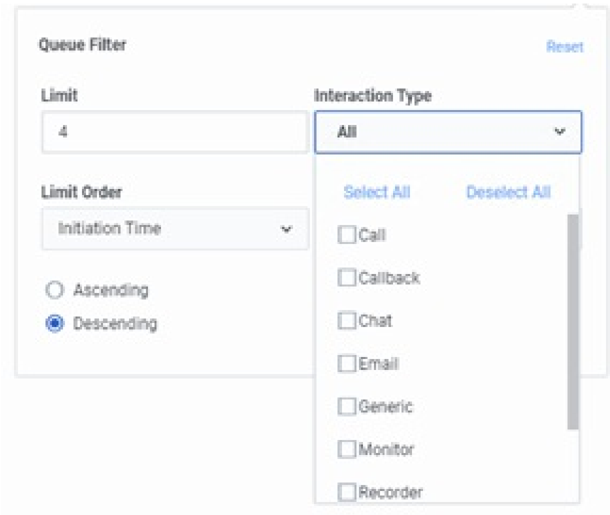
## Queue Result Limits

There is a **default limit** of 50 interactions in queues other than My Interactions. To change this default limit, your CIC administrator can use the `InteractionConnectDefaultQueueLimit` server parameter. If you enable Supervisor features, you can also change this default limit.

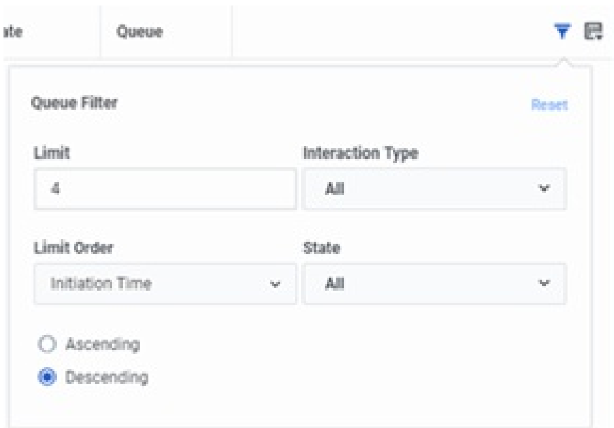
There is also a hard limit of 200 interactions in queues other than My Interactions. If the `InteractionConnectDefaultQueueLimit` server parameter or a user-specified value is higher than this hard limit, CIC uses the hard limit. To override this hard limit, the CIC administrator use the `InteractionConnectMaxQueueLimit` server parameter.

**To filter a queue view:**

1. Click the **Configure Queue Filter** control in the upper right corner of the queue view.
2. To set options for **Interaction Type**, **State**, and **User**, select check boxes or use the **Select All** or **Deselect All** controls.




**Note**: If you have an **Interaction Supervisor Plug-In: Workgroup** license and enable Supervisor Features in Interaction Connect, you can configure additional queue filter parameters.




3. Set **Limit** to the maximum number of interactions displayed in this queue view.
4. Set **Limit Order**

**Note**: Limit Order is not the same as sorting the queue view by a selected column. Limit Order controls the order in which the interactions are retrieved from the CIC server.

5. To apply the filters and close the Queue Filter dialog, click anywhere outside the dialog

**Note**: When you apply a filter to a queue view, the Configure Queue Filter control changes color to orange.

## Remove Disconnected Interactions from a Queue

**Requirements**: You need the appropriate Access Control rights to view or work with queues other than your own. For more information, see Introduction to Queues.

You can remove a disconnected call or other disconnected interaction from a queue. Calls removed from My Interactions are immediately available in Call History.

**To remove a disconnected interaction from a queue:**

- In My Interactions or other queue, right-click the interaction and choose Remove from Queue from the menu that appears.

**Related Topics**

Introduction to Queues

## Queue Contents

**Requirements**: The View Queue Columns Access Control right determines which queue columns you can display in My Interactions or other queue view.

My Interactions and other station, user, or workgroup queues can display the following information about each interaction.

**Tip**: For more information about customizing a queue view, see Add or Remove View Columns.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Account Code</td><td>An account code is an identifying set of numbers assigned to an account name in Interaction Administrator. In the CIC client, you can use account codes to organize interactions by customer. For more information, see Understanding Account Codes.</td></tr>
<tr><td>ACD Wait Reason</td><td>This column displays the reason an interaction has not yet been routed to a specific agent. Possible reasons include "No available agents" or "No available agents for this media type" among others.</td></tr>
<tr><td>Associated Process</td><td>This column displays the name of the process with which this interaction is associated. The ability to associate an interaction with a process is an Interaction Desktop feature.</td></tr>
<tr><td>Attachments</td><td>The Attachments column displays an icon if an email interaction has an attachment. It is blank if no attachments are present. This information is also available in the Details column, but the Attachments column enables you to sort by the presence or absence of an attachment.</td></tr>
<tr><td>Chat Response Time</td><td>This column shows the time that has elapsed since anybody involved in the chat entered some text. For more information, see Working with Chat Sessions.</td></tr>
<tr><td>Details</td><td>This column displays context-specific information based on the interaction type.<ul><li>For calls, it displays the Remote Address (phone number) that you dialed or the phone number of the party on an incoming call.</li><li>For callbacks, it displays the subject entered by the website visitor requesting the callback. For more information, see Working with Callback Requests.</li><li>For email messages, it displays the email subject as well as an importance icon and an attachments icon, if needed. For more information, see Working with E-mail Messages.</li><li>For chats, it displays the name of the user who last typed, and the text they entered. It also displays a typing indicator (icon) to indicate that someone participating in the chat is currently typing. For more information, see Working with Chat Sessions.</li></ul></td></tr>
<tr><td>Duration</td><td>Duration displays the amount of time an interaction has been active.</td></tr>
<tr><td>Importance</td><td>The Importance column displays an icon indicating whether an email message is of high or low importance. It is blank for "normal" importance. This information is also available in the Details column, but the Importance column enables you to sort email interactions by level of importance.</td></tr>
<tr><td>Interaction Id</td><td>The interaction’s identification number. Numbers are assigned sequentially and reset to zero any time the server is restarted.</td></tr>
<tr><td>Interaction Type</td><td>This is a code that corresponds to the interaction type.  For example, 0 is a call and 1 is a chat. See the PureConnect Data Dictionary in the PureConnect Documentation Library for more details.</td></tr>
<tr><td>Line</td><td>The line queue on which the interaction is located.</td></tr>
<tr><td>Lstns</td><td>If someone is listening to or monitoring your interaction, the listen icon appears in the Lstns column in your queue view. For more information, see Determine if Someone is Listening to or Recording Your Interactions.<br><br>Note: You need the Monitor Columns Security right and the appropriate View Queue Columns Access Control right to display the Lstns and Recs columns in a queue view.</td></tr>
</table>

| | |
|---|---|
| **Name** | The name of the person or organization with whom a CIC client user is interacting.<br>For more information about how Interaction Center identifies a caller, see Caller Name.<br>**Note**: Voice Mail appears in the Name column for voice mail messages played back through your Telephone Handset. |
| **Number** | The telephone number of the person with whom a CIC client user is speaking. A SIP URI (SIP phone number in the format sip:x@y:port) appears in the Number column for SIP calls.<br>**Note**: Your CIC administrator can configure the server parameter BlockedTN to display a phrase such as "Private Number" for any incoming call with a blocked number. |
| **Queue** | The Queue column contains an icon indicating the interaction type and its state.<br>If this is an ACD-routed interaction, the name of the ACD workgroup queue to which the interaction was routed also appears here. |
| **Recs** | If someone is making a recording of your interaction, a record icon appears in the Recs column in your queue view. Record icons appear for both ad-hoc and snippet recordings. For more information, see Determine if Someone is Listening to or Recording Your Interactions and Recording Types.<br>**Note**: You need the Monitor Columns Security right and the appropriate View Queue Columns Access Control right to display the Lstns and Recs columns in a queue view. |
| **Security** | The Security column displays the current security level of the call. If a call is not secure, it displays "0." If a call is secure, it displays "100." |
| **State** | The current condition of an interaction. For more information, see Understanding a Call's State. |
| **Station** | The station queue on which the interaction is located. |
| **Subject** | This column displays an email message subject or the subject entered by a website visitor requesting a callback. This information is also available in the Details column, but the Subject column enables you to group related email messages by sorting by subject. |
| **Time in Status** | This column displays how long the agent has been in their current status. |
| **Time in Workgroup Queue** | This column displays the time that an interaction has spent in this workgroup queue. |
| **User** | The user queue on which the interaction is located. |
| **Work Item Category** | Each work item can be associated with a category. The names of the categories of your current work items appear in the Category column of My Interactions.<br>**Note**: When **My Interactions** contains Work Items, you can filter the view and display only Work Items from selected categories. |
| **Work Item Created On** | A Work Item Process creates Work Items as needed. Work Items are routed to agents to gather information or prompt the agent to take some action. This column displays the date the associated Work Item Process created this particular Work Item. For more information, see Working with Interaction Process Automation. |
| **Work Item Description** | A description of the Work Item. |
| **Work Item Due Date** | The date by which this Work Item must be completed. |

| | |
|---|---|
| **Work Item Error** | This column displays a description of an error. An error is a condition severe enough to prevent you or another agent from handling this work item. An administrator who is using Interaction Supervisor or Process Monitor or who is viewing your queue can also see this error. An administrator with the appropriate rights may be able to fix the problem and retry the process using Process Monitor.<br><br>For more information, see Working with Interaction Process Automation. |
| **Wrapup Code** | Wrap-Up codes indicate the nature of an interaction; for example, a billing problem, a new order, or a service request. For more information, see Understanding Wrap-Up Codes. |

**Related Topics**

Caller Name
Understanding a Call's State

# 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, in a reply to an ACD-routed email message, or when responding to a callback request. 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 your company's Help Desk representatives and a general-purpose response library for all users. If you have the appropriate rights, these libraries appear in the Response Management View.

> **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 these 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.
  - **URLs**: URL items are clickable hyperlinks to web pages.

**Related Topics**

Create Personal Responses
Organize Personal Responses
Response Management View
Using Response Management

# Using Response Management

**Requirements**: See Working with Response Management.

You use stored responses to avoid typing the same information repeatedly. 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 a Text Message
- Use Response Management in an Email Message
- Use Response Management in a Social Media interaction

Note: You can navigate from view to view and with a view, press **Tab**. For more information, see Keyboard Navigation

**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 Response Management view. You can arrange personal responses in folders (categories). For more information, see Organize Personal Responses.

**Note**: You can create and edit only your personal responses. Personal responses are private and are not available to other CIC client users. You cannot add to or change the company-wide response items. Company-wide response libraries are indicated by a globe icon.

You can create three kinds of personal responses:

- Message
- File
- URL

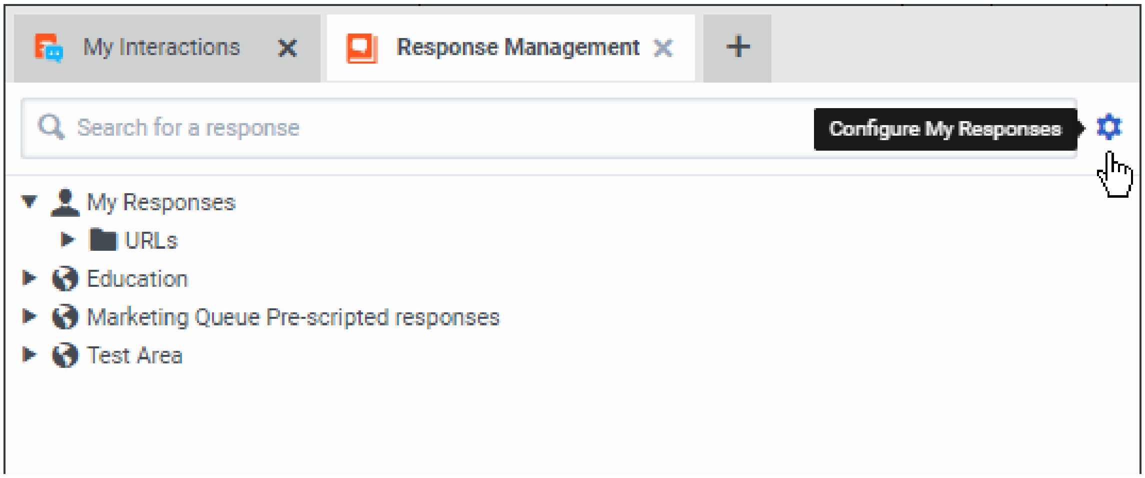
## Personal Messages

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.

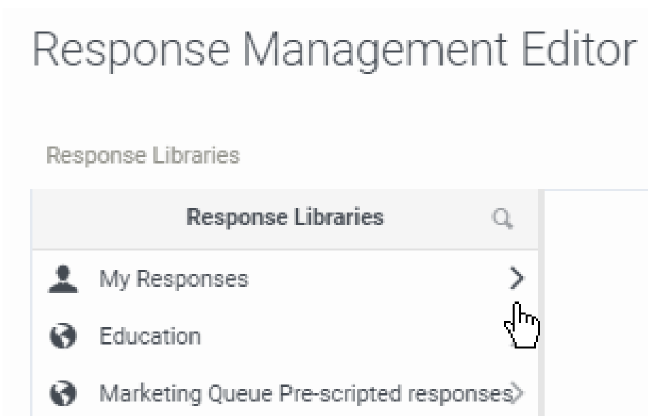
**Note**: A stored message can contain a working URL hyperlink.

**To create a message response item:**

1. Do one of the following:
   - If the Response Management Editor is not already open, in the Response Management view, click the **Configure My Responses** tool.




And then in the Response Management Editor, click the **Expand Category** arrow for **My Responses.** If needed, click **Expand Category** arrows to navigate to the appropriate subcategory.




- If the Response Management Editor is already open, and if needed, click **Expand Category** arrows to navigate to the appropriate subcategory.

2. When you reach the appropriate category, click the **Add** button.
3. From the Type popup menu, select **New Text Response**.
4. 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. See also 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 Text."

5. In the **Shortcut** text box, type a short name, abbreviation, or code.

> **Tip**: The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting. For more information, see Use a Response Shortcut.

> **Note**: Do not use any of these restricted characters in your shortcut: ~ ! ? * ^ \ . These special characters prevent the shortcut from working.

6. In the **Labels** text box, type a space-separated list of words that identify or classify this response item.

> **Note**: As you type labels, a dropdown list appears that lists the labels you have already used. You can select a label from this list.

7. In the composition area, type the text of the message.

**Tip**: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press **Shift+Enter** to create a new line. Press **Shift+Enter twice** to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.

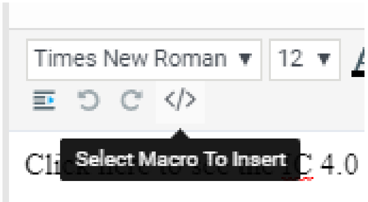
8. Optionally, do any of the following in the My Responses Editor:

**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.
- **Insert Link**: Create a clickable link to a URL by clicking the **Insert Link** tool. Supply the necessary URL address and the text for the link. If you selected some text in the stored response before clicking Insert Link, it appears as the clickable text.
- **Insert Image URL:** Supply a URL ending in the image file name. This URL must be accessible to your browser. Supply the text for the link and click **Insert Link**.

**Tip**: You can also copy and paste the image from your browser to the stored response.

- **Add a Response Macro**: Response macros automatically insert a system value like today's date, an interaction attribute such as the customer's name, or another response item into your email message or chat. Click the **Select Macro to Insert** toolbar button to insert a macro in a personal message. See Create Response Macros for more details.




9. Click **Save.**

**Result**: The new response item appears in the selected folder in the My Responses Window.

**Tip**: Interaction Connect saves new items and changes to existing items only after you press **Save**. You can create multiple new items or make multiple changes before you press **Save**.

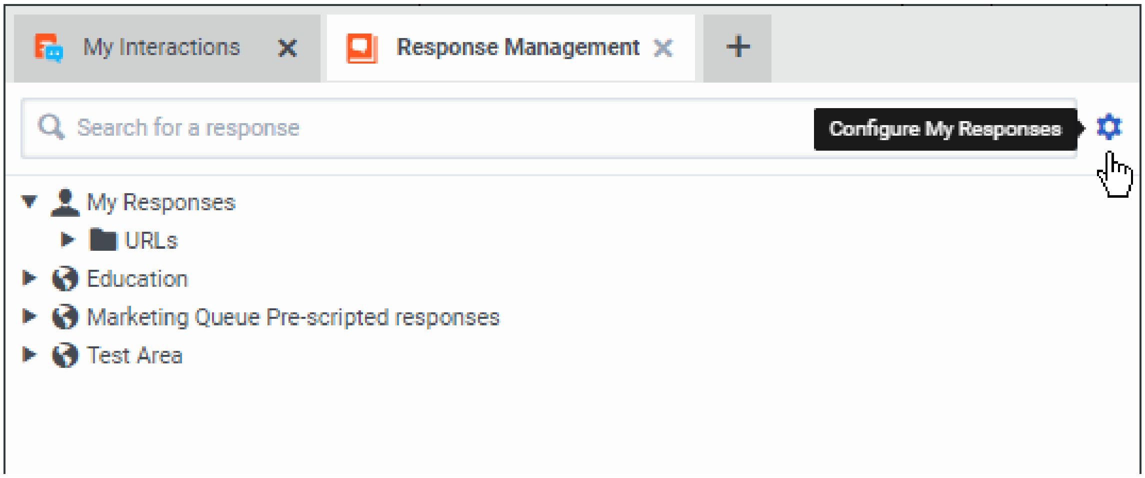
## Personal Files

Personal files are files that you upload from your workstation.

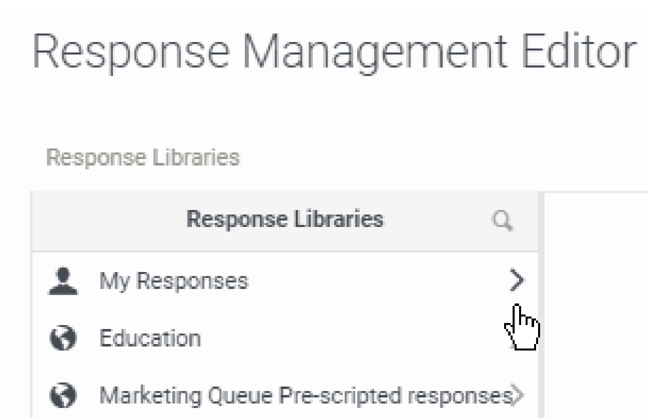
**Note**: You cannot use the following types of executable files (.exe, .sh, and .js) in a personal response.

**To create a file response item:**

1. Do one of the following:
   - If the Response Management Editor is not already open, in the Response Management view, click the **Configure My Responses** tool.




And then in the Response Management Editor, click the **Expand Category** arrow for **My Responses.** If needed, click **Expand Category** arrows to navigate to the appropriate subcategory.




- If the Response Management Editor is already open, and if needed, click **Expand Category** arrows to navigate to the appropriate subcategory.

2. When you reach the appropriate category, click the **Add** button.
3. From the Type popup menu, select **New File Response**.
4. In the **Name** text box, type a name for this stored response.

> **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. See also 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 Text."

5. In the **Shortcut** text box, type a short name, abbreviation, or code.

> **Tip**: The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting. For more information, see Use a Response Shortcut.

> **Note**: Do not use any of these restricted characters in your shortcut: ~ ! ? * ^ \ .  These special characters prevent the shortcut from working.

6. In the **Labels** text box, select one of your previously-used labels from the drop-down list or type a space-separated list of words that identify or classify this response item.
7. In the composition area, do one of the following:

- Drag and drop a file from Windows Explorer to the composition area.
- Click **Choose a file**, navigate to the file and click **Open**.

> **Note**: There is a limit of one file per stored response.

8. Click **Save**.

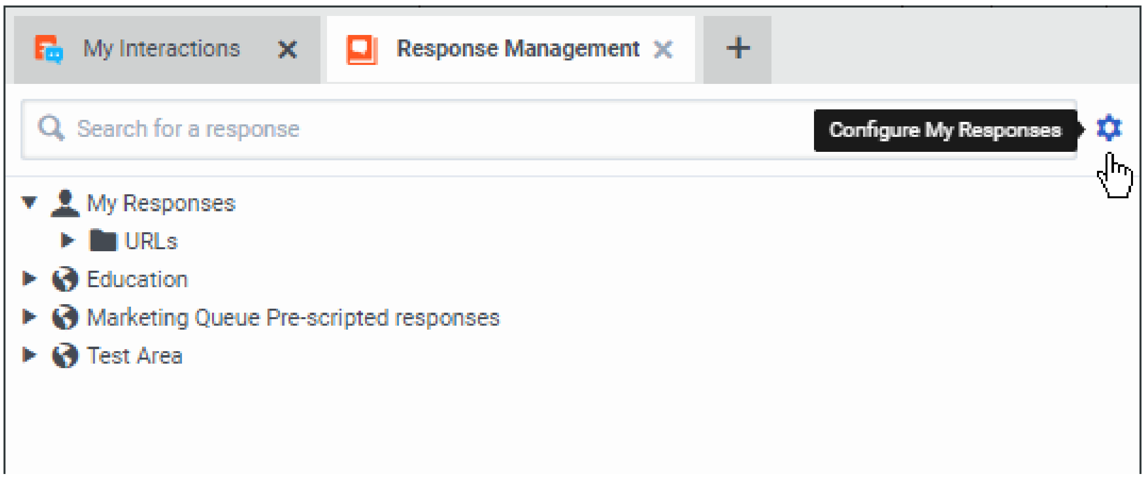
---

## URLs

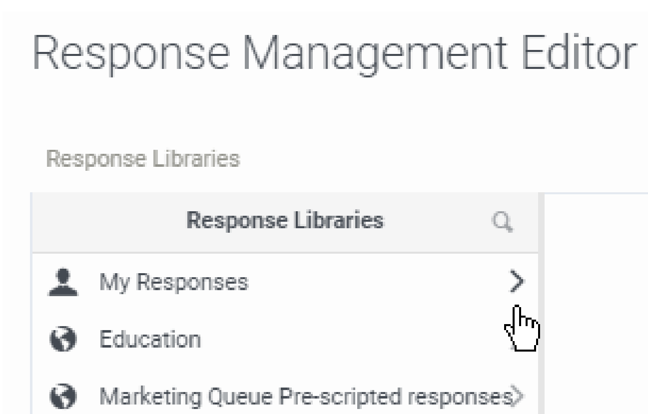
URLs are clickable hyperlinks to web pages.

**To create a URL item:**

1. Do one of the following:
   - If the Response Management Editor is not already open, in the Response Management view, click the **Configure My Responses** tool.




   And then in the Response Management Editor, click the **Expand Category** arrow for **My Responses.** If needed, click **Expand Category** arrows to navigate to the appropriate subcategory.




   - If the Response Management Editor is already open, and if needed, click **Expand Category** arrows to navigate to the appropriate subcategory.

2. When you reach the appropriate category, click the **Add** button.
3. From the Type popup menu, select **New URL Response**.
4. In the **Name** text box, type a name for this stored response.

> **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. See also 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 Text."

5. In the **Shortcut** text box, type a short name, abbreviation, or code.

> **Tip**: The shortcut does not have to be unique. For example, you could use the shortcut "Hi" for all the variations of your standard greeting. For more information, see Use a Response Shortcut.

> **Note**: Do not use any of these restricted characters in your shortcut: ~ ! ? * ^ \ .  These special characters prevent the shortcut from working.

6. In the **Labels** text box, select one of your previously-used labels from the drop-down list or type a space-separated list of words that identify or classify this response item.
7. In the URL text box, type or copy and paste the URL.
8. To test that the URL is correct, click **Open URL**.
9. Optionally, in the Text box, type the name for a clickable link.
10. Click **Save**.

### Related Topics

Create Response Macros
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.

## System

System macros do not depend on the dynamic context of the interaction into which you are inserting it. Here are the currently supported system macros.

| Field | Value |
|---|---|
| User Name | The display name of the logged on user, most likely your display name. |
| Current Date | The short form of the current date based on the language used in your country or region. |
| Current 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 inserted response contains macros, the inserted response contains the appropriate values. Response macros 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!

**Related Topics**

Create Personal Responses

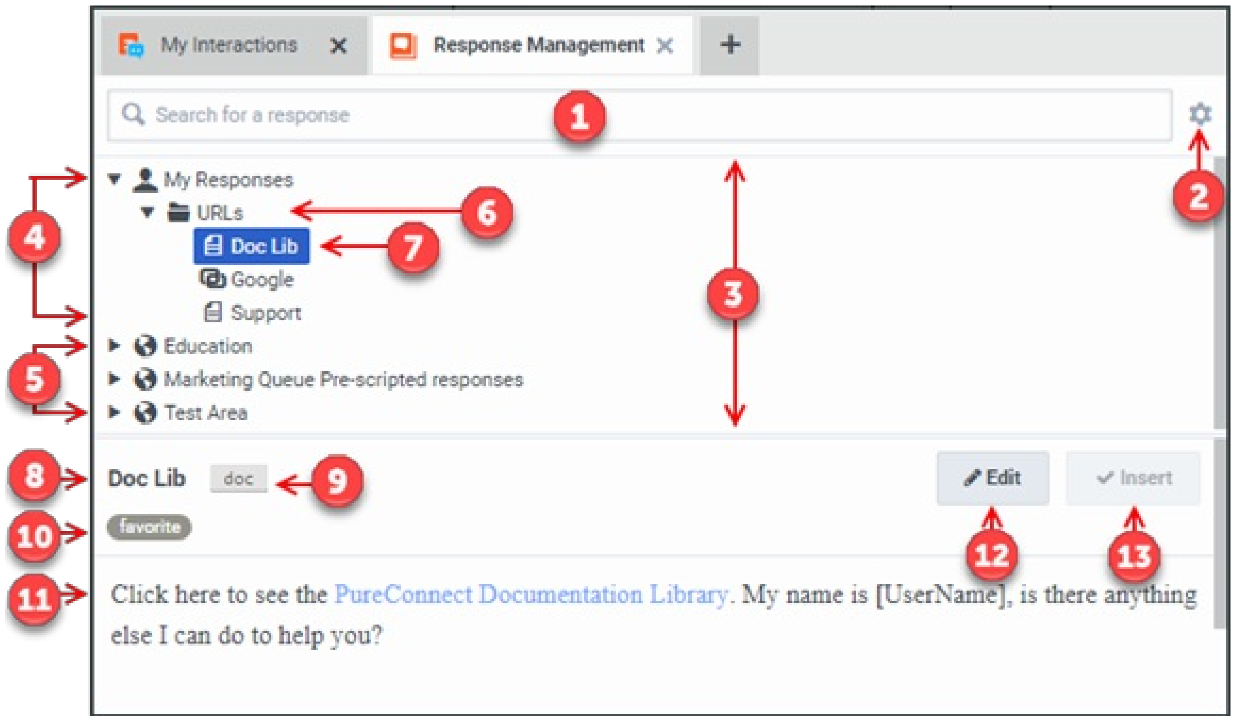
# Response Management View

You can use the Response Management view to search for stored responses during any interaction. You can insert these responses in a chat response, email reply, or interaction notes. You can relay the information verbally during a call.

You can add the Response Management view to the CIC client. You can use the view anytime you have an active and selected interaction. For more information, see Using Response Management.

**To display the Response Management view:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. Click **Show All Views**.
3. In the Add Views dialog box, in the **Interactions** column, select **Response Management**.
4. Click the **Add View** button.



| | | |
|---|---|---|
| 1 | **Search** | To locate a response, use the full-text **Search for a response** box. For more information, see Search for a Response.<br>**Note**: This full-text search tool uses the information in **Name**, **Shortcut**, and **Labels** along with the response item's content to find a response. |
| 2 | **Configure My Responses** | Click this tool to open the Response Management Editor. You can create, edit and delete your personal responses. |
| 3 | **Navigation Pane** | To locate a particular response, click anywhere in this hierarchical view, expanding categories as needed. Both your personal and system-wide response items and categories appear in this tree view. |
| 4 | **My Responses** | This folder contains your collection of personal responses. It can be organized into categories.<br>**Note**: You cannot create personal responses in the current release of Interaction Connect. However, you can create personal responses in another CIC client, such as Interaction Desktop, and use these responses in Interaction Connect. For more information about creating personal responses, see the help in whichever alternative CIC client you use to create personal responses. |
| 5 | **System-wide Responses** | Your CIC administrator can create libraries of standard responses that all or selected CIC client users can use.<br>**Requirement**: You need the appropriate Response Management View Access Control Right to use any of the system-wide response items. |
| 6 | **Category** | Categories are folders or collections of response items. An arrow indicates a category name. |
| 7 | **Selected item** | The selected response item is highlighted. |
| 8 | **Name** | This is the name of the selected response item. This name does not have to be unique. It can default to the first few characters of a message or a file's directory path. |
| 9 | **Shortcut** | You can type the shortcut and press **Ctrl+Space** to insert the response item in a chat or email reply. |
| 10 | **Labels** | Labels provide more search terms. |
| 11 | **Preview Pane** | The preview pane displays an HTML preview of a selected item's text or the directory path and file name of a selected file. |
| 12 | **Edit** | Click the **Edit** control to open the item in the Response Management Editor and make any necessary changes. |
| 13 | **Insert** | Click **Insert** to use selected item in an active and selected chat or email. |

**Related Topics**

Change View Layout
Search for a Response
Using Response Management

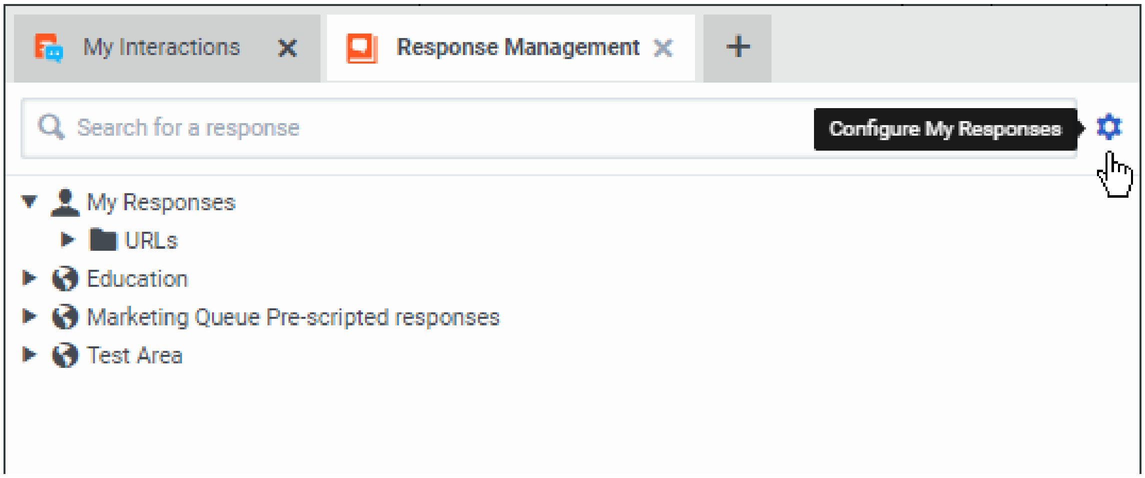
## Response Management Editor

**Requirements**: See Working with Response Management.

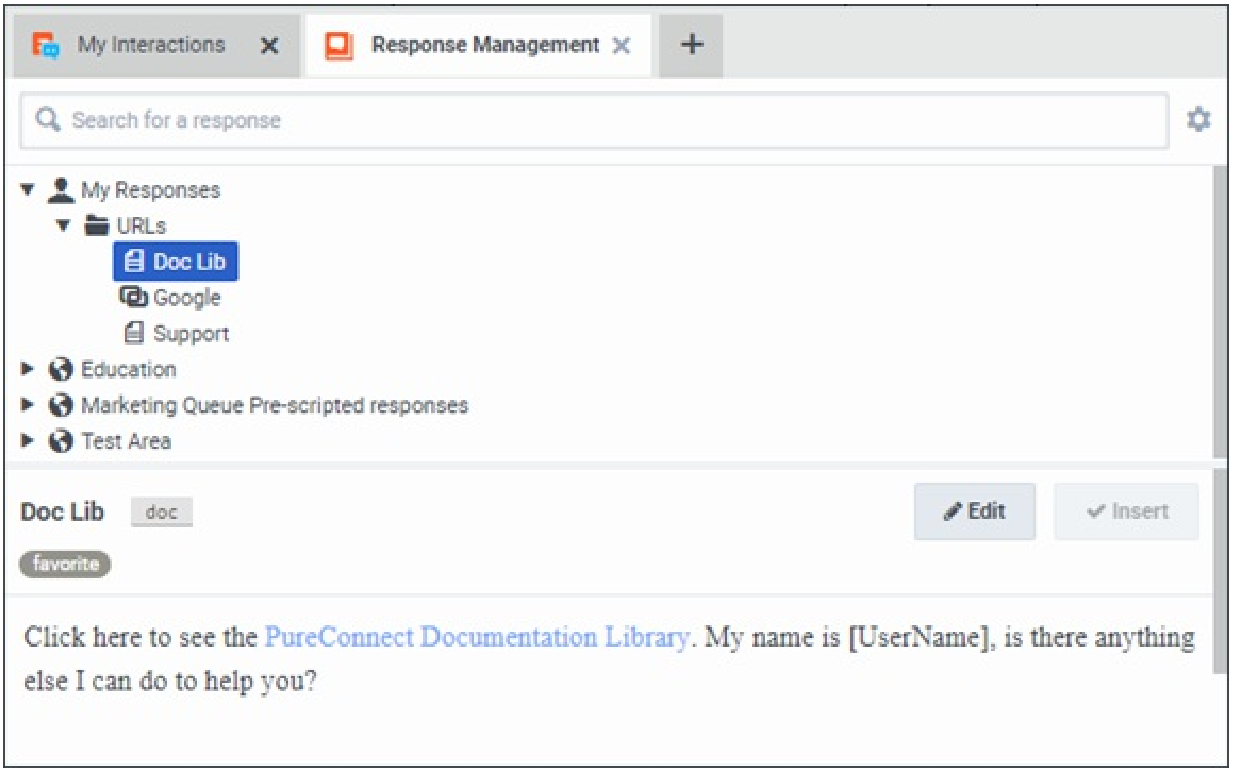
To create and edit response items, use the Response Management Editor. It is a full-featured HTML editor with text formatting tools for messages. You can insert Response Macros, create hyperlinks, and add images.

**To access the Response Management Editor:**

- In the Response Management view, click the **Configure My Responses** tool.

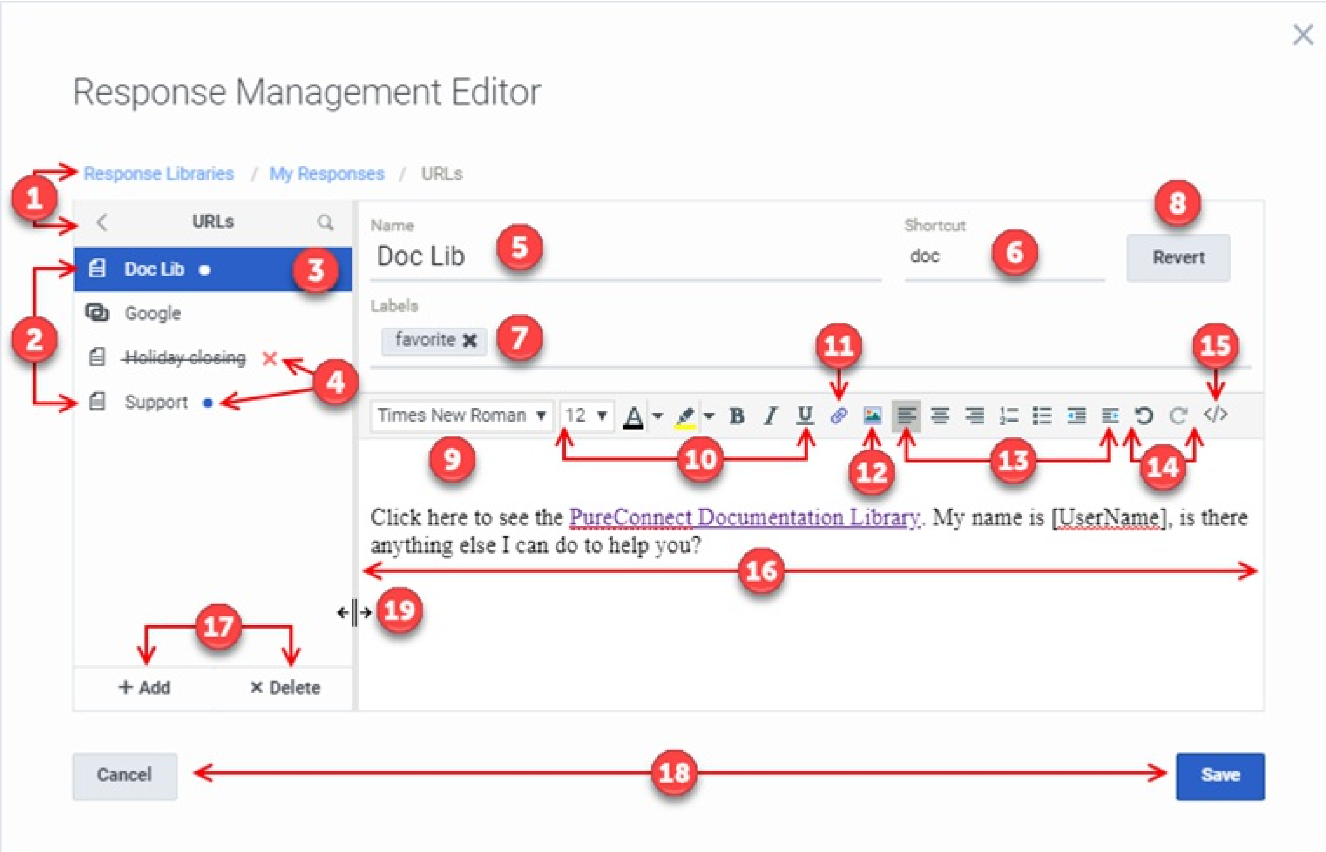


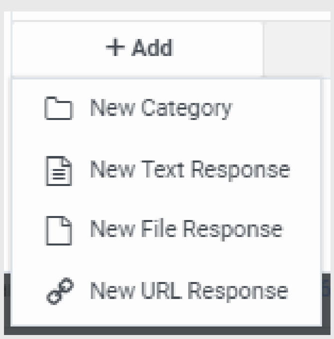

- In the Response Management view, navigate to an existing item in the My Responses folder and click the **Edit** button.




## Editor tools

The Response Management Editor contains navigation and text editing controls.  For more information about creating or editing personal responses, see Create Personal Responses.




| | | |
|---|---|---|
| 1 | **Navigation Aids** | To locate a response or view the items in a category, use navigation bar, the arrows or the **Search** control. |
| 2 | **Response items** | This area displays the names of the response items in the current category. Icons indicate the type of response item. These are the same icons that appear when you add a new response item.   |
| 3 | **Selected item** | The currently selected item is highlighted. |
| 4 | **State** | Interaction Connect updates response items only after you press **Save**.<br>• A **blue circle** indicates that Interaction Connect has not yet saved a new item or changes to an item.<br>• **Striked through text** and a **red X** indicate that Interaction Connect has not yet deleted an item you selected for deletion. |
| 5 | **Name** | Name identifies the response item, but does not have to be unique. If you do not provide a name, it defaults to the first few characters of a message or a file's directory path.<br>**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. |

| | | |
|---|---|---|
| 6 | **Shortcut** | To make it easier to insert this response in a chat or email reply, assign a shortcut. For more information, see Use a Response Shortcut. |
| 7 | **Labels** | Labels provide additional search terms |
| 8 | **Revert** | Revert removes all the changes you have made to the currently selected response item. |
| 9 | **Font** | You can select a font or use the **Default** font setting.<br>**Note**: When you use a stored response, text with the **Default** font setting 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 containing text with a **selected font** and other font characteristics, then the text appears as originally formatted. |
| 10 | **Font characteristics** | The editor includes a full range of text formatting tools. Tooltips identify each of the tools. |
| 11 | **Insert Link** | Insert a link to a URL. You can also turn a selected word or phrase into a clickable hyperlink. |
| 12 | **Insert Image URL** | Add a link to the URL for an image. The person receiving this response can click the link to view the image.<br>**Tip**: You can also copy and paste an image selected in your browser to a stored response. |
| 13 | **Paragraph controls** | These tools include alignment, list, and indenting options. |
| 14 | **Undo and Redo** | Undo and Redo apply only to changes in the editing pane. You can undo your last typing action, one word at a time. Or remove an inserted Link or Image URL. |
| 15 | **Select Macro to Insert** | Insert placeholder fields that are replaced when the response is used. Select a system value, interaction attribute or another stored response. For more information, see Create Response Macros. |
| 16 | **Editing pane** | Type, format, and edit your message here.<br>**Tip**: Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press **Shift+Enter** to create a new line. Press **Shift+Enter twice** to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret. |
| 17 | **Add and Delete** | • Navigate to the appropriate category and select **Add** to add a new response item.<br>• Select an item and click **Delete** to mark the item for deletion. |
| 18 | **Cancel and Save** | Interaction Connect saves new response items and changes to items only after you press **Save**. The same applies to items you mark for deletion. Interaction Connect deletes the item only after you select **Save**. |
| 19 | **Splitter** | To change the width of the Editing pane, point to the vertical splitter and drag the edge to the left or right.<br>**Note**: The text formatting toolbar wraps if the editing pane is too narrow. Click the three-dot icon at the end of the toolbar to display the rest of the tools. |

**Related Items**

- Create Personal Responses
- Create Response Macros
- Response Management View
- Using Response Management

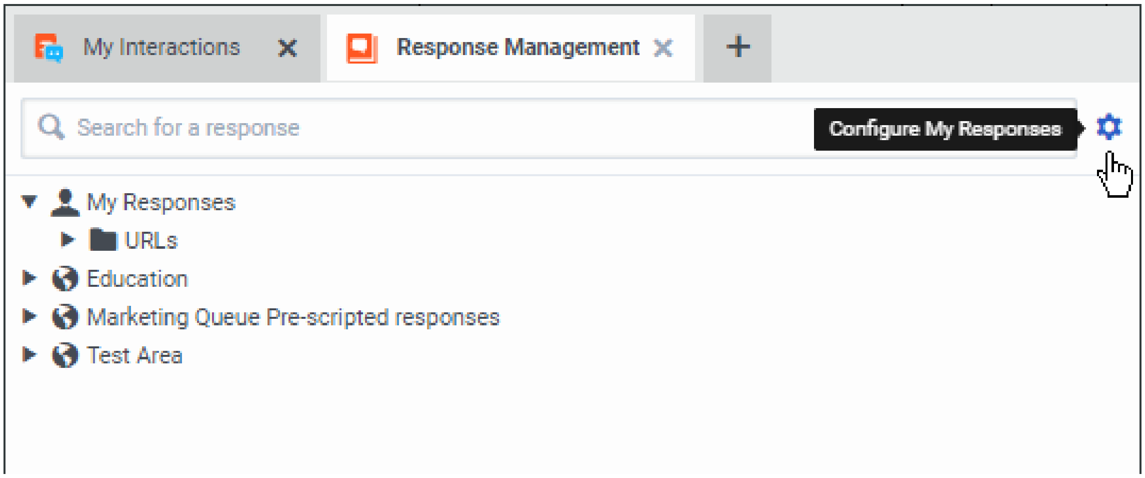
## Organize Personal Responses

**Requirements**: See Working with Response Management.

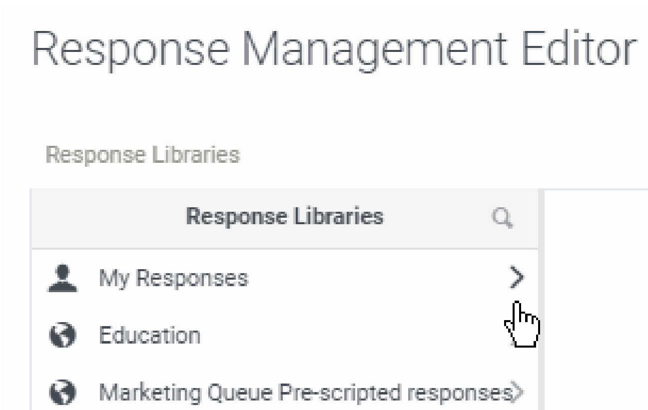
You can make your personal responses easier to locate by storing them in folders. You can nest these folders inside each other to whatever level suits your purpose.

**To create a personal folder:**

1. In the Response Management view, click the **Configure My Responses** tool.




2. In the Response Management Editor, click the **Expand Category** arrow for **My Responses**.




3. Navigate to the level in My Responses where you want to create the category by clicking Expand Category arrows as needed.
4. When you reach the appropriate level, click the **Add** button.
5. From the Type popup menu, select **New Category.**

   **Result**: A new folder appears at the level you selected in the navigation pane.
6. Type a name for the category 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 typing over the name in the Response Management Editor **Name** text box.
- Delete a folder along with any personal responses it contains by selecting the folder, clicking **Delete** and then clicking **Save**.

  > **Note**: In a similar fashion, you can also delete a selected response by selecting the response item, clicking **Delete** and then clicking **Save**. Interaction Connect deletes folders or items only after you select **Save**.

- View the contents of a personal response by clicking the response item. Check the contents in the editing pane of the Response Management Editor.

**Related Topics**

[Create Personal Responses](#)
[Response Management Editor](#)
[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. You can use a response item directly by inserting it into some types of interactions. Or, you can use it indirectly by reviewing the information in a response item as an aid to resolving a customer problem or question.

### Full-Text Search

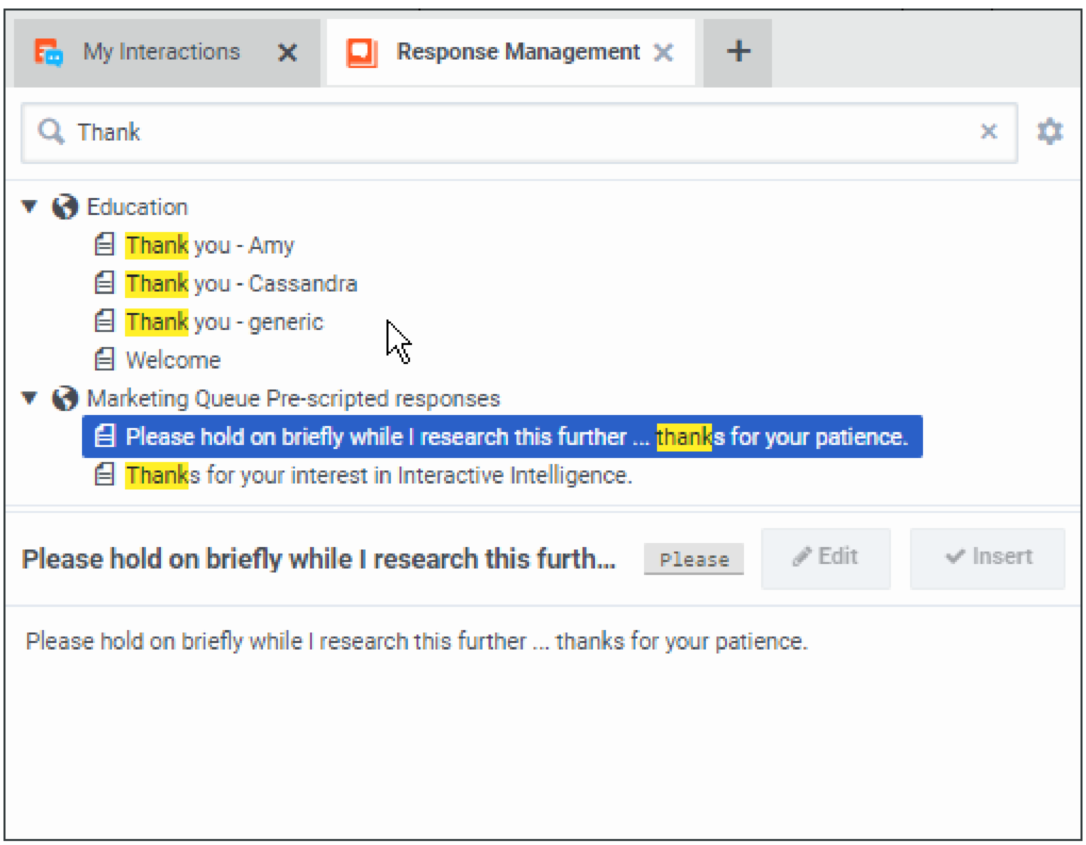
You can use full-text searching to locate a needed response item. Full-text searching looks for matching text in the **Name**, **Label**, **Shortcut**, and text content of a response item. Full-text searching is available in the Response Management view.

Type all or the first part of the word or words that identify the response item. For example, typing "foo" locates response items associated with or containing "food," "foot," or "football." All searches are case insensitive.

**To search for a response item:**

1. In the **Response Management** view, in the **Search for a response** text box, type all or the first part of the word or words that identify the response item and then press **Enter**.

   **Result**: Matching response items appear.
2. Preview the response by selecting a response item from the search results.




**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 in the **Current Interaction** view when you are participating in a Chat Session or composing an Email Reply. Both system-wide and personal responses can have shortcuts.

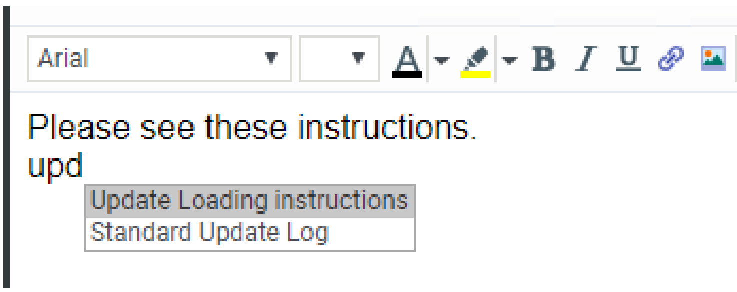
**To use a shortcut:**

1. Type all or part of the shortcut and press **Ctrl+Space**.

   **Tip**: To use Response Management shortcuts with certain alternate languages in Windows, such as Chinese Simplified PRC, press **Ctrl+Alt+Space**. For some alternate languages, **Ctrl+Space** changes the language setting. Also, if you use a language IME (Input Method Editor), wait until the text you typed has finished converting to the selected IME language before pressing **Ctrl+Space** for a Response Management shortcut.

   **Result**: If there is only one matching response item, it is automatically inserted in the composition area of the **Current Interaction** view.

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**

Chats and the Current Interaction view
Email and the Current Interaction View
Using Response Management

# Screen Pops

## Site-Specific Screen Pops

Screen pops can launch site-specific applications for incoming ACD interactions. Enhanced screen pop capability directs the CIC client to automatically launch, or pop, specific applications when agents and other users receive interactions within their ACD queue.

For example, 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 webpage opens when the defined interaction enters your queue. This feature can also be used to enable your CIC administrator to launch various support features such as CRM tickets, your company's knowledgebase, order forms, quotation requests, and more, when an ACD call arrives.

You cannot perform typical actions, such as picking up, placing on hold, transferring, and so on, for site-specific screen pops.

> **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.

# Managing Social Media

PureConnect administrators can configure your corporate Facebook page to create a social media *conversation* anytime a visitor posts a comment. Official company posts become Facebook conversations when anyone posts a comment. Mentions on Twitter become new conversations when Genesys Social Cloud finds keyword matches. WhatsApp messages are processed in Genesys Cloud. These *conversations* become ACD-routed interactions. CIC routes these social media interactions just like other ACD interaction types.

Therefore, as an agent, you receive these social media interactions in **My Interactions** or other workgroup queue view. You use the **Current Interaction** view to reply to these social media interactions.

**Requirements for agents**: To manage Facebook and Twitter interactions, agents need the **ACD Social Media** user accesslicense and must also belong to a workgroup selected when configuring a Facebook channel or Twitter Channel. The workgroup must also have an ACD queue. To manage WhatsApp direct messages, agents require an **ACD WhatsApp** user access license.

**Requirements for administrators:** Administrators need the **Social Media Administrator Access** right.

**Requirements for the IC server**:To enable the Social Media feature for Facebook and Twitter, the IC server needs the **Social Media** feature license. To enable the Social Media feature for WhatsApp, the IC server needs the **WhatsApp Social Media** feature license.

**Requirements for Genesys Cloud:** Because WhatsApp messages are processed in Genesys Cloud your company needs to have a Genesys Cloud organization and be able to authenticate with Genesys Cloud. For more information, see the Genesys Cloud for PureConnect Administrator's Guide.

For more information and additional requirements, see Configure Social Media and the PureConnect Social Media Technical Reference in the PureConnect Documentation Library.

**Note**: Social Media interactions are available **only in Interaction Connect**. Social Media interactions do not appear in Interaction Desktop. PureConnect does not support secure input in Social Media Conversations or Direct Messages. Do not include credit card numbers or other sensitive information in your replies and discourage your customers from doing so.

For more information, see:

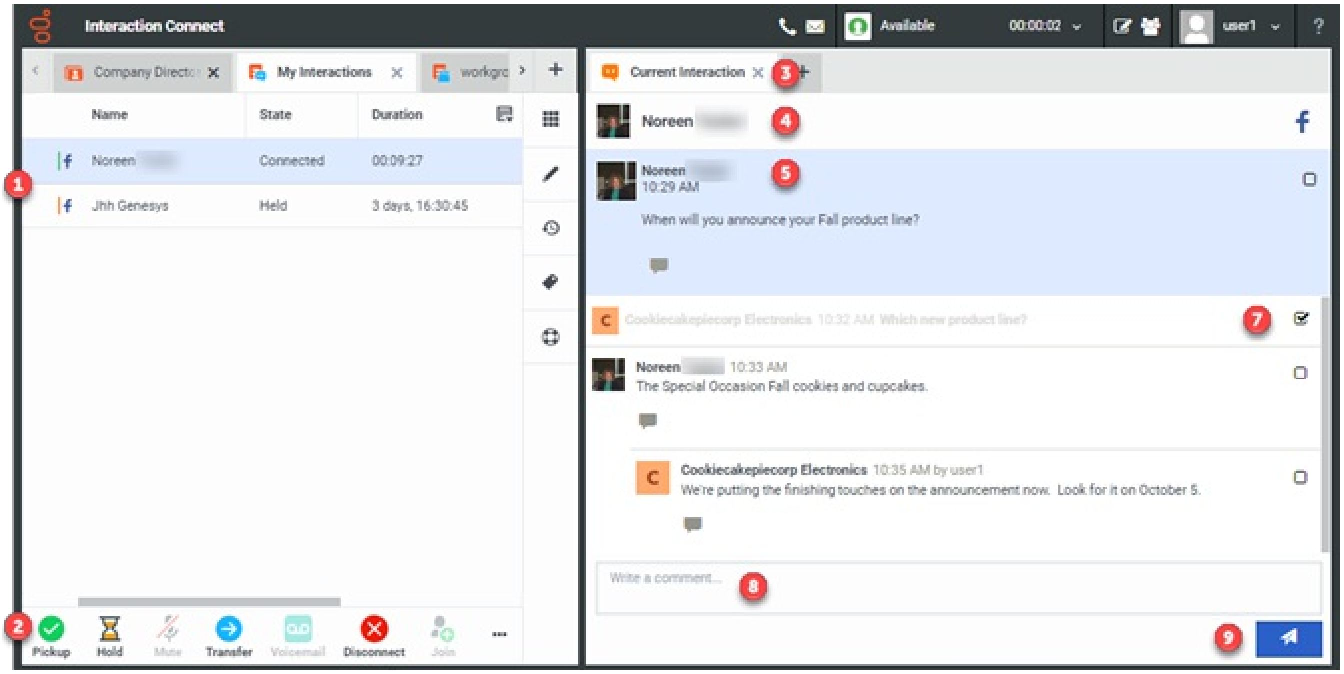
- Configure Social Media
- Facebook conversations
- Twitter conversations
- Manage a Social Media conversation
- Use Response Management in a Social Media interaction
- Social Media Images

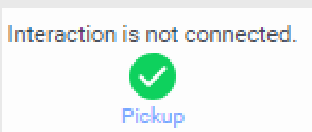
## Facebook conversations

An initial post, comments, and replies form a Facebook conversation. You follow the conversation and post replies in the **Current Interaction** view. This view recreates the comment threading you see in the Facebook interface. You can comment or reply at any level supported by Facebook.

A Facebook conversation continues until you disconnect the interaction. If someone replies or comments in the same conversation thread after you disconnect the original interaction, PureConnect creates a new interaction.

**Note**: You cannot start a Facebook conversation from Interaction Connect. You participate in Facebook conversations by making comments and replying.




| | |
|---|---|
| 1 | The line next to the Facebook interaction icon indicates the interaction state. For example, green is connected, orange is held, red is disconnected, and light blue is alerting. |
| 2 | To pick up, place on hold, transfer, record, or disconnect a Facebook interaction, use the Queue Control toolbar buttons.<br>The **Pickup** button also appears in the **Current Interaction** view for alerting and held interactions.<br><br><br>**Note**: You cannot transfer, forward, or listen to a Social Media interaction. |
| 3 | The selected interaction appears in the **Current Interaction** view as a Social Media conversation. |
| 4 | The name of the initial poster on the Facebook page. |
| 5 | The topmost post is the initial (root) post in this conversation thread.<br>**Note**: The root post always has a blue background. |
| 6 | To type a reply to a selected comment, click the **Reply** icon. |
| 7 | To reveal or hide part of a conversation thread, click the check box. This marks this part of the conversation as "read." It collapses this part of the conversation and hides it. You can reveal this again by clearing the check box.<br>Note: If you refresh and reload the browser page, posts marked as "read" disappear. |
| 8 | Comments made here apply to the initial post. |
| 9 | To post a comment on the initial post, click this button. |

**Related Interactions**

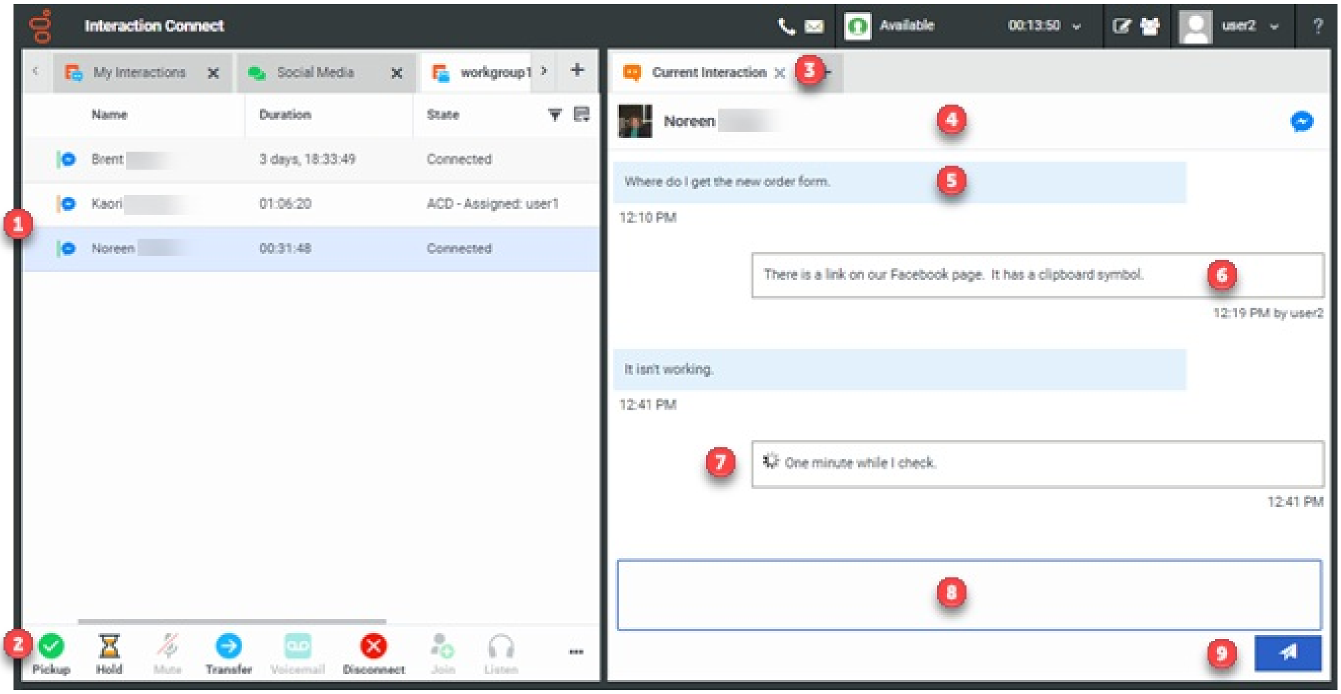
Twitter conversations
Social Media Images

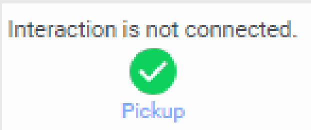
## Facebook Direct Messages

Your customers and other third parties can send direct messages from your company's Facebook page. PureConnect routes these direct messages as interactions to a designated Facebook Direct Message Workgroup.

You respond to a direct message interaction in the **Current Interaction** view. This view creates a similar experience to a Chat interaction. The interaction continues until you disconnect the interaction. If someone replies or comments in the same direct messaging thread after you disconnect the original interaction, PureConnect creates a new interaction.

> **Note**: You cannot initiate a direct message exchange from Interaction Connect. You can only reply.



| | |
|---|---|
| 1 | The line next to the Facebook direct message interaction icon indicates the interaction state. For example, green is connected, orange is held, red is disconnected, and light blue is alerting. |
| 2 | To pick up, place on hold, transfer, record, or disconnect a Facebook interaction, use the Queue Control toolbar buttons.<br>The **Pickup** button also appears in the **Current Interaction** view for alerting and held interactions.<br><br>**Note**: You cannot forward or listen to a Social Media interaction. |
| 3 | The selected interaction appears in the **Current Interaction** view as a Social Media direct message exchange. |
| 4 | The name of the customer or other third party who initiated the direct message exchange appears here.<br>The interaction type icon identifies this as an exchange of Facebook Direct Messages.<br> |
| 5 | Direct messages from the customer or other third party have a blue background. |
| 6 | Your replies have a white background. |
| 7 | A progress spinner appears while PureConnect is sending your messages. It disappears when the message has been sent. If the message is not sent within a time out limit, you have the option to retry the message.<br>If PureConnect detects a duplicate message or other error, you can resend the message or delete it.<br> |
| 8 | Type your direct message here. Or you can use a stored response. See Use Response Management in a Social Media conversation. |
| 9 | To send your message, click this button. |

**Related Topics**

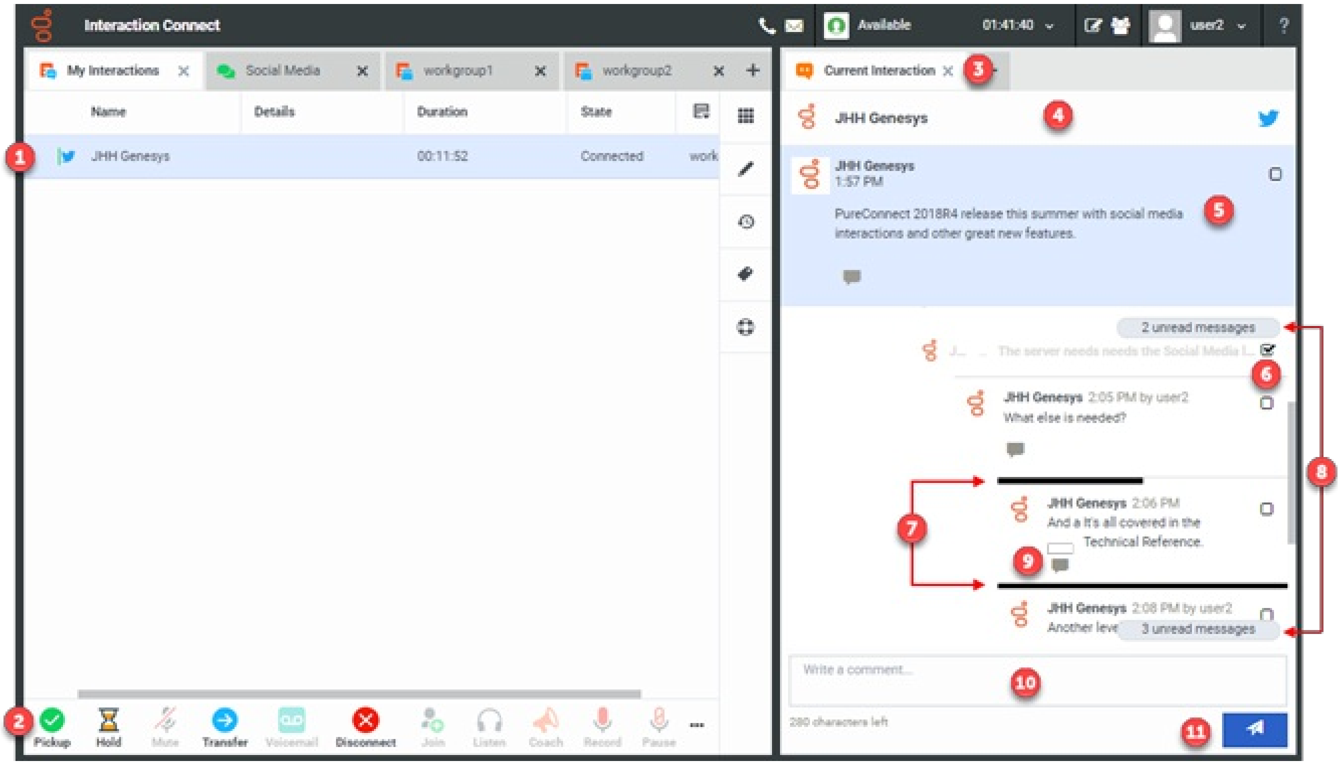
- Facebook Conversations
- Managing Social Media
- Social Media Images
- Twitter Direct Messages

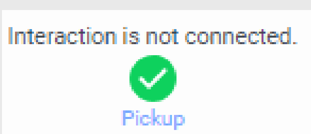
# Twitter conversations

An initial Tweet and replies form a Twitter conversation. The management of a Twitter conversation is very similar to that of a Facebook conversation. You follow the conversation and post replies where needed in the Current Interaction view. You can reply at any level in the Twitter conversation.

Also like a Facebook conversation, a Twitter conversation continues until you disconnect the interaction. Additional tweets in the same conversation thread create a new interaction.

**Note**: You cannot start a Twitter conversation from Interaction Connect. You can only reply.




| | |
|---|---|
| 1 | The line next to the Twitter interaction icon indicates the interaction state. For example, green is connected, orange is held, red is disconnected, and light blue is alerting. |
| 2 | To pick up, place on hold, transfer, record, or disconnect a Twitter interaction, use the Queue Control toolbar buttons.<br>The **Pickup** button also appears in the **Current Interaction** view for alerting and held interactions.<br><br><br>**Note**: You cannot forward or listen to a Social Media interaction. |
| 3 | The selected interaction appears in the **Current Interaction** view as a Social Media conversation. |
| 4 | The name of the Twitter feed containing the initial message, comments, and replies appears here. |
| 5 | The topmost message is the initial (root) tweet in this conversation thread.<br>**Note**: The root tweet always has a blue background. |
| 6 | To mark a message as "read," click the check box. This collapses this part of the conversation and hides it. You can reveal this again by clearing the check box.<br>**Note**: If you refresh and reload the browser page, messages marked as "read" disappear. |
| 7 | Replies to messages are indented. When indentation reaches the limit of a useful message display, solid lines replace indentation. The length of a line indicates the level of indentation. |
| 8 | These indicate the number of unread messages above or below the currently visible part of the Twitter conversation. |
| 9 | To type a reply to a selected comment, click the **Reply** icon. |
| 10 | Comments made here apply to the initial tweet. |
| 11 | To post a comment on the initial tweet, click this button. |

**Related Topics**

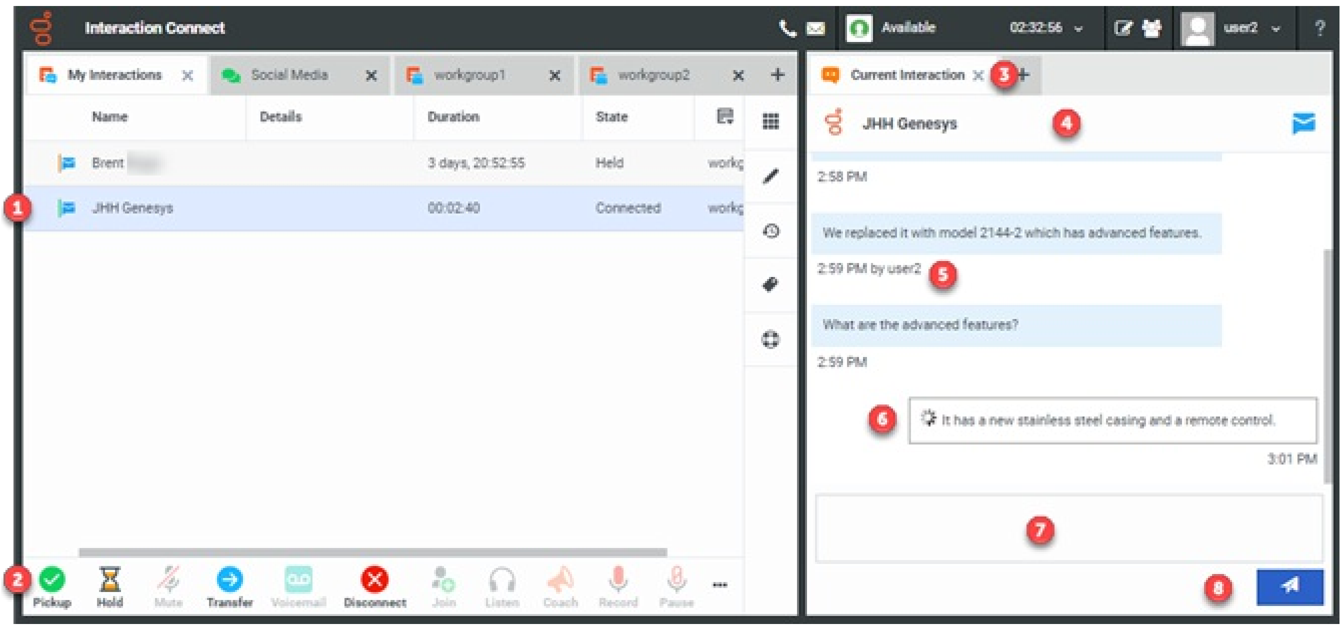
Facebook conversations
Social Media Images

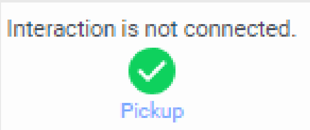
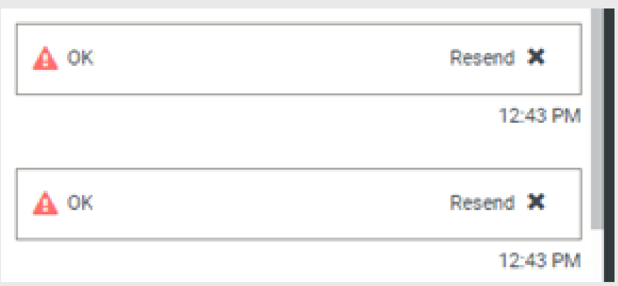
# Twitter Direct Messages

Your customers and other third parties can send direct messages to your company's Twitter account. PureConnect routes these direct messages as interactions to a designated Twitter Direct Message Workgroup.

You respond to a direct message interaction in the **Current Interaction** view. This view creates a similar experience to a Chat interaction. The interaction continues until you disconnect the interaction. If someone replies or comments in the same direct messaging thread after you disconnect the original interaction, PureConnect creates a new interaction.

> **Note**: You cannot initiate a direct message exchange from Interaction Connect. You can only reply.



| | |
|---|---|
| 1 | The line next to the Twitter direct message interaction icon indicates the interaction state. For example, green is connected, orange is held, red is disconnected, and light blue is alerting. |
| 2 | To pick up, place on hold, transfer, record, or disconnect a Twitter interaction, use the Queue Control toolbar buttons.<br>The **Pickup** button also appears in the **Current Interaction** view for alerting and held interactions.<br><br>**Note**: You cannot forward or listen to a Social Media interaction. |
| 3 | The selected interaction appears in the **Current Interaction** view as a Social Media direct message exchange. |
| 4 | The name of the Twitter account to which the customer or other third party sent the direct message appears here.<br>The interaction type icon identifies this as an exchange of Twitter Direct Messages.<br> |
| 5 | Your user name identifies the messages you sent. |
| 6 | A progress spinner appears while PureConnect is sending your messages. It disappears when the message has been sent. If the message is not sent within a time out limit, you have the option to retry the message.<br>If PureConnect detects a duplicate message or other error, you can resend the message or delete it.<br> |
| 7 | Type your direct message here. Or you can use a stored response. See Use Response Management in a Social Media conversation. |
| 8 | To send your message, click this button. |

**Related Topics**

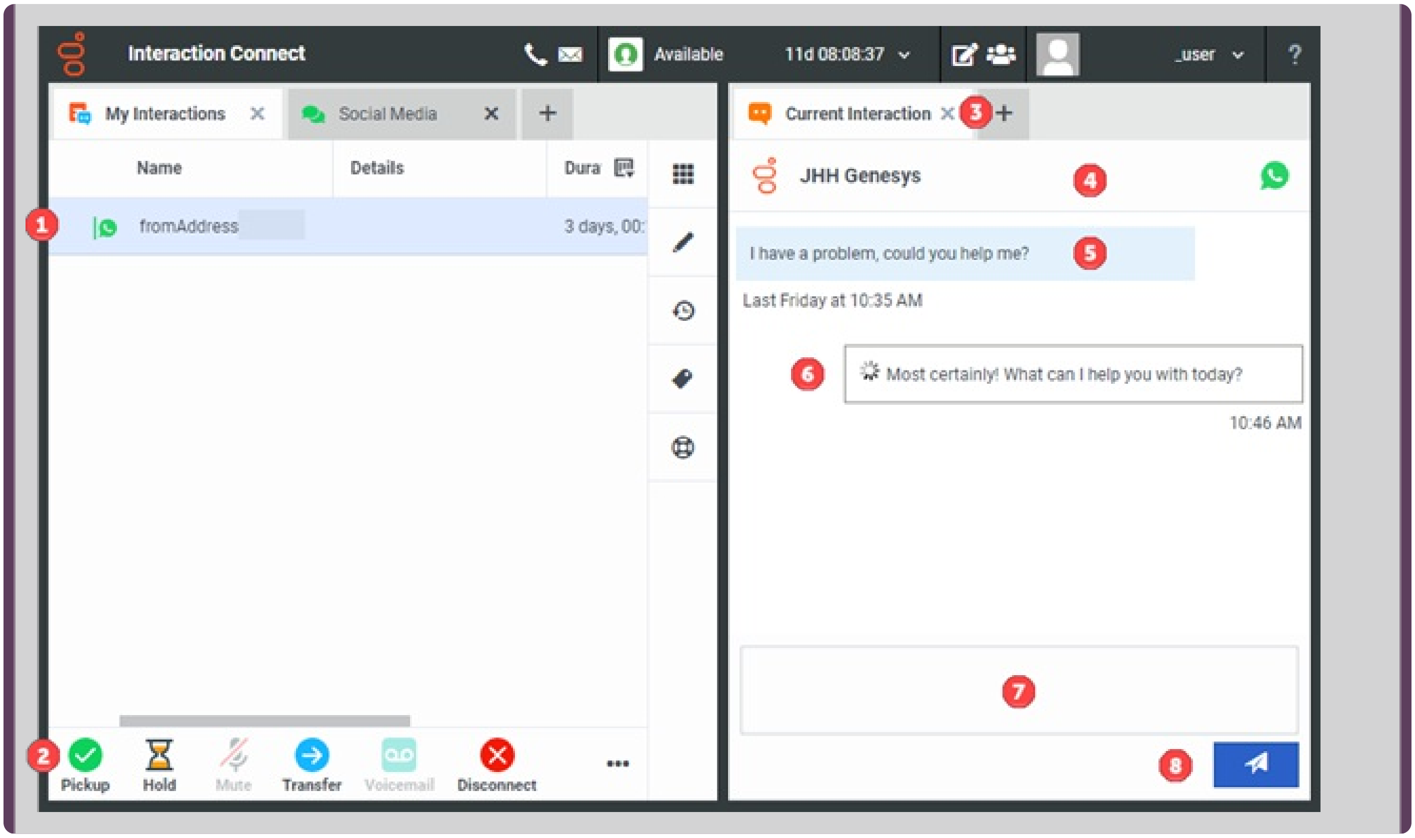
Twitter Conversations
Managing Social Media
Social Media Images
Facebook Direct Messages

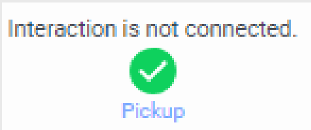
# WhatsApp Direct Messages

Your customers and other third parties can send direct messages to designated WhatsApp channels. PureConnect routes these direct messages as interactions to the workgroups associated with the phone numbers on your WhatsApp Accounts.

You respond to a direct message interaction in the **Current Interaction** view. This view creates a similar experience to a Chat interaction. The interaction continues until you disconnect the interaction. If someone replies or comments in the same direct messaging thread after you disconnect the original interaction, PureConnect creates a new interaction.

**Note**: You cannot initiate a direct message exchange from Interaction Connect. You can only reply.


Interaction Connect
Available
11d 08:08:37
_user
My Interactions
Social Media
Name
Details
Dura
fromAddress
3 days, 00:
Pickup
Hold
Mute
Transfer
Voicemail
Disconnect
Current Interaction
JHH Genesys
I have a problem, could you help me?
Last Friday at 10:35 AM
Most certainly! What can I help you with today?
10:46 AM
1
2
3
4
5
6
7
8

| | |
|---|---|
| 1 | The line next to the WhatsApp direct message interaction icon indicates the interaction state. For example, green is connected, orange is held, red is disconnected, and light blue is alerting. |
| 2 | To pick up, place on hold, transfer, record, or disconnect a Whats App interaction, use the Queue Control toolbar buttons.<br>The **Pickup** button also appears in the **Current Interaction** view for alerting and held interactions.<br><br>**Note**: You cannot forward or listen to a Social Media interaction. |
| 3 | The selected interaction appears in the **Current Interaction** view as a Social Media direct message exchange. |
| 4 | The name of the customer or other third party who initiated the direct message exchange appears here.<br>The interaction type icon identifies this as an exchange of Whats App Direct Messages. |
| 5 | Direct messages from the customer or other third party have a blue background. |
| 6 | Your replies have a white background.<br>A progress spinner appears while PureConnect is sending your messages. It disappears when the message has been sent. If the message is not sent within a time out limit, you have the option to retry the message.<br>If PureConnect detects a duplicate message or other error, you can resend the message or delete it.<br> |
| 7 | Type your direct message here. Or you can use a stored response. See Use Response Management in a Social Media conversation. |
| 8 | To send your message, click this button. |

## Manage a Social Media conversation

Managing Facebook and Twitter conversations is similar to managing any other type of interaction. You must display the Current Interaction view to respond to a social media interaction.

**To manage a Social Media conversation:**

1. Select a Social Media interaction in **My Interactions** or other queue view and click **Pickup**.

   **Result**: The interaction appears in the **Current Interaction** view. This view contains an entire Facebook conversation or Twitter conversation.

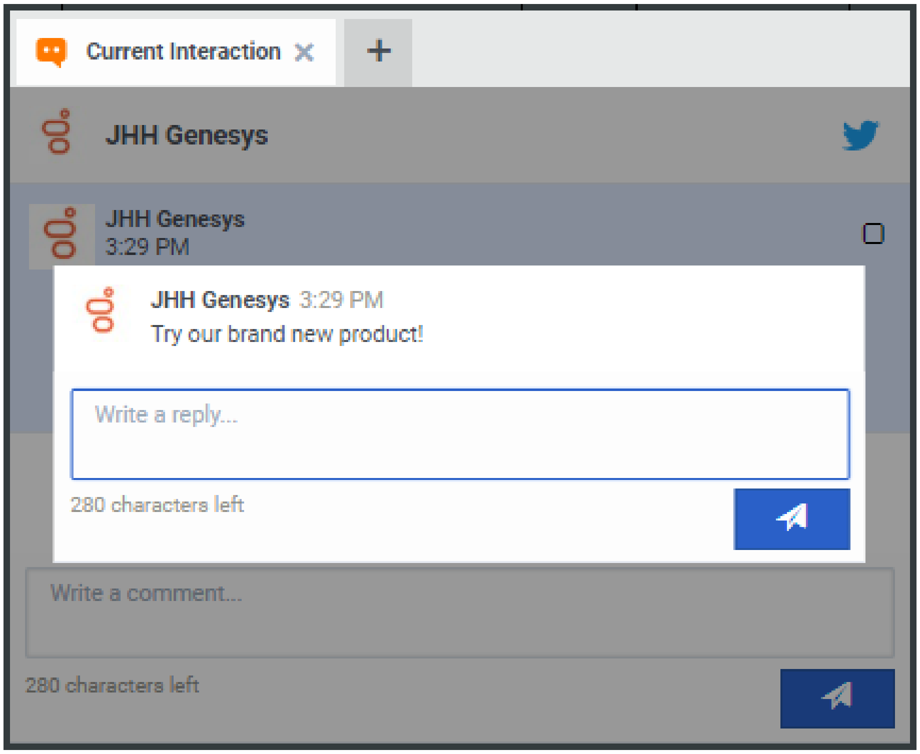
   > **Tip**: To display the **Current Interaction** view, see Add or Close Views.

2. To reply to a Facebook comment or Tweet, do one of the following.

> **Note**: Your replies appear on your company's Facebook page or your company's Tweets and replies page. Your replies also appear in the Current Interaction view after a short interval. You cannot reply to comments or Tweets for **held** or **disconnected** interactions.

- To reply to the root post or initial Tweet, type in the **Write a Comment** box at the bottom of the **Current Interaction** view, then click the **Send** icon.
- To reply to any post or Tweet, select the **Reply** icon below a comment. Type a reply and click the **Send** icon.

> **Tip**: Instead of typing a reply, see Use Response Management in a Social Media conversation.




3. Optionally, do any or all of the following:
   - To mark a message as "read," click the corresponding check box.
     **Result**: This action also hides the message. To display the message again, clear the check box.
     > **Note**: If you refresh and reload the browser page, messages marked as "read" disappear.
   - To display a full-sized image in a message, click the image. For more information, see Social Media Images.
   - To record a Social Media conversation, click the **Snip** button.
     > **Note**: CIC does not support Ad hoc recordings of Social Media interactions. For more information, see Recording Types.
   - To transfer a Social Media conversation, select the interaction in **My Interactions** or other queue view and click the **Transfer** button.
     > **Note**: You can transfer only to workgroups selected as **Conversation workgroups**. See Configure Facebook channels and Configure Twitter Channels.
4. When you finish the Facebook conversation, select the interaction in **My Interactions** or other queue view and click **Disconnect**.

> **Tip**: Or you can place the interaction on **Hold** and return to it later.

**Related Topics**

Facebook conversations
Managing Social Media
Social Media Images
Twitter conversations

# Manage Social Media Direct Messages

Managing Facebook, Twitter, and Whats App direct messages is similar to managing any other type of interaction. You must display the Current Interaction view to respond to a social media direct message.

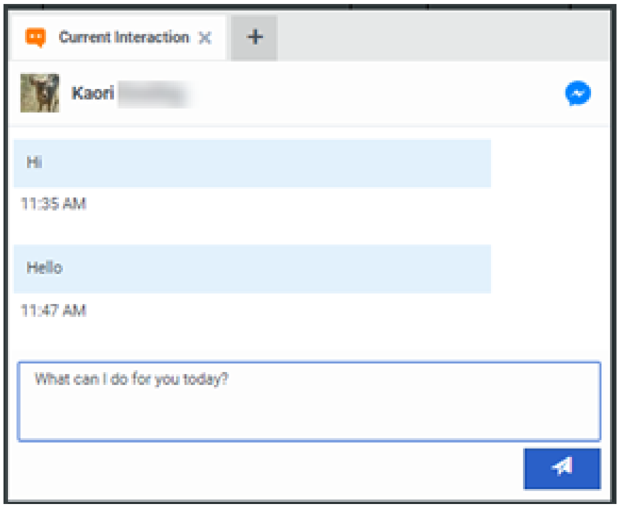
**To manage Social Media direct messages:**

1. Select a Social Media direct message interaction in **My Interactions** or other queue view and click **Pickup**.

   **Result**: The interaction appears in the **Current Interaction** view. This view contains the exchange of direct messages with an outside party in a single interaction. For more information, see Facebook, Twitter, and WhatsApp direct messages.

   > **Tip**: To display the **Current Interaction** view, see Add or Close Views.

2. To reply to a Social Media direct message, type your message in the reply box at the bottom of the **Current Interaction** view, then click the **Send** icon.

   > **Tip**: Instead of typing a reply, see Use Response Management in a Social Media conversation. You cannot reply to direct messages in **held** or **disconnected** interactions.

3. Optionally, do any or all of the following:
   - To display a full-sized image in a message, click the image. For more information, see Social Media Images.
   - To record an exchange of Social Media direct messages, click the **Snip** button.

     > **Note**: CIC does not support Ad hoc recordings of Social Media interactions. For more information, see Recording Types.

   - To transfer an exchange of Social Media direct messages, select the interaction in **My Interactions** or other queue view and click the **Transfer** button.

     > **Note**: You can transfer only to workgroups selected as **Conversation workgroups**. See Configure Facebook channels and Configure Twitter Channels.

4. When you finish the exchange of Social Media direct messages, select the interaction in **My Interactions** or other queue view and click **Disconnect**.

   > **Tip**: Or you can place the interaction on **Hold** and return to it later. If you disconnect a Social Media direct message, any replies or comments for the same direct message become a new interaction.

**Related Topics**

Facebook conversations
Managing Social Media
Social Media Images
Twitter conversations

# Use Response Management in a Social Media Interaction

**Requirements**: You need the Response Management Security right to use Response Management.

You use stored responses to avoid typing the same information repeatedly. You can select a response and include it in a Social Media interaction, both Social Media conversations and Social Media direct messages.

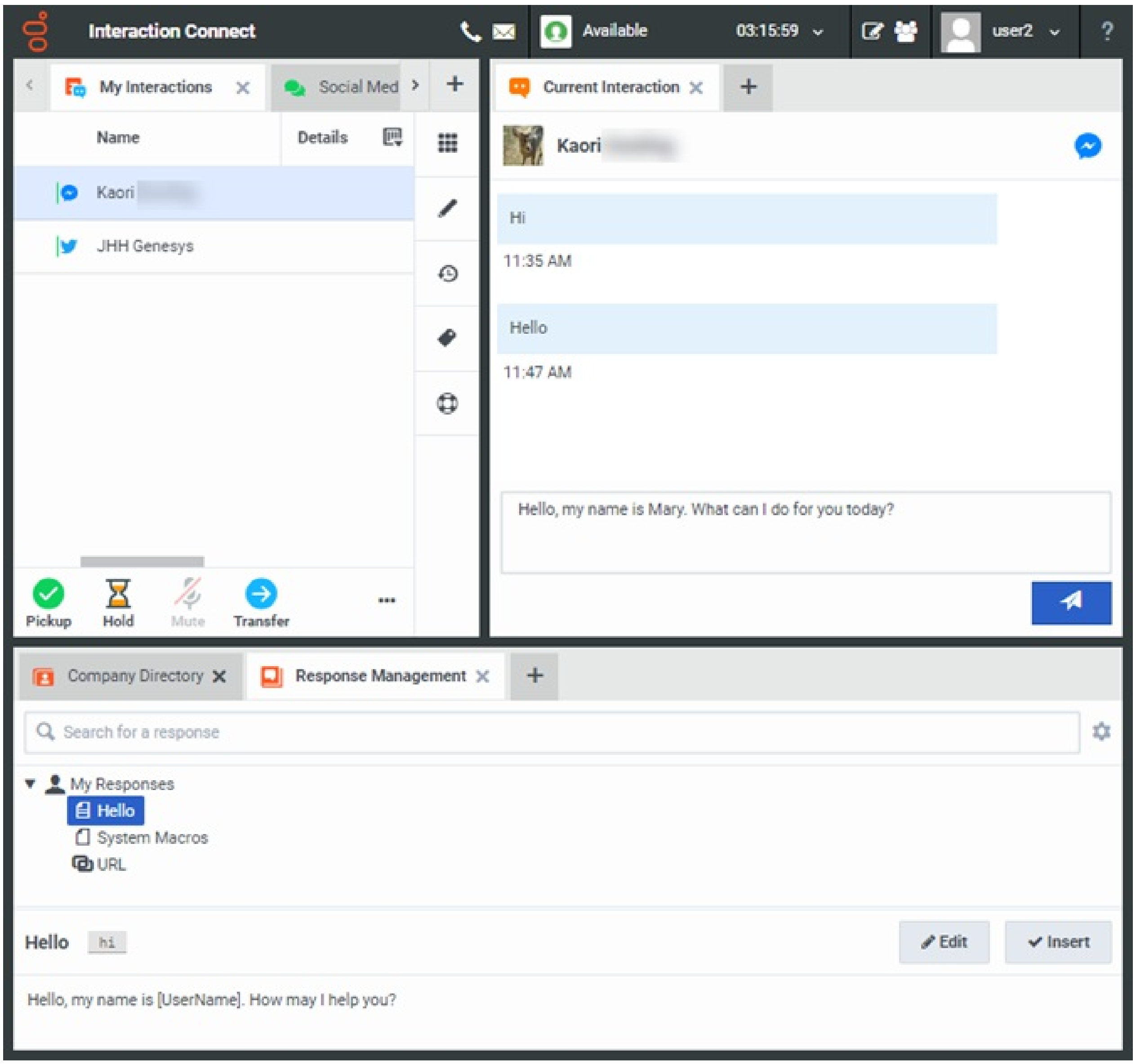
There are some limits to the use of stored responses in Social Media interactions. Social Media interactions are conducted in plain text. Stored responses that contain formatted text are converted to plain text before being sent. You cannot send a file as part of a reply. Hyperlinks and images in a stored response are not sent as part of a reply. However, you can use responses containing macros or URLs.

**To use a stored response in a Social Media interaction:**

1. In the **Current interaction** view, place your cursor in the comment or reply box.
2. Do one of the following:
   - In the Response Management view, search for and then select an appropriate response. **Double-click** the response or click **Insert**.
   - In the **Current Interaction** view, type the Response item Shortcut and press **Ctrl+Space**.

   **Tip**: For more information, see Use a Response Shortcut.

   **Result**: The response appears in the **Current Interaction** view.



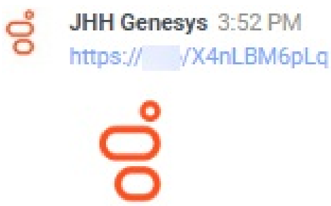

3. Make any necessary changes to the response and then click the **Send** icon.

**Related Topics**

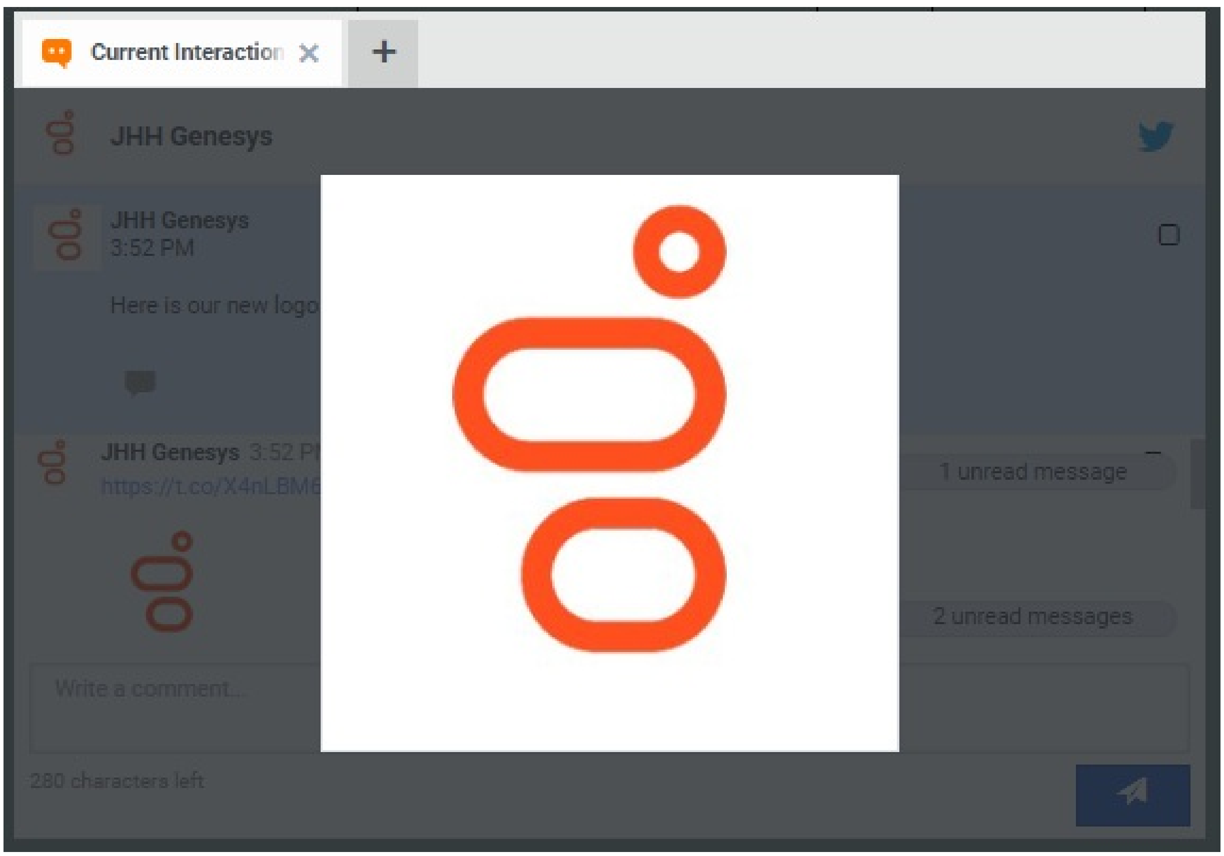
[Manage a Social Media conversation](#)
[Using Response Management](#)

## Social Media Inline Images

Interaction Connect supports inline images in **incoming** Social Media messages. You cannot insert an image in a reply. These images display at 50% of the available screen space. If the image is too large, it appears as a thumbnail.




Click the thumbnail to display the entire image in a popup module.




### Related Topics

[Facebook conversations](#)
[Twitter conversations](#)

# Speed Dial

**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.

**Related Topics**

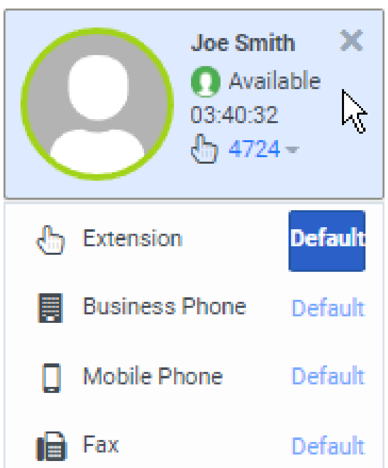
Close a Speed Dial View
Create a Speed Dial View
Delete a Speed Dial View
Dial a Number Using Speed Dial
Display a Speed Dial View
Rename a Speed Dial View

## 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:
   - Single-click the displayed default number shown as a hyperlink.
   - Select a Speed Dial entry and click the down arrow, then click one of the displayed entries.




**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
Add a Directory Contact to a Speed Dial View
Display a Speed Dial View
Speed Dial

## Working with Speed Dial Views

**Requirements**: You need the Can Create Speed Dials Security right to enable you to Create a Speed Dial View. Your CIC administrator can also set server parameters that limit the number of contacts you can display in a Speed Dial view.

## Speed Dial View Limits

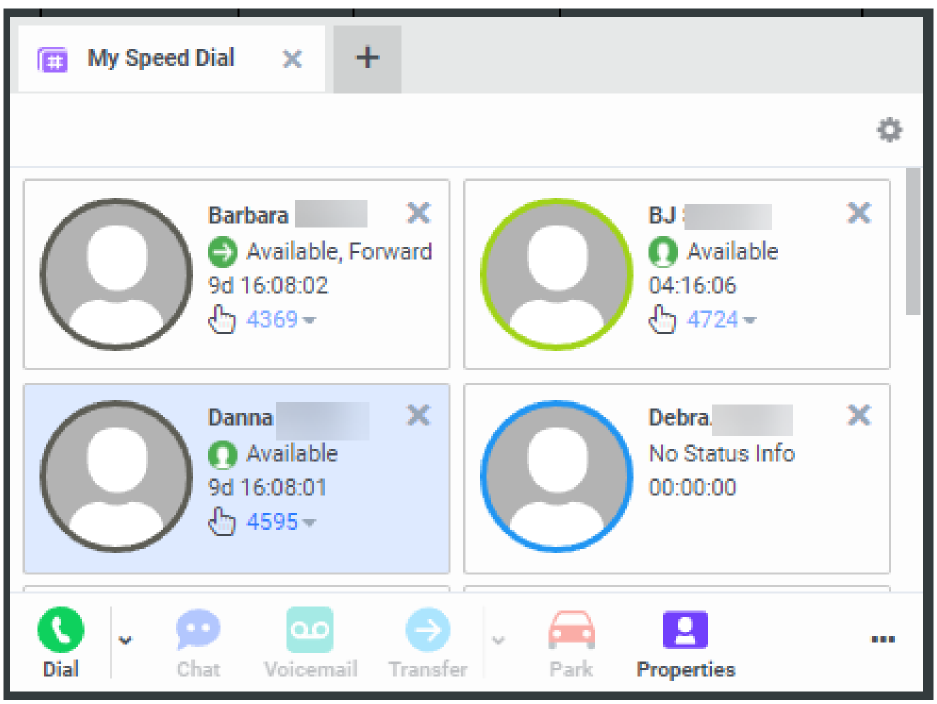
The CIC administrator can use the **`MaxSpeedDialPageSize`** server parameter to specify the maximum number of directory records that can appear in a Speed Dial view. This parameter works in conjunction with **`DefaultSpeedDialPageSize`**.

- If the CIC administrator does not define `DefaultSpeedDialPageSize` and the requested number of directory contacts is greater than `MaxSpeedDialPageSize`, the number of contacts returned is less than or equal to 25.
- If the CIC administrator defines only `DefaultSpeedDialPageSize`, the number of contacts returned is equal to `DefaultSpeedDialPageSize`.
- If the CIC administrator defines both `MaxSpeedDialPageSize` and `DefaultSpeedDialPageSize` and the requested number of contacts is less than or equal to `MaxSpeedDialPageSize`, then the requested number of contacts is returned. If greater than `MaxSpeedDialPageSize`, the `DefaultSpeedDialPageSize` number of contacts is returned.
- If the CIC administrator does not define either `MaxSpeedDialPageSize` or `DefaultSpeedDialPageSize`, the number of contacts returned is less than or equal to 25.

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. The default number is a hyperlink you can click to dial the contact. Or, 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**: CIC sorts the Speed Dial entries by display name.

Your CIC administrator can enable Speed Dial views to display photos or other images for CIC users in a Speed Dial view when you maximize tiles. If no photo is available, a generic image appears on the speed dial entry. The color of the circle indicates the contact's availability based on CIC status. For more information, see **Speed Dial Features**.




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.

**Note**: When you add a view, private Speed Dial views and Directory views display a lock icon next to their name in the Available items list.

**Related Topics**

- Close a Speed Dial View
- Create a Speed Dial View
- Delete a Speed Dial View
- Display 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 without deleting it.

**To close a speed dial view:**

- Click the **Close** button (X) on the Speed Dial tab.

  **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](#)
[Speed Dial](#)
[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.

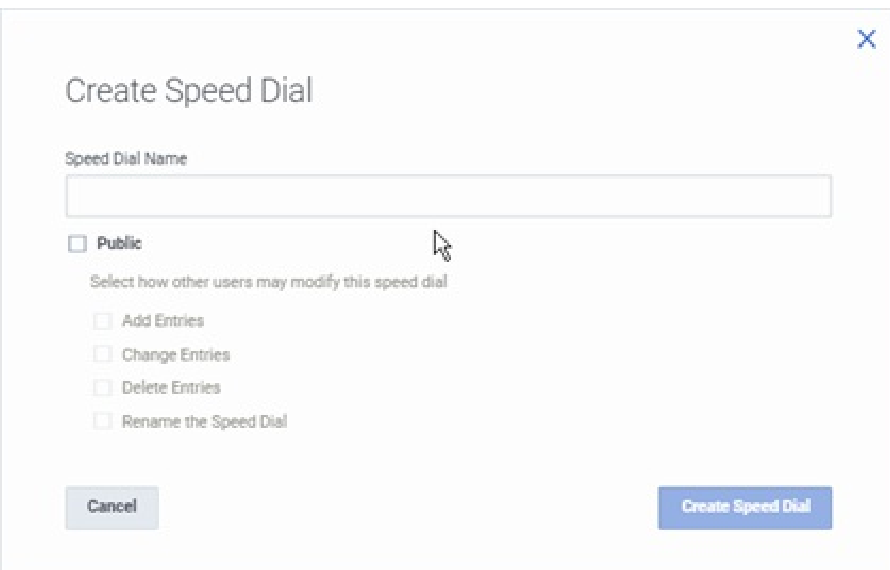
A Speed dial view provides a quick way to dial frequently called contacts.

**Warning**: Once a Speed Dial view is created, its settings cannot be changed.

**To create a Speed Dial view:**

1. Click the **Add View** icon (plus sign) next to any tab.
2. Click **Show all Views**.
3. In the **Directories** section, select **Speed Dial**.
4. In the Speed Dial list, click **Create a new Speed Dial**.
5. Click the **Create** button.

   **Result**: The **Create Speed Dial** dialog box appears.




6. In **Speed Dial Name**, enter a unique name for your new speed dial directory.
7. If you want other users to be able to add your Speed Dial view to their CIC client interface, select **Public**.
8. 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 Security 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, select **Rename the Speed Dial**.

9. Click **Create Speed Dial**.

   **Result**: The new view is added to the list of available Speed Dial views.
10. In the **Add Views** dialog box, click **Add 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**

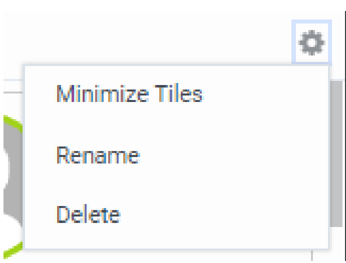
Create a New Entry in a Speed Dial View
Display a Speed Dial View

## 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 Security rights, you can delete any Speed Dial view. For more information, see Create a Speed Dial View.

**To delete a Speed Dial view:**

1. In the Speed Dial view tab, click the **Configure Directory** icon.
2. From the drop-down menu, click **Delete**.




3. To confirm you want to delete the view, in the **Delete Speed Dial** dialog box, click **Delete**.

   **Result**: The name of the Speed Dial view is removed from the list of available Speed Dial views. The Speed Dial view is removed from the CIC client interface for every 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 an available Speed Dial view:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. In the **Quick Picks** list, click **Show All Views**.
3. In the **Add Views** dialog box, in the **Directories** category, select the **Speed Dial** check box.
4. In the list of available Speed Dial views, select the check box for the selected Speed Dial view or views.
5. In the Add Views dialog box, click **Add View** or **Add Views**.

   **Result**: The selected view or views appear.

**Related Topics**

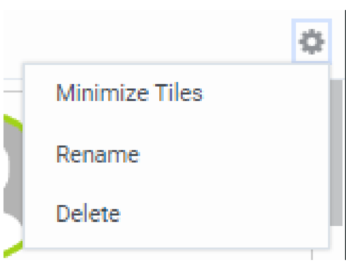
Create a Speed Dial View
Close a Speed Dial View
Speed Dial

## 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 Security rights, you can rename any Speed Dial view. For more information, see Create a Speed Dial View.

**To rename a Speed Dial view:**

1. In the Speed Dial view tab, click the **Configure Directory** icon.
2. From the drop-down menu, click **Rename**.




3. In the **Rename Speed Dial** dialog box, type a new name for the view and click **Rename Speed Dial**.

   **Result**: The name of the Speed Dial view is changed in your workspace and in the list of available Speed Dial views.

**Related Topics**

Working with Speed Dial Views

# 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
Speed Dial Features

## Speed Dial Features

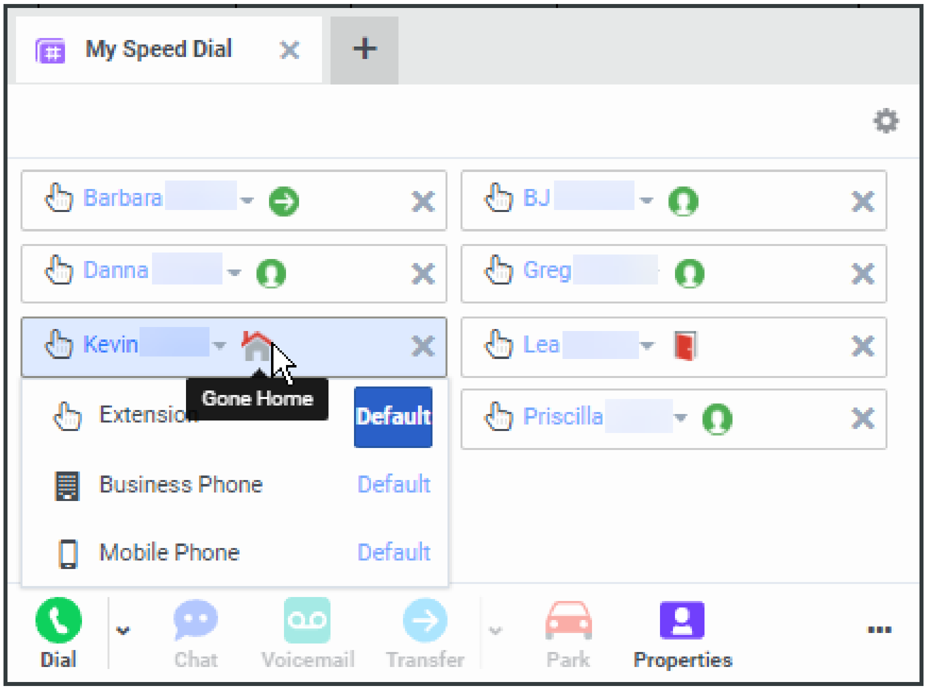
Speed dial views can include photos or images for each entry. The type of entries you see depend on whether your CIC administrator enables this type of display. You can also switch between minimized and maximized tiles in your Speed Dial views.

**To switch view types:**

- Click the **Configure Directory** icon in the Speed Dial view and select **Minimize Tiles** or **Maximize Tiles**.

## Minimized Tiles

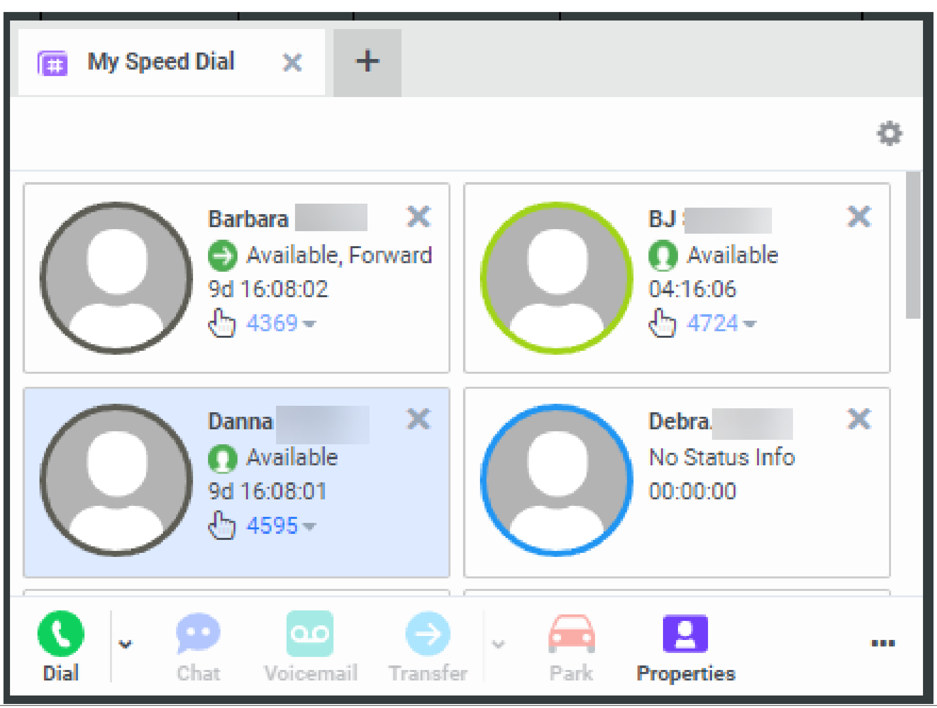
Minimized tiles in a Speed Dial view provide a space-saving, simple list with contact names.



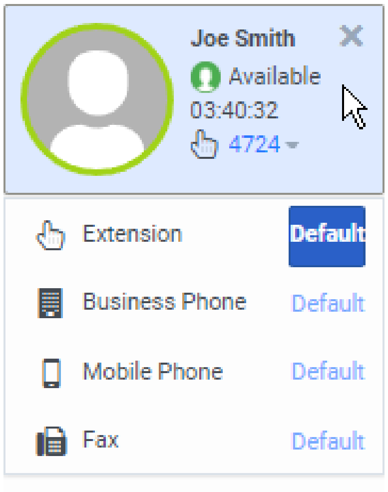

- **Other available numbers:** Click the down arrow next to a contact's name to display all the phone numbers available for the selected contact. Click the number icon or label for any of these other numbers to call it.

## Maximized Tiles

This shows you how the maximized tiles appear in a Speed Dial view; with photos or images for each contact.



- **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.
- **Availability**: When photos or images appear on speed dial entries, the color of the circle indicates the contact's availability based on CIC status.
  - **Green** indicates the contact is logged into a CIC client and his or her CIC status is an available type.
  - **Blue** indicates the contact is logged into a CIC client and his or her CIC status is Available, Follow Me.
  - **Red** indicates the contact is logged into a CIC client, but his or her CIC status is an unavailable type; for example, Gone Home or In a Meeting.
  - **Grey** indicates a CIC user is not logged on to a CIC client.
- **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**

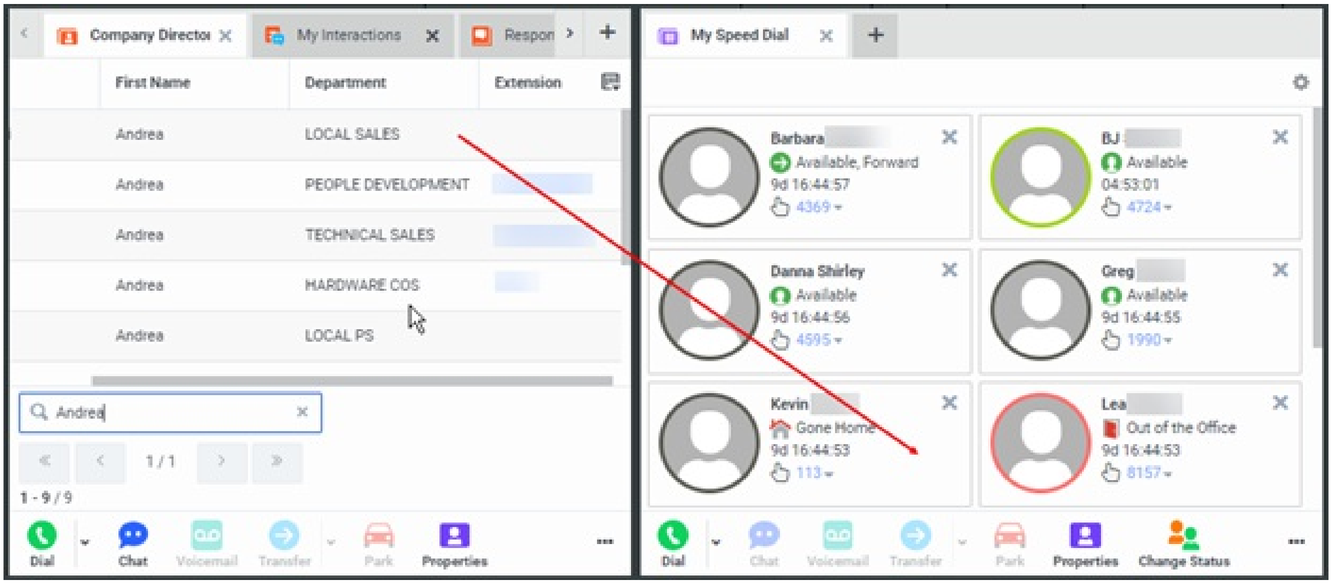
Working with Speed Dial Entries
Working with Speed Dial Views

## 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 Security 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. CIC automatically selects the new entry and positions it in the correct order.

**Note**: The CIC administrator can define the maximum number of contacts you can display in a speed dial, see Speed Dial View Limits.




**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. To view a list of general directories, in the Add Views Dialog Box, in the **Directories** category, select **General Directories**.

### 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 Security 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. Do one of the following:
   - In the Maximized Tiles Speed Dial view, click the down arrow next to the displayed phone number.
   - In the Minimized Tiles Speed Dial view, click the down arrow next to the contact's name.
3. Click **Default** next to one of the available phone numbers.

   **Result**: The selected phone number becomes the new default Speed Dial number. 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 Security 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

# 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
- Fast Status Buttons

> **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**

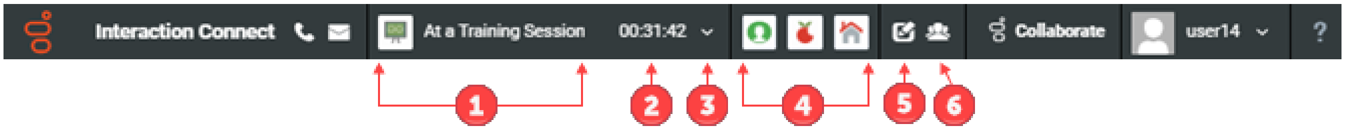
Possible Status Values
Set DND Status with Your Phone

# My Status

Interaction Connect has a My Status section that enables you to set your current status, monitor time in current status, configure and use Fast Status buttons, view or specify status details and set your workgroup activation status.

**Video:**

https://player.vimeo.com/video/436478601




| | | |
|---|---|---|
| 1 | **Current status** | Displays your current status. |
| 2 | **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." |
| 3 | **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. |
| 4 | **Fast status buttons** | Change your status by clicking one of your selected fast status buttons. You determine which fast status buttons appear. |
| 5 | **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. |
| 6 | **Workgroup Activation button** | Click this button to specify the workgroup queues for which you will take interactions. In order to receive ACD-routed interactions, you must logged onto the CIC client, set your status to "Active" for the appropriate workgroups, and set your user status set to an "Available" type. For more information, see Change Your Workgroup Activation Status. |

**Related Topics**

- Fast Status Buttons
- Set Your Status
- Set Status Details
- Workgroup Activation Button
- Workgroup Statistics

# Fast Status Buttons

You can designate selected statuses as favorites. Each status in the My Status drop-down list has a **Favorite status** icon. This icon is a gray or yellow star. A yellow star indicates a favorite status.

Favorite statuses appear as Fast Status buttons in the My Status section. Click a Fast Status button to set your status to one of you pre-selected favorites.

**To add or remove Fast Status buttons:**

1. In the My Status drop-down list, point to, but do not click, a status.
2. Do one of the following:
   - To **add** a Fast Status button, click the **gray** star.
   - To **remove** a Fast Status button, click the **yellow** star.

**Related Topics**

My Status
Set Status in Accessibility Mode

# Possible Status Values

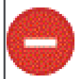
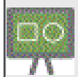
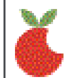
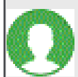
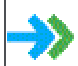
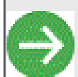
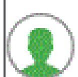
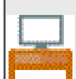
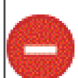
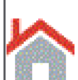
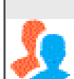
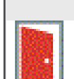
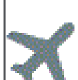
**Requirements**: The View Status Message right controls which statuses can be employed by users in specific workgroups, users assigned certain roles, or even individual users. These status filters determine the status settings available when you Set Your Status or Set Another User's Status.

The icons that appear for each status are configured in Interaction Administrator and may have been changed by your CIC administrator.

**Note**: Customer 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.

**Tip**: You can record status-based messages to play to callers. For more information, see Personal Prompts Options.

The default status values are:

| | |
|---|---|
|  | ACD - Agent Not Answering |
|  | At a Training Session |
|  | At Lunch |
|  | Available |
|  | Available, Follow-Me<br><br>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<br><br>This person is available at a designated remote number. |
|  | Available, No ACD<br><br>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 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 PureConnect 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 **Status Details** next to the My Status drop-down list.
2. In the Status details popup, complete the fields as described below.

| | |
|---|---|
| **Notes** | Enter any additional information on your current status.<br>As a convenience, the notes from the last time you selected this status appear. You can make any necessary changes to these notes.<br>**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.<br>**Note**: The last forwarding number you used for this status defaults to the Forward Number box. |
| **Until Date**<br>**Until Time** | Depending on the selected status, you may supply the date and time, until which you will be unavailable. |

3. Press **Enter** to save your status details.

> **Tip**: Press **Escape** to cancel. If the Status details popup appeared automatically because you selected a status that required status details, your status reverts to your prior status.

**Related Topics**

Possible Status Values
Set Your Status
Set Another User's 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 PureConnect client users can view your status in Status column of the Company Directory.

**To set your status from the My Status drop down list:**

1. Select a status from the My Status drop-down list.

> **Note**: The My Status list displays all the available status settings. For more information, see Possible Status Values.

2. Optionally, enter status details by clicking **Status Details** next to the **My Status** drop-down list.

**Related Topics**

My Status
Possible Status Values
Set DND Status with Your Phone
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 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.

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.

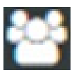
You can determine if a person is available to take a call by checking that user's status. Status information appears in the Status column of the Company Directory or workgroup directory.

**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 Status Details
- Set Your Status
- Setting Status

# Workgroup Activation Button

| | |
|---|---|
| **Icon** |  |
| **Location** | My Status section |
| **Description** | Click this icon to specify the workgroup queues for which you will take calls. In order to receive a call, you must be logged onto the CIC client, have your workgroup activation status set to **Active**, and have your user status set to an "Available" type. For more information, see Change Your Workgroup Activation Status. |

**Related Topics**

- Workgroup Statistics

# Working with Text Messages

**Requirements**: Your CIC administrator must configure the **Short Message Service** (SMS) feature in Interaction Administrator before it is available in the CIC client. Your CIC administrator must also enable the Short Message Service plug-in for you. Your Phone Number Classification Access Control rights determine whether you can send a text message to specific classes of phone numbers (for example, Local, Long Distance or International).

SMS (Short Message Service) is the technology that enables cell phone users to exchange text messages over cell phones. The Short Message Services client feature enables CIC client users to send and receive text messages.

**Related Topics**

- Text Message Conversations
- Use Response Management in a Text Message

## Text Message Conversations

ACD-routed SMS text messages and replies to your text messages can appear in your CIC client as **Chats**. Your CIC administrator controls the routing of inbound SMS text messages. CIC can route SMS text messages as Chats, to a handler, or as a generic object to a queue.

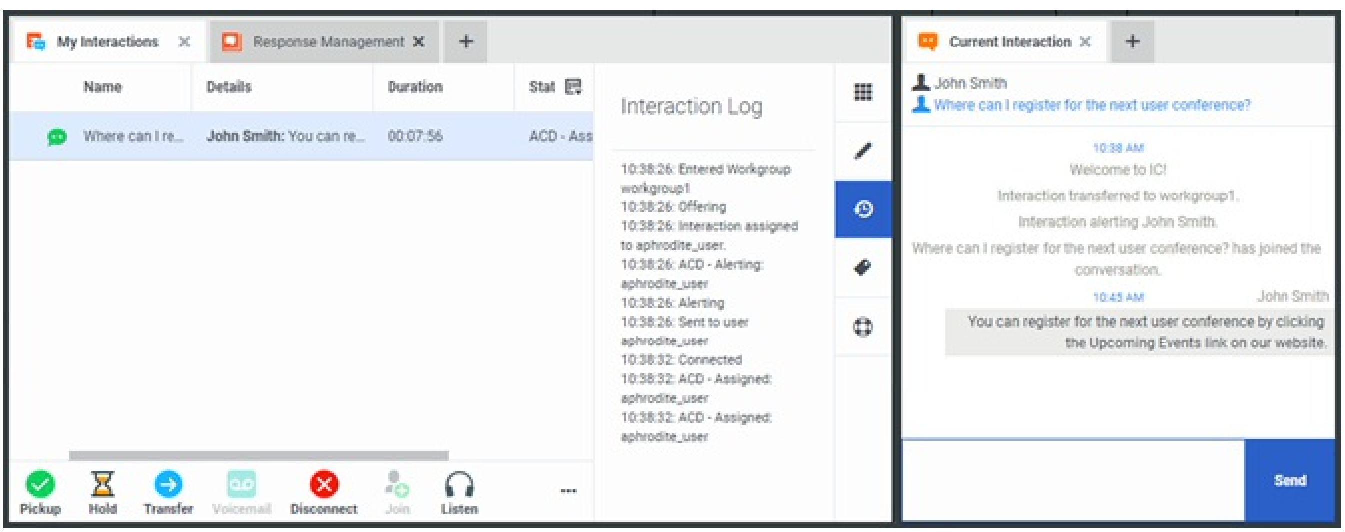
When CIC routes SMS text messages as Chats, you interact with them exactly as you would any other Chat. All the features available when handling a Chat are available to you when handling these SMS text messages. You can invite other CIC users to join the text message conversation, use Response Management to look up answers to frequently asked questions, add notes or codes, and more. See Manage a Chat Session for more details.

**Note**: An SMS text message conference ends when the last CIC agent or other internal party disconnects.

---

### Current Interaction view

You work with SMS text messages in the Current Interaction view.



# Use Response Management in a Text Message

**Requirements**: For information about the prerequisites for using the Short Message Service feature, see Working with Text Messages. You also need the Response Management Security right to use Response Management.

You use stored responses to avoid typing the same information over and over again.

**Note**: It is not currently possible to attach a Response Management stored file to a text message.

**To use a stored response in a text message:**

1. Do one of the following:

    - In the Current Interaction view, in the composition area, type the shortcut for a Response Management item and press **Ctrl+Space**.
    - In the Response Management view, select a response and click the **Insert** button.
    - Copy and paste part of the response from the Response Management view to the composition area of the **Current Interaction** view.

    **Result**: The response immediately appears in the composition area.
2. In the composition area of the Current Interaction view, make any necessary changes to the response.

    **Note**: You can edit the response before it is sent as part of the text message.
3. Click **Send**.

**Related Topics**

Text Message Conversations
Working with Text Messages

# 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 optional Voicemail view in the CIC client.

**Tip**: You can record greetings that prompt users to leave a voicemail when you do not answer the telephone or when you are in a Do Not Disturb status. For more information, see Personal Prompts Options.

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 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 view 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 *CIC TUI User's Guide* and *Quick Reference Card* available in the PureConnect Documentation Library.

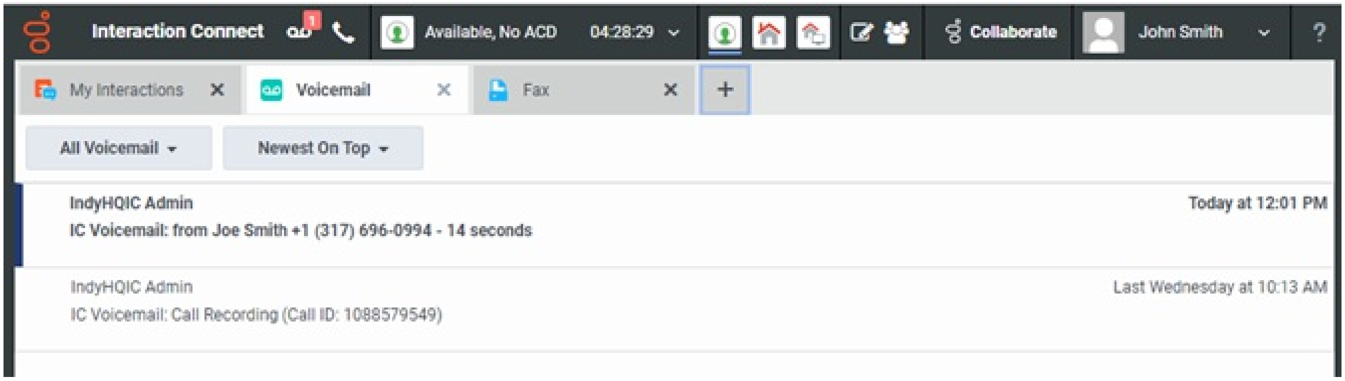
**Related Topics**

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
Use the Voicemail View
Voicemail View

# Message Waiting Indicator

The Message Waiting Indicator (MWI) appears only when you have unheard voicemail messages. The number on the icon, also called a badge, indicates how many unheard message you have.

**Tip**: Click the MWI icon to bring the Voicemail View to the front. This won't add the view, if you are not already displaying it.




# 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. Do one of the following:
   - Click the **Pickup** button.
   - Right-click the call and choose **Pickup** from the menu that appears.

   **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
Pick Up a Call From a Queue

# 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 **Transfer to Voicemail** option may not be available 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 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:**

1. Tell the caller that he or she is going to be transferred to another person's voice mail.
2. Do one of the following:
   - On the Queue Control toolbar, click the **Transfer** button.
   - Right-click the call and choose **Transfer** from the menu that appears.

   **Result**: The Transfer dialog box appears.
3. In the **Transfer To:** field, type all or part of the transfer 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 or not 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 down arrow on the **Transfer** button and select **Transfer to Voicemail**.

   **Result**: The call is transferred to the recipient's voice mail and disappears from **My Interactions**.

**To transfer a call to another person's voice mail using the Directory toolbar:**

1. Select the call
2. Select a directory entry
3. On the Directory toolbar, click the **Voicemail** button.

**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, do one of the following:**

- Select the call, if it is not already selected, then on the Queue Control toolbar, click the Voicemail button.
- If the call is connected, right-click the call and select **Voicemail**.

  **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

# 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.

**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** |
|---|---|
|  | Slow down playback. |

| | |
|---|---|
|   | Speed up playback. |
|   | Rewind message 6 seconds. |

| | |
|---|---|
|  | Fast forward message 6 seconds. |
|  | Decrease volume. |

| | |
|---|---|
|  | Increase volume. |

**Related Topics**

[Interaction Voicemail Player Controls]

# 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. Do one of the following:
   - On the toolbar, click the Listen button.
   - Right-click the call and select **Voicemail**.

   **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**: Genesys 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
Working with Voice Mail

# 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 View
- 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 IC User Applications Setup. For more information, see the *CIC Server Installation and Configuration Guide* in the PureConnect Documentation Library.

## 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 CIC 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:

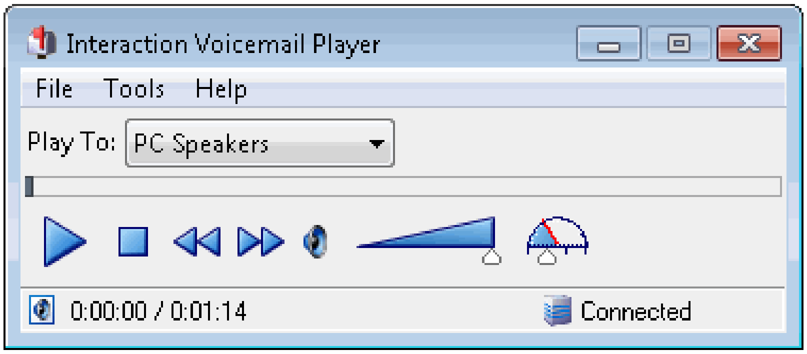
- Play voice mail messages directly from electronic mail.
- Control the playback of voice mail messages.
- Clear a message waiting indicator light

> **Tip**: For more information, see the *Interaction Voicemail Player Help*.

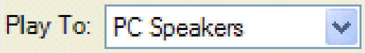
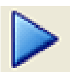
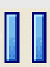
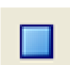
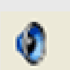
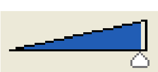
**Related Topics**

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.<br>**Note**: If you restart the CIC client, this defaults to the device you selected for your last voice mail.<br>**PC Speakers**<br>Selecting a playback other than PC Speakers may result in slower startup times.<br>**Remote Telephone**<br>Selecting this device causes CIC to dial the specified number and play the voice mail.<br>**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.<br>**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

## 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.
- Your CIC administrator 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.

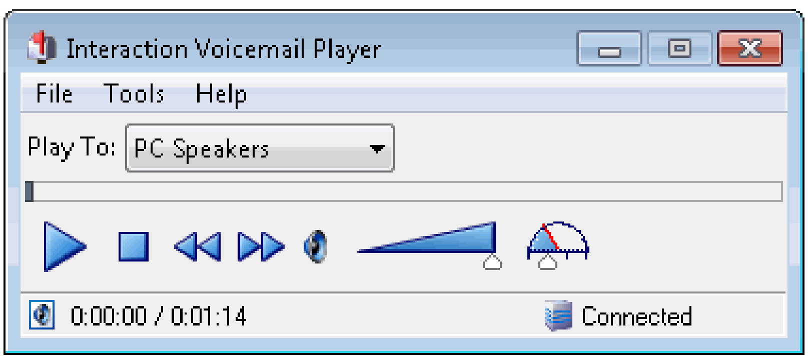
**To listen to your voice mail through your Inbox:**

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, depending on your selection in the Interaction Voicemail Player Options dialog box. For more information, see Configuring Interaction Voicemail Player.




> **Note**: For more information about using this player, see the *Interaction Voicemail Player Help*.

**Related Topics**

Interaction Voicemail Player Controls

# Voicemail View

The Voicemail view 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 View.

**To display the Voicemail view:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. In the **Quick Picks** list, click **Show All Views**.
3. In the **Add Views** dialog box, in the **Extras** category, select the **Voicemail** check box.
4. In the Add Views dialog box, click **Add View**.

    **Result**: The Voicemail view appears.

**Related Topics**

Change View Layout
Use the Voicemail View
Working with Voice Mail

---

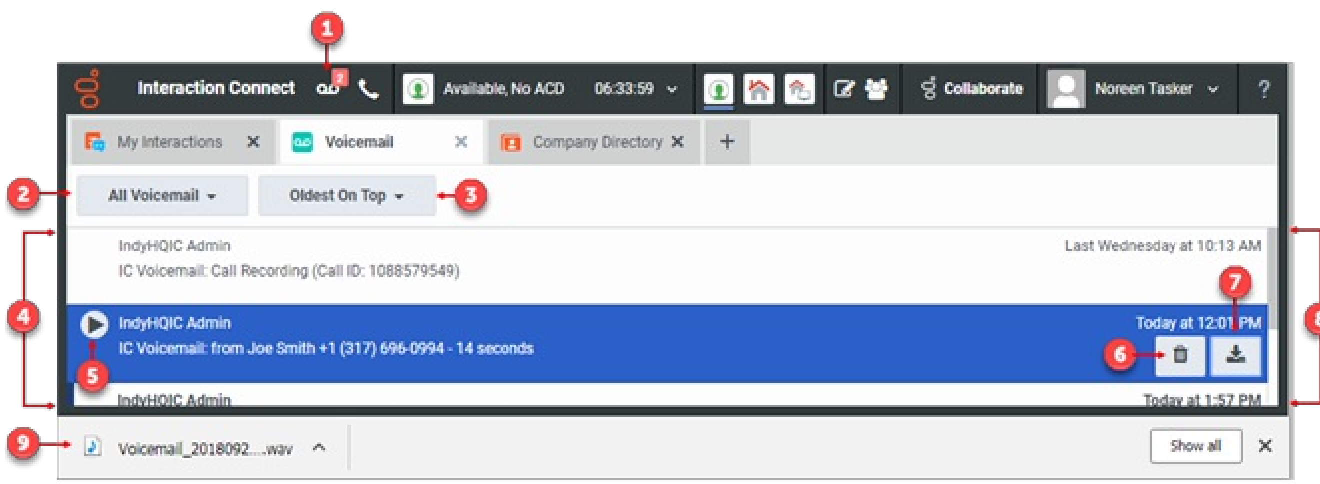
## Use the Voicemail View

Use the Voicemail view 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.

> **Note**: Before you can use the Voicemail Message view, you must make it available as a view in the CIC client. For more information, see Voicemail View.

### Voicemail View Features

This diagram illustrates the main features of the Voicemail view.



| | |
|---|---|
| 1 | The Voicemail Message Waiting Indicator (MWI) appears when you have unheard voice mail messages.<br>• The number on the icon indicates the number of unheard messages.<br>• Click the icon to select the Voicemail view and bring it to the front if it is behind another view.<br>**Note**: Clicking the MWI does not add the Voicemail view to Interaction Connect. For more information on adding this view, see Voicemail View. |
| 2 | Select the type of voicemail messages to display in the Voicemail list:<br>• All Voicemail<br>• Unopened Voicemail<br>• Opened Voicemail |
| 3 | Select a sorting option:<br>• Newest on top<br>• Oldest on top |
| 4 | The Voicemail View contains the **Voicemails List.** It contains the voice mail messages you have not yet deleted, including both previously played and unheard voice mail messages.<br>**Tip**: A blue bar indicates an unheard message.<br>**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. |
| 5 | The currently selected voice mail message appears shaded. Click the **Play** control to listen to the currently selected voice mail message. |
| 6 | Click the **Delete** control to delete the currently selected voice mail message.<br>**Tip**: To delete multiple messages at the same time, press and hold the **Ctrl** key and select the messages, then click the **Delete** control. |
| 7 | Click the **Download** control to download the currently selected voice mail message as a WAV file to your workstation. Use your default audio player to playback the voice mail message.<br>**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. |
| 8 | A vertical scroll bar appears if you have more voice mail messages than can be displayed at one time. |
| 9 | Downloaded messages appear in your browser's File Download location. Click to play back the voice mail message in your default audio player. |

**Related Topics**

Delete voice mail messages
Play back messages in the Voicemail View

## Play back messages in the Voicemail View

You can use the integrated voice mail player to play back voice mail messages to your phone (current station).

**To play back voice mail messages:**

1. Select a voice mail message.
2. Do one of the following:
   - Click the **Play** button on the voice mail message.

     **Result**: This plays back the message to your current station (phone).
   - Click the **Download** button on the voice mail message. Click the WAV filename in the File Download location in your browser.

     **Result**: This plays back the message in your default audio player for WAV files.

**Related Topics**

Use the Voicemail View

## Delete voice mail messages

You can delete old or unneeded voice mail messages from the Voicemail view

**To delete voice mail messages, do one of the following:**

- In the Voicemail view, select a single voice mail message or press and hold the **Ctrl** key, then select multiple voice mail messages. Press the **Delete** button.

  Confirm you are sure you want to delete these voice mail messages by clicking **Delete** when prompted.
- In your email Inbox, delete the email message with the voice mail attachment.

> **Note**: Interaction Connect removes the corresponding voicemail message the next time it automatically updates the Voicemail view.

**Related Topics**

Use the Voicemail View

# Web-Based Phone

**Requirements**: Your CIC administrator must enable this feature and set it up for you. For more information, see Web-based Phone Requirements.

**Warning**: The CIC Web-Based Phone feature **does not support persistent connections**. If you enable this option for these stations, call will fail.

The Web-Based Phone feature enables Interaction Connect users to use a web browser on a computer as a SIP telephone using WebRTC as the communication protocol. The Web-Based Phone eliminates the need to distribute, install, and configure a physical IP telephone for each agent or user, or to install a SIP soft phone application on PCs.

## Implementation

- Web-based Phone Requirements
- Web-based Phone Processing
- Web-based Phone Limitations
- Configure the web-based phone feature

## Use

- Log on with a Web-Based Phone
- Change your Web-Based Phone settings
- Use a Web-Based Phone

## Related Documentation

- Genesys Cloud for PureConnect Administrator's Guide - the first step to enabling CIC web-based phones.
- Genesys Cloud Resource Center - All Genesys Cloud documentation

# Web-based Phone Requirements

## User Requirements

- Your Genesys Cloud Telephony Administrator must assign you an extension number from a Genesys Cloud extension pool. The Web-Based Phone Configuration Wizard available in Interaction Administrator creates extension pools and assigns extension numbers automatically. For more information, see Configure the web-based phone feature.
- Your PureConnect administrator must assign you the User-defined Telephone Number on Remote Logon Security right.

## Workstation Requirements

- Personal computer with the following items:
  - Speakers and microphone (or headset)
  - Supported web browser

    **Note**: Internet Explorer does not support WebRTC phones.

    - Google Chrome (recommended) - version 47 or higher
    - Mozilla Firefox - version 44 or higher

## Licensing

- No feature license for CIC is needed at this time.
- Genesys Cloud Communicate integration license
- Each Genesys Cloud user needs the Communicate - User role

## Network

The web-based phone consumes approximately 80 to 100 Kbps (10-12 KB/sec) of bandwidth for an active call.

**Note**: Ensure that your network connections between the agent and Genesys Cloud are sufficient to facilitate the bandwidth consumption for all CIC web-based phone instances in a location.

## Genesys Cloud Edge appliance (one or more):

- Genesys Cloud Edge (Standard)
- Genensys Cloud Edge Mini
- Genesys Cloud Edge Micro
- Virtual Genesys eCloud Edge

## CIC

- CIC 2020 R2 or later.

**Note**: To ensure existing and newly implemented WebRTC integrations continue to function, Genesys recommends **upgrading CIC to the latest 2019 R4 Patch at a minimum.** The legacy connector used to synchronize data is being deprecated from the Genesys Cloud platform. Cloud Bridge which was introduced in 2019 R4 replaces this connector to synchronize data between the platforms.

# Configure the web-based phone feature

**Requirements**: Your CIC administrator must enable this feature and set it up for you. For more information, see Web-based Phone Requirements.

The following list provides an overview of the configuration process for CIC web-based phone:

1. Enroll in Genesys Cloud Communicate through your Genesys Sales representative.

   > **Note:**
   > To configure the Genesys Cloud Edge, create WebRTC phone definitions, define tie-lines, and assign phones, you must have the **Telephony Admin** and **admin** role in Genesys Cloud.
   >
   > For more information about Genesys Cloud roles, see Roles and permissions Overview in the Genesys Cloud Resource Center.

2. Install and configure the Genesys Cloud Edge.

   > **Note:**
   > The different models of Genesys Cloud Edge have varying capacities, which are affected by the following features and usage scenarios:
   >
   > - Number of registered stations
   > - Number of concurrent calls
   > - Percentage of active calls recorded
   > - Number of Public Switched Telephone Network (PSTN) calls
   >
   > To ensure that you have enough Genesys Cloud Edge appliances to facilitate the number of web-based phones that are necessary in your environment, use the Bandwidth calculator.

3. Use *Genesys Cloud for PureConnect Administrator's Guide* to integrate your CIC system with your Genesys Cloud organization.
4. Ensure each Genesys Cloud Edge device is ready to communicate with CIC:

   > **Note:**
   > By default, Genesys Cloud Edge devices communicate through port/protocol 5061/TLS. You can change the port and protocol but they must match between the Genesys Cloud Edge device and the tie-line.

   a. Specify a Genesys Cloud trunk as an intermediate proxy.

      > **Note:**
      > Ensure the trunk will allow CIC to send calls to Genesys Cloud. You should also record the port and protocol of the SIP line for use later in this procedure when you configure CIC to communicate with Genesys Cloud.

   b. For each Genesys Cloud Edge appliance, create a site.

   c. Create a Genesys Cloud Edge group that includes a phone trunk.

5. In Interaction Administrator, select **System Configuration** > **Genesys Cloud** in the left pane.
6. In the right pane, double-click the **Configuration** entry.

   The **Genesys Cloud Configuration** dialog box appears.
7. Select the **Configure CIC web-based phone** button.

   The first page of the configuration wizard appears. For information on using the first page of the CIC web-based phone wizard, see in *Interaction Administrator Help*

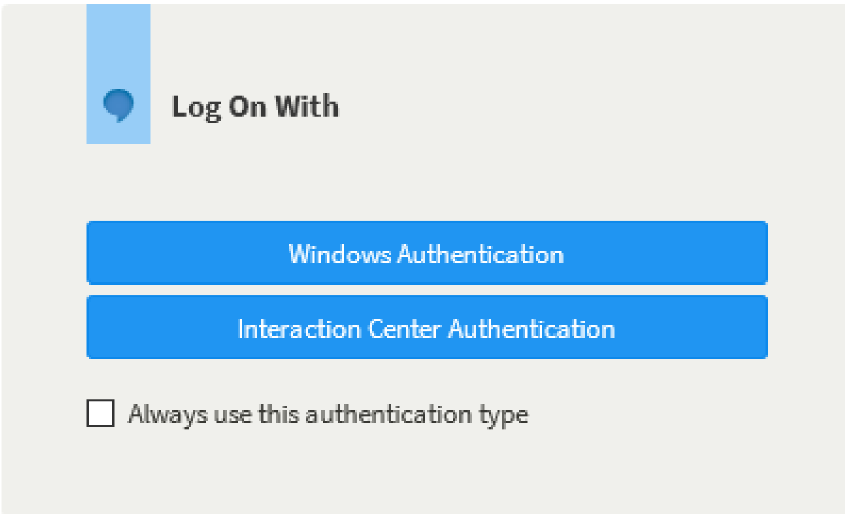
   Each page of the wizard has its own help topic to assist you in configuring CIC web-based phone.
8. Test CIC web-based phones to ensure that they are functioning properly.

   a. Open a supported web browser and navigate to the Interaction Connect logon page.

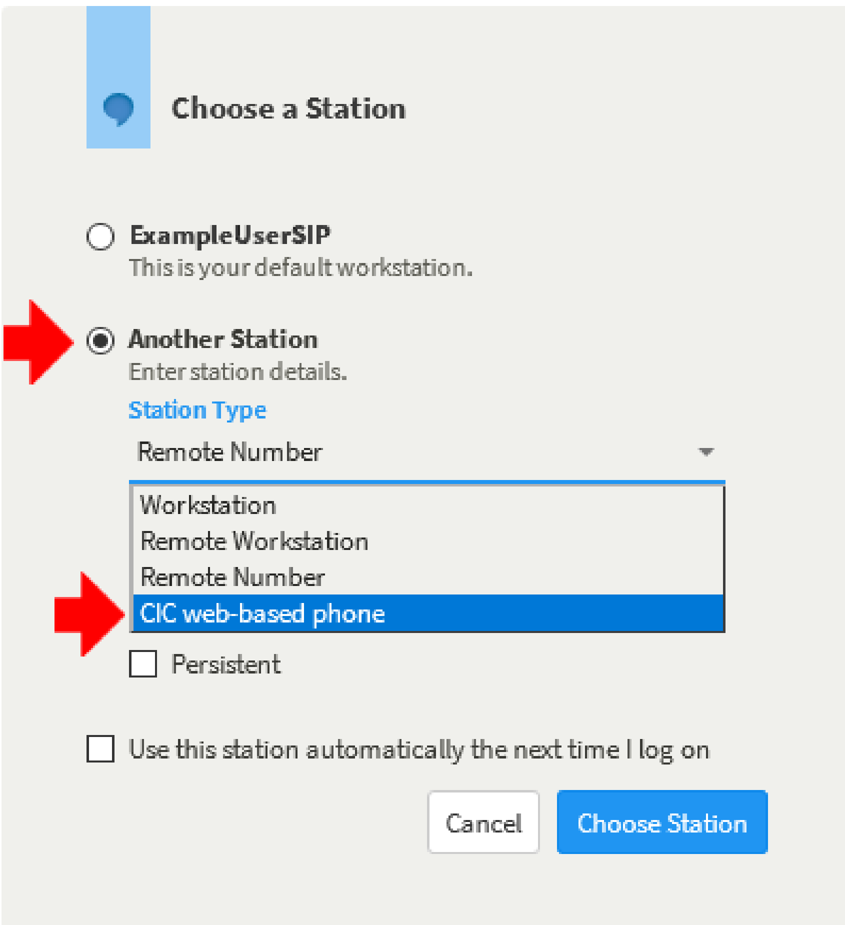
      > **Note:**
      > Ensure that you use **https://** as the web protocol in your web browser.

   b. Select your CIC server.

   c. If prompted, log on using **Windows Authentication**.




d. In the **Choose a Station** page, select the **Another Station**option.
e. In the **Station Type** list box, select **CIC web-based phone**.




> **Note:**
> If you do not see **CIC web-based phone** in the list box, ensure that you are using the **https://** web protocol in your web browser. If you are using the **https://** web browser, validate that the configuration settings described in this procedure for both Genesys Cloud and CIC are correct.

In the **Microphone** list box, select the audio input device that you want to use for CIC web-based phone.

f. If the **Speaker** list box is displayed, select the audio output device that you want to use for CIC web-based phone.

> **Important!**
> The **Speaker** list box is not displayed in the Firefox web browser.

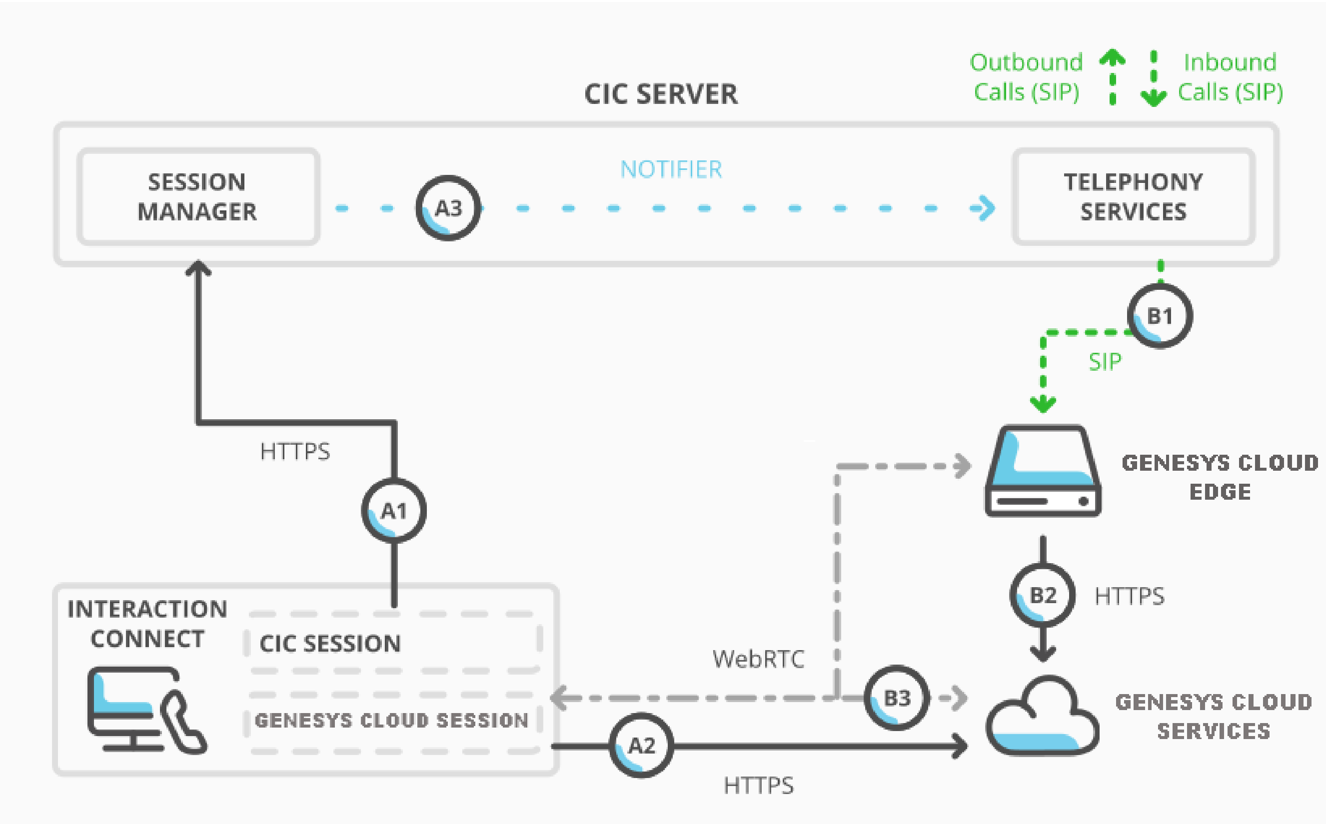
g. Select the **Choose Station** button.

h. Do the following tests and ensure that CIC web-based phone receives each call and the audio functions as expected:
   - Place an outbound call.
   - Call your extension from another telephone.
   - Call your DID telephone number.

# Web-based Phone Processing

> **Requirements**: Your CIC administrator must enable this feature and set it up for you. For more information, see Web-based Phone Requirements.

The following diagram and table explain how CIC supports WebRTC communications for the web-based phone feature, including network protocols and sequence.




CIC web-based phone processing

| Process | Step | Description |
|---|---|---|
| Logon | A1 | The Interaction Connect user logs on to PureConnect. The Genesys Cloud Extension number that the administrator assigned to the user is automatically selected and used by Interaction Connect. |
| | A2 | Interaction Connect automatically logs the user on to Genesys Cloud using the WebRTC station. |
| | A3 | Session Manager registers the user's Genesys Cloud Extension number with the Telephony Services component of the CIC server as a Remote Number workstation. |
| Call control | B1 | For the Remote Number connection, the Telephony Services component of the CIC server calls the Genesys Cloud Extension number through a tie line that is facilitated by Genesys Cloud Edge. |
| | B2 | Genesys Cloud Edge relays the incoming Genesys Cloud Extension call to Genesys Cloud Services. |
| | B3 | Genesys Cloud Services facilitates the exchange of signaling messages and application data between Genesys Cloud Edge and Interaction Connect to establish a WebRTC session. |

# Web-based phone limitations

> **Requirements:** Your CIC administrator must enable this feature and set it up for you. For more information, see Web-based Phone Requirements.

At this time, the CIC web-based phone feature has the following limitations:

- All CIC web-based phones are treated as remote numbers.
- The CIC web-based phone feature facilitates only audio communications, video communications are not available at this time.
- The CIC web-based phone feature supports only the following web browsers:
    - Google Chrome - version 47 or higher
    - Mozilla Firefox - version 44 or higher

For more information about software requirements for CIC, its subsystems, and features, see CIC System Software Requirements.

# Log on with a Web-Based Phone

> **Requirements**: Your CIC administrator must enable this feature and set it up for you. For more information, see Web-based Phone Requirements.

**Save your settings**

At several points in this log on process, you can select a check box that saves your selections. This enables you to skip steps when logging on in the future. After you log on, you can adjust these automatic logon settings in the **Connection** page of the **Applications Settings** dialog box. You can also change your microphone and speaker selections in the **Web-Based Phone** page of the **Applications Settings** dialog box.

> **Tip**: If your CIC administrator has enabled Single Sign On and you select the **Always use this server** check box, you log back in automatically anytime you don't log off Interaction Connect but just close and reopen your browser.

**To log on to Interaction Connect:**

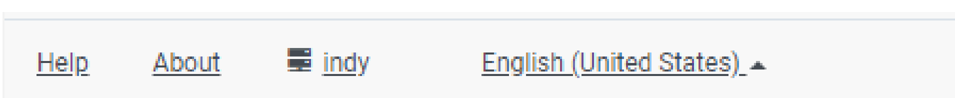
1. Point your browser to the logon page.

> **Tip**: Your CIC administrator can supply the URL for the logon page. If you have questions about any of the required entries, click the **Help** link in the **Application bar**.

2. If your organization uses more than one CIC server, you can choose a server:

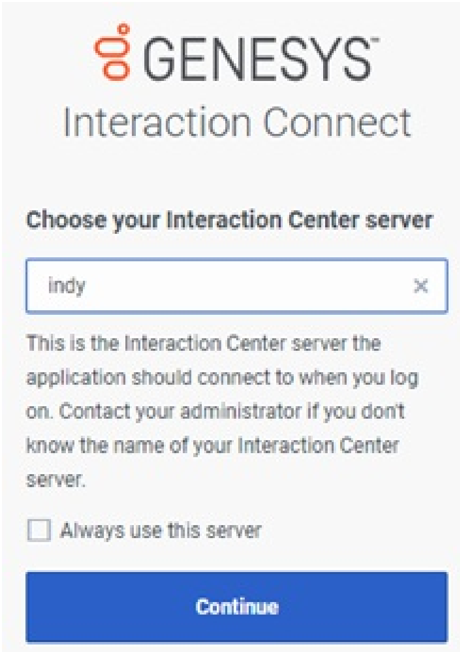
> **Note**: You choose a CIC server at your initial logon, even if there is only one available.

a. If available, in the logon page, in the **Application Bar**, click the name of the currently selected server.




b. In the **Choose Your Interaction Center Server** dialog box, do one of the following:

- If available, select a server from the **Server** drop-down list.
- Type the name of the appropriate CIC server in the **Server** text box.



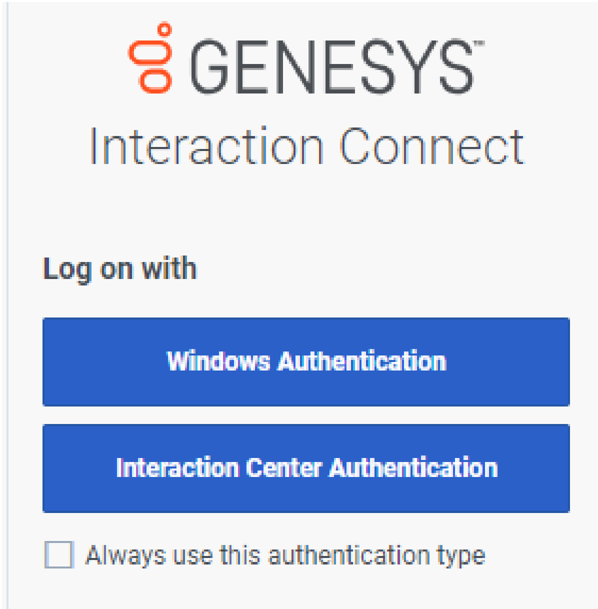

c. Optionally, to save your selections, select the **Always use this server** check box.
d. Click **Choose Server**.

3. Optionally, change the language used in the interface. In the **Application bar**, click the name of the currently selected language and select a different language.

> **Note**: This option is available only if your CIC administrator installs optional language packs on the CIC server. Also, your browser's language setting controls the formats used for dates, times, currency, and numbers.


4. If your CIC administrator has enabled Single Sign On, in the **Log on With** dialog box, do one of the following:

- Click **Windows Authentication** to use your Windows user ID and password to log on.
- Click **Interaction Center Authentication** to use your CIC user name and password to log on.
- Click the button for the alternate Identity Provider configured by your CIC administrator.




**Note**: The **Log on With** dialog box is available only if you can use more than one type of credentials to log on.

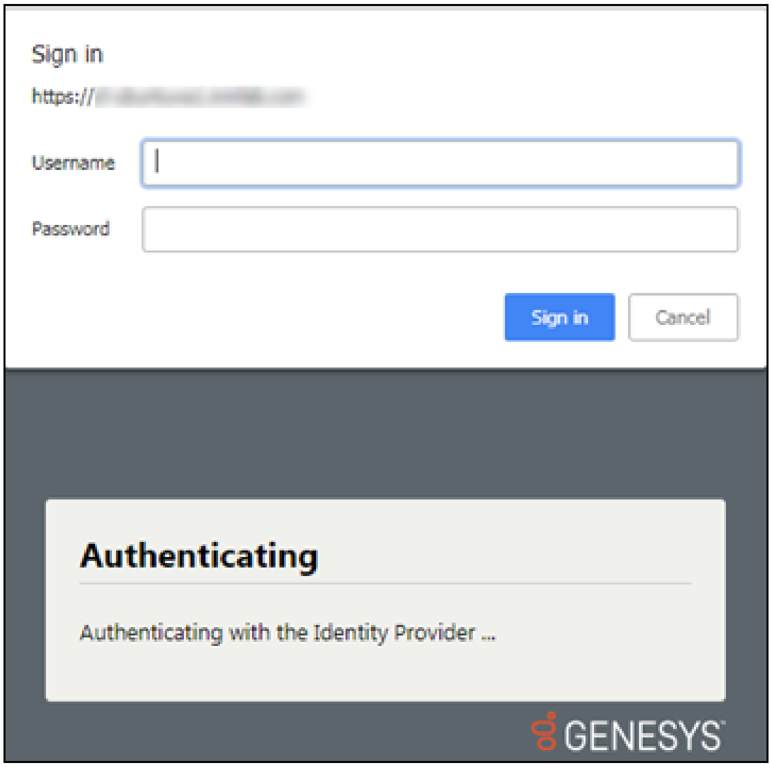
5. Enter the appropriate log on credentials by doing one of the following:

- If you selected **Interaction Center Authentication**, enter your **CIC User ID** and **Password** as configured in Interaction Administrator. Click **Log On.**

**Note**: You also see this dialog box if your CIC administrator has not enabled Single Sign On or you have a CIC 2015 R1 server.


- If you selected **Windows Authentication**, enter your **Windows user name** and **password**. Click **Sign In**.

**Note**: This dialog box does **not** appear if your CIC administrator configures your browser to enable Windows credentials to automatically pass to the CIC server. Also, the appearance of this dialog box varies according to the browser you use.



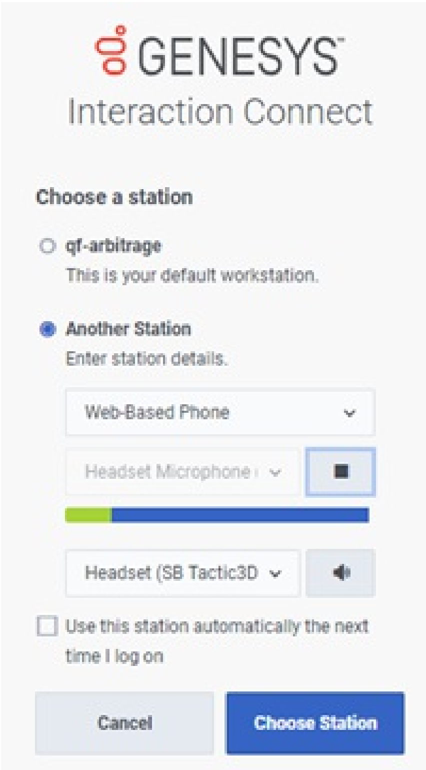

- If you selected another Identity Provider in the **Log on With** dialog box, follow your CIC administrator's instructions for entering credentials and logging on.

6. In the **Choose a Station** dialog box, select **Another Station.**
7. From the **Station Type** drop-down list, select **Web-Based Phone**.

   **Note**: Your Microphone and Speaker selections are saved automatically for your next logon when you select the **Web-Based Phone**.

8. Make a selection from the **Microphone** and **Speaker** drop-down lists.
9. To test the microphone, click the **Test Microphone icon** next to your selection. Speak in your normal tone of voice.

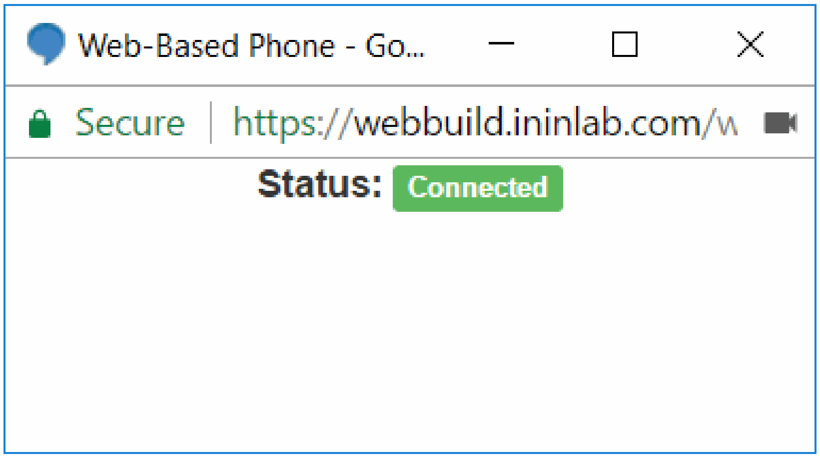
   **Result**: A progress bar appears. Green indicates a comfortable volume for your listener. Yellow indicates the volume is too loud. A blank progress bar indicates a failed test.




Click the **Stop** button (black square) when you complete the test.

10. To test your Speaker selection, click the **Test Speakers icon** next to your selection. Adjust the volume in the normal way for your speakers or headset.
11. Select or clear the **Use this station automatically the next time I log on** check box and click **Choose Station**.

    **Result**: The web-based phone dialog box appears and it remains open for as long as you use the WebRTC phone as your station. **Status** is the connection status of your WebRTC phone




**Related Topics**

[Change Your Password]
[Web-Based Phone]
[Change your Web-Based Phone settings]
[Language Setting]
[Logging On]
[Single Sign On]

# Change your Web-Based Phone settings

**Requirements**: Your CIC administrator must enable this feature and set it up for you. For more information, see Web-based Phone Requirements.

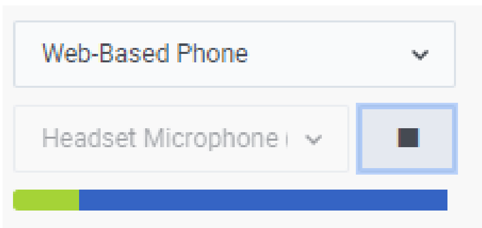
If your current station is a web-based phone, you can change your phone settings at any time.

1. In the Applications Settings dialog box, click **Web-Based Phone**.
2. Select a microphone and speaker from the drop-down lists.

   **Note**: Chrome users can select their microphone and speaker. Firefox users can only select their microphone.

3. Optionally, test your Microphone and Speaker.
   a. To test the microphone, click the **Test Microphone icon** next to your selection. Speak in your normal tone of voice.

      **Result**: A progress bar appears. Green indicates a comfortable volume for your listener. Yellow indicates the volume is too loud. A blank progress bar indicates a failed test.

      Click the **Stop** button (black square) when you complete the test.
   b. To test your Speaker selection, click the **Test Speakers icon** next to your selection. Adjust the volume in the normal way for your speakers or headset.

4. Click **Save Settings**.

**Related Topics**

Web-Based Phone

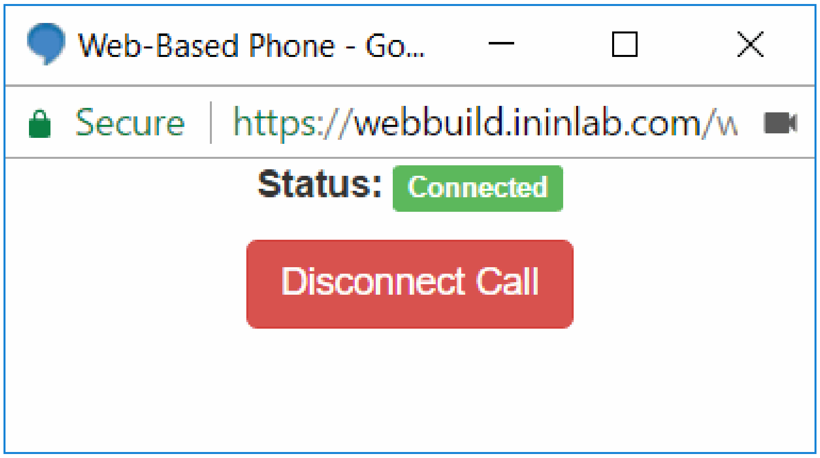
# Use a Web-Based Phone

**Requirements**: Your CIC administrator must enable this feature and set it up for you. For more information, see Web-based Phone Requirements.

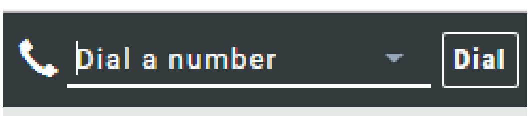
You can use your workstation's microphone and speakers or headset to participate in phone conversations.

**Tip**: Don't refresh your browser while you are on a connected call and using a web-based phone. This disconnects the call.

- Use the Web-Based Phone dialog box to monitor the connection status of your WebRTC phone. You can use the **Disconnect Call** button to disconnect a call. This is similar to hanging up a physical phone to end a call. This additional method of disconnecting is useful if Interaction Connect becomes unavailable during a switchover.




- Use the Queue Control toolbar to perform standard call control operations such as picking up, transferring, or disconnecting calls.
- Use your keyboard and the Dial a number field to place calls.




- Use the Dial Pad in the My Interactions Sidebar to make calls. Or you can use the Dial Pad to make menu selections by sending DTMF tones to a connected call.

# Widgets

Widgets are streamlined and lightweight elements you can add to your company's website to support activities like chatting with an agent. PureConnect Widgets are JavaScript-based, cloud-hosted, and cloud-configured extensions that implement the Genesys Widgets API under a continuously integrated and deployed release model.

Interaction Connect supports the configuration of Genesys Widgets for use in your company's website. These widgets are easy to configure and deploy by means of code snippets you include in your company's website.

**Note**: Genesys widgets do not require the use of Interaction Web Tools.

**Requirements**: To deploy a widget, you must have a public-facing web portal with a reverse proxy. To display the Widgets view, you need the **Widgets Configuration** Administrator Access right. To create widgets and configure every widget property, you also need the Widget Configuration Master Security right. If you can display the Widgets list, but do not have the Security Right, then you can't create widgets and can only configure widget properties listed on the **Unrestricted Properties** page. Only an Interaction Connect user with both the **Widgets Configuration** Administrator Access right and the **Widget Configuration Master** Security right can select these **Unrestricted Properties**.

For developers, the Genesys Widgets Reference provides information for commands, events, configuration, and localization details for Genesys widgets. PureConnect uses a subset of the Genesys widgets available in PureEngage.

## Widget Types

- **Web Chat**: The Web Chat widget enables a website visitor to start a live chat with company representative. This creates a PureConnect Chat interaction that is routed to the appropriate queue.
- **Callback**: Website visitors can request a call from one of your agents. The Callback widget provides a form for website visitor details. PureConnect routes this information as a Callback interaction to the appropriate queue.
- **Call Us**: Website visitors can initiate a call to any selected phone number displayed on the Call Us widget. This initiates a call interaction that is routed to the appropriate agent.
- **Offers**: Use the Offers widget to display a product or promotion along with an image or video. You can select from Toaster or Overlay mode.
- **Sidebar**: A Sidebar widget contains displays icons, titles, and command shortcuts for the widgets available on your company website.
- **Chatbots**: PureConnect supports not only the Genesys Intelligent Automation chatbot, but also chatbots from third-party vendors.

## Simple Configuration and Deployment

You do not need developer skills to configure and deploy a Widget. See Configure a Widget and Deploy a Widget.

## Security

To enable security for PureConnect widgets, use SSL/TLS and HTTPS. When you enable security, the widget sends requests to the proxy server over HTTPS. The proxy server then uses the ICWS SSL port to forward the widget request to the IC server.

The following configuration is required:

- **Widget-enabled website**
  Configure SSL/TLS on the widget-enabled website.
- **Reverse Proxy server**
  Configure SSL/TLS on the reverse proxy server. Configure the reverse proxy to use port 8019 which is the ICWS SSL port.
- **Widget**
  Enable HTTPS in the widget. Set **Use HTTPS** to **Yes** on the General page of the Widgets Configuration panel. For more information, see Widgets General Configuration.

**Related Topics**

Widgets General Configuration
Widgets Plugins Configuration

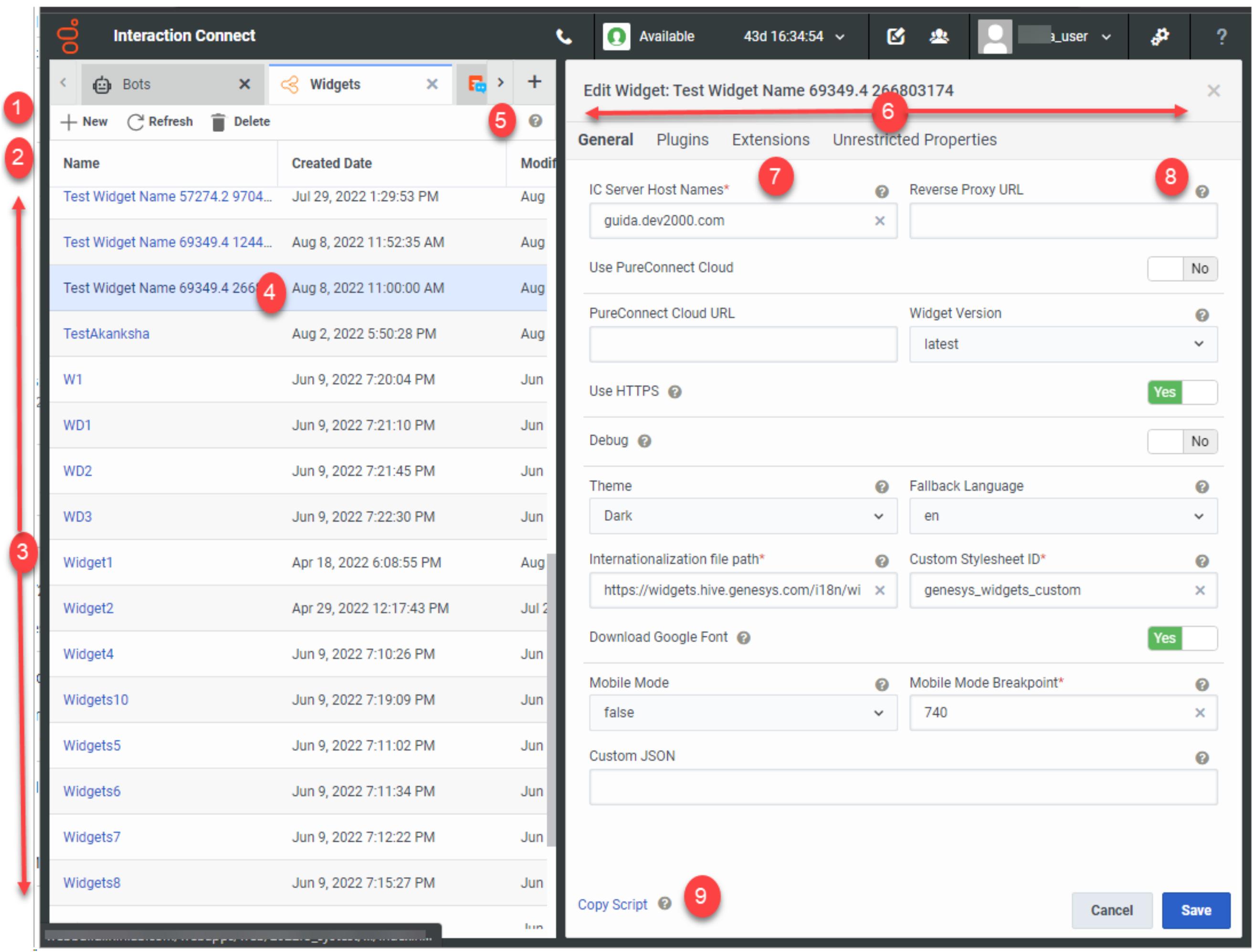
[Widgets Extensions Configuration](#)
[Widgets Unrestricted Properties Configuration](#)

# Widgets View

The Widgets view enables you to configure widgets. You can then generate the JavaScript snippet that enables you to deploy a widget to your company's website.

**Requirements**: See [Widgets](#).

**Tip**: To display the Widgets view, see [Add or Close Views](#).



| | | |
|---|---|---|
| 1 | **Toolbar** | **New** (Add), **Refresh**, and **Delete** controls.<br>To update the Widgets view and display any new Widget configurations created by other Interaction Connect users, click **Refresh**<br>**Note**: The Widgets view does not update automatically. |
| 2 | **Column headings** | Move columns by dragging and dropping column headings. For more information, see Customize Columns. |
| 3 | **Widgets list** | The list of widget configurations. |
| 4 | **Selected widget** | To edit or delete a Widget configuration, select a Widget from the list. |
| 5 | **Help** | Click for Widgets view help. |
| 6 | **Configuration panel** | A slide out panel for adding or editing Widget configurations. |
| 7 | **Required** | A red asterisk indicates a required field. |
| 8 | **Help** | To display help for a selected field, point to this icon. |
| 9 | **Copy Script** | After you configure a widget, click this control to generate a JavaScript snippet in the form of an HTML script tag.<br>**Note**: You deploy widgets by adding this JavaScript snippet to the appropriate page in your company's website. See Deploy a Widget. |

**Related Topics**

Widgets
Configure a Widget

# Custom Themes and Forms

You can customize the appearance of any type of Genesys Widget. If needed, you can also change the layout, content, and other features of the Chat Registration form.

## Themes

Use a custom theme to change the appearance of Genesys Widgets. Use CSS properties to control non-structural properties such as color and font-family. For information about creating and registering a custom theme, see Styling the Widgets.

You then include this name of your theme in the Custom JSON field on the Widget General Configuration page.

**Example 1:**

```
{"main":{"theme":"mytheme","themes":{"mytheme":"cx-theme-mytheme"}}}
```

**Example 2:**

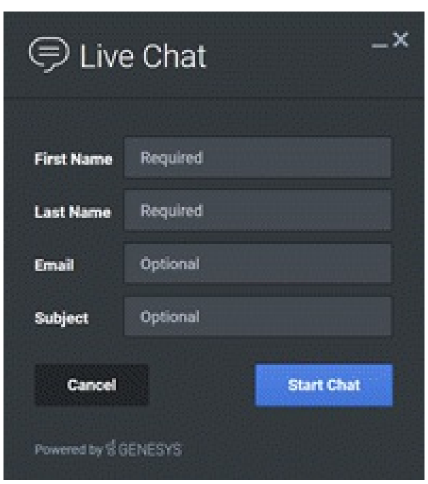
In this example, we are modifying the Chat registration form to change the Subject from a textbox to a dropdown with options.

```
{
  "webchat": {
    "form": {
      "wrapper": "<table></table>",
      "inputs": [
        {
          "id": "cx_webchat_form_firstname",
          "name": "firstname",
          "maxlength": "100",
          "placeholder": "@i18n:webchat.ChatFormPlaceholderFirstName",
          "label": "@i18n:webchat.ChatFormFirstName"
        },
```

```
        {
          "id": "cx_webchat_form_lastname",
          "name": "lastname",
          "maxlength": "100",
          "placeholder": "@i18n:webchat.ChatFormPlaceholderLastName",
          "label": "@i18n:webchat.ChatFormLastName"
        },
        {
          "id": "cx_webchat_form_email",
          "name": "email",
          "maxlength": "100",
          "placeholder": "@i18n:webchat.ChatFormPlaceholderEmail",
          "label": "@i18n:webchat.ChatFormEmail"
        },
        {
          "id": "cx_webchat_form_subject",
          "name": "subject",
          "maxlength": "100",
          "placeholder": "Select an option",
          "label": "@i18n:webchat.ChatFormSubject",
          "type": "select",
          "options": [
            {
              "text": "Request a Qoute",
              "value": "Qoute_Request"
            },
            {
              "text": "Make a Payment",
              "value": "Payment"
            }
          ]
        }
      ]
    }
  }
}
```

## Forms

Genesys provides a default **Web Chat** registration form. This form is shown to website visitors requesting a live chat with one of your agents.




You can change the layout, input type, label, and attributes for each input in this Chat Registration form. For more information, see https://docs.genesys.com/Documentation/GWC/Current/WidgetsAPI/CustCRF.

You then copy and paste the JSON for the custom form into the **Custom JSON** field on the Widget General Configuration page.

**Note**: While you can add extra form fields with custom JSON, you need an extension to pass values from the form through to the interaction that gets created. For more information, see Widgets Extensions Configuration.

# PureConnect Widget Extensions

This topic describes widget extensions that are specific to PureConnect. They are in addition to the functions described in the Genesys Widgets and Genesys Widgets Extensions documentation.

The following functions can be called from within a custom extension for PureConnect Widgets. Note that the "service" object is obtained in a custom extension by invoking CXBus.registerPlugin("pluginName"). Also, If you use custom attributes, the server prefixes attribute names with WebTools_.

## WebChatService.setSpeechStormCustomData

This function takes in a custom object that is sent to the SpeechStorm plugin for use with MicroApps. The parameter cannot contain complex objects – it must be a flat key-value pair object.

Example:

```
service.command("WebChatService.setSpeechStormCustomData", {     parameter1: "value1",
    parameter2: "value2" });
```

## WebChatService.setChatRoutingContexts

This function takes in an array of objects that define the routing contexts for a chat. This function must be called prior to a chat being started.

Example:

```
service.command("WebChatService.setChatRoutingContexts", [     {         context: "skill1",
        category: "skills"     },     {         context: "skill2",         category: "skills"
    }, ]);
```

## WebChatService.setChatAdditionalAttributes

This function takes in a dictionary of string/string pairs.  This function allows a custom extension to set additional Interaction Attributes on a PureConnect chat.  This function must be called prior to a chat being started.

Example:

```
service.command("WebChatService.setChatAdditionalAttributes", {     attributeName1:
"attributeValue1",     attributeName2: "attributeValue2", });
```

## WebChatService.setBotCustomParameters

This function takes in a dictionary of string/string pairs.  This function allows a custom extension to set custom parameters on a Bot chat.  This function must be called prior to a chat being started.

Example:

```
service.command("WebChatService.setBotCustomParameters", {     attributeName1:
"attributeValue1",     attributeName2: "attributeValue2", });
```

## WebChatService.clearBotCustomParameters

This function takes no parameters and clears the value provided in WebChatService.setBotCustomParameters.  This function is automatically called when a chat is started, but is also provided for convenience if a custom extension needs it.

Example:

```
service.command("WebChatService.clearBotCustomParameters");
```

## WebChatService.setBotName

This function provides an API to allow the customization of the bot name.

Example:

```
service.command("WebChatService.setBotName", {     botName: "Alex" });
```

### WebChatService.setChatNotes

This function takes in an object that defines notes that should be set on a PureConnect chat.  This function must be called prior to a chat being started.

Example:

```
service.command("WebChatService.setChatNotes", {     notes: "notes" });
```

## Widgets and Web Services parameters

PureConnect widgets use the same WebProcessor as Interaction Web Tools chats. This means you can use some of the same Web Services parameters to configure Widget Chats.

The *Interaction Web Tools Technical Reference* contains descriptions of these parameters and their uses. For more information, see Configuring Web Services Parameters and its related topics.

| Parameter | Valid for Widgets | Notes |
|---|---|---|
| **Web Processor Parameters** | | |
| AgentConnectedMsg | Yes | |
| AgentDisconnectedMsg | Yes | |
| HoldMsg | Yes | |
| VisitorConnectedMsg | Yes | |
| VisitorDisconnectedMsg | Yes | |
| PerformCleanRestart | Yes | |
| SystemName | No | |
| **Web Processor Bridge Parameters** | | |
| CallbackAccessControl | Yes | Because Widgets do not support authenticated access, the value of `2=authenticated only` has the same behavior as "block all". |
| ChatAccessControl | Yes | Because Widgets do not support authenticated access, the value of `2=authenticated only` has the same behavior as "block all". |
| QueryQueueAccessControl | No | There is no equivalent for Widgets. |
| MaxPollFrequency | Yes | |
| AdditionalHTTPPorts | No | HttpPluginHost reads the value, but doesn't do anything with it for widgets. |

| | | |
|---|---|---|
| AdditionalHTTPSPorts | No | HttpPluginHost reads the value, but doesn't do anything with it for widgets. |
| AllowClientProblemReport | No | |
| ProblemReportControlExpression | No | |
| QueueQueryIdleAbortTime | No | |
| QueueQueryTime | No | |
| **Denial of Service Parameters** | | |
| CallbacksAllowedUnitTime | Yes | |
| CallbackStatusQueryDuration | No | |
| CallbackStatusQueryIdleAbortDuration | No | |
| MaxActiveCallbacksAllowed | Yes | |
| MaxCallbacksAllowedPerUnitTime | Yes | |
| InteractionsAllowedUnitTime | Yes | |
| MaxActiveInteractionsAllowed | Yes | |
| MaxAnonymousInteractionsAllowed | Yes | |
| MaxAnyInteractionsAllowedPerQueue | Yes | If the limit is exceeded, WP logs an error. There is no error to the end user though. Unsure if expected or not. |
| MaxInteractionsAllowedPerUnitTime | Yes | |
| MaxInteractionsAllowedPerUser | No | |
| MaxInteractionsAllowedPerIP | Yes | |
| TrustedHosts | Yes | |
| **Idle/Timeout Parameters** | | |
| EnableIdleTimeout | Yes | |
| IdleDisconnectMessage | Yes | |
| IdleWarningMessage | Yes | |
| PartyIdleGraceTime | Yes | |
| PartyIdleTime | Yes | |

# Configure a Widget

The Widgets view enables you to create, configure and deploy widgets to your company's website.

**Requirements**: See Widgets.

**To create a widget:**

1. Display the Widgets view, by doing one of the following:
   - Click the Administrator Views button, then click **Widgets**.
   - Use the Add Views dialog box. **Widgets** appears under Administration.
2. In the **Widgets** view, click **New**.
3. In the **Create a Widget** panel, type a **Name** for the widget.

3. Do one of the following:

- To configure this widget, click **Create**. In the Widget configuration panel, complete and save the Widget configuration options.

- To save the widget, but delay configuration, click the arrow on the **Create** button and select **Create Without Configuring**.

**To edit a widget's configuration:**

1. In the **Widgets** view, click a Widget configuration name.

   **Result**: The Widget configuration panel appears.
2. Update selected configuration options in the Widget configuration panel and then click **Save**.

**Related Topics**

Deploy a Widget

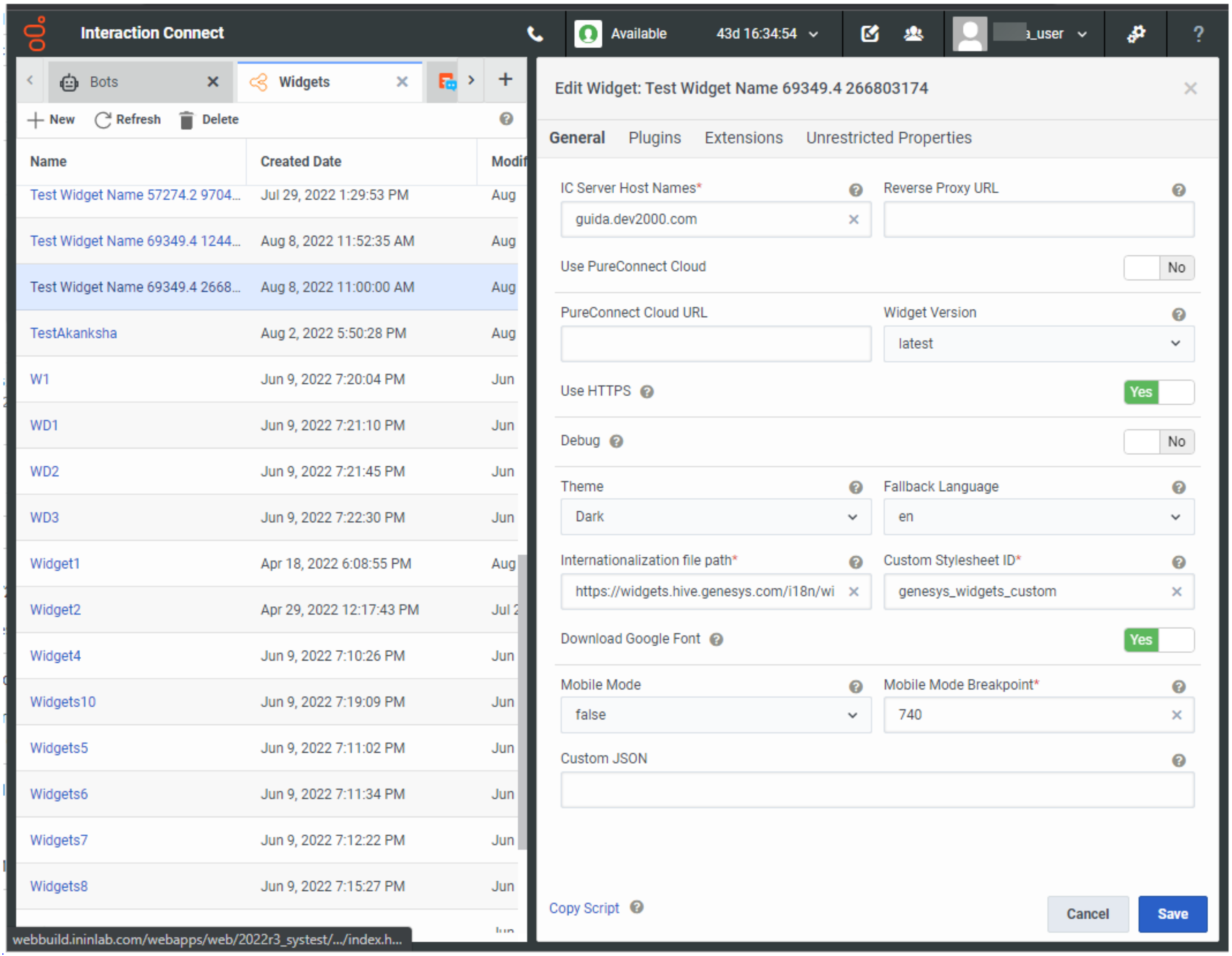
---

## Widgets General Configuration

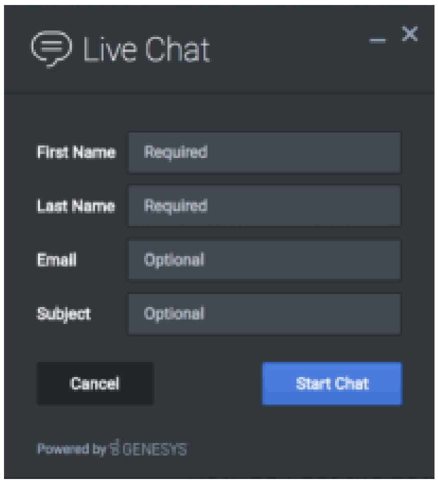
**Requirements**: To configure every widget property, you need the **Widget Configuration Master** Security right. If you do not have this Security right, you see only the configuration options made available to you on the **Unrestricted Properties** page. For more information, see Widgets.

**Tip**: To return to the list of Widgets, save any changes and click **Cancel**.

The General page of the Widgets Configuration panel applies to the widget as a whole and handles themes, languages, and mobile devices. It also enables you to configure factors unique to CIC such as the IC server name, reverse proxy and whether to use HTTP or HTTPS for communication between the web server and the IC server.




| Option | Description |
|---|---|
| **IC Server Host Names** | Enter the name or names of your IC server and any off server Session Managers. Use a comma to separate the names.<br><br>**Tip**: Use a FQDN if your reverse proxy cannot talk to your IC server without it. Also, you do not need to enter both server names in a switchover pair. |
| **Reverse Proxy URL** | Enter the name or FQDN of the web server functioning as a reverse proxy to the IC server inside your firewall.<br><br>**Note**: If you use a reverse proxy with Genesys Intelligent Automation, the **Intelligent Automation URL** field on the Genesys Intelligent Automation configuration is ignored and this field is used instead. See Plugins Configuration. |
| **Use PureConnect Cloud** | Select **Yes** if your organization is a PureConnect Cloud customer. |
| **PureConnect Cloud URL** | If you set **Use PureConnect Cloud** to **Yes**, enter your organization's PureConnect Cloud URL. |
| **Use HTTPS** | Select the communication port used for communication between the web server and CIC server.<br>• If **Yes**, use the default HTTPS port number of 8019.<br>• If **No**, use the default HTTP port number of 8018. |

| | |
|---|---|
| **Widget Version** | Select the PureConnect **Widget Version** from the drop-down list and the selected version will be configured.<br>**Note**: The Widget-version drop-down in the Interaction Connect is available only when you configure WidgetVersion parameter in the IA. For more information, see Server parameter for Widgets |
| **Debug** | Enable debug logging from the bus to appear in the browser console. |
| **Theme** | You can change the appearance of Genesys Widgets using themes. Themes allow you to change colors and fonts for widgets.<br>Here is an example of the Dark Chat theme.<br><br>**Note**: To use a custom theme, you can Inject your own custom JSON into the configuration. See Custom Themes and Forms. |
| **Fallback Language** | The language used in the widget is based on browser preference. If the widget is unable to use any of the browser's preferred languages, then the widget uses the language selected here. You select from the available i18n Language Packs. |
| **Internationalization file path** | Default English language strings are built into each widget and are displayed by default. Defining this i18n language pack overrides the built-in strings. Enter a path to a remote i18n.json language pack file.<br>**Note**: Your organization must maintain and host this file.<br>**Warning**: This is a customization option best reserved for developers. The developer would need to ensure that they include all of the localization keys the widget uses. These localization keys are part of the source code and are not documented. See https://docs.genesys.com/Documentation/GWC/8.5/Deployment/GWCInternat. |
| **Custom Stylesheet ID** | Enter the HTML ID of a <style> tag that contains CSS overrides, custom themes, or other custom CSS intended for Genesys Widgets. On startup, Widgets move this <style> tag to the end of the document so that 1:1 CSS class overrides apply correctly. |
| **Download Google Font** | By default, the Widgets CSS refers to the Roboto font, available at https://fonts.google.com/. To prevent the Roboto font file from being downloaded at startup, set this option to **No**.<br>**Note**: Set this option to **No** if you have security concerns regarding including fonts from third party sources, to optimize your page load time, or if you already include Roboto on your website. |

| | |
|---|---|
| **Mobile Mode** | Select one of the following:<br>• **True** forces Mobile Mode on all devices.<br>• **False** disables Mobile Mode completely.<br>• **Auto** causes Genesys Widgets to switch automatically between Mobile and Desktop Modes. The Widget code detects whether the website visitor is using a desktop browser or mobile browser. |
| **Mobile Mode Breakpoint** | Set a breakpoint width in pixels where Genesys Widgets switches to Mobile Mode. This breakpoint is checked at startup only. |
| **Custom JSON** | Inject your own custom JSON object into the configuration.<br>**Note**: You can use this field to extend the Widgets configuration beyond its current structure. In order for this field to work properly, it must contain valid, parsable JSON. For more information, see Custom Themes and Forms. |

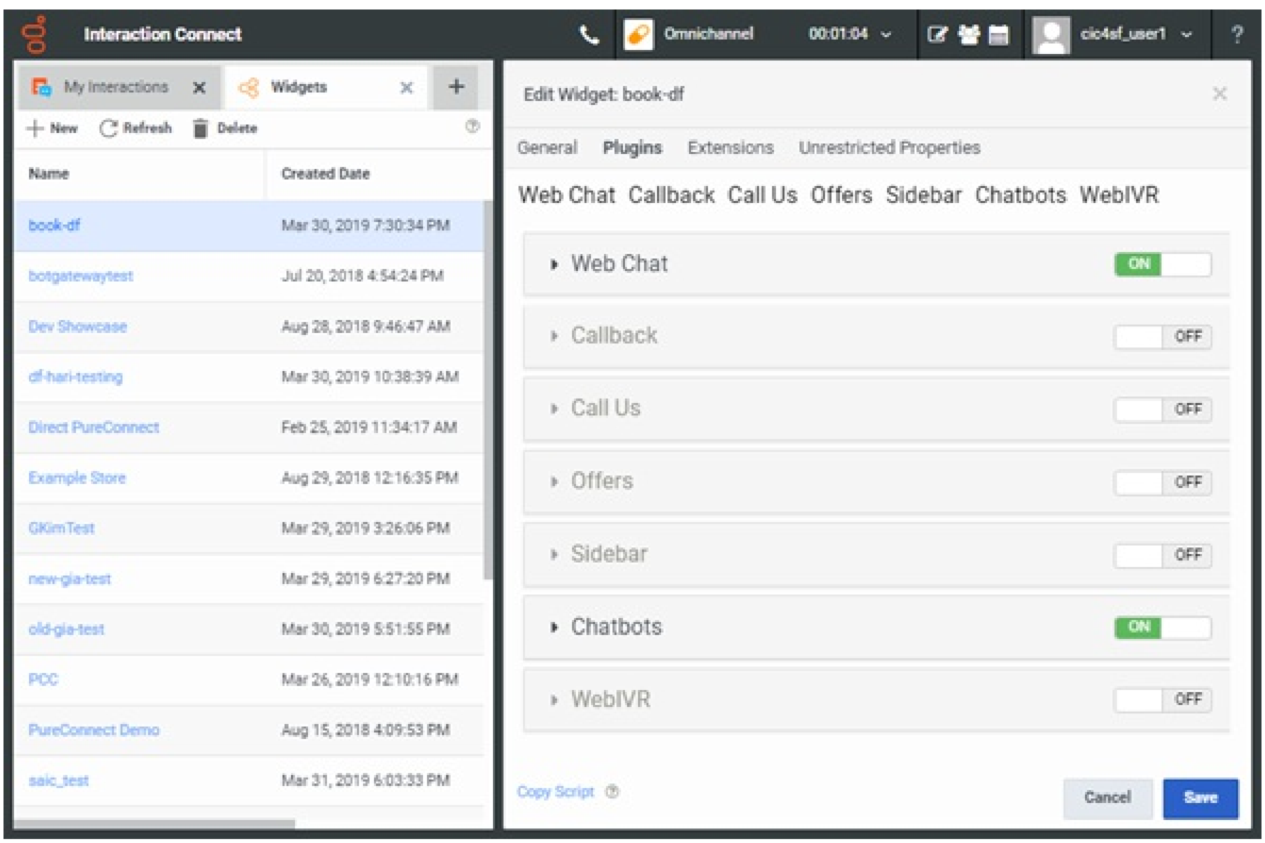
**Related Topics**

Configure a Widget
Widgets Plugins Configuration
Widgets Extensions Configuration
Widgets Unrestricted Properties

## Widgets Plugins Configuration

**Requirements**: See Widgets.

The Plugins page of the Widgets view has settings specific to each type of widget. To configure a specific type of widget, set the appropriate toggle switch to **ON** and expand the corresponding section of the Plugins page.




**Expand** the following configuration instructions for each type of plugin.

### Widgets and the Sidebar

To enable the **Callback**, **Call Us**, or **Offers** widgets you must also add them to the **Sidebar**. Or you must add some JavaScript code to your website that tells the CXBus to open those widgets.

#### Examples:

- To open the Callback widget, use: `window.CXBus.command("Callback.open")`
- To open the CallUs Widget, use: `window.CXBus.command("CallUs.open")`
- To open the Offers window, use `CXBus.command("Offers.open")`

These commands could be tied to a button press or a timer. If, for instance, you want an offer to just appear for the customer. Using JavaScript code is really an advanced scenario, but gives you better control over when the widget should appear.

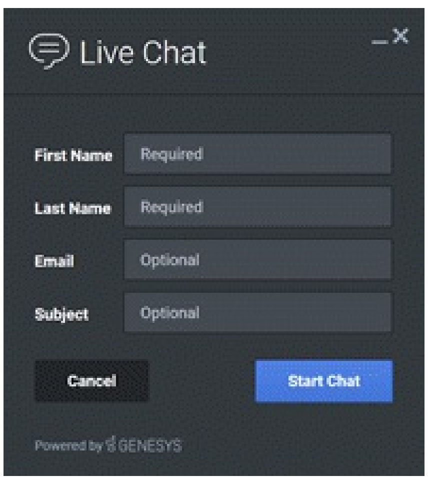
#### Possible Display Issue

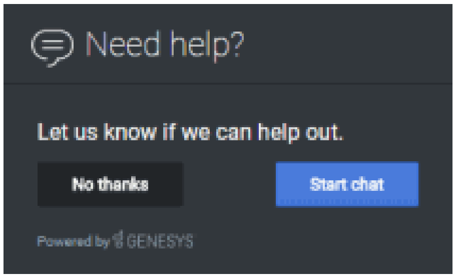
If you use the Sidebar and position it Right and also enable the Chat button in the Web Chat widget configuration, this causes a display issue. The two controls overlap. To avoid this, add the WebChat widget to the Sidebar and do not display the Chat button.

### Web Chat

The Web Chat widget enables a website visitor to start a live chat with company representative. This creates a PureConnect Chat interaction that is routed to the appropriate queue.

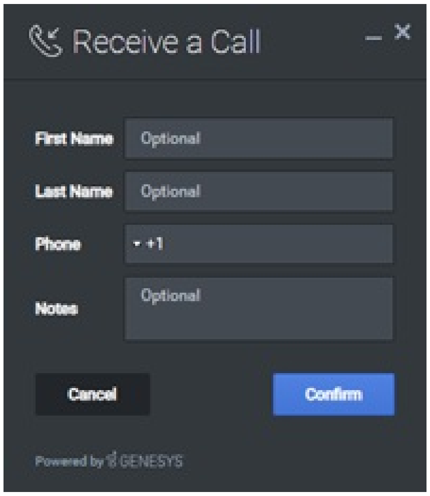
> **Note**: Configuration of the Web Chat Plugin is **not** required for Predictive Engagement chats. The Web Chat Plugin configuration is needed only for web chats. For more information about chat types, see Working with Chat Sessions.



| Option | Description |
|---|---|
| **Emojis Enabled** | Enable or disable the Emoji menu inside the Chat message input. |
| **Proactive Enabled** | If you enable proactive chat, a website visitor is invited to chat after a defined interval.   |
| **Proactive Idle Timer** | Set an interval in seconds. This defines the time that lapses between a visitor reaching your webpage and the appearance of a chat invitation. |
| **Proactive Cancel Timer** | Set the number of seconds a proactive chat invitation is visible before it automatically cancels itself and disappears. |
| **Chat Button Enabled** | Enable or disable the appearance of a **Chat** button on screen.<br>**Note**: Enabling the appearance of the Chat button while using the Sidebar and positioning it Right causes a display issue. If you use the Sidebar, add the WebChat widget to the Sidebar and do not display the Chat button. |
| **Chat Button Open Delay** | Set the number of milliseconds delay before the Chat button appears on screen. |
| **Chat Button Effect Duration** | Set the length of the Chat button "fade in" animation effect in milliseconds. |
| **Chat Button Hide During Invite** | Set this to **Yes** to hide the Chat button when Proactive Chat is enabled. When the invitation is dismissed, reveal the Chat button again. |
| **Target Type** | Select a queue type. |
| **Target Name** | Enter the name of the queue as configured in Interaction Administrator.<br>**Note**: PureConnect uses **Target Type** and **Target Name** for ACD routing purposes. |

## Callback

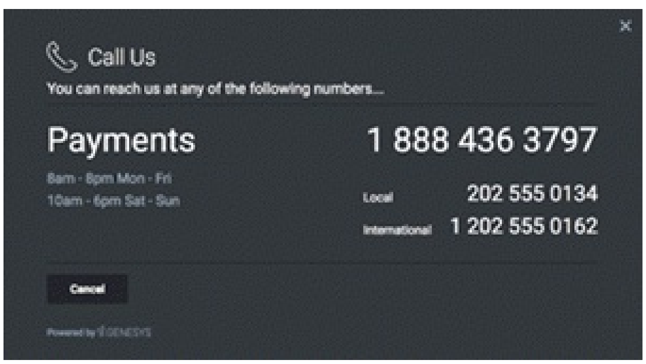
The Callback widget provides a form for website visitor details. PureConnect routes this information as a Callback interaction to the appropriate queue.




| Option | Description |
|---|---|
| **Target Type** | Select a queue type. |
| **Target Name** | Enter the name of the queue as configured in Interaction Administrator.<br>**Note**: PureConnect uses **Target Type** and **Target Name** for ACD routing purposes. |
| **Country Codes** | To enable the display of country codes for phone numbers, select **Yes**. |

## Call Us

Website visitors can initiate a call to any selected phone number displayed on the Call Us widget. Enter the contact information as it should appear on the Call Us widget.




You can add multiple contacts and sets of business hours to the Call Us widget.

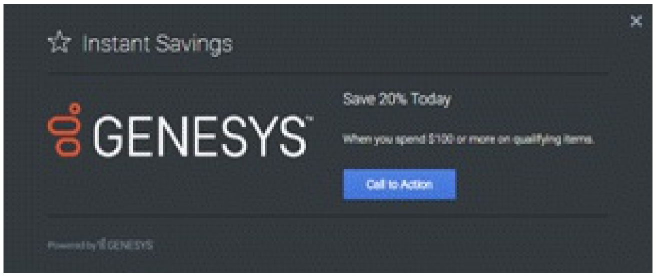
- To add new contacts or sets of business hours, click the **+ Add Contact** or **+ Add Hours** button.
- To delete a selected contact or set of business hours, click the appropriate **trash can** icon.

| Option | Description |
|---|---|
| **Name** | Enter a contact's name or a label for the phone number. |
| **Number** | Enter the contact's phone number. |
| **Localized Override** | Instead of the display name, enter a String Name from your localization file. This "i18n" property overrides the display name.<br>**Note**: The first contact displays as the larger, main number. Additional numbers appear stacked in the phone number section of the widget. |
| **Hours** | Enter the business hours (for example, 8AM - 5PM Mon-Fri).<br>**Note**: Multiple entries appear stacked in the business hours section of the widget. |

## Offers

**Important**: The legacy version of the Offers Widget has been deprecated as of version 9.0.015.11. Offers are now embedded in the existing Engage Widget. If you're currently using the legacy Offers widget and need help, please reach out to your Genesys representative.

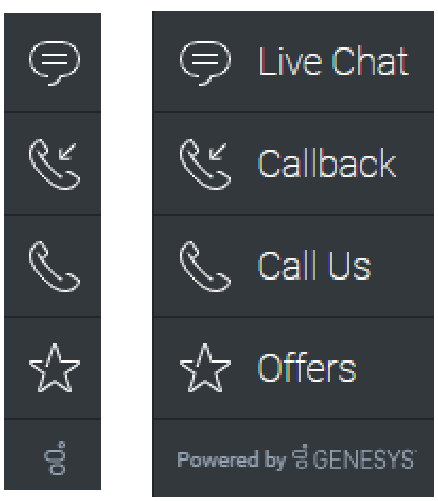
The Offers widget enables your website visitors to view a product or a promotion along with an image or video. You can select from Toaster or Overlay mode.



| Option | Description |
|---|---|
| **URL** | Enter the URL to open when the website visitor clicks on the image or button. |
| **Title** | Enter a title for the widget. This text appears in the widget header. |
| **Headline** | Enter the text to appear in larger text above the body. |
| **Body** | Enter the main body text of the widget. |
| **Button Text** | Enter the text to be displayed inside the button. |
| **Timeout** | Enter a delay in milliseconds after which the widget closes if there is no interaction. |
| **Image URL** | Enter the URL of an image that appears when the website visitor clicks on the image or widget button. |
| **Video URL** | Enter the URL of a YouTube or Vimeo video that appears in the Offer widget.<br>**Note**: If an image URL is present, the image replaces this video. |
| **Display Mode** | Select the **Toaster** or **Overlay** display mode:<br>**Toaster** mode displays automatically, then fades out after the delay entered in **Timeout**. In **Overlay** mode, the widget displays until the website visitor closes it. |
| **Text Position** | Select the text location to the left or right side of the image or video. This applies only to the **Overlay** display mode. |
| **Allow 3rd Party Video Libraries** | To allow the widget to load 3rd party video libraries from YouTube or Vimeo, select **Yes**. This enables the widget to show videos within an offer. This option is disabled by default. |

### Sidebar

A Sidebar widget contains displays icons, titles, and command shortcuts for the widgets available on your company website.




A channel is a widget plugin that appears in the Sidebar widget. You can add multiple channels to the Sidebar widget.

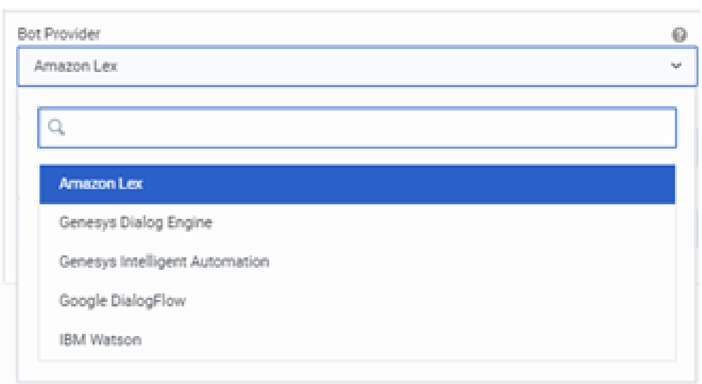
- To add a widget plugin to the Sidebar, complete the configuration and click the **+ Add Channel** button.
- To remove a widget plugin from the Sidebar, click the **trash can** icon at the bottom of the configuration.

| Option | Description |
|---|---|
| **Show on Startup** | Display the sidebar on the screen when the Sidebar is launched. |
| **Position** | Select the position of the Sidebar on the screen. The default is **Right**. |
| **Expand on Hover** | To enable the expand (slide-out) or contract (slide-in) behavior of the sidebar, select **Yes**. |
| **Channels** | In this section, click the **+Add Channel** button, then configure the appearance and operation of one channel at a time for the Sidebar widget.<br>**Note**: The order in which the channels appear in the Sidebar widget is based on the order in which you define them in this Sidebar widget configuration. |
| **Plug-in Name** | Enter the name of the channel. If you enter a reserved name, the default values for that plugin appear.<br>**Note**: The plug-in name should not contain spaces. The name must also match the case the Widget code expects. Acceptable values are: **WebChat**, **Callback**, **CallUs** and **Offers**. |
| **Click Command** | Change the name of the command that is triggered when the website visitor selects a Sidebar option. |
| **Click Options** | Enter valid command options used when the click command is executed. |
| **Display Name** | Optionally change the default display name for this channel with your own static string. Or to achieve localization, use an i18n query string. Syntax: @i18n:<plugin namespace>.<display key>. |
| **Display Title** | Change the default tooltip content for this channel with your own static string. Or to achieve localization, use i18n query string. Syntax: @i18n:<plugin namespace>.<display key>. |
| **Icon** | Change the default icon for this channel. |
| **On Click** | Define a custom on click function. This overrides clickCommand and clickOptions. |

## Chatbots

PureConnect supports not only the Genesys Intelligent Automation chatbot, but also chatbots from third-party vendors.

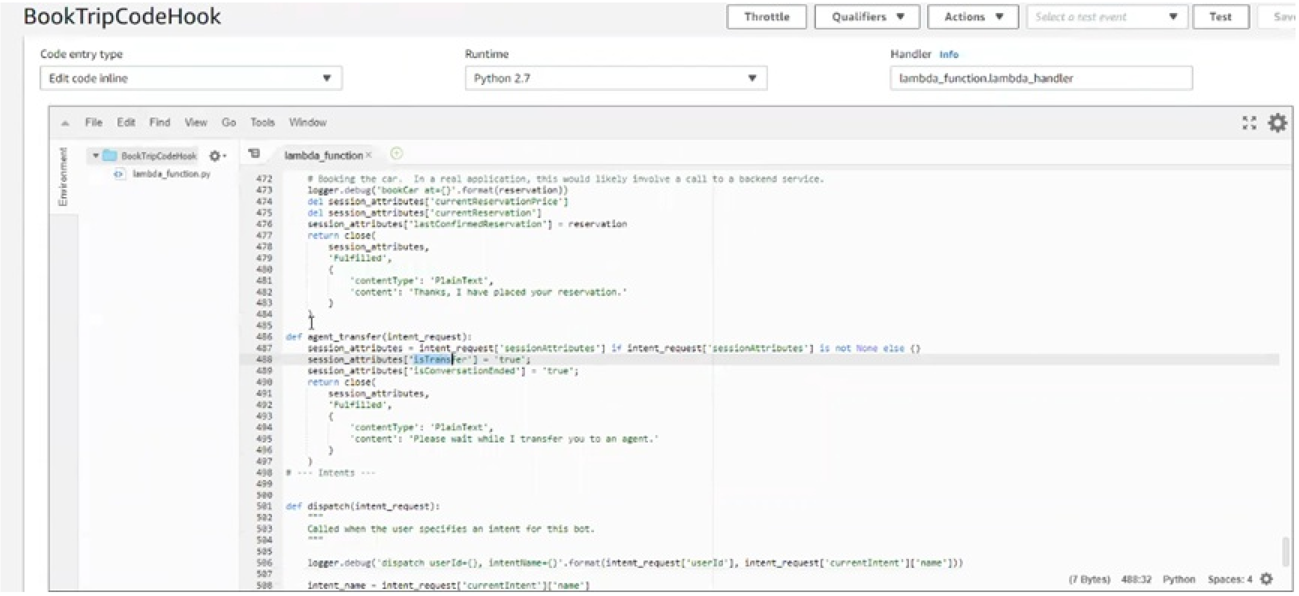
**Requirements**: To support third-party chatbots, the IC Server must be running CIC 2019 R1 Patch 5 version or later. Alternatively, you can apply a gap ES to an IC Server running CIC 2019 R1 Patch 4. Chatbot support also requires Interaction Connect version 2019 R1 Patch 5 or later.




Select the appropriate provider from the **Bot Provider** dropdown list, then expand the appropriate section below for configuration instructions.

- **Amazon Lex**

Amazon Lex is an interface for building conversation bots. The default Amazon Lex UI with slots does not enable you to set up the required session variables. In an Amazon Lex box, you set up session variables as part of an **AWS Lambda function**.You must handle all the intents within the Lambda function code.

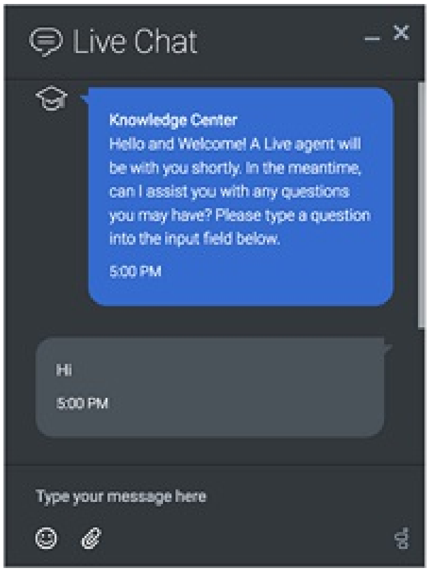



| Option | Description |
| --- | --- |
| Amazon Lex Bot Alias | Enter the alias that points to a specific version of your chatbot. |
| Amazon Lex Bot Name | Enter the name of your chatbot. |
| AWS Region | Enter the name of the Amazon region in which your chatbot instance is available. |
| AWS Congnito Identity ID | Enter the ID for temporary, limited-privilege credentials to your chatbot which enables it to use AWS resources. |
| Amazon Lex Welcome Message Trigger | Chatbots expect a welcome message when starting a chat session. Amazon Lex does not send one by default as it reacts to incoming messages only. Enter a word or phrase that chatbots can send to the Amazon Lex bot to invoke the configured welcome message. |
| Amazon Lex Chat Transfer Identifier | Enter the session attribute name that indicates the consumer is requesting to be transferred to an agent or customer service person. |
| Amazon Lex Chat Ended Intent | Enter the session attribute name that indicates the consumer has ended the chat. |

- **Genesys Intelligent Automation**

The PureConnect integration with Genesys Intelligent Automation is a fully tested, secure offering that allows easy integration of bots and other services with on-premises and cloud implementations of PureConnect. It uses a serverless, event driven microservice that deploys to, and resides in the cloud. For more information, see the PureConnect Integration with Genesys Intelligent Automation Technical Reference.

The Genesys Chatbot can appear like this to your website visitors:

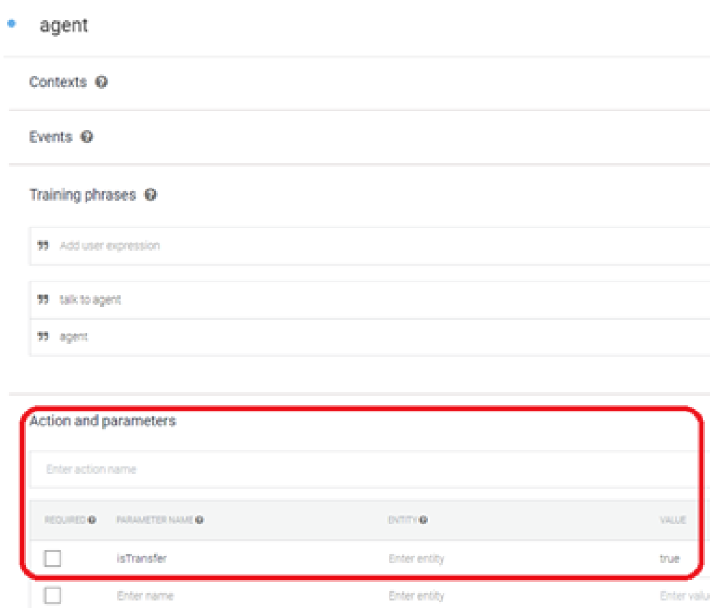


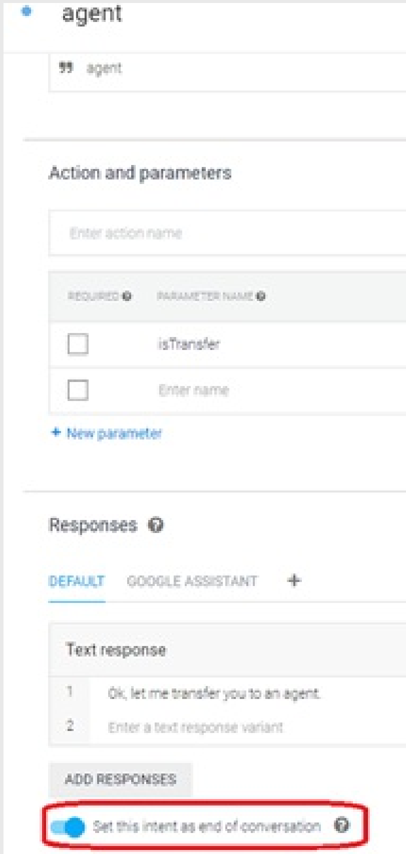

| Option | Description |
|---|---|
| **Intelligent Automation URL** | If you set **Use a Reverse Proxy for Intelligent Automation** to **No**, enter the full URL for the Genesys Intelligent Automation server.<br>If you provide this URL, the **Intelligent Automation** Server field is ignored. |
| **Intelligent Automation Site ID** | Enter the Intelligent Automation Site ID that Genesys Intelligent Automation generated when you created an application or module for the chatbot flow. For more information, see the *PureConnect Integration with Genesys Intelligent Automation Technical Reference*. |
| **Intelligent Automation Authorization Key** | Enter the Intelligent Automation key that Genesys Intelligent Automation generated when you created a company. For instructions about identifying this key, see the *PureConnect Integration with Genesys Intelligent Automation Technical Reference*. |
| **Use a Reverse Proxy for Intelligent Automation** | Enable or disable using a reverse proxy for the Genesys Intelligent Automation server. |
| **Intelligent Automation Server** | If you set **Use a Reverse Proxy for Intelligent Automation** to **Yes**, then enter the FQDN of the Genesys Intelligent Automation server.<br>If you use a reverse proxy, the Intelligent Automation URL field is ignored. The **Reverse Proxy URL** field on the General tab is used to create the end-result URL to assess Intelligent Automation. |
| **GIA version 9.0.102+** | • If you are using GIA version 9.0.102 or later, select **Yes**.<br>• If you are using a GIA version earlier than 9.0.102, select **No**. |
| **Use Chat Persona** | • To use the Visual Persona in GIA version before 9.0.102, select **No**.<br>• To use the Chat Persona in GIA version 9.0.102+, select **Yes**.<br>For more information about configuring a chat persona in Genesys Intelligent Automation, see https://docs.genesys.com/Documentation/GAAP/Current/iaHelp/Personas.<br>Selecting **Yes** enables the Genesys Intelligent Automation (GIA) chatbot to use buttons, images, and videos rich media types. For more information about rich media, see https://docs.genesys.com/Documentation/GAAP/latest/iaHelp/RichMedia.<br>As part of configuring GIA in **PureEngage**, the admin must also select Text, Buttons, and Videos in the Callflow Preferences as part of the chat-based persona. If the admin does not select these options, the rich media does not show up in GIA chats.<br>The admin must write custom scripts to use any of the other rich media types such as Quick Replies in GIA chatbots. For more information, see https://docs.genesys.com/Documentation/GWC/latest/Deployment/GWCRM. |
| **Intelligent Automation Test Call** | When "yes" is enabled then it uses GIA Test Application, If "No" is selected then it uses GIA production Application. |

- **Google DialogFlow**

When you create a Google Dialogflow bot, you set up **intents** that get matched in the bot as the consumer types. For each intent, you can associate an **action.** Dialogflow processes the chat as directed by this bot configuration.

For more information, see [https://dialogflow.com/](https://dialogflow.com/).

| Option | Description |
|---|---|
| **Google Auth Client Email** | Enter the email address associated with the service account in DialogFlow that has access to interact with the DialogFlow bot. |
| **Google Auth Client Key** | Enter the private key for the certificate associated with the service account in DialogFlow that has access to interact with the DialogFlow bot.<br>**Tip**: The client key should be the entire private_key string, including the —BEGIN part. Don't include the \n at the end. |
| **DialogFlow Project Name** | Enter the project name for the DialogFlow bot. |
| **DialogFlow Chat Transfer Identifier** | DialogFlow does not have the concept of a consumer requesting to be transferred to an agent or customer service person. To enable chatbots to determine that a consumer is requesting to talk to someone other than the bot, we need to know what to look for.<br>Enter the name of the boolean parameter that is configured inside an **intent** that denotes the consumer wants a transfer. Parameters are set on an intent in this section in DialogFlow:<br> |

| | |
|---|---|
| **DialogFlow Chat Ended Identifier** | This is the name of the field that chatbots looks for to determine if a chat session is completed. By default, if an intent is set up with **Set this intent as end of conversation** turned on, then this value should be **end_conversation**. However, if a custom parameter is used (like the transfer identifier), this would be the name of the parameter that denotes that the chat has ended. The default mechanism to handle this in an intent is as follows:<br><br> |

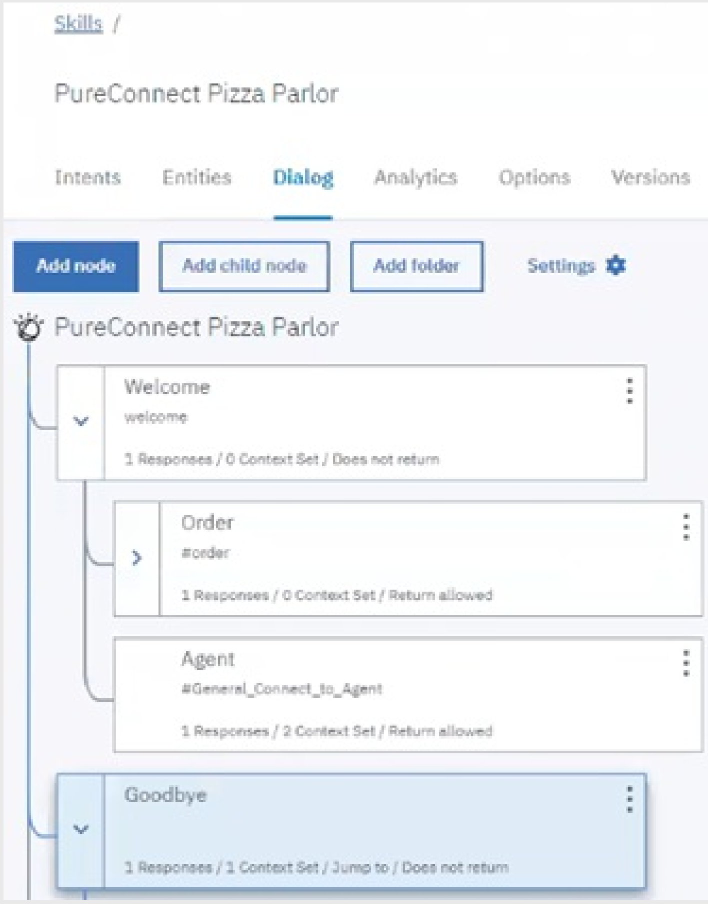
- **IBM Watson**

IBM Watson is an enterprise-ready, artificial intelligence platform. IBM Watson can be used to build AI-integrated chat bots. You configure **actions** and **responses** on chatbot **nodes** in Watson Assistant dialogs. IBM Watson processes the chat as directed by this bot configuration.

| Option | Description |
|---|---|
| **IBM Watson URL** | Type the URL for the region (location) in which this chatbot is deployed. |
| **IBM Watson User Name** | Enter the email address associated with the IBM Cloud Account user. |

| | |
|---|---|
| **IBM Watson Password** | Enter the password for the IBM Cloud Account. |
| **IBM Watson Workspace** | Enter the Workspace ID associated with the skill under API details. |
| **IBM Watson Version ID** | Enter the Watson version number under which this chatbot is running. |
| **IBM Watson Chat Transfer Identifier** | Watson does not have the concept of a consumer requesting to be transferred to an agent or customer service person. To enable chatbots to determine that a consumer is requesting to talk to someone other than the bot, we need to know what to look for.<br>Enter the name of the boolean parameter that is configured on a **node** to denote that the consumer wants a transfer. Select **Dialog** and navigate to the appropriate node.<br><br><br>In the node corresponding to the consumer requesting a chat with an agent, define a variable indicating the transfer request. For example, $transfer_requested and true.<br>This is usually accompanied by a variable for disconnecting from the IBM Watson chatbot; that is a "chat ended" variable. |

<table>
<tr>
<td>IBM Watson Chat Ended Intent</td>
<td>
IBM Watson does not have a built-in end of conversation indicator. Define a context variable on a node that enables Watson to identify that the consumer has ended the conversation.




For example, in the Goodbye portion of the chatbot, in the appropriate dialog, define a variable that indicates the conversation is over. Open the context editor by clicking the ellipsis by Then set context.


Then open the context editor by clicking the elipsis by Then respond with. Then add a context variable by supplying an identifier and a value; for example, $chat_ended and true.

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

## WebIVR

Genesys Intelligent Automation can provide your customers with chat bot-based access to your WebIVR applications. Customers can converse with a bot using natural language to accomplish various business needs, such as making a payment or checking an account balance.

You can use WebIVR-based MicroApps in chat interactions to accomplish various business tasks. For example, if an agent is helping a customer with a purchase and you want to collect credit-card information, you can use a MicroApp to securely capture the information without requiring it to go through the agent.

For more information, see https://docs.genesys.com/Documentation/GAAP/Current/iaRef/WebIVRWidgets.

| Option | Description |
|---|---|
| **MicroApps Enabled** | Set this to **Yes** to use WebIVR-based MicroApps in chat interactions. |
| **Intelligent Automation URL** | If you set **Use Reverse Proxy for MicroApps** to **No**, enter the full URL for the Genesys Intelligent Automation server. |
| **Use a Reverse Proxy for MicroApps** | Enable or disable using a reverse proxy for the Genesys Intelligent Automation server. |
| **Intelligent Automation Public URL** | If you set **Use a Reverse Proxy for MicroApps** to **No**, enter the full URLfor the Genesys Intelligent Automation server. |

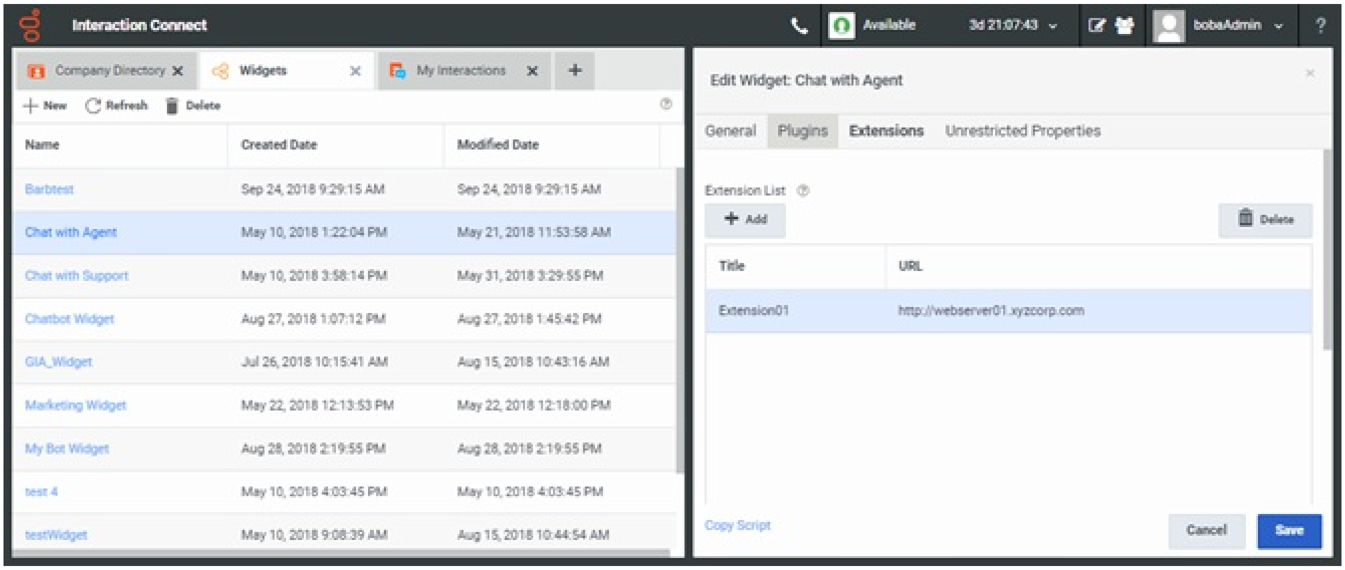
**Related Topics**

Configure a Widget
Widgets View

## Widgets Extensions Configuration

**Requirements**: To configure **Extensions**, you need the **Widget Configuration Master** Security right. For more information, see Widgets.

Extensions are add-ins created by your developers and added to a Genesys widget. For information about creating an extension to a Genesys widget, see Genesys Widgets Extensions,in the Pure Engage Documentation Library.




| Option | Description |
|---|---|
| **Title** | Enter a descriptive name for the extension. |
| **URL** | Enter a URL that points to your extension implementation. The location would most likely be on your web server or cloud hosting service. |

**Related Topics**

- Configure a Widget
- General Configuration
- Widgets Plugins Configuration
- Unrestricted Properties Configuration

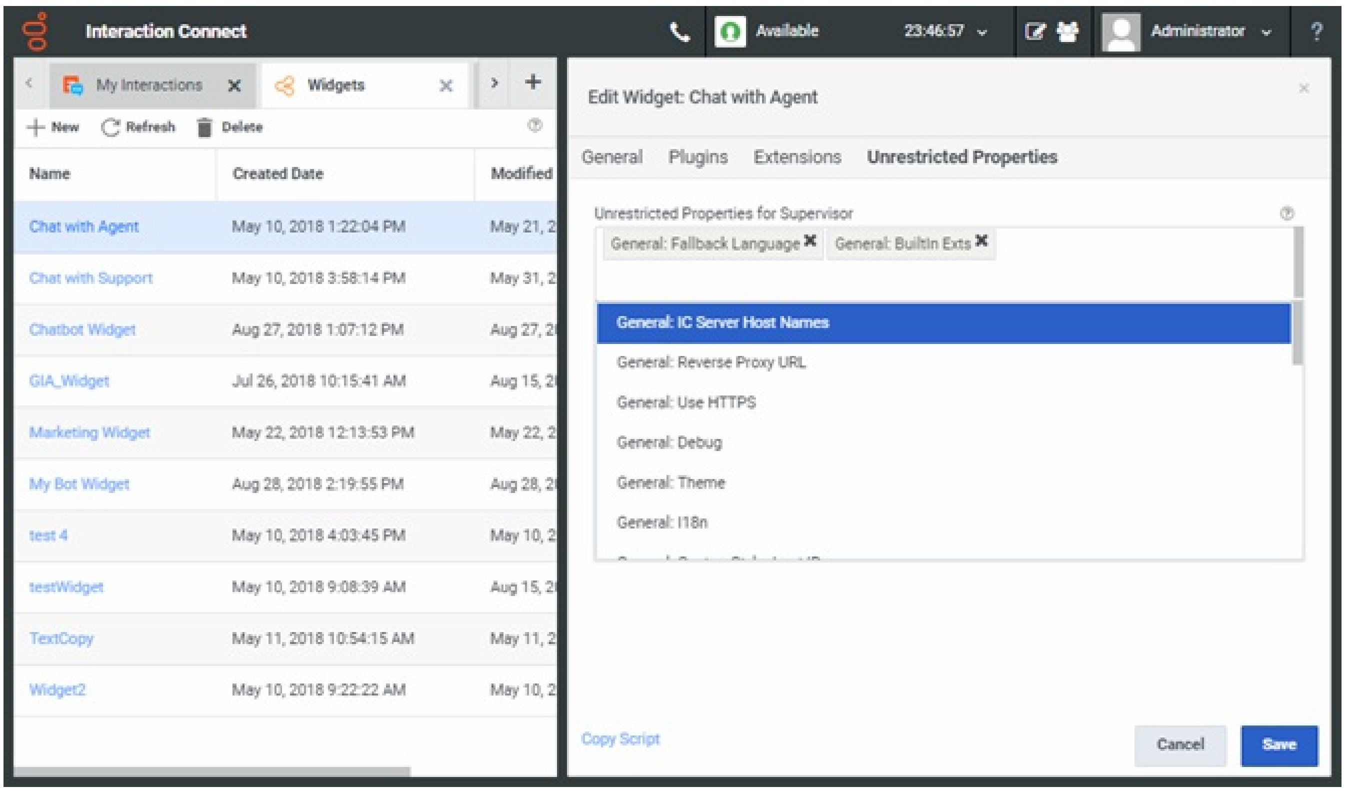
## Widgets Unrestricted Properties Configuration

> **Requirements**: To configure **Unrestricted Properties**, you need the **Widget Configuration Master** Security right. For more information, see Widgets.

Use the **Unrestricted Properties** page to control which properties Supervisors can configure. These are usually limited to low-risk properties that are directly related to their jobs. Supervisors are users who can display the Widgets view but can configure only selected options. Supervisors have the **Widgets List Administrator Access** right, but do not have the **Widget Configuration Admin** Security right.

### Example

You might enable Supervisors to control ACD routing by allowing them to change which ACD enabled workgroup receives chats. You would give Supervisors the right to change the **Webchat: Target Name**. Supervisors could then change chat routing in an emergency, for a holiday, or in anticipation of an increased workload.




**To set Unrestricted Properties, do one of the following:**

- To add a property, click in the **Unrestricted Properties for Supervisor** box and select a property.
- To remove a property, click the **X** before the name of a selected property.

**Related Topics**

Configure a Widget
General Configuration
Widgets Plugins Configuration
Widgets Extensions Configuration

# Deploy a Widget

Follow these steps to add a widget to your company's website:

1. Create and configure a widget. See Configure a widget.
2. Generate a JavaScript snippet in the form of an HTML script tag. In the Widgets view Configuration panel, click the Copy Script control for the selected widget.
3. In the Widget Script dialog box, click **Copy to Clipboard**. This copies the code snippet to your Windows clipboard.
4. Close the notification and then copy and paste this code snippet in a text file.
5. Add this JavaScript snippet to the appropriate page in your company's website.

> **Note**: Depending on your website access rights, you may have to ask someone in your IT group to insert this snippet for you.

**Related Topics**

Configure a Widget

# Bots

This feature allows partners and customers to use Bots for automating initial social media interactions with their clients without the intervention of agents. The Bots can capture some recurrent and standard information from users, which helps to make efficient and prioritized routing decisions through handlers.

**Requirements**: To integrate Bots , you must have a public-facing web portal with a reverse proxy. To display the Bots view, you need the **Bots Configuration** Administrator Access right. To create bots and configure every bot property, you also need the Bot Configuration Master Security right. If you can display the Bots list, but do not have the Security Right, then you can't create bots and can only configure bot properties listed on the **Unrestricted Properties** page. Only an Interaction Connect user with both the **Bots Configuration** Administrator Access right and the **Bots Configuration Master** Security right can select these **Unrestricted Properties**.

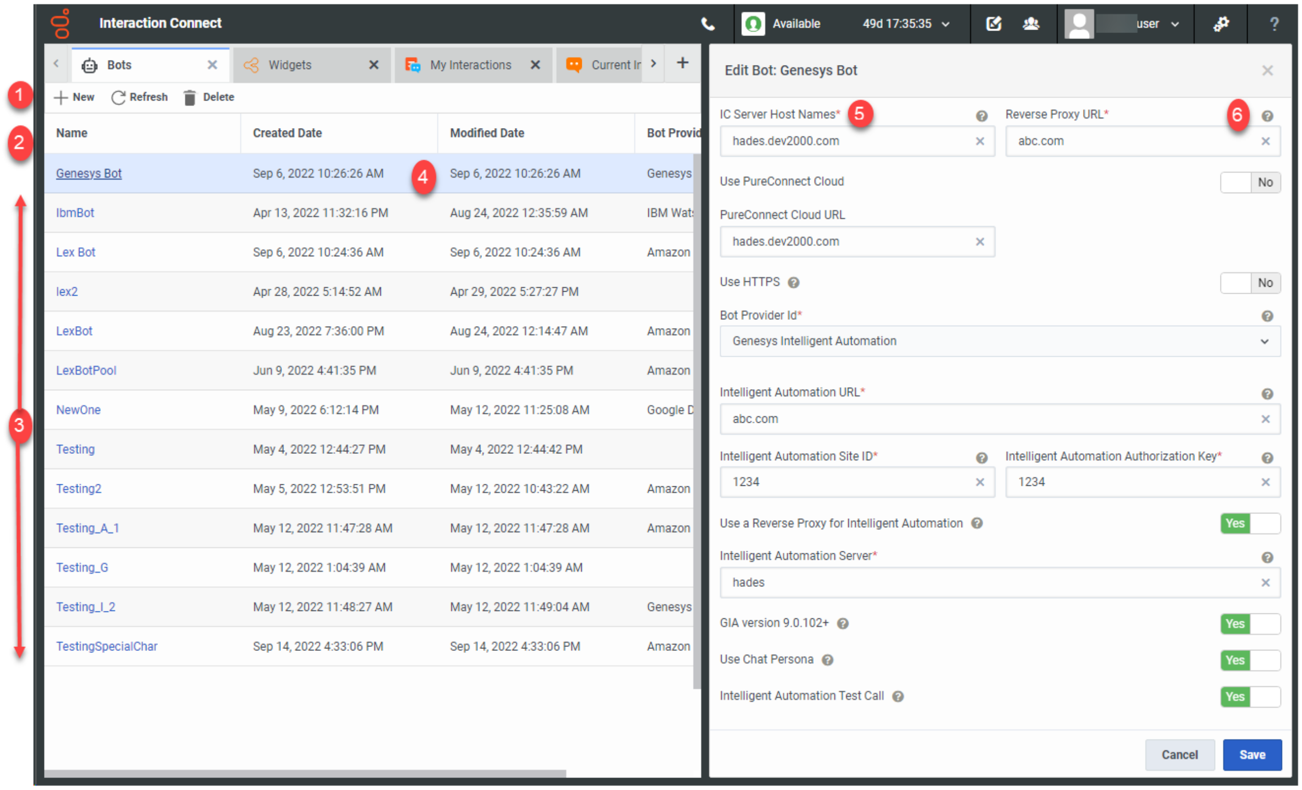
**Related Topics**

Bot View

Configure a Bot

# Bots View

The BOT view enables you to configure Bots. For configuration instruction please see below table.



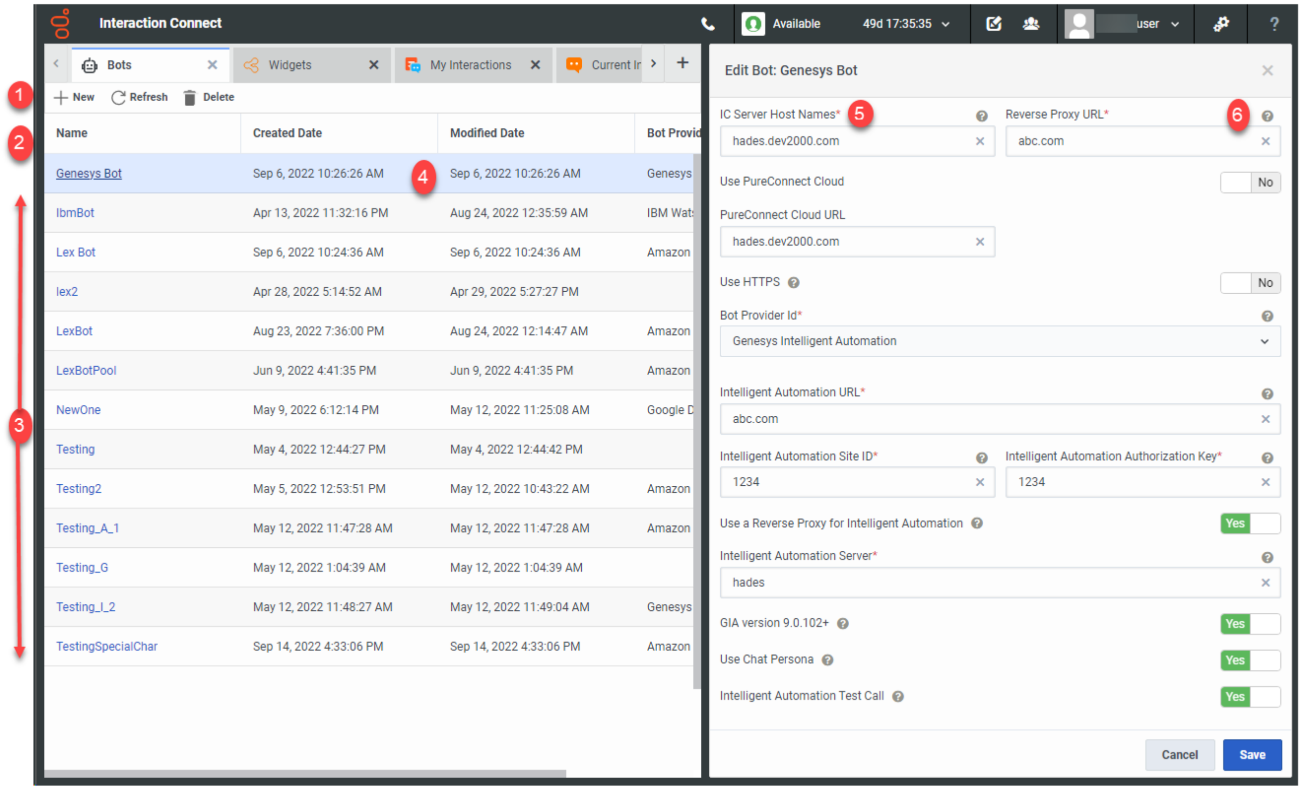

| | | |
|---|---|---|
| 1 | **Toolbar** | **New** (Add), **Refresh**, and **Delete** controls.<br>To update the Bots and display any new Bot configurations created by other Interaction Connect users, click **Refresh**<br>**Note**: The Bots view does not update automatically. |
| 2 | **Column headings** | Move columns by dragging and dropping column headings. For more information, see Customize Columns. |
| 3 | **Widgets list** | The list of Bot configurations. |
| 4 | **Selected widget** | To edit or delete a Bot configuration, select a Bot from the list. |
| 5 | **Required** | A red asterisk indicates a required field. |
| 6 | **Help** | To display help for a selected field, point to this icon. |

### Related Topics

Configure a Bot

# Bots View

The BOT view enables you to configure Bots. For configuration instruction please see below table.



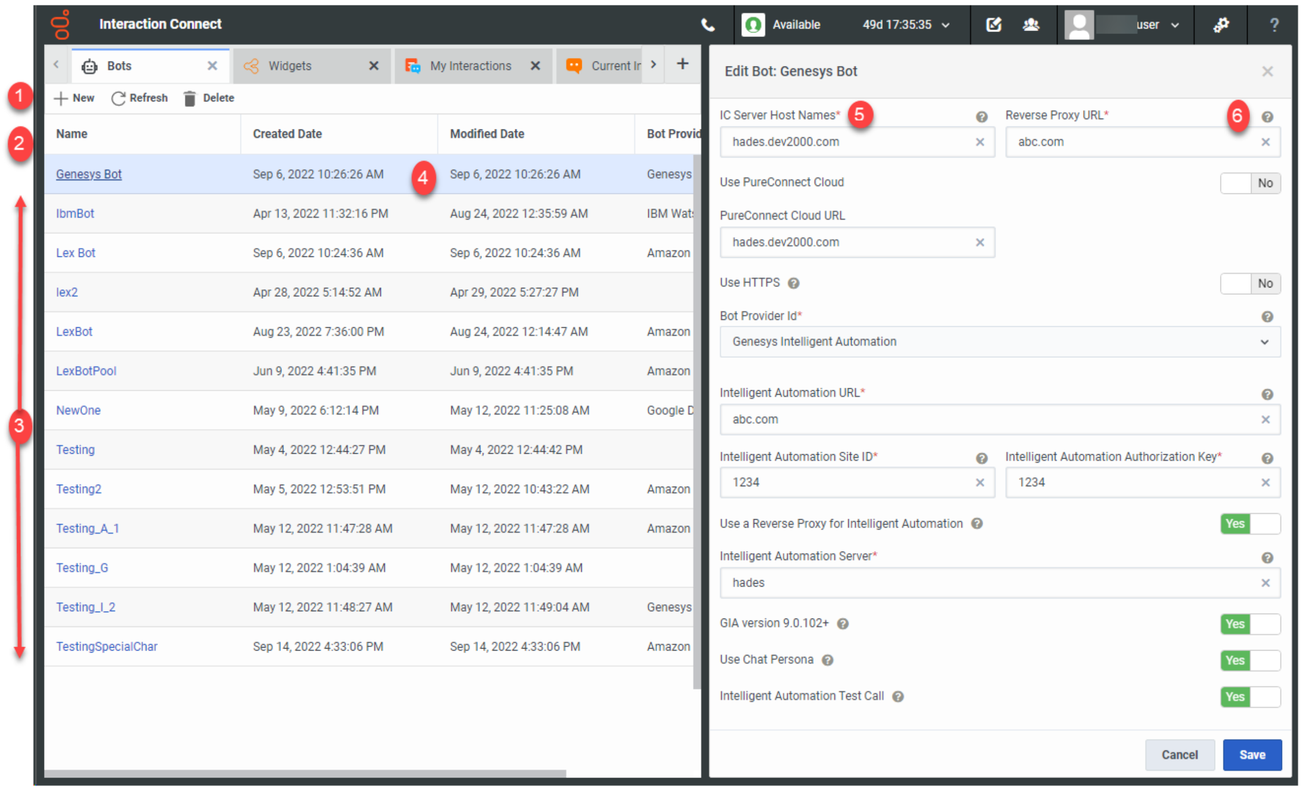

| | | |
|---|---|---|
| 1 | **Toolbar** | **New** (Add), **Refresh**, and **Delete** controls.<br>To update the Bots and display any new Bot configurations created by other Interaction Connect users, click **Refresh**<br>**Note**: The Bots view does not update automatically. |
| 2 | **Column headings** | Move columns by dragging and dropping column headings. For more information, see Customize Columns. |
| 3 | **Widgets list** | The list of Bot configurations. |
| 4 | **Selected widget** | To edit or delete a Bot configuration, select a Bot from the list. |
| 5 | **Required** | A red asterisk indicates a required field. |
| 6 | **Help** | To display help for a selected field, point to this icon. |

**Related Topics**

Configure a Bot

## Bots View

The BOT view enables you to configure Bots. For configuration instruction please see below table.



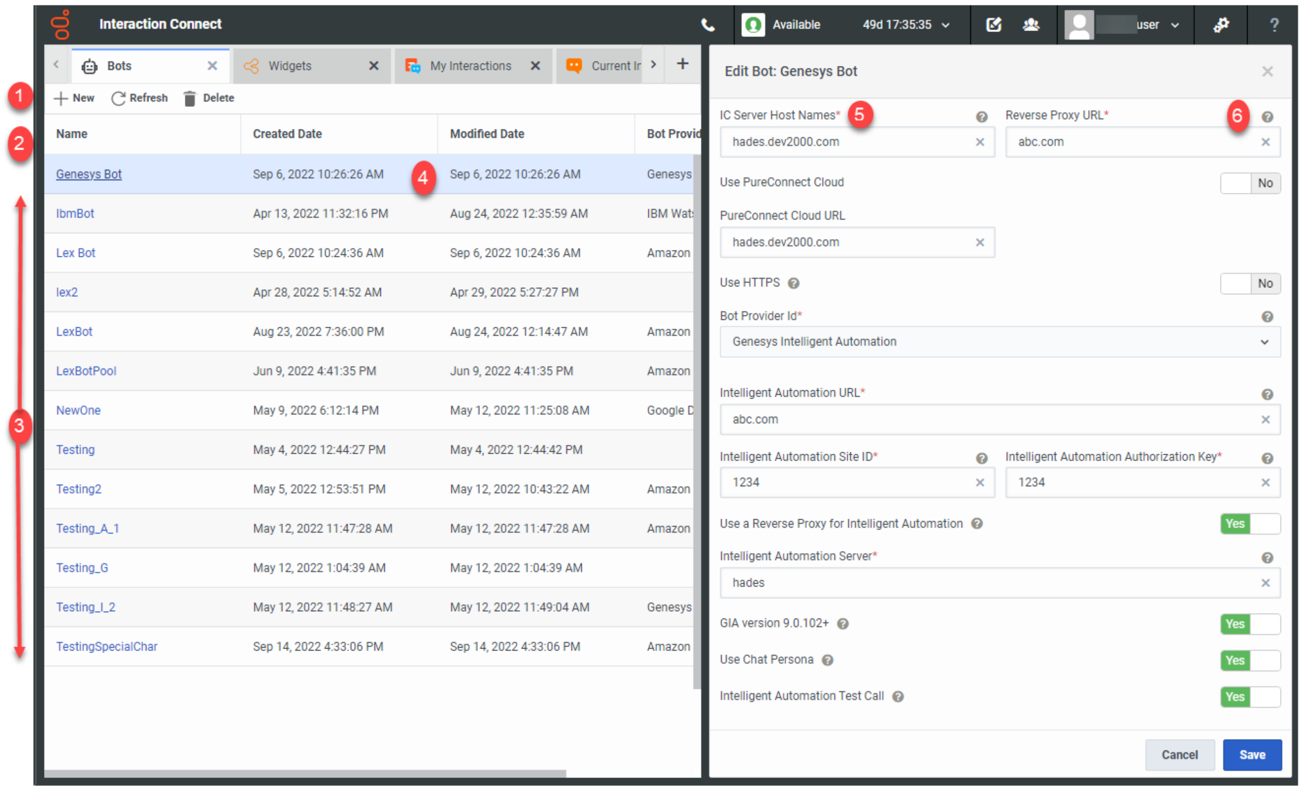

| | | |
|---|---|---|
| 1 | **Toolbar** | **New** (Add), **Refresh**, and **Delete** controls.<br>To update the Bots and display any new Bot configurations created by other Interaction Connect users, click **Refresh**<br>**Note**: The Bots view does not update automatically. |
| 2 | **Column headings** | Move columns by dragging and dropping column headings. For more information, see Customize Columns. |
| 3 | **Widgets list** | The list of Bot configurations. |
| 4 | **Selected widget** | To edit or delete a Bot configuration, select a Bot from the list. |
| 5 | **Required** | A red asterisk indicates a required field. |
| 6 | **Help** | To display help for a selected field, point to this icon. |

### Related Topics

Configure a Bot

## Bots View

The BOT view enables you to configure Bots. For configuration instruction please see below table.




| | | |
|---|---|---|
| 1 | **Toolbar** | **New** (Add), **Refresh**, and **Delete** controls.<br>To update the Bots and display any new Bot configurations created by other Interaction Connect users, click **Refresh**<br>**Note**: The Bots view does not update automatically. |
| 2 | **Column headings** | Move columns by dragging and dropping column headings. For more information, see Customize Columns. |
| 3 | **Widgets list** | The list of Bot configurations. |
| 4 | **Selected widget** | To edit or delete a Bot configuration, select a Bot from the list. |
| 5 | **Required** | A red asterisk indicates a required field. |
| 6 | **Help** | To display help for a selected field, point to this icon. |

### Related Topics

Configure a Bot

# Workgroups

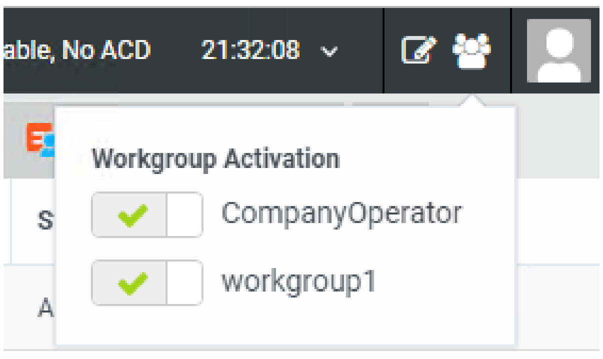
## Change Your Workgroup Activation Status

**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:**

- Click the **Workgroup Activation** button in the My Status section to display the Workgroup Activation dropdown list where you can click the activation status toggle switch for the workgroups to which you belong.




**Related Topics**

View Other Workgroup Members Activation Status
Introduction to Queues

# Change a User's Activated Workgroups

**Requirements**: You need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features. You also need the Modify Workgroup Queues Access Control right for the selected workgroup.

If you have the appropriate license and right, you can manage other users' workgroup activation status from various places in Interaction Connect.

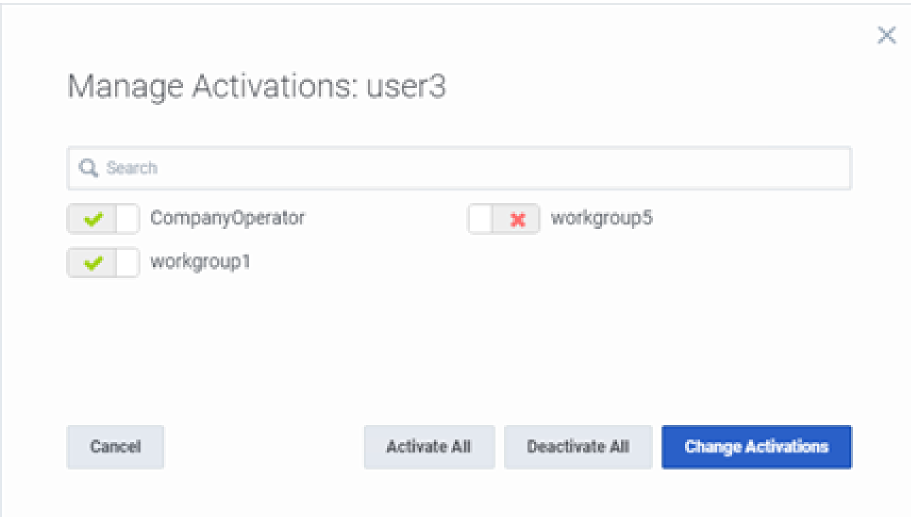
You can launch the dialog for managing a user's activation status from these places in Interaction Connect:

- Directory views, like the Company Directory or a Workgroup Directory
- Agent Statistics view

**To change the workgroup activation status for a selected user:**

1. Do one of the following:

- In the Agent Statistics view for the selected user, click **Manage Activations**.
- In the Company Directory or a Workgroup Directory, select the user and click the User Activations button.




2. Optionally, in the **Manage Activations** dialog box, type all or part of a workgroup's name in the **Search** text box.
3. Click the activation status toggle switches to activate or deactivate the selected user in a selected workgroup.

> **Note**: A green checkmark indicates the agent is activated. A red X indicates the agent is deactivated.

4. Click **Change Activations**.

**Related Topics**

Change Your Workgroup Activation Status

# Change a Workgroup's Activated Users

**Requirements**: You need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features. You also need the Modify Workgroup Queues Access Control right for the selected workgroup.

If you have the appropriate license and right, you can manage the activation status of all the members of a workgroup from various places in Interaction Connect.

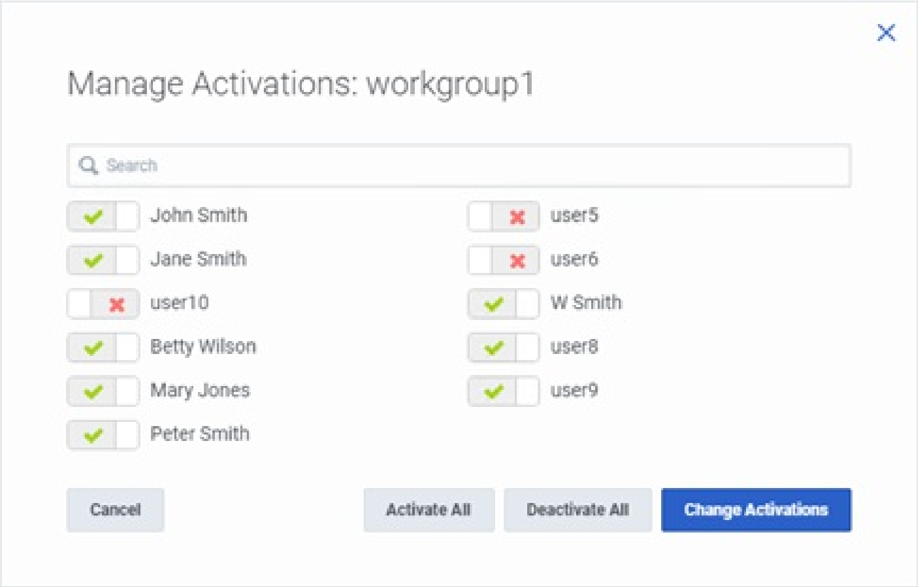
You can launch the dialog for managing a user's activation status from these places in Interaction Connect:

- Workgroup Directory view
- Workgroup Statistics view
- Workgroup Overview view

**To change the workgroup activation status for members of a workgroup:**

1. Do one of the following:

- In a Workgroup Directory view, click the Workgroup Activations button.
- In the Workgroup Statistics view, click **Manage Activations**.
- In the Workgroup Overview view, click **Manage Activations**.




2. Optionally, in the Manage Activations dialog box, type all or part of a user's name in the Search text box.
3. Click the activation toggle switches to activate or deactivate selected users.

> **Note**: A green checkmark indicate the agent is activated. A red X indicates the agent is deactivated.

4. Click **Change Activations**.

**Related Topics**

Change Your Workgroup Activation Status

# 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. In the Add Views dialog box, from the **Directories** list, select **Workgroups and Profiles**.
2. Click **Add View**.

   **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

# 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. These procedures assume you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring.

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.

**Video:**

https://player.vimeo.com/video/437056174

**To transfer a call to a workgroup:**

1. Inform the caller that he or she is going to be transferred.
2. While the call is still connected, do one of the following:

   - On the Queue Control toolbar, click the Transfer button.
   - Right-click the call and choose **Transfer** from the menu that appears.

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

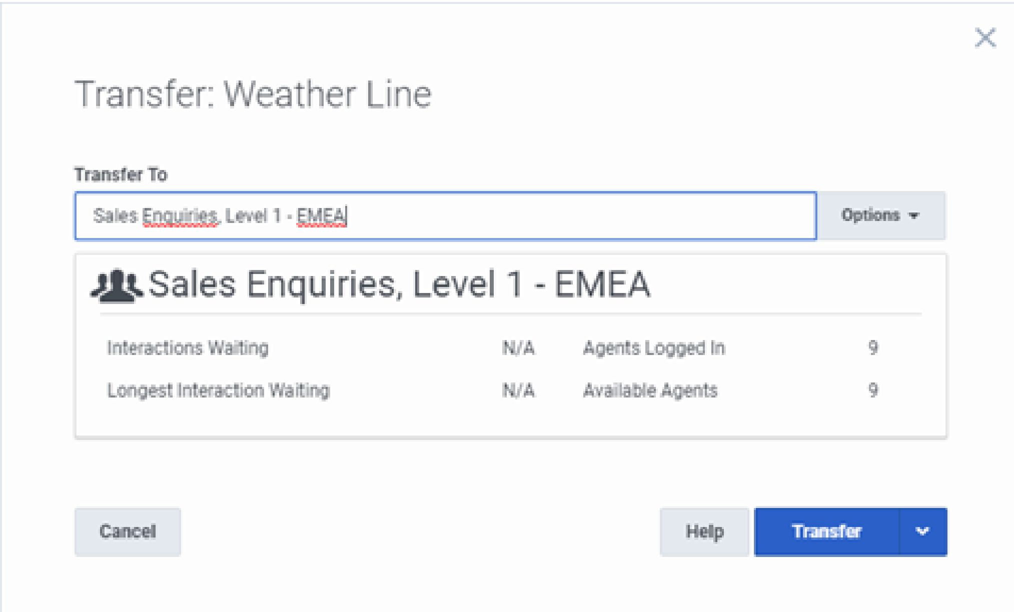
   **Result**: A drop-down list of choices appears.

**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.

   **Result**: Status information for the selected CIC Workgroup appears. This enables you to check the workgroup's current statistics before transferring the call. Use this information to estimate the probable wait time for a transferred call.




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. Do one of the following:

   - Drag the call to a workgroup in the Workgroups and Profiles directory view. In the **Transfer Confirmation dialog box**, click **Transfer**.
   - Select a workgroup name in the Workgroups and Profiles directory view and press **Enter**.
   - Click on a workgroup name in the Workgroups and Profiles directory view. In the Directory toolbar, click **Transfer**.

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

**Related Topics**

My Interactions
Transferring Calls

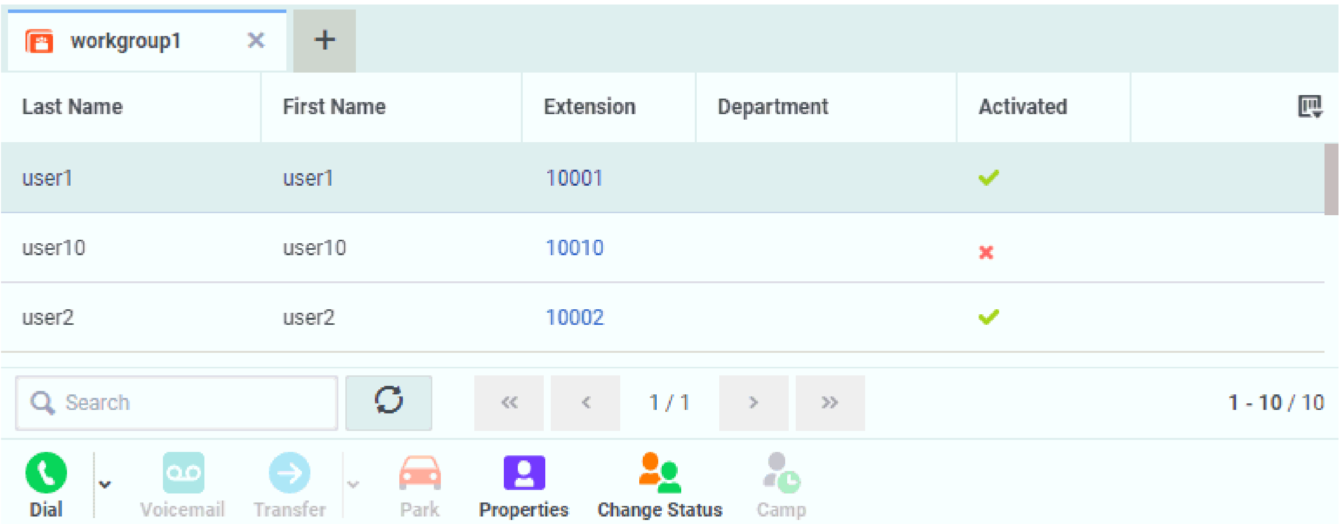
# View Other Workgroup Members' Activation Status

**Requirements**: You need the View Directory Status Columns Access Control right for the **Activated** column to display the Activated column in a Workgroup directory. The View Workgroups Access Control right determines which Workgroup Directories you can display. For more information, contact your CIC administrator.

In order to receive an ACD workgroup call, an agent must be logged onto the CIC client, have his or her workgroup activation status set to **Active**, and be in an "Available" type of Customer Interaction Center status. You can view the activation status of all members of a workgroup by adding the **Activated** column to a Workgroup directory.

You can display the **Activated** column only on a Workgroup directory view. You cannot display it on the Company Directory view. Activation Status is specific to a workgroup. An agent can be a member of more than one workgroup and be “Active” in one or more of these workgroups, but “Inactive” in the rest.

**Tip**: For more information about adding columns to a directory, see Add or Remove View Columns.




**Note**: A check mark in the Activated column of a Workgroup directory view indicates an "Active" status. An X indicates an "Inactive" status.

**Related Topics**

Change Your Workgroup Activation Status
Customize Columns
View Members of a Workgroup

## 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**

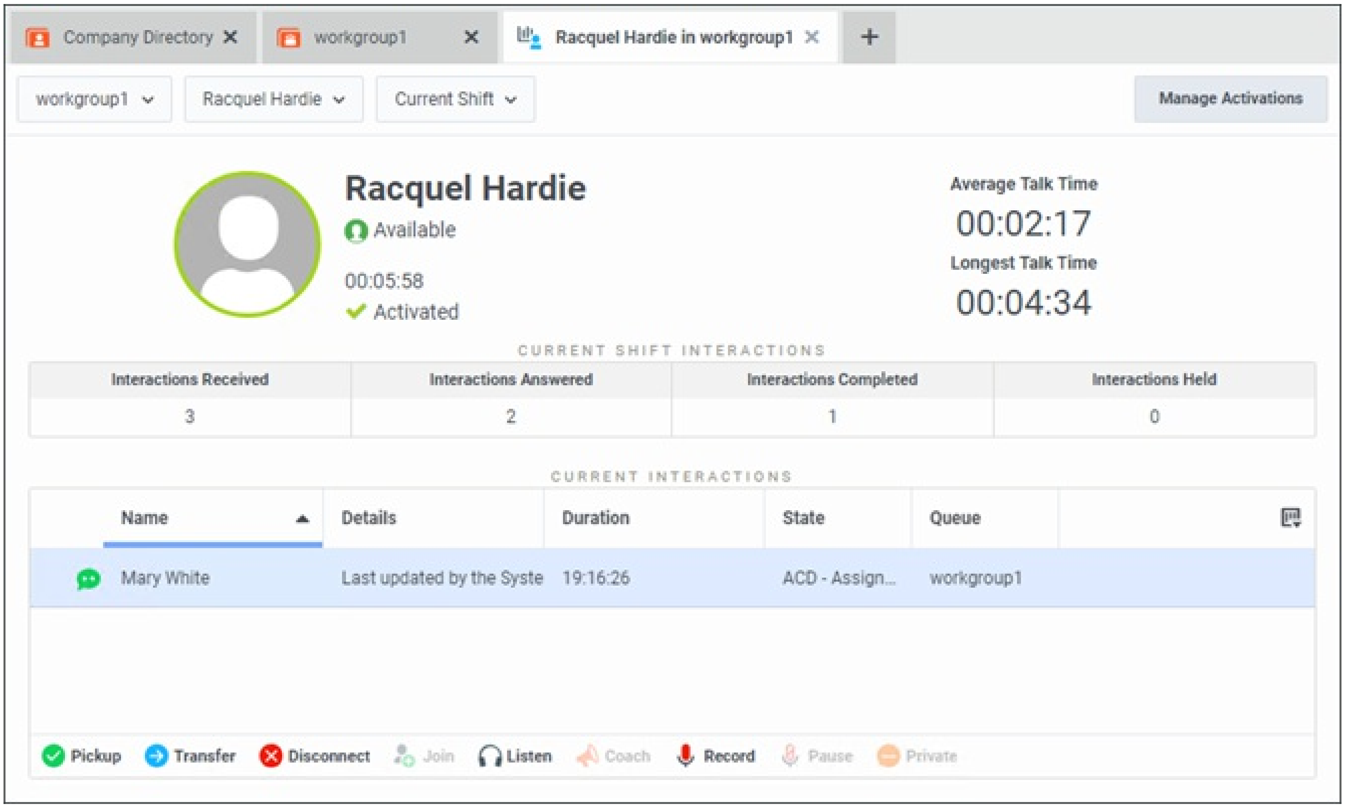
Add or Close Views
Change a User's Activated Workgroups
Change a Workgroup's Activated Users
View Other Workgroup Members Activation Status
Working with Other Directories

# Statistics

## Agent Statistics

**Requirements**: See Display and Configure Agent Statistics.

The Agent Statistics view summarizes the activity of a single agent in a selected workgroup. This view enables supervisors to manage agents. Agents can also use this view to monitor their own statistics. It shows user status, workgroup activation status, and the selected agent's specific statistics. It includes a queue view of the interactions assigned to the agent with supervisor-focused queue controls including **Coach**, **Listen**, and **Join**.


Company Directory
workgroup1
Racquel Hardie in workgroup1
workgroup1
Racquel Hardie
Current Shift
Manage Activations
Racquel Hardie
Available
00:05:58
Activated
Average Talk Time
00:02:17
Longest Talk Time
00:04:34
CURRENT SHIFT INTERACTIONS
Interactions Received
3
Interactions Answered
2
Interactions Completed
1
Interactions Held
0
CURRENT INTERACTIONS
Name
Details
Duration
State
Queue
Mary White
Last updated by the Syste
19:16:26
ACD - Assign...
workgroup1
Pickup
Transfer
Disconnect
Join
Listen
Coach
Record
Pause
Private

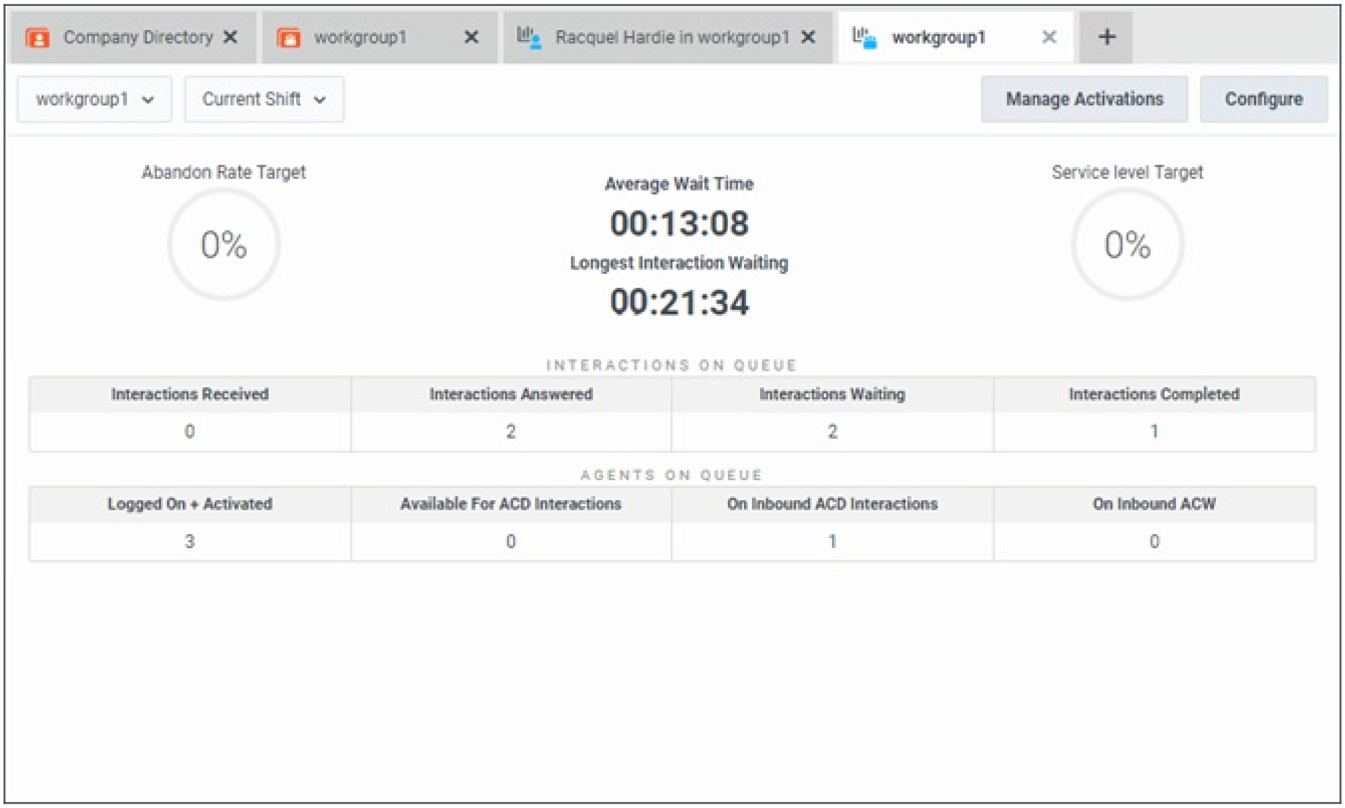
| | |
|---|---|
| **Select a Workgroup drop-down list** | Click the down arrow and select a workgroup from the drop-down list or use the search text box to find a workgroup.<br><br>**Note**: This list contains only the workgroups for which you have the Statistics Workgroups Access Control right. If you do not have the Interaction Supervisor Plug-In: Workgroup license and have not also enabled supervisor features, you can select only from workgroups to which you belong. |
| **Select an agent drop-down list** | Click the down arrow and select an agent belonging to the selected workgroup.<br><br>**Note**: This list contains only the agents belonging to the selected workgroup. If you do not have the Interaction Supervisor Plug-In: Workgroup license and have not also enabled supervisor features, you can select only yourself. |
| **Select a shift/period drop-down list** | Click the down arrow and select the current or previous shift or period.<br><br>For more information about shifts and periods, see Shift Period Statistics in the Workgroup Overview topic or ACD Statistics in the Interaction Administrator help. |
| **Manage Activations** | To manage workgroup activations for this user, click **Manage Activations**. See Change a User's Activated Workgroups. |
| **Configure** | To display or hide alerts for the displayed statistics, click the **Configure** button.<br><br>**Note**: A supervisor configures alerts in IC Business Manager. These alerts take the form of alert icons (color bubbles) and changes to text including font style, font color, or background color. |
| **Agent information** | This section displays the agent's photo, CIC status, time in CIC status, and Workgroup Activation status.<br><br>The circle around the agent's photo also indicates CIC status:<br>• Green indicates that the agent is in an ACD Available status and activated in one or more workgroups.<br>• Blue indicates that the agent is available, but not in an ACD Available status.<br>• Red indicates the agent is in a DND status; for example, At Lunch or In a Meeting,<br>• Grey indicates that the agent is not logged on. |
| **Average Talk Time** | The average amount of time any connected interaction was connected during the selected shift or period. |
| **Longest Talk Time** | The longest amount of time any connected interaction was connected during the selected shift or period. |
| **Selected shift or period Interactions** | This section displays statistics for non-disconnected interactions currently or previously on the agent's queue during the selected shift or period.<br>• **Received** is the number of interactions that alerted on this agent's queue during the current period.<br>• **Answered** is the number of interactions that were answered by the agent.<br>• **Completed** is the number of interactions picked up by the agent and then transferred or disconnected.<br>• **Held** is the number of interactions placed on hold by the agent during the current period. |
| **Current Interactions** | This section displays the interactions currently on the agent's queue.<br><br>**Note**: This section appears only if you have the Interaction Supervisor Plug-In: Workgroup license and have also enabled supervisor features. To select which columns to display, use the **Choose Column** control on the right side of the column heading row. |
| **Queue Control Toolbar** | To assist with or monitor an agent's interaction, select a current interaction and use the toolbar buttons |

## Workgroup Statistics

**Requirements**: See Display and Configure the Workgroup Statistics view.

You can view live statistical data for a selected workgroup queue in an efficient and highly visual format. Service Level, Abandon Rate and Wait Time statistics display prominently. You can compare statistics for selected workgroup queues by displaying this view multiple times and selecting a different workgroup each time. With the appropriate license, you can select which statistics you want to view and also enable alerts for the statistics.

**Tip**: You can add the view multiple times to monitor more than one workgroup.



| | |
|---|---|
| **Select a Workgroup drop-down list** | Click the down arrow and select a workgroup from the drop-down list or use the search text box to find a workgroup.<br><br>**Requirement**: The Statistics Workgroups Access Control right determines which workgroups appear in the selection drop-down list. |
| **Select a shift/period drop-down list** | Click the down arrow and select the current or previous shift or period. |
| **Manage Activations** | To change the activation status for members of this workgroup, click **Manage Activations**. See Change a Workgroup's Activated Users. |
| **Configure** | To select and arrange the displayed statistics, click **Configure**. See Display and Configure the Workgroup Statistics view.<br><br>**Requirement**: To configure which statistics appear in this view, you need the **Interaction Supervisor Plugin: Workgroups** license. |
| **Abandon Rate Target** | Percentage of all interactions on this workgroup queue during the current period that were abandoned. An abandoned interaction occurs when the external party disconnects before the interaction connects (an agent picks it up.) |
| **Average Wait Time** | The average time all interactions have been in the ACD-Alerting state in this workgroup queue during the current period. |
| **Longest Interaction Waiting** | Duration of the longest currently waiting interaction. This interaction has been in the ACD–Wait Agent state the longest. Its duration is the amount of time that the interaction has waited to be picked up by an available agent, based on time in queue only.<br><br>**Tip**: N/A indicates that no interactions are currently in the ACD-Wait Agent state. |
| **Service Level Target** | The percentage of all interactions in the workgroup queue during the current period that agents picked up before exceeding the service level time limit. The CIC administrator configures service levels on a per workgroup basis in Interaction Administrator. |
| **Interactions On Queue** | The default arrangement displays the total number of non-disconnected interactions on this workgroup queue during the selected shift or period.<br>• **Received** is the number of interactions that alerted on this workgroup queue.<br>• **Answered** is the number of interactions that an agent answered.<br>• **Waiting** is the number of interactions currently alerting or on hold.<br>• **Completed** is the number of interactions picked up by agents and then transferred or disconnected.<br><br>**Tip**: If you have the Interaction Supervisor Plugin: Workgroups license you can select and arrange the statistics in this section. See Display and Configure the Workgroup Statistics view. |
| **Agents on Queue** | The default arrangement displays the number of agents belonging to the selected workgroup during the selected shift or period:<br>• **Logged on + Activated**: Agents who logged on to an Interaction Client with their workgroup activation status set to an "Active" type.<br>• **Available for ACD Interactions**: Agents with their CIC status set to an Available type.<br>• **On Inbound ACD**: Agents working on an ACD-routed interaction.<br>• **On Inbound ACW**: Agents in a "Follow-Up" type status. CIC assigns this type of status when an agent is completing After Call Work for an ACD-routed interaction.<br><br>**Tip**: If you have the Interaction Supervisor Plugin: Workgroups license you can select and arrange the statistics in this section. See Display and Configure the Workgroup Statistics view. |

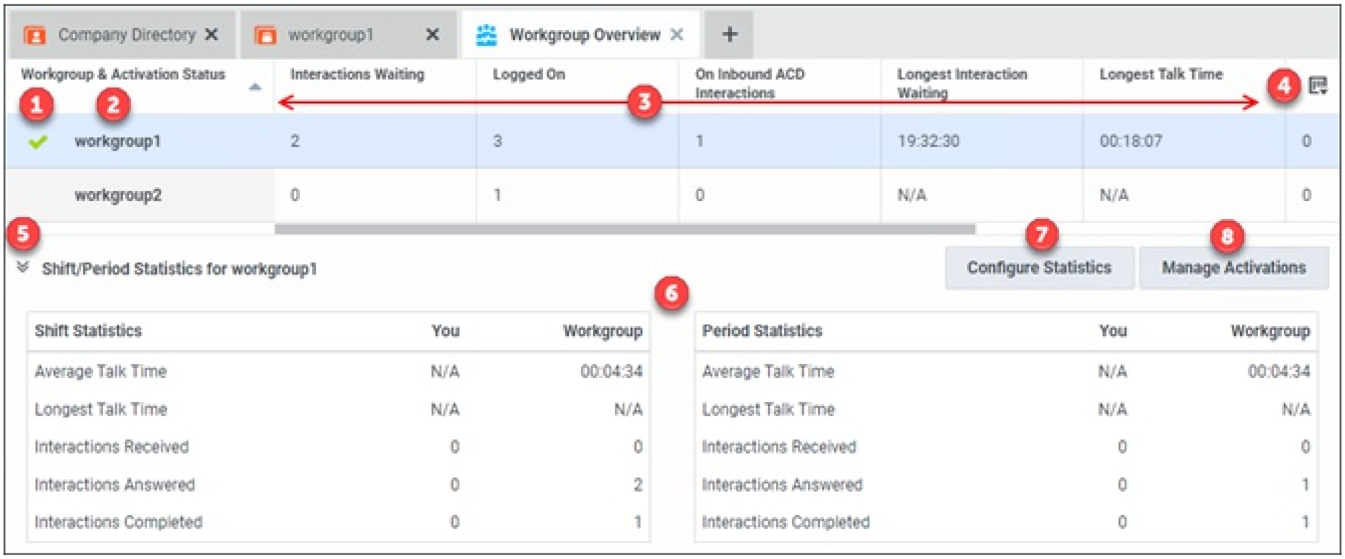
**Related Topics**

Display and Configure the Workgroup Statistics view

## Workgroup Overview

**Requirements**: See Display and Configure the Workgroup Overview.

You can view statistics for selected workgroup queues. You can select multiple workgroups and view up to eight statistics per workgroup. Shift/Period statistics can help you monitor your performance and compare it to that of a selected workgroup. With the appropriate license, you can select which Shift/Period statistics you want to view and also enable alerts for the statistics.



| | | |
|---|---|---|
| 1 | **Workgroup Activation Status** | A check mark indicates that your status is "Activated." An X indicates that your status is "Deactivated."<br><br>**Tip**: To change your workgroup activation status, click a status icon. A gray icon indicates that you don't have the appropriate rights to change this status. For more information, see Change Your Workgroup Activation Status. |
| 2 | **Workgroup Name** | The name of the workgroup as defined in Interaction Administrator. |
| 3 | **Workgroup Statistics** | **Tip**: Click a column heading to sort the contents of the view. Click the same column heading to sort the contents in reverse order.<br><br>These default statistics appear for each workgroup:<br>• **Interactions waiting**: Number of interactions waiting on this workgroup queue.<br>• **Logged on agents in this workgroup**: Total number of logged-on agents in this workgroup, regardless of their status.<br>• **On inbound ACD interactions**: Total number of agents working on inbound ACD interactions in this workgroup queue.<br>• **Longest interaction waiting**: The longest connection time of any of the **currently connected** interactions. "N/A" indicates that there are no currently connected interactions.<br>• **Longest talk time**: The longest amount of time any currently connected call has been connected.<br>• **Agents available**: The number of logged-on and activated agents in this workgroup who have an "Available" status.<br>• **On inbound ACW**: Total number of agents performing after call wrap-up work to conclude an inbound ACD interaction on this workgroup queue.<br>• **On outbound ACW**: Total number of agents performing after call wrap-up work to conclude an outbound ACD interaction on this workgroup queue. |
| 4 | **Configure** | To choose the workgroups and select the statistics displayed in this view, click the **Configure** button.<br><br>**Requirement**: The Statistics Workgroups Access Control right determines which workgroups you can include in the Workgroup Statistics view. To configure which statistics appear in this view, you need the **Interaction Supervisor Plug-In: Workgroups** license. |
| 5 | **Shift/Period Statistics control** | To display or hide a statistical summary of the **current** shift or period for the **currently selected workgroup**, click this control.<br><br>**Note**: The interval statistics do not update when you hide this section. |
| 6 | **Shift/Period Statistics** | For more information, see Shift\Period Statistics. |
| 7 | **Configure Statistics** | Click **Configure Statistics** to select the **shift/period comparison type** and select **up to five statistics** to display in this section. You can also display or hide **alerts** for the selected statistics.<br><br>**Requirement**: To configure which statistics appear in this view, you need the **Interaction Supervisor Plug-In: Workgroups** license.<br><br>**Note**: A supervisor configures alerts in IC Business Manager. These alerts take the form of alert icons (color bubbles) and changes to text including font style, font color, or background color. |
| 8 | **Manage Activations** | To change the activation status for members of this workgroup, click **Manage Activations**. See Change a Workgroup's Activated Users. |

## Shift\Period Statistics

By default, Shift/Period Statistics contain a statistical summary comparing the currently selected workgroup's statistics and your personal statistics as a member of that workgroup. If you have the appropriate Supervisor license, you can select the type of comparison made and which statistics appear here.

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 N/A (not applicable.)

- **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 agents picked up.
- **Interactions Completed:** Number of interactions that agents picked up and then disconnected, sent to voice mail, parked on orbit, or transferred.

**Related Topics**

Display and Configure the Workgroup Overview

---

## Display and Configure Agent Statistics

**Requirements**: To display Agent Statistics for **other agents**, you need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features. To display Agent Statistics for **yourself only**, you do not need this license. However, you do need the license to see the Current Interactions part of the Agent Statistics view. See Licensing and Enablement below.

You need the Customize Client Security right to add views. To display this view, you also need the Workgroup Statistics Security right. You need the Workgroups: Statistics Access Control right for any workgroups you select. The View Directory Status Columns Access Control right enables you to display an agent’s status information.

### Licensing and Enablement

This table describes the relationship of licensing, supervisor features, and the Agent Statistics view.

| Interaction Supervisor Plug-In: Workgroup license | Enable Supervisor features | Agent Statistics view |
|---|---|---|
| Yes | Yes | You can see your own and other agents' statistics. The Current Interactions part of the view is visible. |
| Yes | No | You can see your statistics, but not other agents' statistics. The Current Interactions part of the view is not visible. |
| No | No | You can see your statistics for the workgroups to which you belong. The Current Interactions part of the view is not visible. |

This is an overview of the activity of an agent within a workgroup. You can add as many Agent Overviews as you need, but PureConnect will actively update statistics in only five of the displayed views.

**To display the Agent Statistics view:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. In the **Quick Picks** list, click **Show All Views**.
3. In the **Add Views** dialog box, in the **Extras** category, select the **Agent Statistics** check box.
4. In the **Add Views** dialog box, click **Add View**.

   **Result**: A blank Agent Statistics view appears in Interaction Connect. You see a reminder that you haven't yet selected a workgroup.

5. In **Agent Statistics**, make the following selections:
   - From the **Select a Workgroup** drop-down list, select one workgroup. If needed, use the search box to find the appropriate workgroup.

> **Note**: This list contains only the workgroups for which you have the Statistics Workgroups Access Control right. If you do not have the Interaction Supervisor Plug-In: Workgroup license and have not also enabled supervisor features, you can select only from workgroups to which you belong.

- From the **Select an Agent** drop-down list, select one agent. If needed, use the search box to find the appropriate agent.

  > **Note**: This list contains only the agents belonging to the selected workgroup. If you do not have the Interaction Supervisor Plug-In: Workgroup license and have not also enabled supervisor features, you can select only yourself.

- Optionally, change the shift/period selection in the **Current Shift** drop-down list.

  **Result**: The **Agent Statistics** view displays statistics for the selected agent within the selected workgroup.

6. Optionally, in the **Current Interactions** section, select and arrange the displayed statistics:

   > **Note**: This section appears only if you have the Interaction Supervisor Plug-In: Workgroup license and have also enabled supervisor features. You can rearrange and remove statistics only in the **Current Interactions** section. This arrangement and selection is saved separately for each Agent Overview.

- To select the statistics displayed here, click the **Choose Columns** control.
- To rearrange the statistics, drag and drop column headings
- To resize a column, drag the right side column boundary.

**Related Topics**

Agent Statistics

---

## Display and Configure the Workgroup Statistics view

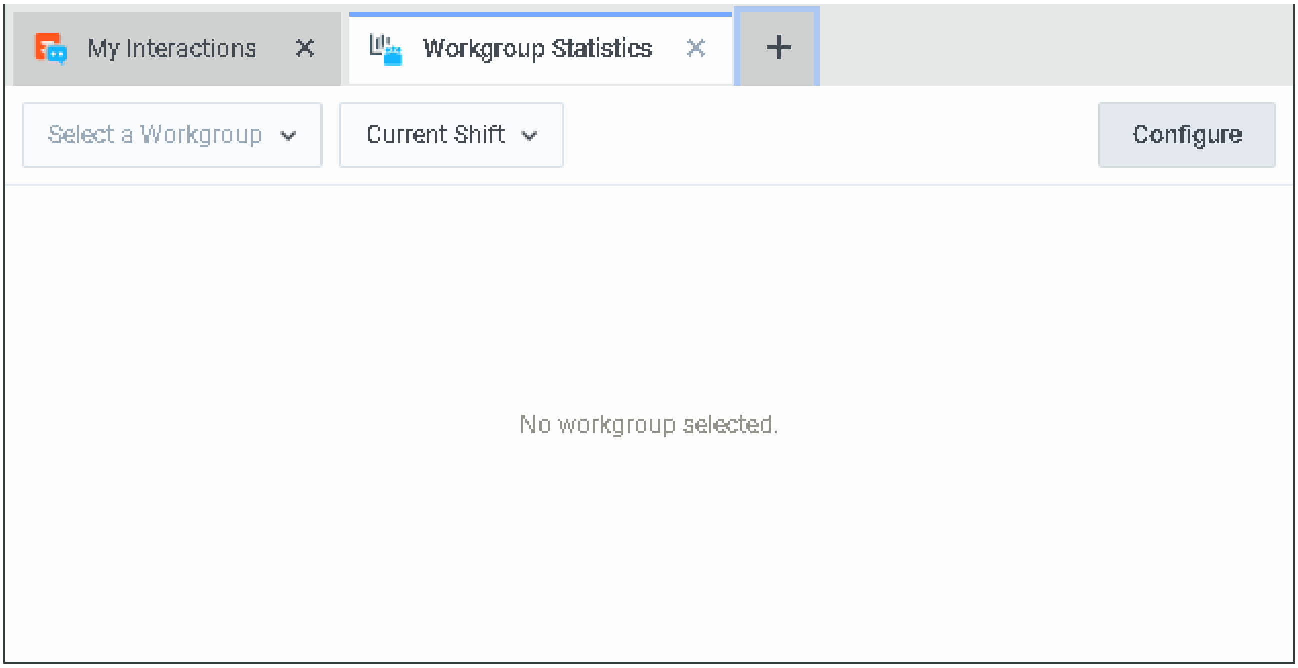
> **Requirements**: You need the Customize Client Security right to add views. The Workgroup Statistics Security right enables you to display the Workgroup Statistics view. The Statistics Workgroups Access Control right determines which workgroups you can select for this view. Membership in a workgroup does not confer the right to view statistics for that workgroup.
>
> To configure which statistics appear in this view, you need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features.
>
> To manage activations for the members of this workgroup, you need the **Interaction Supervisor Plug-In: Workgroups** license and must enable supervisor features. You also need the Modify Workgroup Queues Access Control right for the selected workgroup.

> **Note**: You can view statistics for more than one workgroup at the same time by displaying this view multiple times and selecting a different workgroup each time.

**To display the Workgroup Statistics view:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. In the **Quick Picks** list, click **Show All Views**.
3. In the **Add Views** dialog box, in the **Extras** category, select the **Workgroup Statistics** check box.
4. In the **Add Views** dialog box, click **Add View**.

   **Result**: A blank Workgroup Statistics view appears in Interaction Connect. You see a reminder that you haven't yet selected a workgroup.

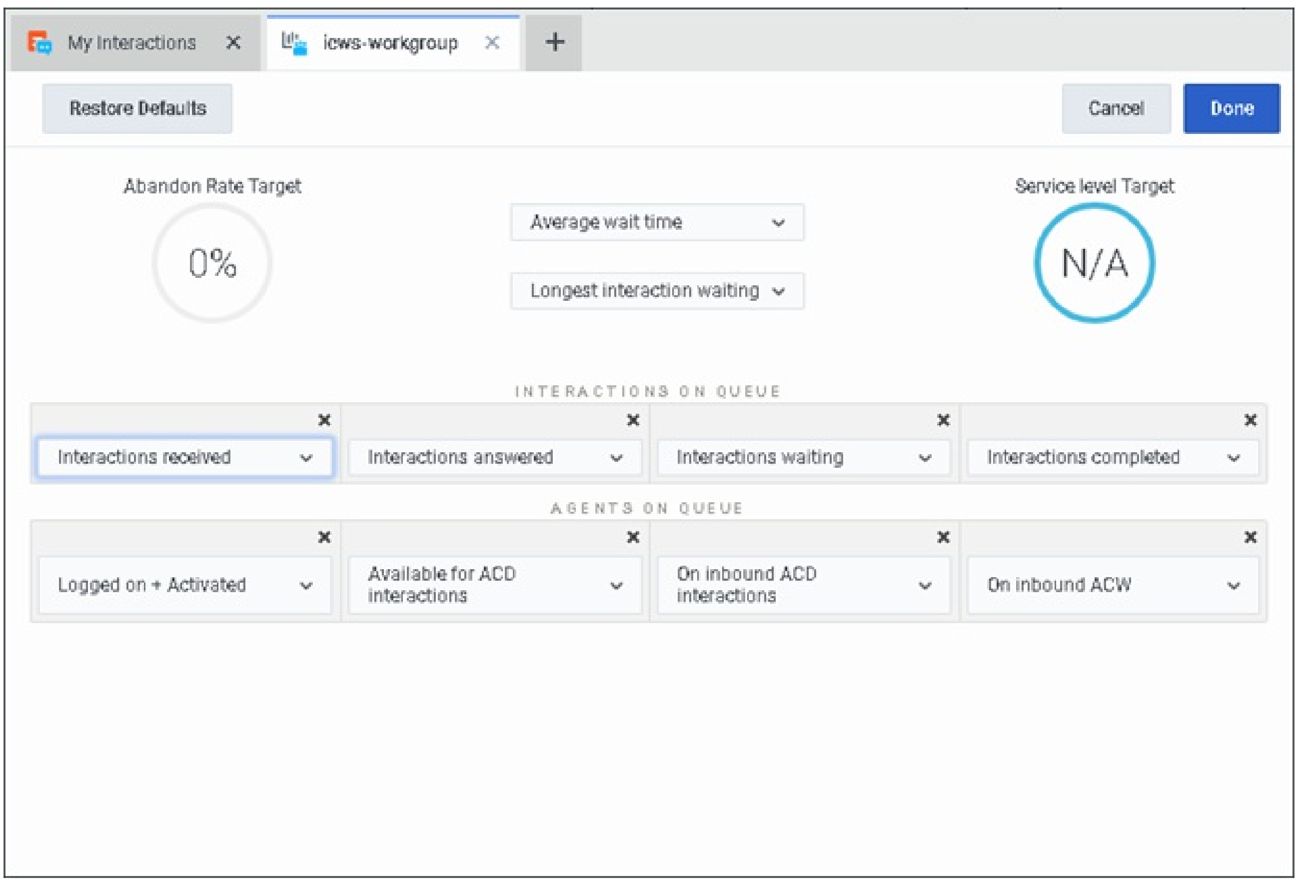



5. In the **Workgroup Statistics** view, from the **Select a Workgroup** drop-down list, select one workgroup. If needed, use the search box to find the appropriate workgroup.

   **Note**: This list contains only the workgroups for which you have the **Statistics Workgroups** Access Control right.

   **Result**: The **Workgroup Statistics** view displays statistics for the selected workgroup queue.
6. Optionally, change the shift/period selection in the **Current Shift** drop-down list.
7. Optionally, click **Configure** to select the displayed statistics. Click **Done** when finished.

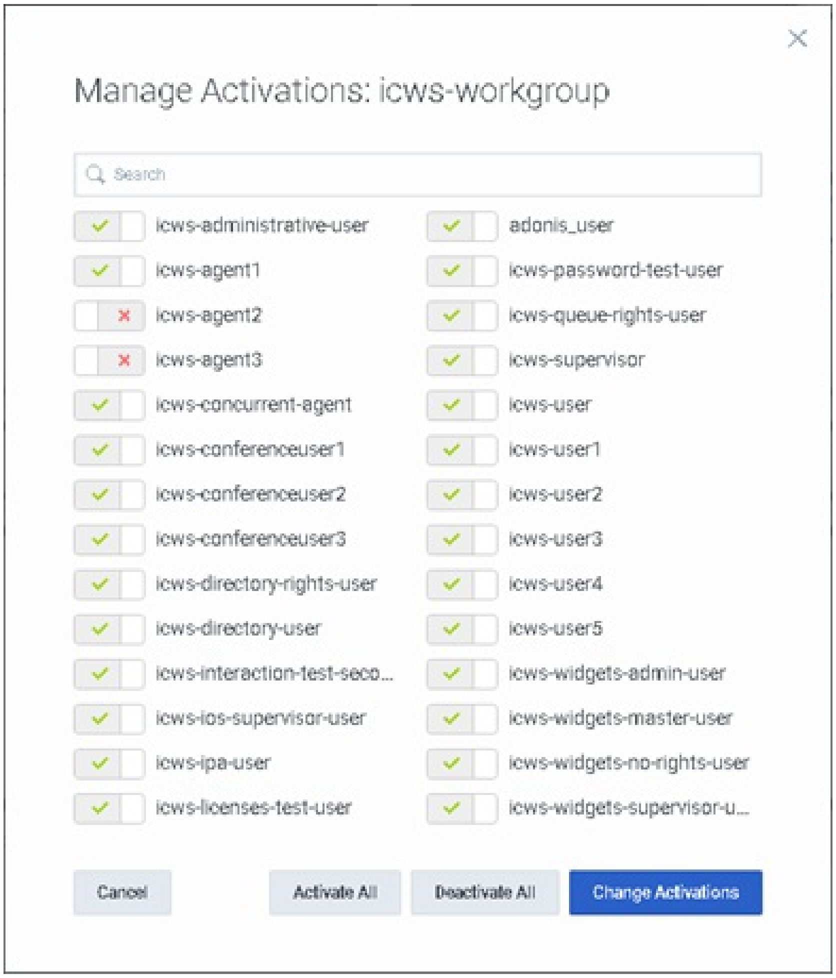
**Note**: You can rearrange and remove statistics only in the **Interactions on Queue** and **Agents on Queue** sections.



Do any of the following:

- To select a different statistic, click the down arrow on any statistic.
- To change the arrangement, drag and drop statistics.
- To remove a statistic, click the **X** for the selected statistic.
- To add a statistic if you have fewer than four statistics in a group, click the plus sign (**+**).

8. To change the activation status for members of this workgroup, click **Manage Activations**. Click the toggle switch to activate (green checkmark) or deactivate (red X) selected workgroup members. When finished, click **Change Activations**.




**Related Topics**

Workgroup Statistics

## Display and Configure the Workgroup Overview

**Requirements**: You need the Customize Client Security right to add views. The Workgroup Statistics Security right enables you to display the Workgroup Overview. The Statistics Workgroups Access Control right determines which workgroups you can select for this view. Membership in a workgroup does not confer the right to view statistics for that workgroup.

To configure which statistics appear in this view, you need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also enable supervisor features.

To manage activations for the members of this workgroup, you need the **Interaction Supervisor Plug-In: Workgroups** license and must enable supervisor features. You also need the Modify Workgroup Queues Access Control right for the selected workgroup.

**To display and configure the Workgroup Overview:**

1. Click the **Add View icon** (plus sign) next to any tab.
2. In the **Quick Picks list**, click **Show All Views**.

3. In the **Add Views** dialog box, in the **Extras** category, select the **Workgroup Overview** check box and click **Add View**.

   **Result**: A blank **Workgroup Overview** appears in Interaction Connect. You see a reminder that you haven't yet selected one or more workgroups.
4. In the **Workgroup Overview**, click **Choose Workgroups**.

   > **Note**: In the **Choose Workgroups** dialog box, the **Available** list contains only the workgroups for which you have the Workgroups Statistics Access Control right.
5. Do one of the following:
   - To move a name to the **Selected** list, select a name in the **Available** list and click the **>** control.
   - To move all workgroup names to the **Selected** list, click **>>**.
   - To move all or selected workgroup names from the **Selected** list back to the **Available** list, select a name and click **<<** or **<**.
   - To change the order of the workgroups, in the **Selected** list, select a workgroup name and click the up or down arrows above the list.
6. When your **Selected** list is complete, click **Choose Workgroups**.
7. Optionally, to configure the Shift/Period Statistics for a workgroup:

   > **Note**: Configuration requires an Interaction Supervisor Plug-In: Workgroups license.

   a. Select a workgroup appearing in the **Workgroup Overview**.
   b. Click the control next to **Shift/Period Statistics**.
   c. In the Shift/Period Statistics section, click **Configure**.
   d. In the **Configure Interval Statistics** dialog box, in the **Select shift/period comparison type** section, select one of the following:
      - **Compare my current and previous statistics**
      - **Compare my statistics with the workgroup's statistics**
      - **Compare the workgroup's current and previous statistics.**
   e. To select the statistics for this view, use the **>** and **<** controls to move the statistics names to the **Selected Statistics** list.

      > **Tip**: To change the order of the statistics, use the up and down arrows in the **Selected** list.
8. To change the activation status for members of this workgroup, click **Manage Activations**.
9. Click **Save**.

## Available Statistics

| | |
|---|---|
| **Average Agent Negative Score** | Sum up agent negative score divided by the total number of calls in the current/previous period or shift |
| **Average Agent Positive Score** | Sum up agent positive score divided by the total number of calls in the current/previous period or shift |
| **Average Customer Negative Score** | Sum up customer negative score divided by the total number of calls in the current/previous period or shift |
| **Average Customer Positive Score** | Sum up customer positive score divided by the total number of calls in the current/previous period or shift |

| | |
|---|---|
| **Average Hold Time** | The average hold time in queue of all ACD interactions. In technical terms, this value is the average time all ACD interaction on the agents queue for the specified workgroup have been in Hold state |
| **Average Talk Time** | Average connection time for all currently connected calls. Total amount of time spent on different ACD interactions, divided by number of ACD interactions.<br>**Note**: If there are no currently connected calls, Average Talk Time is N/A (not applicable). |
| **Average Wait Time** | Average wait time in queue of all interactions. This value is the average time all interactions have been in the ACD - Alerting state. |
| **Interactions Abandoned** | Number of interactions that the remote party externally disconnected before they could be client connected (picked up by an agent). |
| **Interactions Answered** | Number of ACD- interactions that have agents picked up and connected. |
| **Interactions Completed** | Number of interactions that have agents picked up and went to a state of ACD-assigned and then were disconnected, sent to voice mail, parked on orbit, or transferred. |
| **Interactions Flowed Out** | Number of interactions flowed-out. |
| **Interactions Held** | Number of interactions held. |
| **Interactions Received** | Number of interactions that have alerted in the workgroup queue or My Interactions. |
| **Longest Interaction Waiting** | Time of the longest currently waiting interaction. This interaction has been in the ACD - Wait Agent state the longest. Its duration is the amount of time that the interaction has waited to be picked up by an available agent, based on time in queue only. Overall time in the system (such as time in IVR) is not counted. |
| **Longest Talk Time** | The longest amount of time any currently connected call has been connected.<br>**Note: Longest Talk Time is not calculated at the workgroup level for the current Shift or Period.** |
| **Longest Wait Time** | The longest time an interaction was in the ACD - Wait Agent state during the current shift/period. |
| **Non-ACD Interactions** | The number of interactions answered by an agent that were not routed to the agent by ACD. These are interoffice interactions, transfers, and other person-to-person interactions. |
| **Total Hold Time** | Total amount of hold time for ACD interactions. |
| **Total Talk Time** | Total amount of time that Agents spent on different ACD interactions. |
| **Total Wait Time** | The total time that different ACD interactions waited in the Workgroup Queue before they were ACD assigned. |

**Related Topics**

Workgroup Overview

# 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 CIC Server.

Session Manager can run on the CIC 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 a CIC server ever fails, in less than 30 seconds the server can switch control to another mirror image CIC server with minimal phone disruption. In addition, administrators can manually switch the “active” CIC server with no phone disruption. It takes from 90 to 150 seconds for the CIC client to reconnect.

If a switchover occurs, you automatically reconnect if your administrator has enabled the Single Sign On feature. Otherwise you reconnect after you click the **Log On** button.

> **Note**: If you have SSO enabled, yet log on using CIC credentials, auto reconnect still works as expected. Regardless of the type of logon, CIC may disconnect your current call during a switchover.

**Related Topics**

Auto Reconnect

# Interaction Connect Help change log

| Date | Changes |
|---|---|
| 08-February-2018 | CIC does not forward ACD-routed calls when you are in an Available Forward status. Added Note to Forward Calls to Your Remote Telephone Number. |
| 22-February-2018 | Interaction Dialer custom script support in Interaction Connect. Affected these topics: What's New in Interaction Connect, Interaction Scripter, and Log on to Campaigns. |
| 02-March-2018 | Widgets for PureConnect. Added new topics: Widgets, Widgets View, Configure a Widget, Widgets General Configuration, Widgets Plugins Configuration, Widgets Extensions Configuration, Widgets Unrestricted Properties Configuration, and Deploy a Widget. |
| 06-March-2018 | UI label changes: From Language to Language Fallback and finally to Fallback Language in Widgets General Configuration.<br>In Security Rights topic, documented that Widgets List Security right renamed to Widgets Configuration. Widgets Configuration Admin Security Right renamed to Widgets Configuration Master. Rewrote Requirements in affected Widgets topics.<br>Added Genesys Widgets to the What's New in Interaction Connect help topic. |
| 07-March-2018 | Interaction Quality. Added Agent scorecard, Call Scorecard, Chat Scorecard, Interaction Quality, Quality Dashboard topics. Updated What's New in Interaction Connect topic. |
| 09-April-2018 | Account Codes administration. Added Requirements for Configuring Account Codes to Working with Account and Wrap-Up Codes topic. Added description of Account Codes view to Configure Account Codes topic. Set Configure Account Codes topic as context-sensitive help for Account Codes view. |
| 24-April-2018 | Account Code administration. Added new topic: Configure Account Codes. Edited these topics: Working with Account and Wrap-up Codes, Advanced Dialing Options, and What's New in Interaction Connect.<br>Monitored Interactions. Added Monitor a Chat and Monitored Interactions topics. Edited What's New in Interaction Connect and Security Rights topics.<br>Stationless Logon. Added new Stationless Logon topic and added Stationless Logon section to Logging On and What's New in Interaction Connect topics.<br>Updated information for Client Access license, changed topics to mention limited agent: Logging On and Stationless Logon. Also, In Stationless Logon, documented which views are hidden and which features are disabled if a Client Access License is not available. |
| 27-April-2018 | Social Media user interface. Added new topics: Managing Social Media, Facebook, and Twitter. |
| 01-May-2018 | Added tooltip help for Widgets configuration.<br>Added Interaction Optimizer Integration to What's New in Interaction Connect topic. |

| | |
|---|---|
| 10-May-2018 | Added description of new server parameter, MaxQualitySearchResultsICWS, to Optional General Server Parameters. |
| 14-May-2018 | New minimized tiles option for Speed Dial views. Affected multiple topics: Working with Speed Dial Views, Delete a Speed Dial View, Rename a Speed Dial View, Speed Dial Featuresk, and Change a Speed Dial Entries Default Number. |
| 22-May-2018 | Shift Trading view renamed to My Shift Trading view. Affected these topics: Access Control Rights, Add View Dialog Box, Interaction Optimizer, Manage Trades, My Schedule, Request a Shift Trade, Request Time Off, Shift Trading, and Use Schedule Reminders. |
| 01-June-2018 | Changes to the Widgets Administration view including new links to context-sensitive help and a new Copy Script control. |
| 06-June-2018 | Adjusted documentation to reflect that any user with Supervisor Features enabled wants alerts for the Workgroup Overview, Workgroup Statistics, and Agent Statistics views. Updated the Display and Configure topics for each of these views. |
| 08-June-2018 | Alert configuration. Created new topics: Active Alerts view, Add an Alert, Copy an Alert, Edit an Alert, Delete an Alert, Alert Sounds, and Manage Alerts dialog box. |
| 18-June-2018 | Email playback. Updated Interaction Quality, Acknowledge Scorecards, Call Scorecard & Chat Scorecard, Email Scorecard, My Quality Results, and What's New in Interaction Connect topics. |
| 19-June-2018 | Interaction Process Automation. Added topics: Filter a Queue View, Filter by Work Item Category, Interaction Process Automation, Interaction Process Automation Terminology, Pick Up a Work Item, Processes, Put a Work Item on Hold, Remove a Work Item, Start a Process, Transfer a Work Item, Work Item Alerts, Work Item Viewer, and Work Items. Edited Queue Contents to show Associated Process. |
| 28-June-2018 | Dropped requirement of Interaction Quality Monitoring Agent license in the Interaction Quality and New Features topic. |
| 11-July-2018 | Notification sounds played for alerts and alert action controls. Updated the Add an Alert topic. |
| 13-July-2018 | In the Active Alerts view topic, rewrote description of Toggle Grouping control because of a UI change. |
| 23-July-2018 | In the Log on to Campaigns topic, noted that the Ready to Take Calls check box does not apply to base scripts in Dialer campaigns.<br><br>Social Media configuration. Added topics: Configure Social Media, Enable Social Media, Create or Log On to the Social Media Account, Configure Facebook channels, Configure Twitter channels.<br><br>Social Media Twitter conversations: documented in Managing Social Media, Manage a Social Media conversation, Facebook conversations, Twitter conversations, and Social Media Images |
| 27-July-2018 | Noted that CIC does **not** support Ad Hoc recording of Social Media interactions in the Manage a Social Media Conversation and Snip Button topics. Added Chat Scorecard topic. Renamed the Social Media Scorecard topic to Social Conversation Scorecard. Added Scorecards to in 2018 R4 section of What's New in Interaction Connect.<br><br>Rewrote note in Switchover topic to read: If you have SSO enabled, yet log on using CIC credentials, auto reconnect still works as expected. Regardless of the type of logon, CIC may disconnect your current call during a switchover.<br><br>Documented image support in Social Media Direct messages in the Social Media Inline Images topic. |

| | |
|---|---|
| 02-August-2018 | Changed these links wherever they appeared in the client help:<br>• http://testlab.inin.com, changed to testlab.genesys.com<br>• help.inin.com, changed to help.genesys.com<br>• mailto: documentation@inin.com, changed to mailto: PureConnectDoc@genesys.com<br>• http://community.inin.com, changed to https://community.genesys.com/communities/pureconnect?CommunityKey=cf214c8f-5206-4010-9b2c-2085cbd65a44<br>• http://ideas.inin.com, changed to https://pureconnect.ideas.aha.io/portal_session/new. |
| 23-August-2018 | New widget types: Callback, Call Us, Offers, and Sidebar. Updated Deploy a Widget, Widgets General Configuration, Widgets Plugin Configuration, and What's New topics.<br>Added to Requirements in the Interaction Quality topic: The CIC administrator must contact Product Management for information about obtaining this license. |
| 28-August-2018 | Changed documentation to reflect that a support representative creates the Genesys Social Media Account for you. Affected the Configure Social Media, Enable Social Media, and Log On to the Social Media Account topics. |
| 07-September-2018 | Social Media Direct Messages. Added topics: Social Media: Manage Social Media Direct Messages, Facebook Direct Messages, and Twitter Direct Messages. Updated Configure Facebook Channels and Configure Twitter Channels topics to include direct message channel configuration. Rewrote requirements for agents in the Managing Social Media topic.<br>Agent Quality Results and Playback support for Social Media records. Updated My Quality Results, Social Conversation Scorecard, Social Direct Message Scorecard, and What's New in Interaction Connect.<br>Response Management in Social Media. Added a new topic: Use Response Management in a Social Media Interaction. Updated Managing Social Media, Manage a Social Media Conversation, and Using Response Management.<br>Inline image display. Updated Social Media In-line Images topic to reflect that images are displayed first at thumbnails and are no longer initially displayed at 50% of the available screen space<br>Transferring a social media conversation. Updated Manage a Social Media conversation topic.<br>Secure input. Added note that PureConnect does not support secure input to the Managing Social Media and What's New in Interaction Connect topics.<br>Added to description of progress spinner in the Facebook Direct Messages and Twitter Direct Messages topics: If the message is not sent within a time out limit, you have the option to retry the message. |
| 28-September-2018 | Intelligent Automation. Added to types of available widgets in Widgets view, Widgets General Configuration, Widgets Plugin Configuration, Widgets Extensions Configuration, and Widgets Unrestricted Properties Configuration. |
| 03-October-2018 | Added Interaction Quality Monitoring Agent license to requirements for viewing and using the My Quality Results view. |

| | |
|---|---|
| 08-October-2018 | Updated screen captures for Rebranding and UX rework.<br><br>Removed documentation for Add/Remove Plugins field. This was removed from General configuration. Affected. Added documentation for new On/Off toggle switch. Affected Widgets Plugins Configuration and Widgets General Configuration topics. |
| 25-October-2018 | Added explanation of server parameters affecting Speed Dial views to the Working with Speed Dials topic and noted it in Add a Directory Contact to a Speed Dial View.<br><br>Added Queue Results Limits to Filter a Queue view topic. |
| 08-November-2018 | Updated documentation to reflect that you must disconnect a callback interaction and the resulting call interaction separately: Respond to a Callback Request and Callback Window. |
| 03-December-2018 | Per localization, changed *reverse extension* to *the reverse of your phone extension*. |
| 07-December-2018 | Updated screen captures for Rebranding and UX rework. |
| 25-January-2019 | Altocloud view. Added new topics: Interaction Connect and Genesys Altocloud and Altocloud View. Updated Widgets Plugins Configuration, Working with Chat Sessions, Table of Contents, and What's New in Interaction Connect. |
| 11-February-2019 | In Widgets topic, added reference to developer documentation, the Genesys Widgets Reference. |
| 15-February-2019 | Journey Mapping. Added topics: Add a Contact, Add an Organization, Associate an Interaction with a Contact, Find a Contact, Find an Organization, Journey Map, Journey Map view, Journey Map button, Modify Contact Information, Modify Organization Information, Quick Add a Contact, and Use the Journey Map view.<br><br>Journey Mapping: Updated Playback a Recorded Interaction, Queue Control Toolbar Buttons, Security Rights, and View Interaction Properties.<br><br>View General Directories ACL is not needed for contact resolution. Removed from Requirements in multiple topics. |
| 22-February-2019 | Journey Mapping. Added explanation of new field, Social ID, in the Quick Add Contact dialog box and updated screen captures. Affected the Quick Add a Contact topic. |
| 26-February-2019 | Altocloud view. This view now updates in real-time and is no longer a snapshot of the visitor's journey. Made changes to What's New in Interaction Connect and Altocloud view topics. |
| 01-March-2019 | Altocloud Chat icon replaced with standard Chat icon with an Altocloud badge. Updated Working with Chat Interactions topic text and screen capture. |
| 04-March-2019 | Replaced PureEngage screen captures with captures that reflect features supported in PureConnect. Updated the Callback and Sidebar sections of the Plugins Configuration topic. |
| 08-March-2019 | Added a more detailed explanation of wrap-up code assignment for Interaction Dialer calls to the Disposition a Call topic. |
| 11-March-2019 | Created this change log. |

| | |
|---|---|
| 18-March-2019 | Documented new Auto select interactions after disconnect option in the Alerting Options topic.<br>Added Auto select interactions after disconnect to What's New in Interaction Connect topic. |
| 20-March-2019 | Incorporated Co-Browse orphan topics from the PureConnect Documentation library into the Interaction Connect help.<br>Incorporated CIC Web-based phone orphan topics from the PureConnect Documentation library into the Interaction Connect help.<br>Fixed broken hyperlinks in the Use the Journey Map view topic. |
| 26-March-2019 | Added Genesys Altocloud bullet point to 2019 R2 section of What's New in Interaction Connect. |
| 28-March-2019 | In the Widgets Plugins Configuration topic, Offers section, rewrote the description of Video URL to state that: If an image URL is present, the image replaces this video. |
| 02-April-2019 | In the Widgets Plugin Configuration topic, added a new Chatbots section. Described configuration of the Google DialogFlow chat bot. Moved the Genesys Intelligent Automation chatbot configuration to this section. Added Third-Party Chatbot Support to the 2019 R1 section of the What's New in Interaction Connect topic. |
| 09-April-2019 | In Listen to Someone Leave a Voice Mail Message topic, added link to Working with Voice Mail. In Working with Voice Mail topic, add emphasis to "voicemail features on your telephone" and made converted references to the CIC TUI User's Guide and Quick Reference Card to working hyperlinks.<br>Reorganized Widgets Plugin Configuration topic. |
| 12-April-2019 | Updated description of third-party chatbots in the What's New in Interaction Connect topic. |
| 19-April-2019 | Updated Amazon Lex, Dialog Flow, and Watson Widget configuration information per UI changes. |
| 24-April-2019 | Added Tip about searching for locations and deleting locations to Add an Organization topic.<br>Added Requirements section to introduction for Interaction Connect and Interaction Desktop help. |
| 01-May-2019 | Held Journey Map-related topics until feature is officially released. |
| 08-May-2019 | Added (OOO) for Out of Office to Personal Prompts Options and Possible Status Values topic to improve search results per a user request. |
| 14-May-2019 | Verified Altocloud documentation is correct for 2019 R2 GA. Made minor adjustments. |
| 15-May-2019 | Fixed bookmark in Widgets General Configuration. |
| 06-June-2019 | Added new topics: Update Emergency Information and E911 Emergency Calls. Added to TOC. |
| 07-June-2019 | Added new topic: E911 Emergency Call Alerts. Added to TOC. |
| 12-June-2019 | Added screen captures to E911 Emergency Calls and Update E911 Emergency. |
| 19-June-2019 | Fixed broken link in Interaction Connect and Altocloud topic. |

| | |
|---|---|
| 21-June-2019 | Added map ID for context-sensitive help for Emergency Information dialog box. |
| 25-June-2019 | Added new topic: Custom Themes and Forms. Also, in Widgets General Configuration, added notes in Theme and Custom JSON referring to this new topic. |
| 26-June-2019 | Updated description of when wrap-up codes are used in the Understanding Wrap-Up Codes topic. Made it clearer calls made on behalf of a workgroup are the only type of outgoing interactions that support wrap-up codes. |
| 02-July-2019 | Held back E911 topics from 2019 R3 version. To be release in 2019 R4. |
| 03-July-2019 | Added Note to Disposition a Call which mentions the new Eic_DialerAllowInboundWrapUp interaction attribute.<br>Removed all references to PureCloud Directory view. This is no longer supported. Added notice to the What's New in Interaction Connect help topic. |
| 10-July-2019 | Added Web Chat Widget Subject bullet point to 2019 R2 section of What's New in Interaction Connect. |
| 12-July-2019 | Added new screen captures and a second example to Custom Themes and Forms. Added warning about using the Sidebar to enable Callback, Call Us, or Offers widgets to Widgets Plugins Configuration. |
| 17-July-2019 | Added Support for Arabic bullet point to 2019 R3 section of the What's New in Interaction Connect topic. |
| 25-July-2019 | Added Widget Types section to Widgets topic. Updated descriptions of some of the widget types in Widgets Plugins Configuration. |
| 01-August-2019 | Added new topic PureConnect Widget Extensions. |
| 28-August-2019 | Edited What's New in Interaction Connect, E911 Emergency Calls, Update E911 Emergency Information, and E911 Emergency Call Alerts topics for late-breaking changes to the feature. |
| 06-September-2019 | Fixed links in the Configure the web-based phone feature. |
| 23-September-2019 | Held back E911 topics from 2019 R4 help version. Feature to be released in 2020 R1. |
| 25-September-2019 | Updated definitions of Local Disconnect and Remote Disconnect in Understanding an Interaction's State topic. |
| 25-September-2019 | Added "Also, If you use custom attributes, the server prefixes attribute names with WebTools_." to the PureConnect Widget Extensions topic. |
| 02-October-2019 | Released E911 topics for 2020.R1. Updated version number in Interaction Connect Help introductory topic. Corrected typo in Log on to Campaigns. Base scripts instead of basic scripts. |
| 11-October-2019 | Added link to Advanced Dialing Options in the Dial of Behalf of a Workgroup topic. |
| 18-October-2019 | Added description of Use Chat Persona to Widgets Plugins Configuration topic. |

| | |
|---|---|
| 21-October-2019 | Rewrote Desktop Alerts and added notes for Chrome users. |
| 25-October-2019 | Edits for renaming of PureCloud for CIC integration to Genesys Cloud for PureConnect integration. |
| 06-November-2019 | Added documentation for Webchat usability enhancements, including support in replies for emojis, qouting earlier messages, and using multimedia. |
| 12-November-2019 | In Widgets Plugins Configuration, Sidebar section, added to Plugin-Name description: Note: The plug-in name should not contain spaces. The name must also match the case the Widget code expects. Acceptable values are: WebChat, Callback, CallUs and Offers. |
| 21-November-2019 | Per customer feedback, updated Note in Enable Social Media. |
| 06-December-2019 | Updated notes in both Enable social Media and Log On to the Social Media Account. |
| 09-December-2019 | Made correction; drag and drop call transfer works only with the Company Directory. Updated Transfer a Call to a Directory Entry and Drag and Drop a Call on a Name in a Directory topics. |
| 13-January-2020 | Added Warning to Add or Close Views and Logging on topics about using IceLib applications with Interaction Connect. |
| 22-January-2020 | Added new topics for phase 1 accessibility enhancements, Accessibility Compliance. |
| 31-January-2020 | In Schedule a Callback, updated screen capture and added Note to step 4. Select a Time zone. Note: To see the Time zone option, your system administrator must configure the Interaction Dialer Timezone Map Data option and configure a Zone Set. See Configure Time Zone Maps and Assign Them to Campaigns, Where Applicable and Zone Sets. |
| 31-January-2020 | Added information about Call History Max Time server parameter to Call History Retention section of Call History topic. |
| 25-February-2020 | Added help for configuration of WhatsApp Direct Messages. |
| 26-February-2020 | Added help topic, Set Status in Accessibility Mode. |
| 03-March-2020 | Removed stray button images from Queue Control Toolbar Buttons topic. Left over from conversion. |
| 06-March-2020 | Added navigation from view to view to Keyboard Navigation. Added new My Interactions Shortcuts and Create a Conference Call in Accessibility Mode topics. Mentioned both in What's New in Interaction Connect. Also removed stray button images from Queue Control Toolbar Buttons topic - left over from project conversion. |
| 06-March-2020 | Added Note about configuration of data sources to the Journey Map view topic. |

| | |
|---|---|
| 10-March-2020 | In the Custom Themes and Forms topic, updated formatting of JSON examples to make it easier to cut and paste code. Added note about using extensions. In the Configure a Widget topic, updated procedure because Cancel button was removed. |
| 10-March-2020 | In the Interaction Quality topic, added the requirement for the Interaction Recorder Client Access license. |
| 20-March-2020 | Added new topics: Create a Conference Call in Accessibility Mode and Conference Button. Updated Accessibility Enhancements and What's New in Interaction Connect. |
| 24-March-2020 | Updated Personal Prompts topic for removal of accordion sections. Added more detail to What's New in Interaction Connect and also Keyboard Navigation for additional Accessibility Enhancements. |
| 07-April-2020 | Added topics and links for Create a Conference Chat in Accessibility Mode. |
| 08-April-2020 | Renamed Drag and Drop a Call on Another Call to Create a Conference Call Using Drag and Drop. Fixed all links. Other minor cleanup. |
| 30-March-2020 | Fixed broken link in Genesys Cloud for PureConnect Features topic. |
| 20-April-2020 | Added What's New notice for WhatsApp Direct Messages. Add new license requirement to Managing Social Media topic. In Enable Social Media topic, added Note: Genesys Hub URL is not required for WhatsApp Direct Messages. |
| 29-April-2020 | Updated screen capture in Callbacks and the Current Interaction view to show the Reset Number button. |
| 30-April-2020 | Added further explanation of accessibilityMode Server parameter to Accessibility Enhancements topic. |
| 01-May-2020 | Added Time in Status and Time in Workgroup Queue to Queue Contents topic. Added Warning to Web-based Phone topic that it does not support persistent connections. |
| 04-May-2020 | Updated Configure WhatsApp channels with tips and confirmation code information. Added "additional requirements" to Requirements for administrators in Managing Social Media. |
| 05-May-2020 | Added description of WebChatService.setBotName to PureConnect Widget Extensions topic. |
| 06-May-2020 | Updated licensing requirements in the Managing Social Media and What's New in Interaction Connect topics. Added Note to WhatsApp Direct Messages in 2020 R2 section of the What's New in Interaction Connect help. |
| 07-May-2020 | Added Genesys Cloud requirements to Managing Social Media topic. Added new Widgets Updates section to What's New in Interaction Connect topic. |
| 08-May-2020 | Updated WhatsApp licensing information in Managing Social Media and What's New in Interaction Connect topics. Added to Tip in Managing Social Media Direct Messages. Also added "Each PureCloud user needs the Communicate - User role" to the Licensing section of the Web-based Phone Requirements topic. |
| 14-May-2020 | In What's New in Interaction Connect, created 2020 R3 section and added Response Management and File Uploads. Added to Create Personal Responses topic: Note: You cannot use the following types of executable files (.exe, .sh, and .js) in a personal response. |
| 22-May-2020 | Added Tip about recording personal prompts to the Working with Voice Mail topic. |
| 26-May-2020 | Updated link to Genesys My Support portal in introduction. |

| | |
|---|---|
| 27-May-2020 | Added User-defined Telephone Number on Remote Logon Security right to the User Requirements section in the Web-based Phone Requirements topic. Added note to the description of that right in the Security Rights topic. |
| 09-June-2020 | Added updates for two-way file transfer feature. This included new topics: Administrator Views, Accept and Send Files During a Chat, and Configure Inbound File Transfer Settings. Also updated the Chats and the Current Interaction View, Security Rights, and What's New in Interaction Connect topics. |
| 12-June-2020 | Added updates for client templates feature. This included new topics: Client Templates, Create a Client Template, Edit a Client Template, and Delete a Client Template. |
| 17-June-2020 | Per reader feedback, added screen captures to the Display and Configure the Workgroup Statistics view topic. |
| 18-June-2020 | Per reader feedback, added link to Search a Directory to the Dial a Number Inside the Organization topic. Added or fixed links to descriptions of period and shift in the Agent Statistics and Workgroup Overview topics. |
| 23-June-2020 | Added note to Search a Directory topic: Status is not included in the search. |
| 25-June-2020 | Added Security section to Widgets topic. |
| 30-June-2020 | Added video to Customizing Queue Control Toolbars topic. |
| 08-July-2020 | Added videos to My Status, Click to Dial a Directory Contact, and Dial a Number Inside the Organization topics. |
| 09-July-2020 | Updated Shortcut Keys topic. Some keyboard shortcuts added as part of Accessibility enhancements. |
| 10-July-2020 | Added video to Transfer a Call to a Workgroup topic. |
| 15-July-2020 | Updates to Client Templates, Create a Client Template, Edit a Client Template, and Delete a Client Template topics. |
| 23-July-2020 | Added Widgets and Web Services Extensions topic. |
| 10-August-2020 | Removed Miscellaneous book and topic reference from TOC. Not needed. |
| 11-August-2020 | Updates to Agent Statistics and Display and Configure Agent Statistics View. The Interaction Supervisor Plug-In: Workgroups license is no longer required for an agent to see their statistics. |
| 13-August-2020 | In the Web-based Phone Requirements topic, added warning about Cloud Bridge replacing the soon-to-be deprecated cic-connector. |
| 18-August-2020 | Added Genesys Cloud Workforce Engagement section and Genesys Cloud Inbox Notifications topic. Updated What's New in Interaction Connect. |
| 24-August-2020 | Minor edit to Genesys Cloud Inbox Notifications topic. |
| 25-August-2020 | Renamed PureCloud to Genesys Cloud where appropriate. |
| 18-September-2020 | Added Workforce Engagement Administration, Historical Data Upload, Interaction Replication, and Genesys Cloud Configuration Status topics to the Genesys Cloud Workforce Engagement section. In What's New in Interaction Connect, replaced Inbox Notifications with Genesys Cloud Workforce Engagement Management features. |

| | |
|---|---|
| 22-September-2020 | Updates to Search a Directory and Sort a Directory topics. Sorting and searching is supported in 2021 R1 in status-related columns in the Company directory and Workgroup directories. |
| 05-October-2020 | Altocloud view renamed to Predictive Engagement. Changed Altocloud to Genesys Predictive Engagement as needed. |
| 20-October-2020 | Updated screen capture in Predictive Engagement view topic. |
| 21-October-2020 | Updated Workforce Engagement view screen captures to show Genesys Cloud Admin button. |
| 09-November-2020 | Updated Widgets developer documentation links to point to new locations in all.docs.genesys.com. |
| 05-January-2021 | Fixed broken link in Historical Data Upload topic. Started new Health Overview topic. Added interaction types to Interaction Replication topic introduction. Added 2021 R1 description of new Genesys Cloud Engagement Management features. |
| 06-January-2021 | Continued updates for 2021 R1 Genesys Cloud Engagement Management features. This included a first draft of the new Health Overview topic and edits to the Interaction Replication topic with new and updated screen captures. |
| 14-January-2021 | Completed updates for 2021 R1 Genesys Cloud Engagement Management features. |
| 12-February-2021 | Added a note in Using Response Management topic also provided link to Keyboard Navigations topic |
| 03-March-2021 | Updated screen capture in Transfer a Call after consulting the Recipient topic. |
| 11-August-2021 | Added Consult, Consult during a call topics. |
| 01-November-2021 | Added Secure Input, Process the Secure Input topics. |
| 01-February-2023 | Added a new topics for "MS Teams Integration with CIC" |
| 16-October-2023 | Added a new topic for "MS Teams Integration  - Using Teams as Login station" |