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See Change Log for summary of changes.

GENESYS

Interaction Optimizer (CIC Web Applications)

Printed Help

Abstract

This document contains the application help for Interaction Optimizer (Web).

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

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Starting and Exiting

This section provides links to information on how to log on, log off, and exit.

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- Single Sign On
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Logging On

Save your settings

During this log on process, you can select check boxes that save 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.

> **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 Optimizer but just close and reopen your browser.

To log on to Interaction Optimizer:

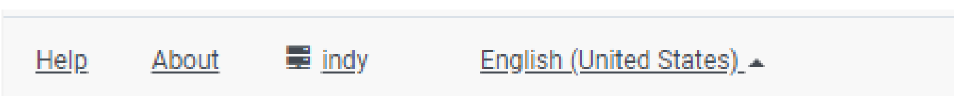
1. Point your browser to the logon page.

   > **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:

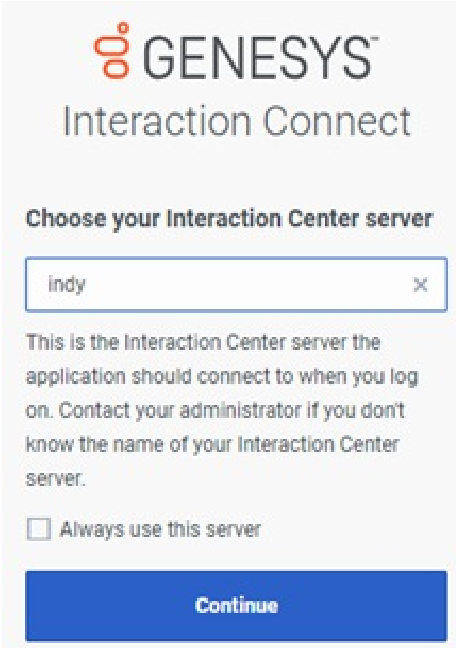
   > **Note**: You choose a CIC server at your initial logon, even if there is only one available.

   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.



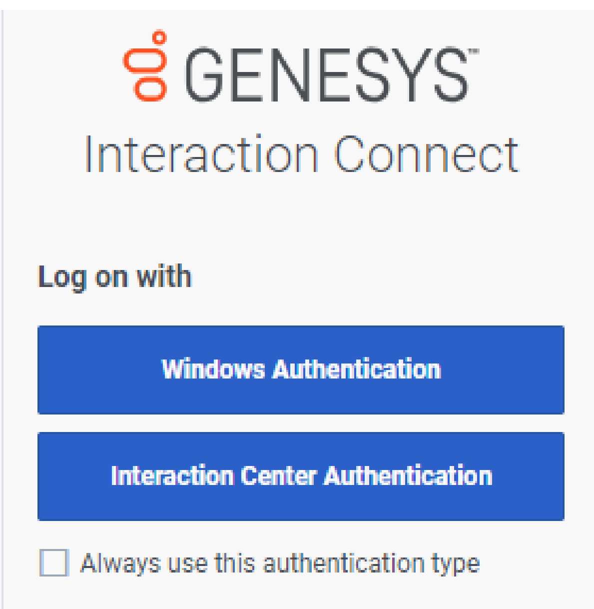
c. Click **Continue**.

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.

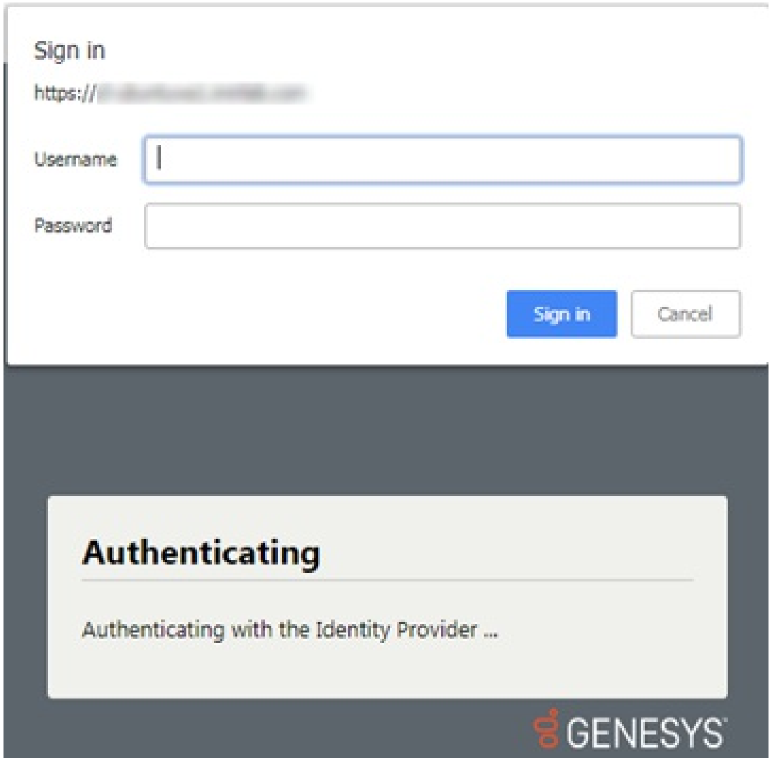
5. Enter the appropriate log on credentials by doing one of the following:

   - 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**, in the **Authentication Required** dialog box, 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.



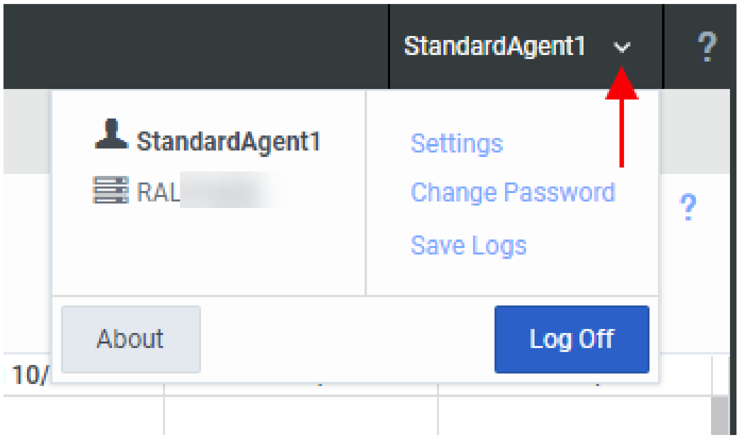
- If you selected another Identity Provider in the **Log on With** dialog box, follow your CIC administrator's instructions for entering credentials and logging on.

Related Topics

[Change Your Password]
[Language Setting]
[Single Sign 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.



Related Topics

[Exiting]
[Logging On]

Exiting

To exit Interaction Optimizer:

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

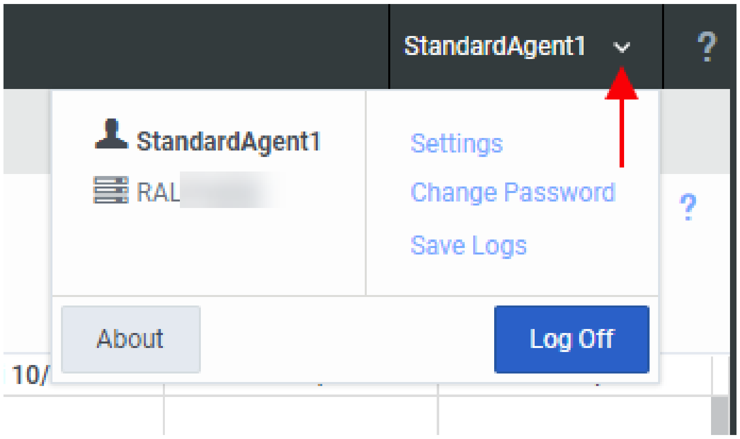
Related Topics

[Logging Off]

Connection 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. Open the menu and then click **Settings**.



2. In the **Connection** page of the Applications Settings dialog box, 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. To change the language used in the CIC interface, do one of the following: • Select a language. • 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 CIC 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.
Remember my Interaction Center user ID.	This setting automatically supplies your CIC user name when you use Customer Interaction Center Authentication.

Related Topics

Logging On
Single Sign On

Change Your Password

If your Customer Interaction Center password has expired, you see an "Expired Password" warning when you try to log on using **Customer Interaction Center Authentication**. Change your password immediately to log on and continue loading Interaction Optimizer. Failure to change your password after an "Expired Password" warning causes Interaction Optimizer 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.

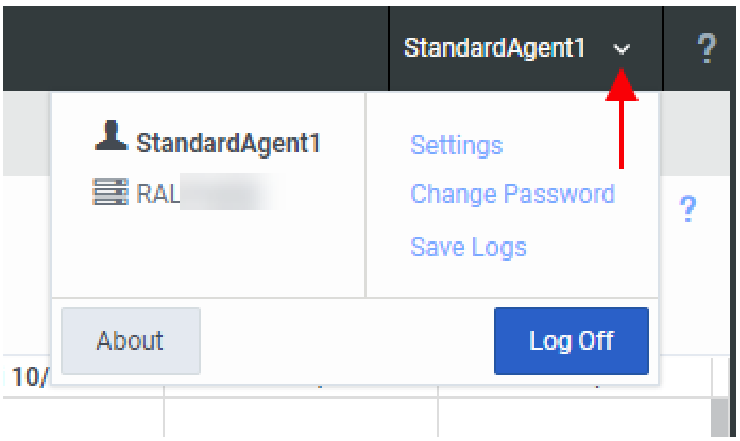
If your password is going to expire soon, a prompt appears periodically (usually once per day or on the next logon) asking if you want to change your password now. If you select **Yes**, then the Change Password dialog box appears.

> **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 in the top right corner.



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

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

Related Topics

Logging On
Single Sign On

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.

> **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.

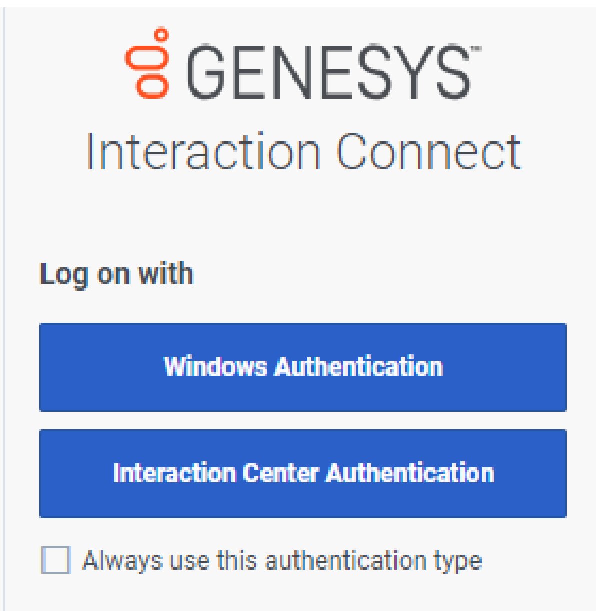
Related Topics

Logging On

Single Sign On

Single Sign On enables you to log on 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

Auto Reconnect

If Interaction Optimizer 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

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.

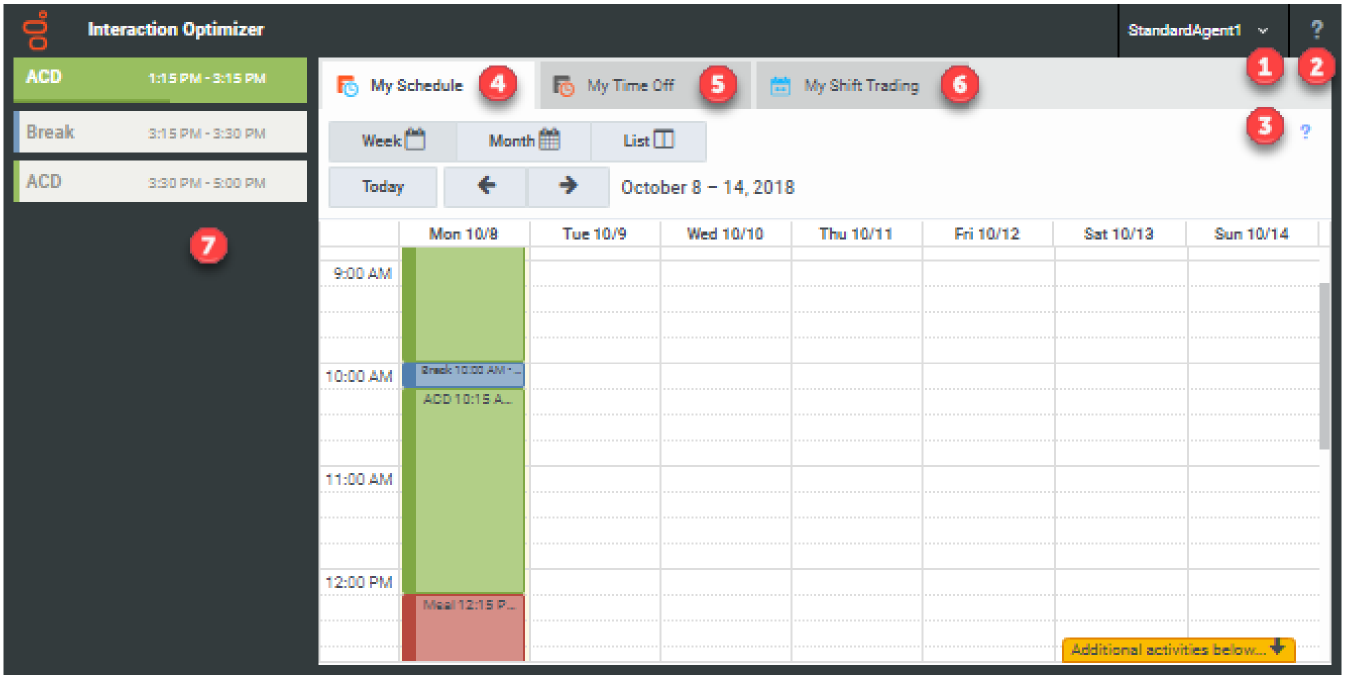
If a switchover occurs, you automatically reconnect if your administrator has enabled the Single Sign On feature. Otherwise you reconnect after you click the Log On button.

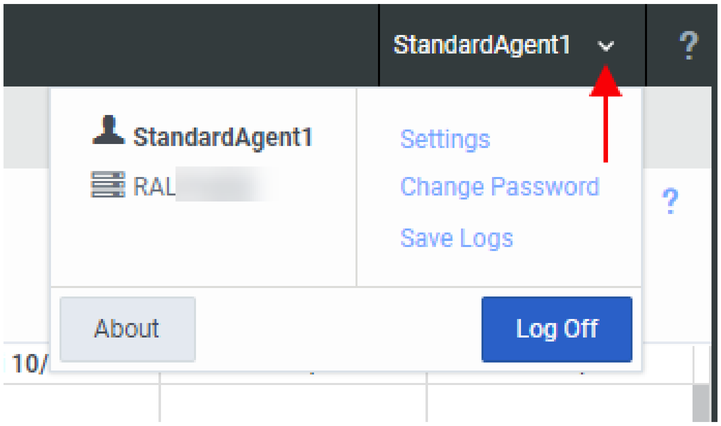
Related Topics

Auto Reconnect

Interaction Optimizer Interface

You view your schedule and manage time off requests in Interaction Optimizer using the various elements of its interface. The elements explained here are always available.

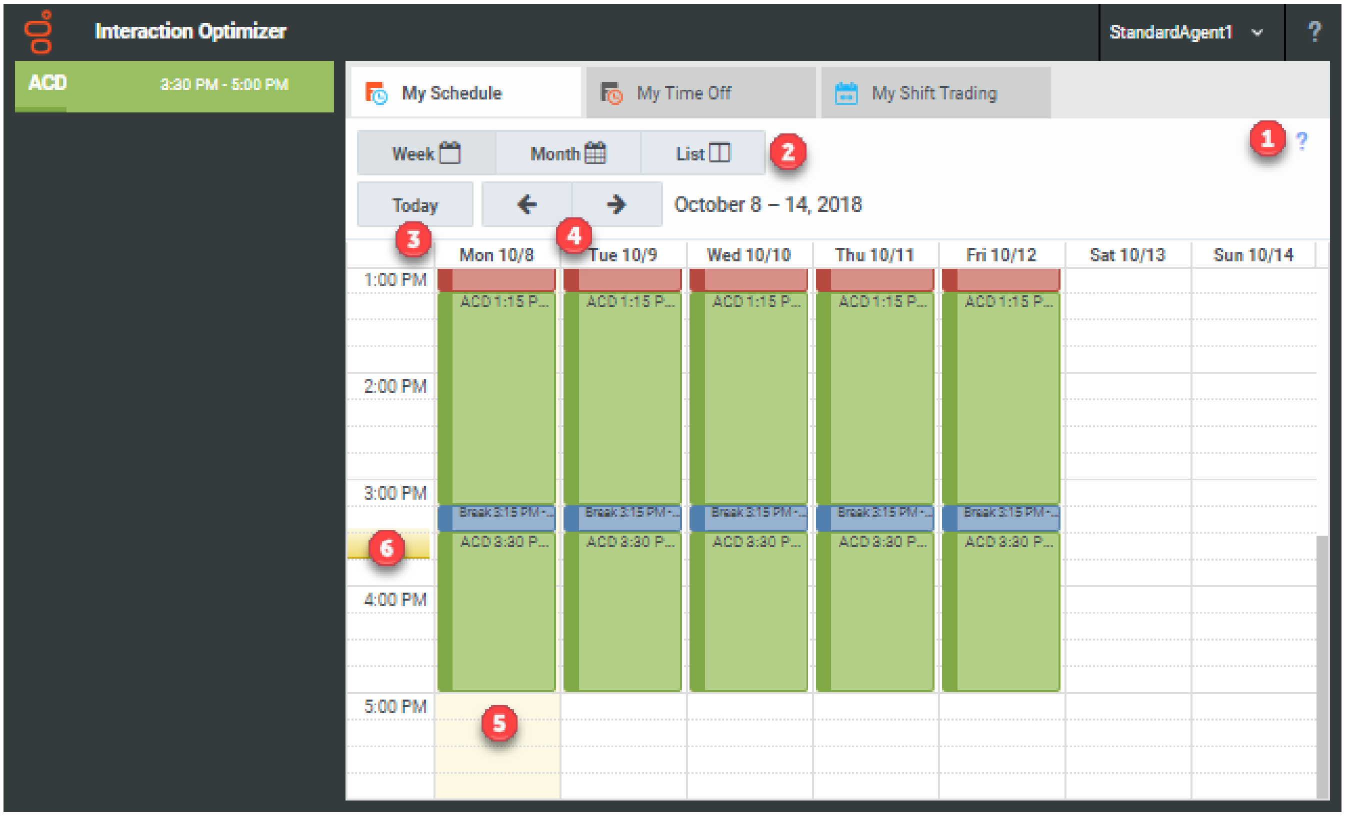


1	**Menu**	Click this symbol to display a system menu that includes options for changing settings or your password and also saving logs for troubleshooting. This dialog box also displays the name of the currently logged on user and the name of the CIC server.  ■ To search and view help for Interaction Optimizer, click **Help**. ■ To display the Interaction Optimizer version number and other company information, click **About**. ■ To log off,click **Log Off**.
2	**Application Help**	To display the beginning of the Interaction Optimizer help and a Table of Contents, click here.
3	**Help for current tab**	To display help specifically for the current tab, click this help icon.
4	**Schedule tab**	To view your schedule, select this tab.
5	**My Time Off tab**	To create, review, or cancel time off requests, select this tab.
6	**Shift Trading**	To trade part of your scheduled shift with a co-worker, select this tab.
7	**Today's Schedule**	Today's Schedule displays a breakdown of your scheduled activities for today. It includes a time remaining countdown for the currently scheduled activity. This area displays a "No events today" message if you are not scheduled to work today. It displays a warning when you are out of adherence to the published schedule.

Schedule tab

The Schedule tab enables you to view your schedule in Week, Month, or List views.

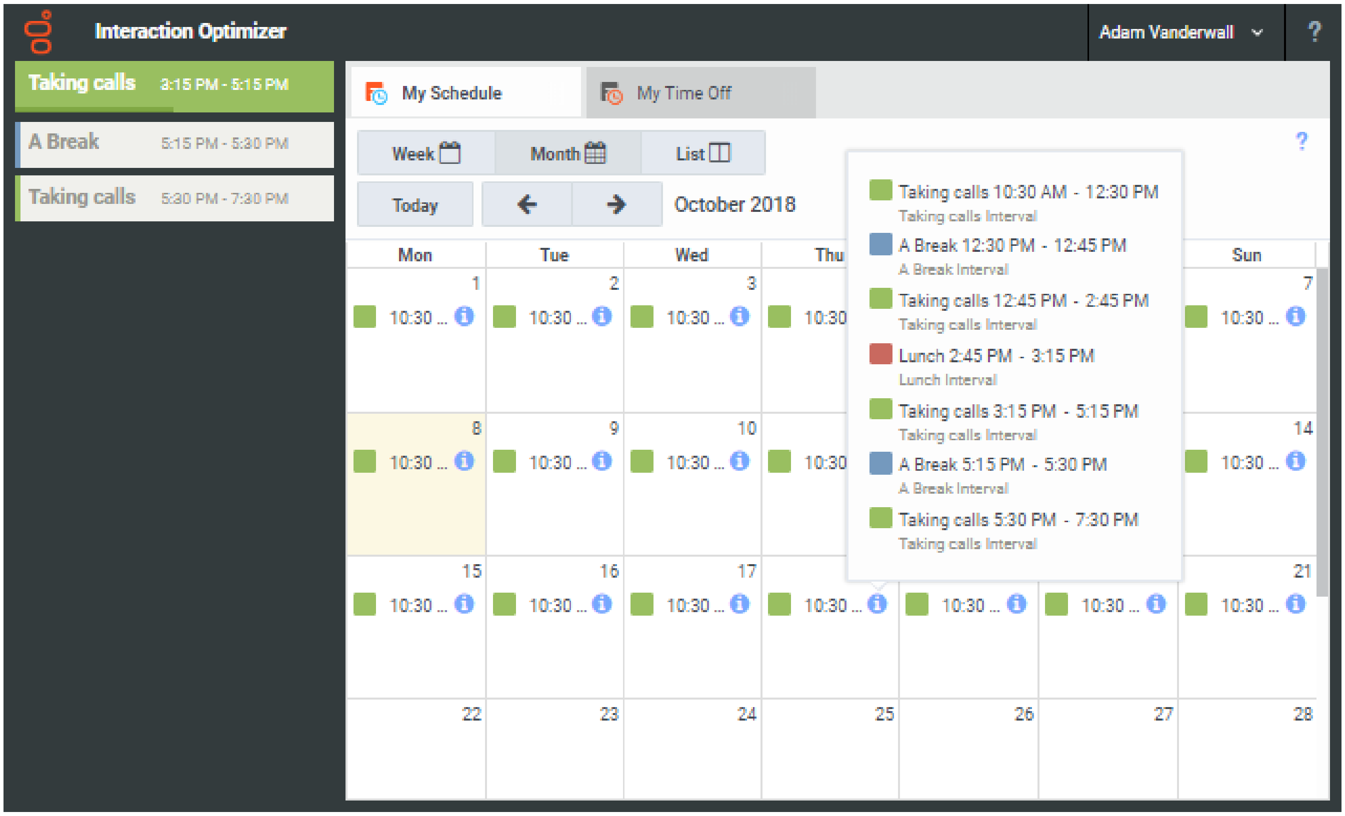
Schedule Week view



1	**Help for current tab**	To display help for the Schedule tab, click this help icon.
2	**Alternate views**	To display a week, month, or list view of your schedule, click one of these controls.
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 in the week view indicates the current time.

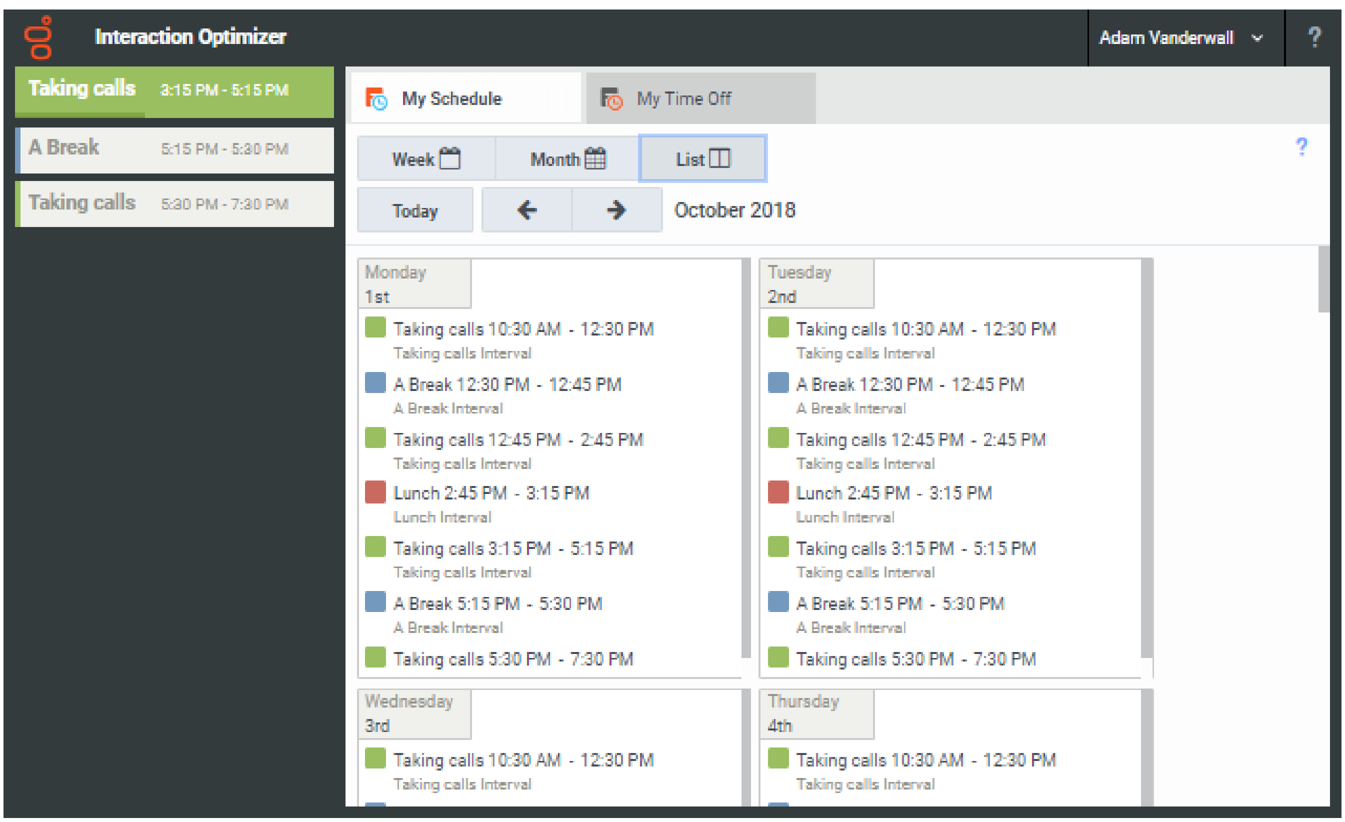
Schedule Month view

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 calendar icon in the selected day.



Schedule List view

The Schedule List view displays schedule details for each day.

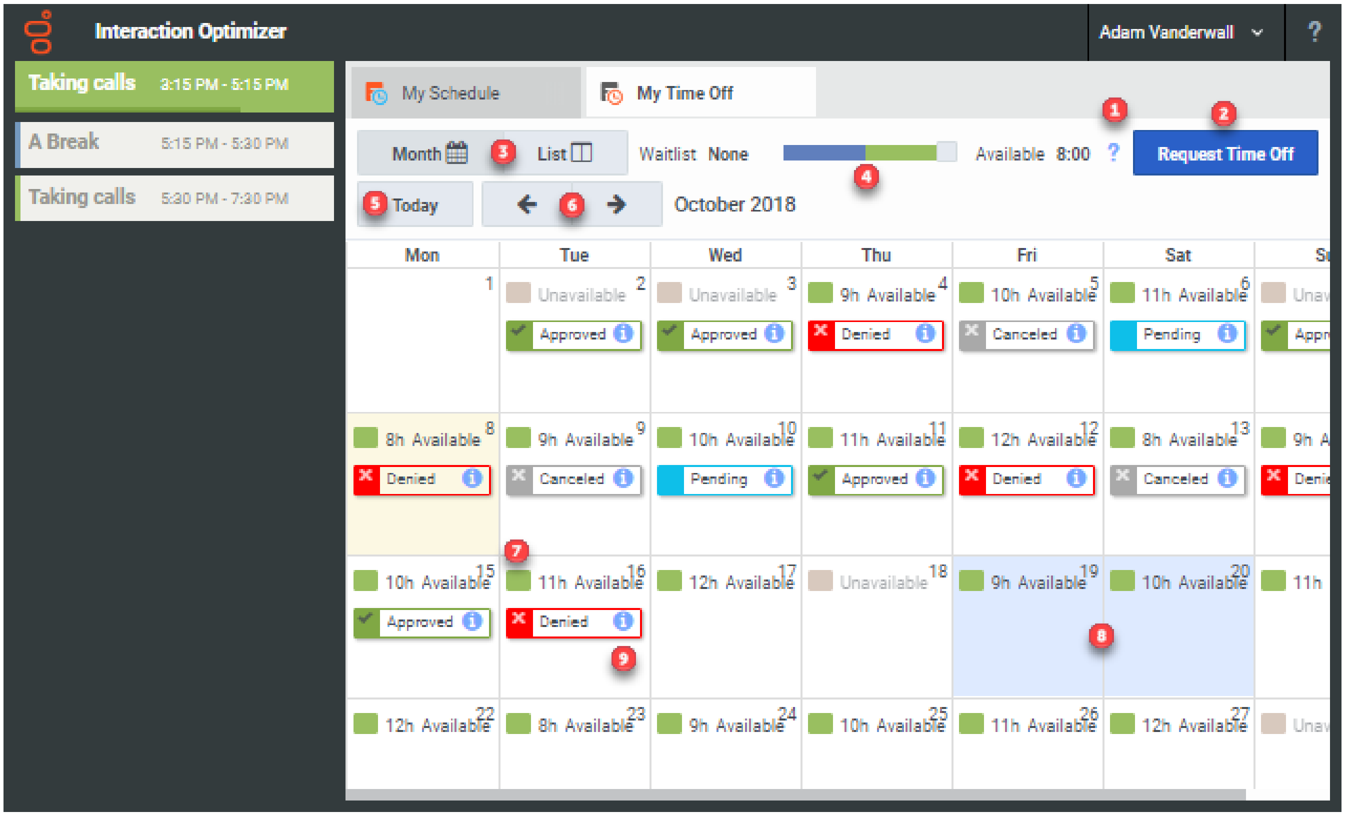


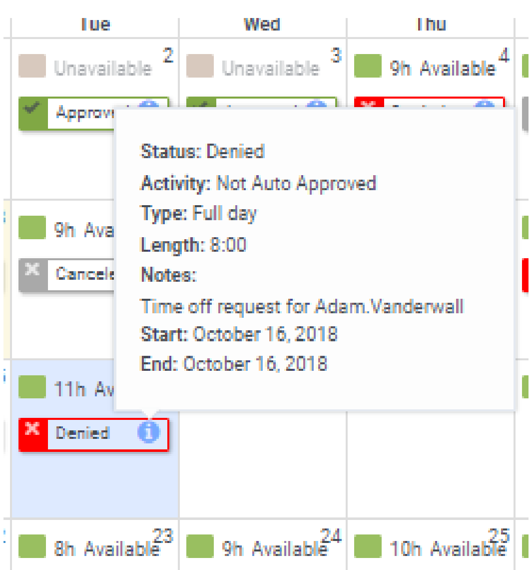
My Time Off tab

The My Time Off tab enables you to manage your time off requests. You can:

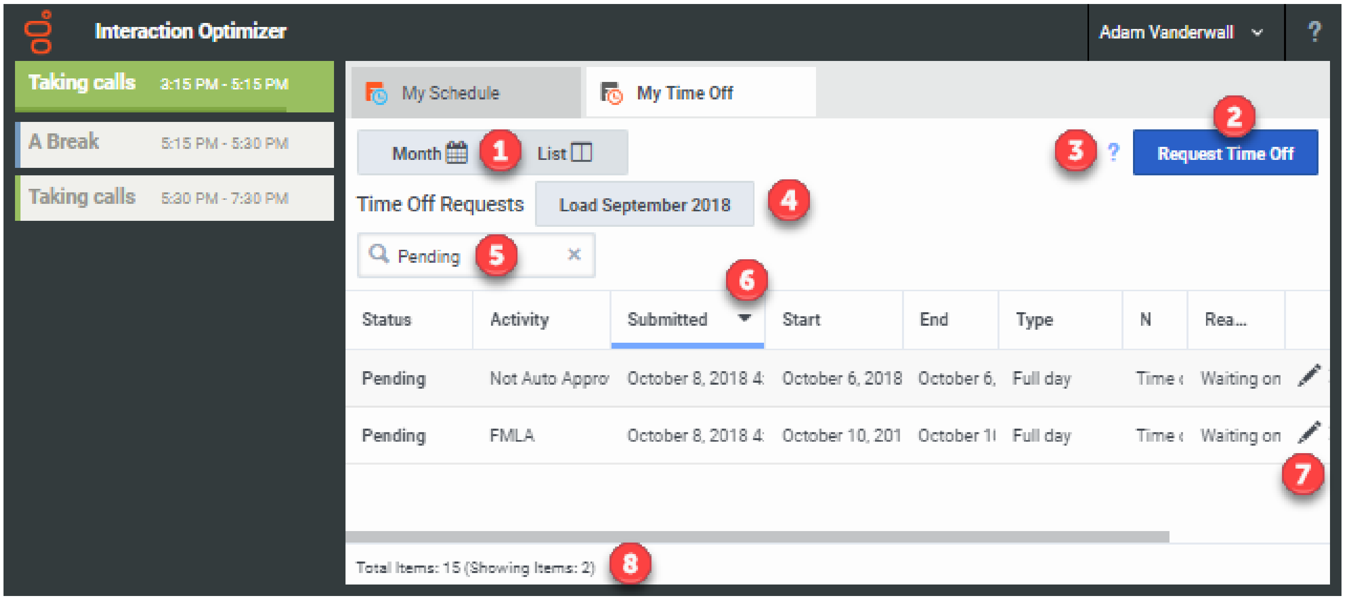
- Identify days in the schedule where time off is available.
- Review your previous time off requests.
- Submit a new time off request.

Time Off Month view



1	**Help for current tab**	To display help for the My Time Off tab, click this help icon.
2	**Request Time Off**	To create a time off request, click this control.
3	**Alternate views**	To display the appropriate view, click one of these controls: • A month view of your **time off requests**. • A list view of your **time off requests**.
4	**Slider control**	To indicate how much time off per day you want to request, adjust this control. • To locate days where your administrator could automatically approve a time off request, use the **Available** side of the slider. *Note*: Your CIC administrator determines whether automatic time off request approval is available. • To indicate time off per day for any day, use the **Unavailable** side of the slider. *Note*: The number of hours you select defaults to your time off request.
5	**Today**	To navigate to today's date, click this control.
6	**Previous and next controls**	To navigate through views of past, current, and future schedules, click these controls.
7	**Green icons**	Green icons indicate days where time is available in the current time off plan and where your CIC administrator could automatically approve the request. This is based on number of hours allotted for the "coverage group" to which you belong. A coverage group contains similar agents who could cover for one another.
8	**Selected day**	Select a day or range of days in the calendar view before you create a time off request. The date range defaults to **Start** and **End** date in your time off request.
9	**Time off request**	Your time off requests and the status of each request appear on the appropriate day in the month view. To view details of a time off request, click its icon. 

My Time Off List view



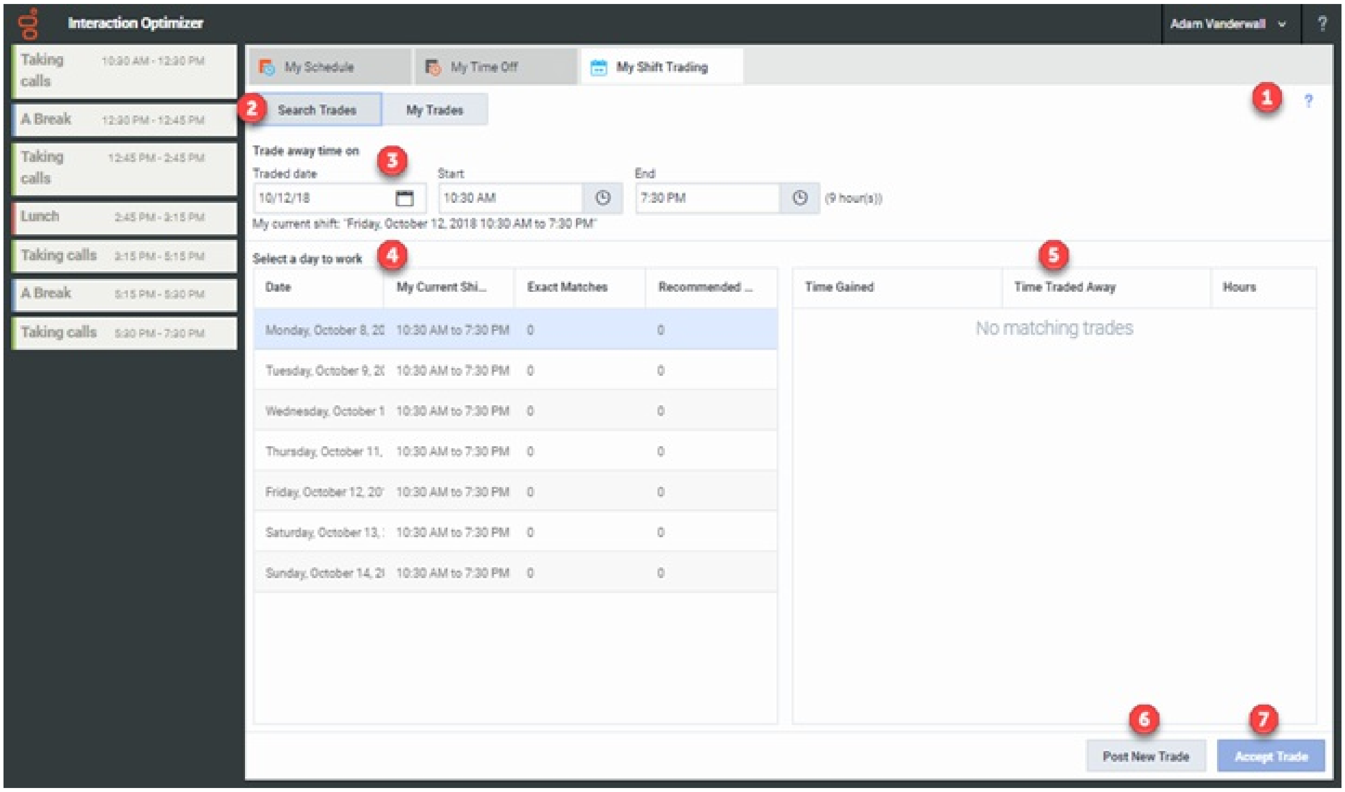
1	**Alternate views**	To display a month view or a list view of your **time off requests**, click one of these controls.
2	**Request Time Off**	To create a time off request, click this control.
3	**Help for current tab**	To display help for the My Time Off tab, click this help icon.
4	**Load control**	To retrieve Time Off Request information from previous schedules, click this control.
5	**Filter by...**	Type selection criteria in this text box to filter the list by any value in any of the columns in the list of time off requests.
6	**Column sort indicator**	Click any column heading to sort the list of time off requests. Click the same column heading to change the sort order.
7	**Edit or Cancel controls**	You can change or cancel a **Pending** time off request by clicking the appropriate control on the line where the time off request appears.
8	**List summary**	The bottom border of the Time Off List view shows the total number of your time off requests and the number appearing in the list view.

Shift Trading tab

Requirements: See Shift Trading.

Search Trades view

Use this view to search for existing trade requests that other agents have posted. If you don't find a match, you can click the **Post New Trade** button to post a trade request that other agents can view.

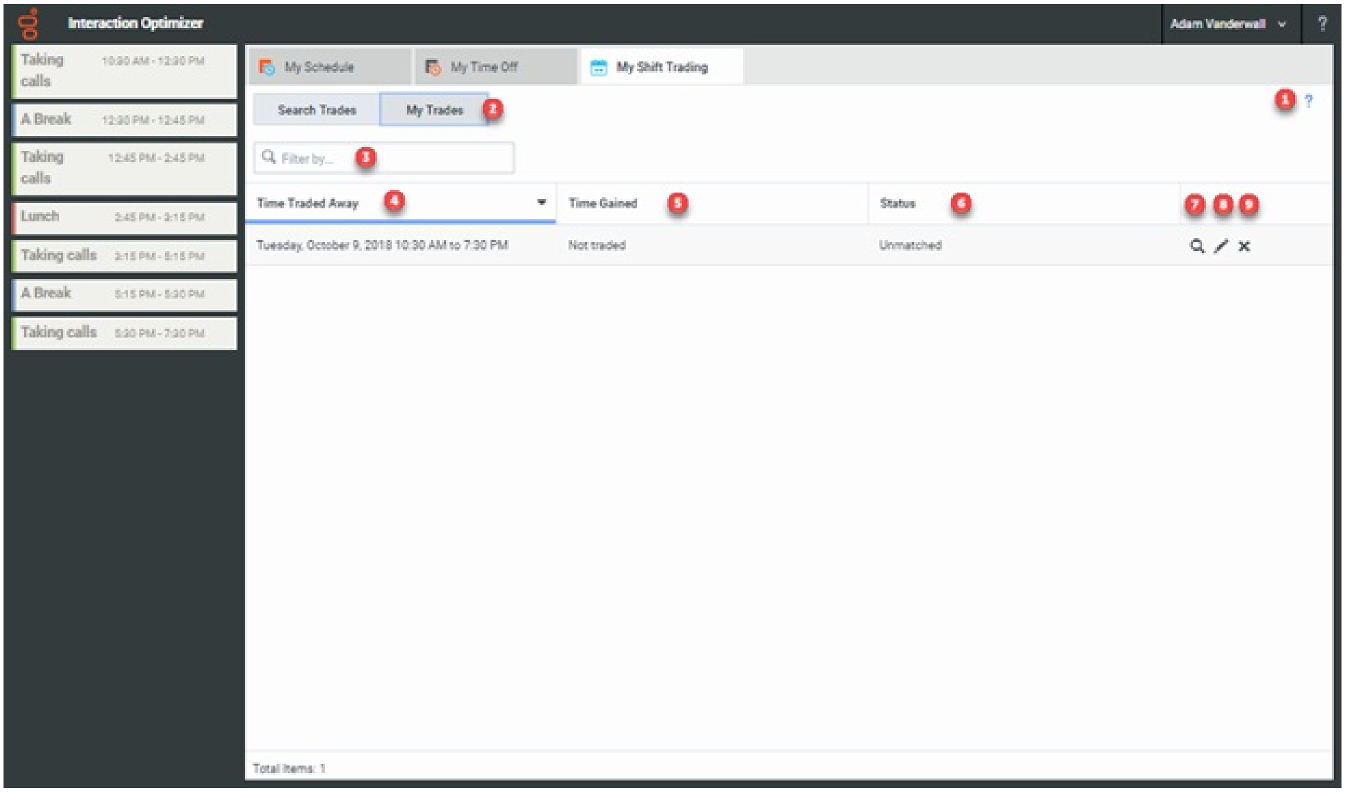


1	**Help for current tab**	Display help for Shift Trading.
2	**Search Trades**	Display the Search Trades view.
3	**Trade away time on**	Specify what shift or part of your shift you want to trade.
4	**Select a day to work**	Select a day when you would work in place of your traded shift.
5	**Possible trades**	Check if any existing unmatched trade requests match your needs.
6	**Post New Trade**	If, after searching for a matching trade, you don't find an acceptable trade, click **Post New Trade** to create a trade request.
7	**Accept Trade**	Select an acceptable matching trade in the Select a day to work section and click **Accept Trade**. The trade is either approved automatically or set to wait for administrator review.

My Trades view

Use this view to manage your shift trade requests. You can edit or cancel any of your unmatched trade requests or your matched trade requests that are still pending approval.

> **Note**: If you cancel a matched trade request, it cancels the **entire** trade. Neither the offering or accepting agent will be able to edit the trade.



Note: If you cancel a matched trade request, it cancels the **entire** trade. Neither the offering or accepting agent will be able to edit the trade.

1	**Help for current tab**	Display help for Shift Trading.
2	**My Trades**	Display the My Trades view.
3	**Filter by**	Set filter criteria. Type all or part of a value in the **Time Traded Away**, **Time Gained**, or **Status** columns to filter the list.
4	**Time Traded Away**	This column lists the time in your schedule that you are trading away.
5	**Time Gained**	This column lists the time you are working in place of the traded away time.
6	**Status**	This column indicates the status of the trade request or match. **Note**: The status values can vary depending on whether the item is a request or a match. Once a trade request is matched, the trade match's status appears.

	Trade Request	**Canceled** The trade request was canceled, either by an unmatched request or by a match that the offering agent canceled. **Denied** The request was denied. No other agent will see it. **Expired** A trade request can be assigned an expired status for any of the following reasons: • The trade request is invalid, and a trade cannot occur within the specified time. • The trade has an expiration time specified by the offering agent. The trade expired within one hour of the set expiration time. • The start time specified by the offering agent occurs in a future time that is less than the number of hours configured by the CIC administrator for how long in the future to allow trades. • None of the possible start times that the offering agent is willing to work is at least the number of hours in the future configured by the CIC administrator. **Unmatched** This is the initial state for a trade request. No agent has yet accepted this trade. If the accepting agent cancels a matched trade, the trade request reverts to the Unmatched status.
	Trade Match	**Approved** The shift trade has been approved and the shifts have already been traded. **Canceled** The agent who accepted the trade cancelled the trade request. **Denied** The CIC administrator denied the request or it was denied automatically. Other agents do not see this request. **Expired** The shift trade request expired for any one of several possible reasons. For example, the request's start time does not occur far enough in the future. **Pending review** The trade request has been matched but still requires CIC administrator approval.
7	**Search**	Search again for a match to this shift trade request.
8	**Edit**	Edit this trade request.
9	**Cancel**	Cancel this trade request. You can cancel any **Unmatched** or **Pending review** request. **Note**: Both the offering and accepting agent will see this **Canceled** trade request in the **My Trades** view.

Time off Request

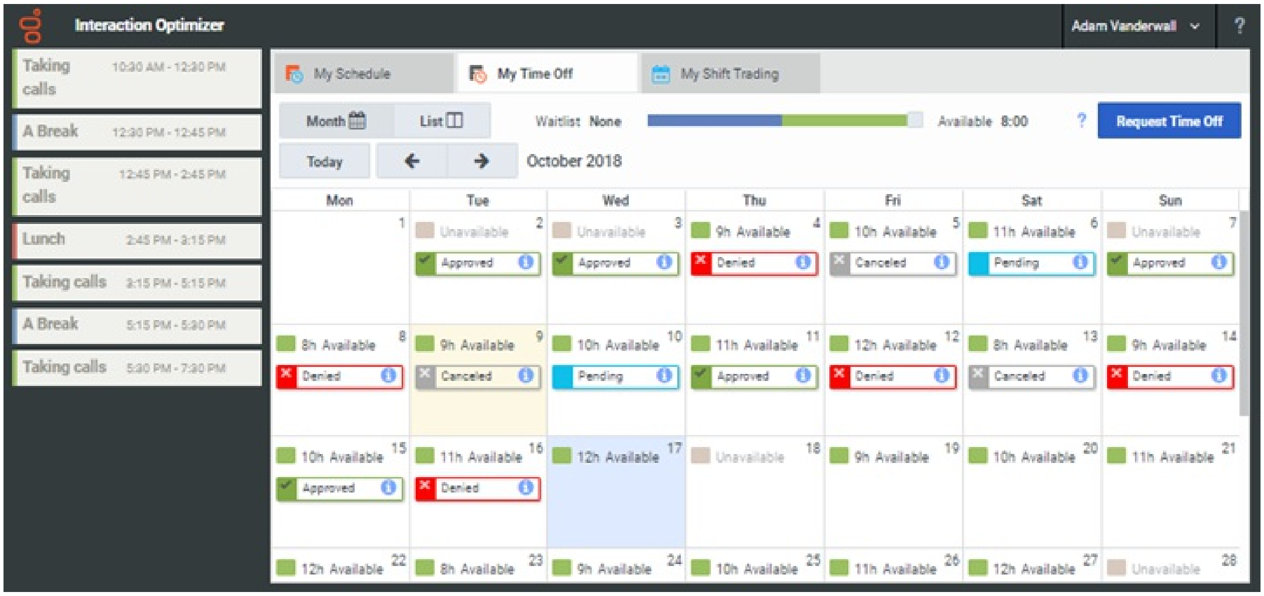
This section explains how to request time off.

- Request Time Off
- Edit a Time Off Request
- Cancel a Time Off Request

Request Time Off

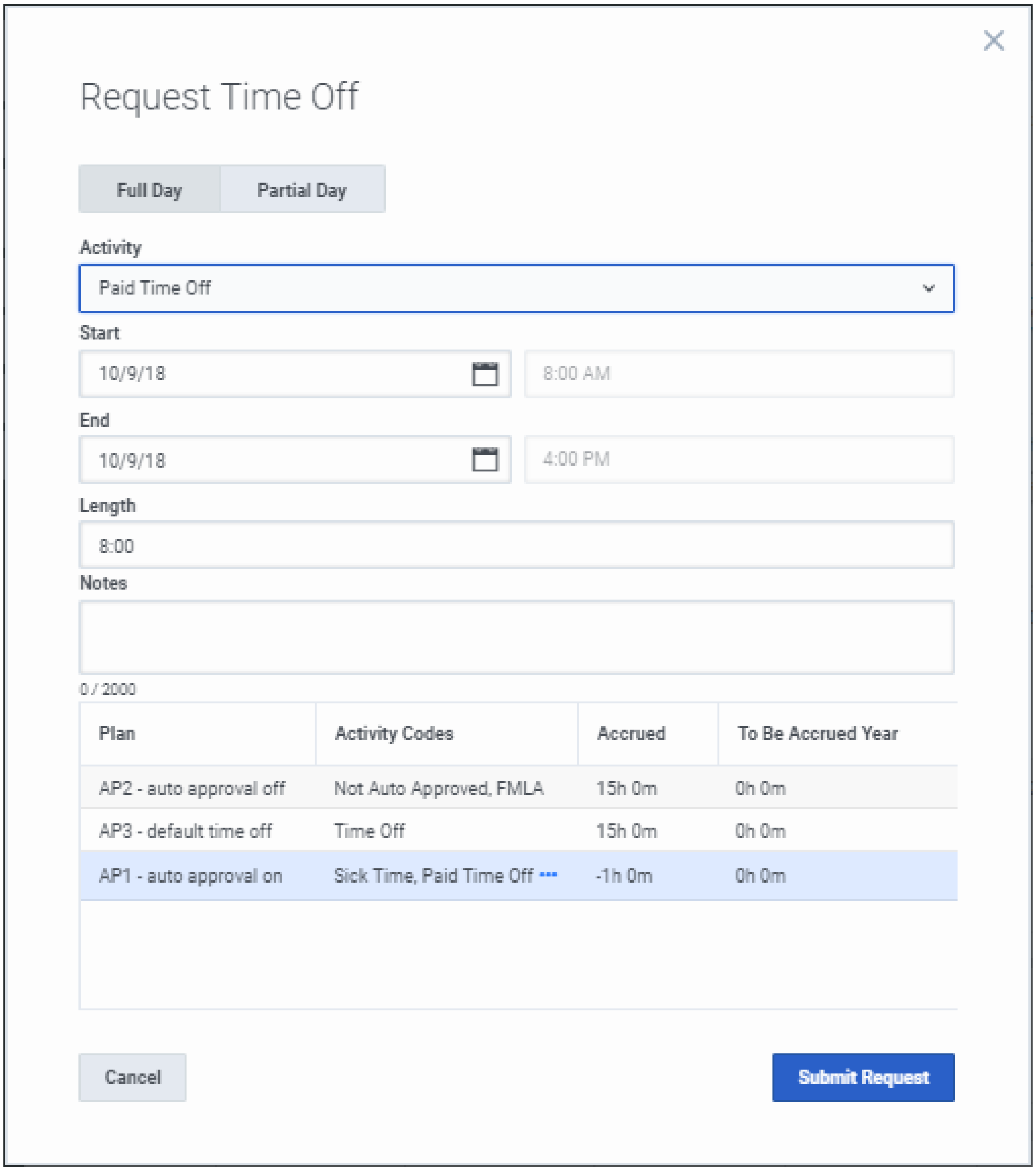
Requirements: To submit a Time Off request, you need the **Agent can submit time off** Security Right.

1. Select the **My Time Off** tab.
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.



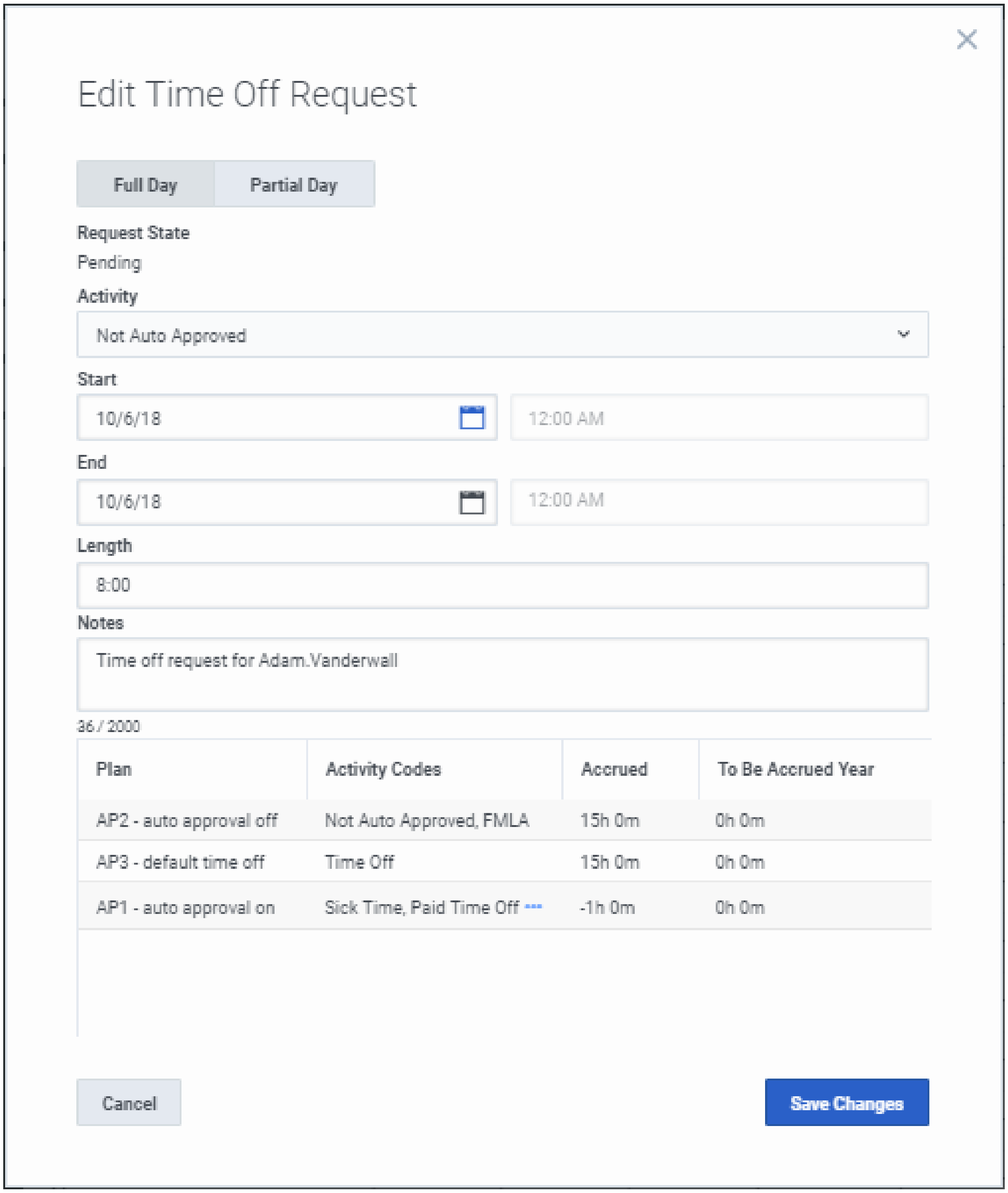
11. Click **Submit Request**.

Edit a Time Off Request

Requirements: To edit a Time Off request, you need the **Agent can submit time off** Security Right.

You can edit any of your **Pending** time off requests.

1. Select the **My Time Off** tab.
2. Select the **List** view.
3. Click the **Edit this time off request** button (pencil) 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.

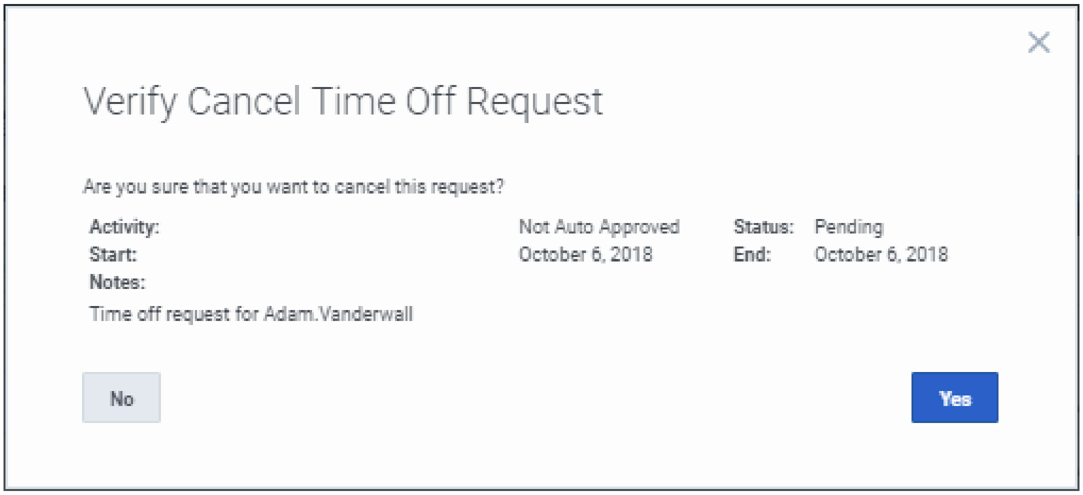
5. Click **Save Changes**.

Cancel a Time Off Request

Requirements: To cancel a Time Off request, you need the **Agent can submit time off** Security Right.

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 **My Time Off** tab.
2. Select the **List** view.
3. Click the **Cancel this time off request** button (X) for a selected **Pending** time off request.
4. In the **Verify Cancel Time Off Request** dialog box, click **Yes**.



Shift Trading

Requirements: In order for you to trade shifts with other agents, your CIC administrator must enable Shift Trading in ICBM. The CIC administrator must also assign you the **Agents can trade shifts** Security Right and the **Shift Trading** Access Control Right in Interaction Administrator.

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
- View Traded Shifts

Request a Shift Trade

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 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**.

Related Topics

View Trades

Manage Trades

You can view and manage your trade requests and traded shifts in the My Trades view.

1. In the 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.

Related Topics

Request a Shift Trade

Change log

Date	Changes
11-August-2015	**2015 R4** Shift Trading You can trade all of part of your scheduled shift with another agent.
08-August-2017	**2017 R4** Removed references to Interaction Client .NET Edition. Updated copyright page.
20-February-2018	**2018 R2** Rebranded terminology. Updated copyright page. Rebranded screen captures.
28-February-2019	Created this change log.