

## About the Operator Console

Operator Console is a specialized version of Interaction Desktop designed specifically for receptionists, company operators, contact center dispatchers, and other personnel who direct many calls. Along with the standard features in Interaction Desktop, Operator Console users have specific functionality tailored to their needs. You can quickly identify whether you are using Operator Console. The words "Operator Console" appear in the window title in Interaction Desktop.

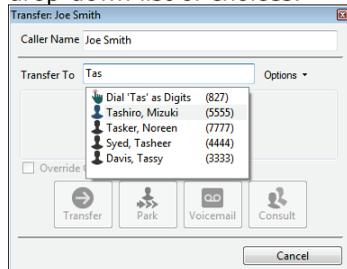
## Operator Console Rapid Transfer

Operator Console users have access to two quick and easy ways to transfer calls. Operator Console users can also employ any of the standard methods for transferring a call.

**Note:** Be sure that the appropriate view has focus. A tab with its name in bold type indicates the view with focus. This is the view that receives keyboard input. When transferring calls, verify that the view containing the call has focus before typing the extension or phone number.

### Transfer a call by typing a name or number

1. Select a call and start typing the extension or phone number to which you want to transfer the call. The **Transfer** dialog box opens with a drop-down list of choices.



2. From the drop-down list, select either **Dial [your entry] as Digits** to convert a text entry into numbers, or select the appropriate name and associated extension number.
3. Optionally, if you select a CIC user as a recipient, you can select or clear the **Override Call Forwarding** check box. If selected, CIC disregards any forwarding phone number set for the CIC user. If cleared, CIC transfers the call to the extension or phone number currently preferred by the CIC user.
4. Click **Transfer**.

### Transfer by selecting a directory entry

Select a call, then select a directory entry and press **Enter**. This action transfers the selected call to the phone number or extension for the selected directory entry.

## Operator Console keyboard shortcuts

Interaction Desktop reserves these shortcut features for Operator Console users:

Shortcut	Example
Press <b>Enter</b> to switch a connected or alerting call between connected and hold states.	You can press <b>Enter</b> to answer a call as it comes into <b>My Interactions</b> . After you have answered, you can press <b>Enter</b> to put the call on hold, and then press <b>Enter</b> again to reconnect.
Press <b>Enter</b> within a directory to transfer a selected call to a selected directory entry.	Continue to select a call, select a directory entry, and press <b>Enter</b> . The call transfers to the default phone number for the selected directory entry.
Press <b>Shift + Enter</b> to dial the default number for the currently selected directory entry.	Select a directory entry or personal contact, then press <b>Shift+Enter</b> to call that person at their default phone number.

## Operator Console Call Transfer shortcut keys

Interaction Desktop reserves Call Transfer Shortcut Keys for Operator Console users with the necessary Security and Access Control rights. However, all users can employ the standard shortcut keys available in Interaction Desktop.

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

Transferring a call after speaking with the intended recipient is a **consult transfer**. Use a consult transfer to speak to the recipient before you transfer the call.

### To use any of the following shortcut keys:

1. Select a connected call (or a call on hold).

2. Select the appropriate directory entry.
3. To transfer the call to one of the alternate configured numbers for the user, press the shortcut key combination. Or press **Enter** to use the rapid transfer feature to forward the call.

**Example:** To transfer a currently selected call to a user's mobile phone after talking to the intended recipient, select the recipient's directory entry, press and hold **Ctrl** and **Shift**, then press **I**.

Transfer to	Without Consulting	After Consulting
Assistant	Ctrl+Alt+N	Ctrl+Shift+N
Business	Ctrl+Alt+B	Ctrl+Shift+B
Business 2	Ctrl+Alt+U	Ctrl+Shift+U
Fax	Ctrl+Alt+F	Ctrl+Shift+F
Home	Ctrl+Alt+H	Ctrl+Shift+H
Home 2	Ctrl+Alt+O	Ctrl+Shift+O
Mobile	Ctrl+Alt+I	Ctrl+Shift+I
Pager	Ctrl+Alt+G	Ctrl+Shift+G

## Operator Console Whisper Mode

Interaction Desktop reserves Whisper Mode for Operator Console users. If they have the appropriate rights, other users can employ the supervisory Coach feature.

To add yourself to an agent's interaction on any queue you have permission to monitor, use Whisper mode. Whisper mode enables you to talk to the agent without the customer knowing. The agent can hear your side of the conversation, but the customer cannot.

**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.

### To coach an agent on an interaction:

1. Make sure that you have permission to monitor a specific queue.
2. Select the interaction you want to join and click the **Whisper** button or press **Ctrl+W**.

**Result:** The **Listen** button activates. If the agent has the appropriate rights, an icon appears in the agent's **Lstns** column in **My Interactions**.

**Note:** You now connect to the agent's interaction, enabling you to convey information to the agent without the other party knowing. The agent can hear your side of the interaction, but the other party cannot.

**Tip:** To disconnect the session, click the Listen button.

## Advanced user tips and shortcuts

Interaction Desktop contains shortcuts for frequently performed tasks.

**Note:** These shortcuts work only if you select an interaction or view before you use a shortcut. A view must have focus before you use the shortcut keys. A tab with its name in bold type indicates the view with focus.

For shortcuts to work properly, hold down the **Ctrl** or **Alt** key while pressing and releasing the second and then, if needed, the third key.

### Interaction functions

Shortcut	Function	Shortcut	Function
Ctrl+B	Callback	Ctrl+D	Disconnect
Ctrl+P	Pickup	Ctrl+J	Join
Ctrl+H	Hold	Ctrl+L	Listen In
Ctrl+U	Mute	Ctrl+R	Record
Ctrl+T	Transfer	Ctrl+E	Pause
Ctrl+K	Park Orbit	Ctrl+I	Private
Ctrl+M	Voicemail	Ctrl+N	Assistance
Ctrl+Shift +P		Properties	
Ctrl+Shift +R		Remove from Queue	

### Menu shortcuts

Shortcut	Function
Alt+F+O	Log off
Alt+F+S	Change Station
Alt+F+C	Close (hide) the Interaction Desktop
Alt+F+X	Exit
Ctrl+Shift+N	Create a new View
Alt+R+C	Create a new Workspace
Alt+O+C	Configuration

### More keyboard tips

The **Winkey** is the Windows logo key typically located between the **Ctrl** and **Alt** keys.

- To place Interaction Desktop on top of any other running Windows applications, in Windows 8, press **WinKey+N**. In previous Windows versions, press **WinKey+C**. If an interaction is in your queue, the focus is on **My Interactions**.
- To expand Interaction Desktop to full-screen mode, press **Winkey+up arrow**. To restore it to its previous size, press **Winkey+down arrow**.

## Interaction Desktop basics

The following sections describe features that are available to all Interaction Desktop users. They are particular interest to users new to Interaction Desktop who direct and manage large numbers of interactions.

## Create workspaces and add views

You can create custom workspaces to contain different views. These views can relate to one specific task such as managing calls or emails. If you no longer need a custom workspace, you can delete it.

### Create a custom workspace

1. Do one of the following.
  - Click the down arrow to the right of the **New** button and select **Workspace**.
  - Select Workspaces > Create Workspace.
2. In the **Create New Workspace** dialog, type a **Name** and **Description**, and then select an Icon for the workspace.
3. Click **OK**.

### Add views

You can add views like **My Interactions** or the **Company Directory** to custom workspaces. You can add the same view to multiple workspaces.

1. Open the workspace to which you want to add a new view and do one of the following:
  - Click **File > New > View**.
  - Click the down arrow to the right of the **New** button and select **View**.
  - Press the shortcut keys **Ctrl+Shift+N**.
2. In the **Create New View** dialog box, locate and select the view you want to add to the workspace and click **OK**.

## Manage status

### Set your status

Do one of the following:

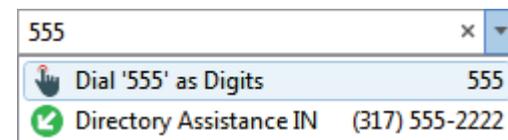
- Select a status from the **My Status** drop-down list.
- In the notification area of your taskbar (at the lower right side of your main window), right-click your status icon.
- Click a Fast Status button.



## Manage phone calls

### Make a new call

Type a number in the **Enter a Name or number to dial** drop-down list and press **Enter** or select a number from the list.



### Dial a recently dialed number

Do one of the following:

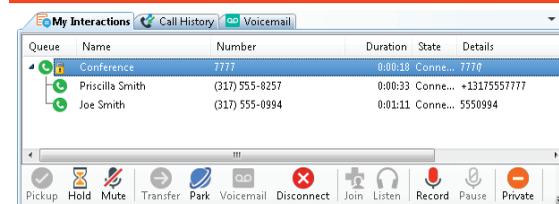
- Click the arrow at the end of the **Enter a Name or number to dial** drop-down list. Then click any number in this list of recently dialed numbers.
- In the **Call History** view, double-click a selected number. Or right-click a number and then click **Dial**.

### Dial a number inside the organization

In the Company Directory, do one of the following:

- Double-click a name in the directory list.
- Click any phone number [link](#) and then click **Yes** at the Dial prompt.
- Right-click a name and click one of the displayed "Dial..." entries.

## Conference calls



### Create a conference call

1. Dial the number of a participant in the conference call, and then click the Hold button to put the call on hold.
2. Repeat step 1 for each participant.
3. 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. You see a new Conference interaction.

## Conference call tips

- To **add parties** to a conference call, drag a connected call and drop it on the Conference interaction.
- To **join** a conference call, select the call or conference call you want to join and click the Join button.
- To **disconnect** someone from a conference call, from the list of joined calls in the conference, choose a participant and click the **Disconnect** button or right-click and choose **Disconnect**.

## More about Interaction Desktop

### Help

- To learn about views and workspaces, click **Help > Getting Started**.
- To learn more about managing interactions, click **Help > Interaction Client**.

### Online tutorial

Check with your CIC administrator about the availability of an online tutorial that shows you how to use Interaction Desktop.

## My Contact Information

Corporate phone number: \_\_\_\_\_

My direct number: \_\_\_\_\_

My extension: \_\_\_\_\_

My password: \_\_\_\_\_

My email address: \_\_\_\_\_

Other: \_\_\_\_\_

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# Interaction Desktop™ Operator Console

## Quick Reference Card

