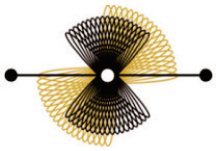

INTERACTIVE INTELLIGENCE®

Deliberately Innovative

IC Business Manager

Printable help

Interactive Intelligence Customer Interaction Center® (CIC)

2015 R2

Last updated January 15, 2015
(See Change Log for summary of changes.)

Abstract

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IC Business Manager

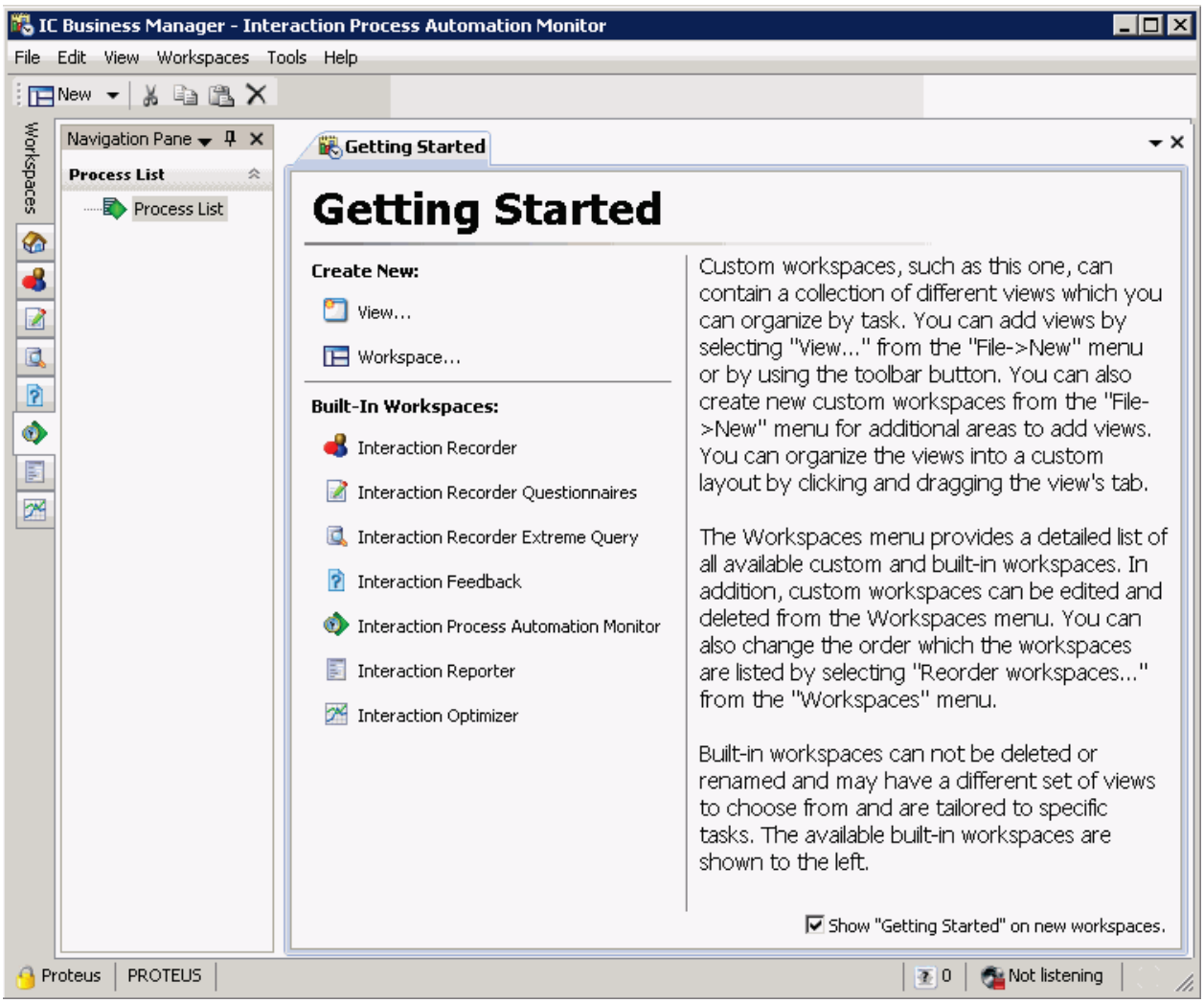
Introduction to IC Business Manager

Welcome to the Getting Started help for IC Business Manager. IC Business Manager provides a user interface for easy access to the features of application program modules. For help with a specific area within a Workspace, click anywhere in the Workspace and press **F1**. For help with a specific module, select the appropriate module application below:

- Interaction Feedback help
- Interaction Optimizer Administration help
- Interaction Process Automation Monitor help
- Interaction Process Automation Reporting help
- Interaction Recorder Client help
- Interaction Recorder Extreme Query help
- Interaction Report Assistant help
- Interaction Reporter help
- Interaction Supervisor help
- Interaction Tracker help

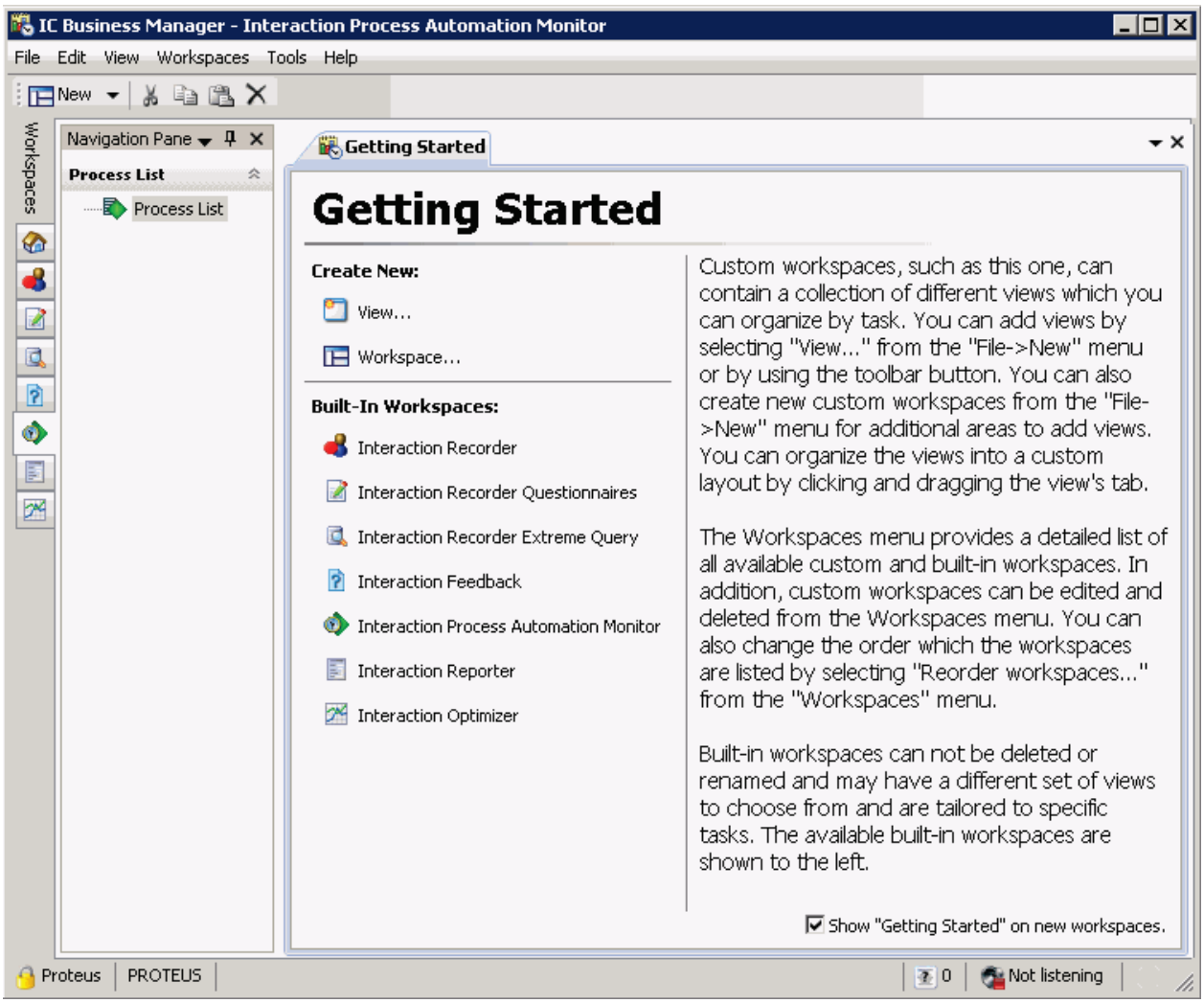
About the IC Business Manager user interface

IC Business Manager's interface includes navigation panes, menus, toolbars, and a Workspace. To learn more about IC Business Manager features, pause the mouse pointer over an area on the graphic below, and click to display more information.



About the IC Business Manager user interface

IC Business Manager provides a user interface for easy access to the features of application program modules. The interface includes navigation panes, menus, toolbars, Workspace tabs, and a Workspace. To learn more about IC Business Manager features, pause the mouse pointer over an area on the graphic below, and click to display more information.



Feedback, support, and additional information

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

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

Interactive Intelligence home page

To visit the Interactive Intelligence home page, do one of the following:

- Go to http://www.inin.com.
- From the **Help** menu, select **Interactive Intelligence**, then click **Home**.

Interactive Intelligence Product Information site

To access the Interactive Intelligence Product Information site, do one of the following:

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

- Go to https://my.inin.com/products/cic/Pages/default.aspx.
- From the **Help** menu, select **Interactive Intelligence** and then click **Support.**
- From the **Help** menu, select **About IC Business Server Manager**, then in the **About - IC Business Manager** dialog**,** click the **Support** link.

Interactive Intelligence cCommunity

Interactive Community is a free and public service provided by Interactive Intelligence to promote an online community devoted to the sharing of ideas and information regarding Interactive Intelligence software. To visit the Interactive Intelligence Interactive Community, do one of the following:

- Go to http://community.inin.com.
- From the **Help** menu, select **Interactive Intelligence** and then click **Community**.
- From the **Help** menu, select **About**, then in the **About - IC Business Manager** dialog, click the **Community** link.

Interactive Intelligence Feedback

To submit product feedback and report bugs, request enhancements, or submit other product-related information to Interactive Intelligence, do one of the following:

- Go to http://feedback.inin.com.
- From the **Help** menu, select **Interactive Intelligence** and then click **Feedback**.
- From the **Help** menu, select About,then in the **About - IC Business Manager** dialog, click the **Feedback** link.

To submit documentation feedback, do one of the following:

- If you have a comment or question about a specific help topic, click the **Send Feedback** link at the top right of that topic. An email window opens. The "To" address is set to documentation@inin.com. The "Subject" line is includes information that helps us identify the help topic where you clicked the link. Enter your comments or questions in the body of the email message and then send us the message.
- Send an email message to **documentation@inin.com**.

What's new in IC Business Manager

The following changes and enhancements were introduced in this Interaction Business Manager release:

CIC 2015 R2

Updated documentation to reflect the removal of IC Historical Reporting, and updated CIC 2015 R2 copyright and trademark information.

CIC 2015 R1

Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.

IC 4.0 SU5

Updated Log in and Log off topics to reflect the Log on button. Added information about the status bar, and how to log on from the status bar when you disconnect.

Updated link to Interaction Tracker help.

IC 4.0 SU4

No updates for IC 4.0 SU4.

IC 4.0 SU3

A Help topic was added for the About dialog, and for Feedback, Support, and Additional information. Also, screen captures were updated to reflect the more modern user interface technology currently in place.

IC 4.0 SU2

Floating views can be positioned anywhere on the screen and are not constrained to the Interaction Center Business Manager window. You can click and drag any tab off of the application so that it becomes its own separate window and remains on top of the main window. If you close or minimize Interaction Center Business Manager, the floating window will also close or minimize.

IC 4.0 SU1

No new changes or enhancements were introduced in this release.

Starting and Exiting

Start and exit

This section provides information on how to log on, log out, and exit IC Business Manager. It also contains information on changing your password.

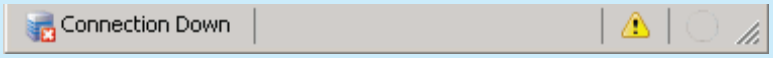
See the following topics for starting and exiting IC Business Manager:

- Log on
- Log out
- Exit
- Change your password

Log on

Use the log on dialog to provide credentials to the IC Server Host and to specify your logon information.

Note: If you disconnect from IC Business Manager, click the Connection Down message on the status bar to open the log on dialog box.



Log on to IC Business Manager:

1. Do one of the following:
   - Double-click the **IC Business Manager** icon on the Windows desktop or taskbar.

- From the **Start** menu, select **Interactive Intelligence** and then select **IC Business Manager**.

Result: The IC Business Manager log on dialog opens.

2. Make any necessary adjustments. See the **Log on settings** below.
3. Click the **Log On** button.

Log on settings

This section describes the settings available on the IC Business Manager log on dialog.

Use Windows Authentication

Select this check box to use your Windows Login credentials for authentication.

User

Type the user name to log on to the IC Server. If you selected the **Use Windows Authentication** check box, this field is unavailable.

Password

Type the password to log on to the IC Server. If you selected the **Use Windows Authentication** check box, this field is unavailable.

Save Password

Select this check box to avoid entering your password each time you log on. If you share this computer with others, do not select the **Save Password** check box.

Server

Type the name of the IC Server Host.

Log off

To log out of IC Business Manager and keep the application open, open the **File** menu and click **Log off.**

Note: To log out and close the application, click the **X** in the upper-right corner of IC Business Manager.

Exit

To exit IC Business Manager, do one of the following:

- Open the **File** menu and choose **Exit**.

- Press the shortcut keys **Alt+F4**.
- Click the **X** in the upper-right corner of IC Business Manager.

Change your password

When you start IC Business Manager, if your IC Business Manager password has expired, the **Change Password** dialog appears and you must change your password immediately in order to login and continue loading IC Business Manager. Failure to change your password after an "Expired Password" warning causes IC Business Manager to exit.

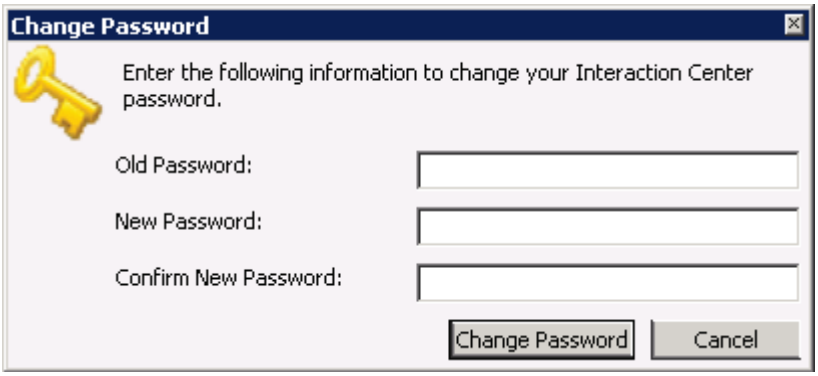
Your CIC administrator creates Password Policies in Interaction Administrator. The password policy assigned to you controls how often you must change your CIC password. It also determines minimum password length, how many unique characters are required, whether sequential digits are allowed, how often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

Based on the password policy that your CIC administrator has created for you, if your password is going to expire soon (within 2 days, today, etc.) a prompt appears periodically, asking if you want to change your password at this time. If you select **Yes**, the **Change Password** dialog appears.

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

Change your password at any time

1. Open the **File** menu and select **Change Password**. The **Change Password** dialog appears.



2. In the **Old Password** field, type your current IC Business Manager password.
3. In the **New Password** field, type your new IC Business Manager password.
4. In the **Confirm New Password** field, type your new IC Business Manager password again.
5. Click the **Change Password** button.

Using the Navigation Pane

Using the Navigation Pane

The IC Business Manager Navigation Pane provides easy access to the active module's features. The Navigation Pane provides centralized navigation to module components, which display their views in the Workspace. By default, the Navigation Pane is displayed on the left side of the window, and it can be hidden or closed for a larger view of the Workspace.

For more information about using the Navigation Pane, see the following topics:

- About the Navigation Pane
- Hide the Navigation Pane
- Move the Navigation Pane

About the navigation pane

The **navigation pane** helps you navigate within module components, which display their views in the Workspace. By default, the **navigation pane** appears on the left side of the window. You can hide or close it for a larger view of the Workspace. You can also minimize the **navigation pane** to increase the area of the Workspace.

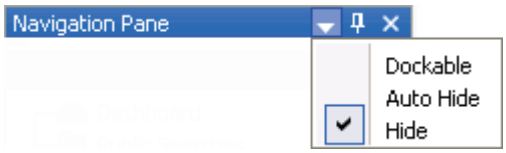
Hide the navigation pane

To increase the area of the Workspace in the window, you can hide the Navigation Pane. There are several ways to minimize and expand the Navigation Pane. Choose the one that best fits your working style. You can also move the Navigation Pane to a new location in the workspace. For more information, see Move the Navigation Pane.

Hide the navigation pane

To hide the **navigation pane** so that it is turned off and completely hidden, do one of the following:

- Open the **View** menu, select **Navigation pane,** and click **Off**.
- Click the Navigation Pane drop down menu and select **Hide**.



- In the Navigation Pane title bar click the **X** in the upper right corner.

Note: To display the Navigation pane again, from the **View** menu click **Reset Pane Layout**.

Auto Hide the Navigation Pane

To automatically hide the Navigation Pane, from the **View** menu select **Navigation Pane** and select **Auto**.

Note: Use this option to turn off the Navigation Pane if it is empty, or to keep it open if it contains navigational information for the workspace.

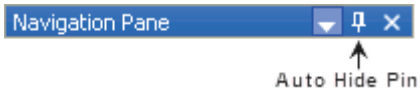
Minimize the Navigation Pane

When you minimize the Navigation Pane, the slim profile of the minimized pane is pinned along the left side of the window, providing quick access to the Navigation Pane. To minimize the Navigation pane, do one of the following:

- Open the **View** menu, select **Navigation pane,** and choose **Minimized.**

Note: To temporarily display the Navigation Pane, pause the mouse pointer over the minimized Navigation Pane tab. The Navigation Pane expands, and it is automatically minimized when you move your mouse pointer away from the pane.

- Click the Navigation Pane drop down menu and select **Auto Hide**.
- In the **Navigation Pane** title bar, click the **Auto Hide** pin.



Note: To expand the Navigation Pane back to its original state on the left side of the window, pause the mouse over the minimized Navigation Pane tab to expand it, and then click the Auto Hide pin.

Dock the Navigation Pane

To dock the Navigation Pane and return it to the original state, open the **View** menu, select **Navigation pane,** and click **Normal**.

Move the navigation pane

You can drag and drop the navigation pane to a new location in the Workspace.

Dock (Move) the navigation pane to another location in the workspace

1. Click and hold the **navigation pane** title bar. The docking icons appear.
2. Without letting go of the mouse button, move the mouse over the icon that represents where you want to move the Navigation Pane.

Note: IC Business Manager highlights the area to which the Navigation Pane will move. Only the outer docking icons are available.

3. Release the mouse button to drop the Navigation Pane into its new location. The Navigation Pane automatically moves to the chosen area.

Note: You can Hide the Navigation Pane in its Floating position by right-clicking in the Navigation Pane title bar and selecting **Hide**. To display the floating Navigation Pane again, open the **View** menu, select **Navigation Pane,** and click **Normal**.

Return the navigation pane to the original location

To return the **navigation pane** to its original state on the left side of the window, open the **View** menu and click **Reset Pane Layout**.

Understanding the Workspace

Understanding the Workspace

A Workspace contains the module view selected in the Navigation Pane and is displayed in the IC Business Manager.

IC Business Manager is installed with built-in Workspaces that cannot be deleted or renamed, may have a different set of views from which to choose, and are tailored to specific tasks. You can also create custom Workspaces, which can contain a collection of different views selected from the active modules and configured to suit your needs. In addition, IC Business Manager contains a **Default Custom Workspace** that you cannot rename, but you can add, modify, or remove custom views within it.

The **Workspace Tabs** located to the left of the Navigation Pane allow you to switch between available modules.

- The Workspace can be displayed in full-screen mode, so that toolbars, menus, and window borders do not appear.
- Tabbed views can be displayed in slide show mode, which cycles between views every 5 seconds.

For more information about using Workspaces, see the following topics:

- About Built-In Workspaces
- About Custom Workspaces
- Add or Remove a Custom Workspace
- Display the Workspace in Full Screen View
- Set Up a Slide Show
- Change the Workspace Order

About built-in workspaces

A workspace displays the module views that are selected in the Navigation Pane. IC Business Manager is installed with built-in Workspaces that cannot be deleted or renamed, may have a different set of views from which to choose, and are tailored to specific tasks. In some modules, you can add views and organize them into a custom layout by clicking and dragging a view's tab.

The Workspaces menu provides a detailed list of all available built-in and custom Workspaces. You can change the order in which the Workspaces are listed by selecting **Reorder Workspaces** from the **Workspaces** menu.

For information on adding views to a workspace, see Add a new view to the workspace. To add a custom workspace, see Add or remove a custom workspace.

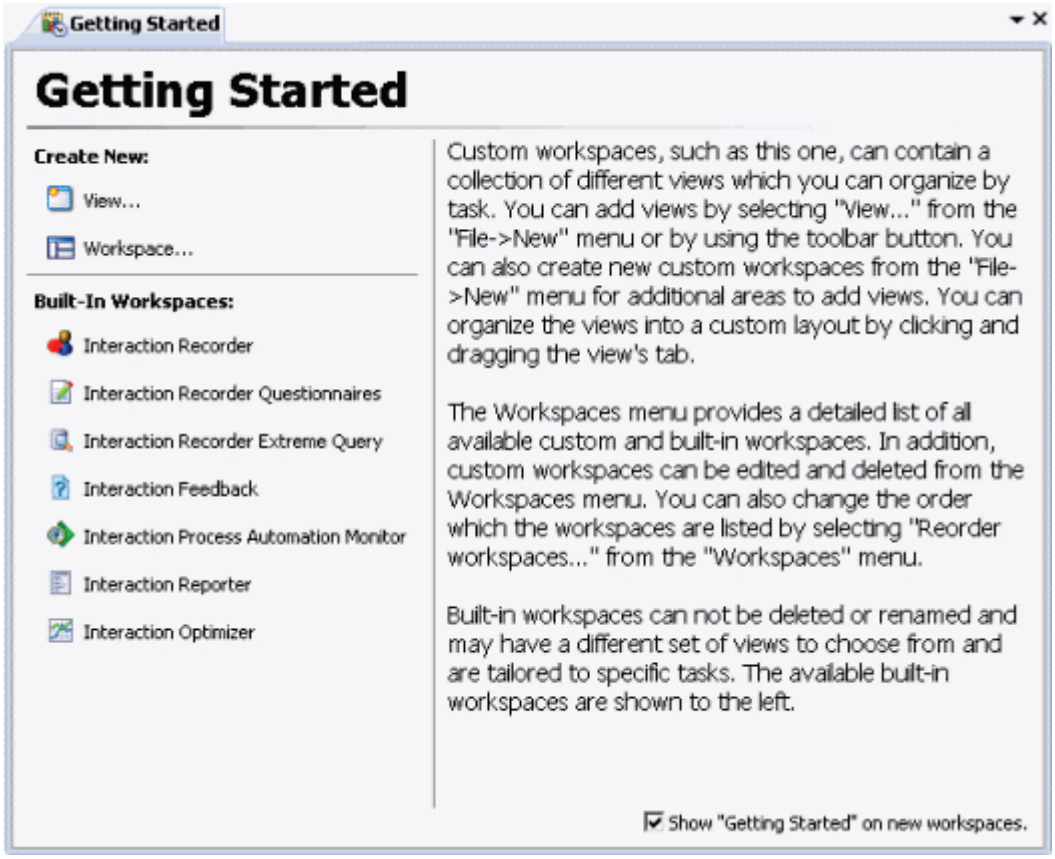
About custom workspaces

A Workspace displays the module views you select in the **navigation pane**. **Custom workspaces** contain a collection of different views, which you select from the active modules and configure to suit your needs. You can add views to a custom Workspace, and you can organize the views into a custom layout by clicking and dragging a view's tab.

The **Workspaces** menu provides a detailed list of all available custom and built-in Workspaces. Custom Workspaces can be edited and deleted from the Workspaces menu. You can also change the order in which the Workspaces are listed by selecting **Reorder Workspaces** from the **Workspaces** menu.

Getting Started view

Each custom Workspace opens with a **Getting Started** view that contains information about setting up a custom Workspace, as well as links to built-in Workspaces and options for creating a new Workspace or View. To remove the **Getting Started** view from your Workspace, right-click the **Getting Started** tab and select **Close View** from the menu that appears.



Note: To permanently remove the **Getting Started** view from future custom Workspaces you create, clear the **Show "Getting Started" on new workspaces** check box. If you clear this check box, IC Business Manager creates custom Workspaces without views. For information on creating views, see Add a New View to the Workspace.

The IC Business Manager default custom workspace

IC Business Manager contains a **default custom workspace**. You cannot rename the default workspace, but you can add, modify, or remove custom views within it.

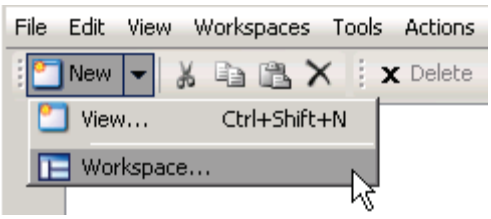
Add or remove a custom workspace

You can add a custom Workspace to collect different views, which you can sort by task. You can also delete the custom Workspace if you no longer need or use it.

Note: Built-in Workspaces cannot be deleted.

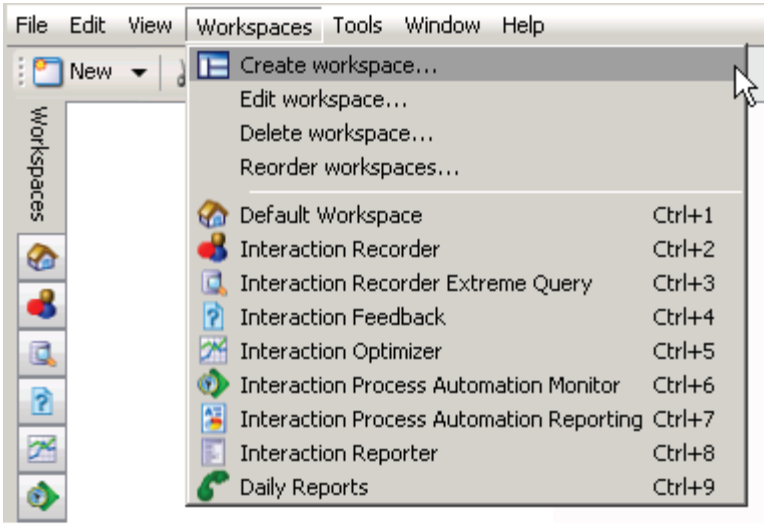
Add a new workspace:

1. Do one of the following.
   - Click the down arrow to the right of the **New** button and select **Workspace** from the menu that appears.

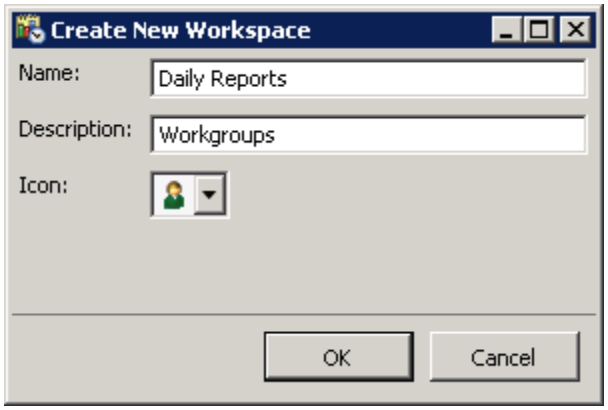


OR

- From the **Workspaces** menu, click **Create Workspace**.



2. In the **Create New Workspace** dialog, in the **Name** field type the title of the Workspace.



3. In the **Description** field, type a short, descriptive summary of the Workspace.
4. From the **Icon** drop down list, select an icon to associate with the Workspace.
5. Click the **OK** button.

Result: A custom Workspace appears with the **Getting Started** view. To remove this view, right-click the **Getting Started** tab and select **Close View** from the menu that appears.

Note: To permanently remove the Getting Started view from future custom Workspaces you create, clear the **Show "Getting Started" on new workspaces** check box. If you clear this check box, IC Business Manager creates custom Workspaces without views. For information on creating views, see Add a New View to the Workspace.

To remove a custom Workspace:

1. Open the custom Workspace you want to delete.
2. From the **Workspaces** menu, click **Delete Workspace**.
3. Click the **Yes** button.

Display the workspace in full screen view

In full screen view, the workspace is maximized to fill the entire screen. Toolbars, menus, and other non-essential controls are hidden. This feature is helpful in environments that require overhead displays and general monitoring.

Display the workspace in full screen view

1. Do one of the following:
   - From the **View** menu, click **Full Screen**.
   - Press the **F11** shortcut key.

   Result: The Workspace is expanded to a full-screen view.
2. To hide the Navigation Pane, open the **View** menu, select **Navigation Pane**, and click **Off**.

Restore the view to its original size

1. Do one of the following:
   - Pause the mouse pointer at the top of the screen to display the menu bar. The **Full Screen** button is displayed on the menu bar and highlighted. Click **Full Screen** to restore the Workspace view to its original size.
   - Press the **F11** shortcut key.

   Result: The Workspace is restored to its original size.
2. To display the Navigation pane on the left, from the **View** menu select **Navigation Pane** and click **Normal**.

Set up a slide show

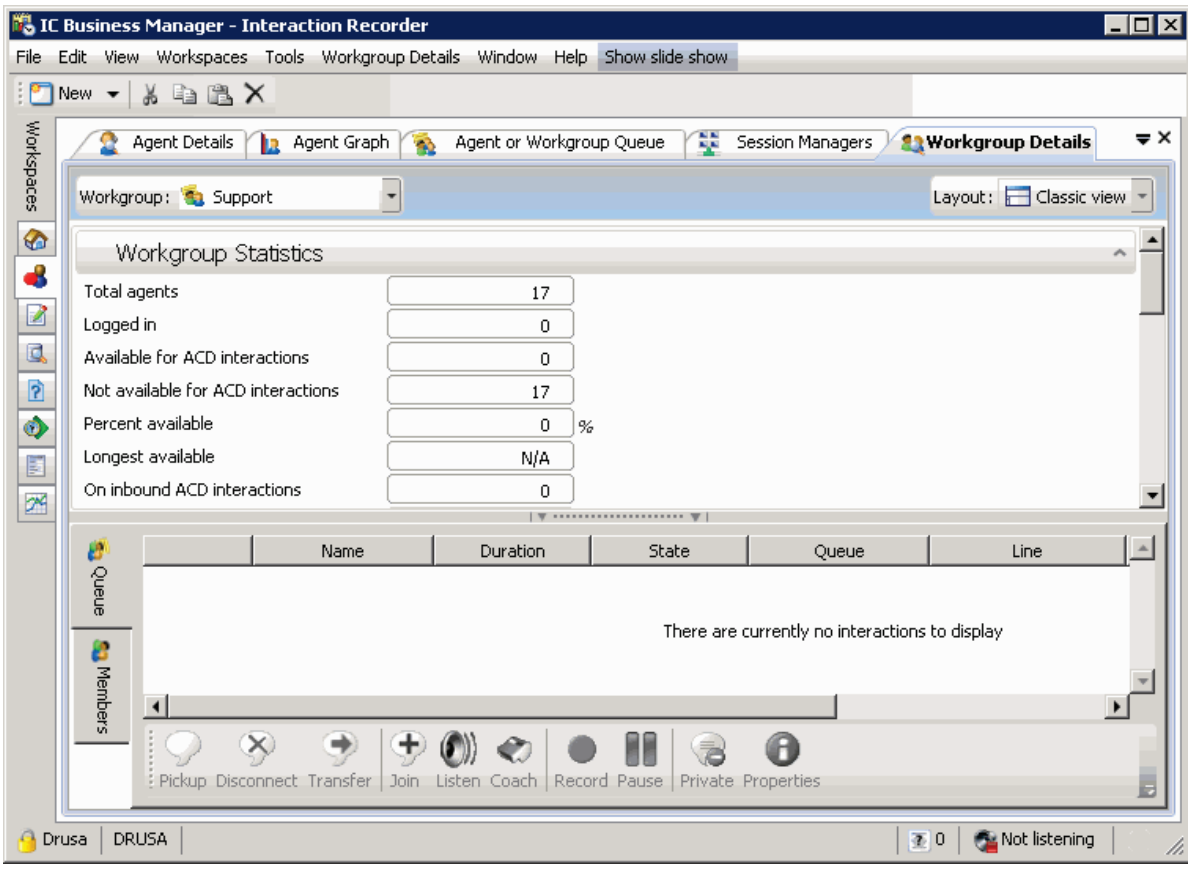
In slide show mode, the workspace can be configured to continuously cycle through open tabbed views at 5 second intervals. This mode makes it easy to monitor multiple views using an overhead monitor or kiosk. Before setting up a slide show, dock the views so they are in a tabbed arrangement. For information on docking the views, see Arrange Views in a Workspace.

Start an IC Business Manager slide show

1. Open the workspace that contains the views you want to rotate.
2. From the **View** menu, select **Show slide show**.

   Result: The **Show Slide Show** button is displayed on the menu bar and highlighted.

> **Note**: To restore the Workspace to its original view, click the **Show Slide Show** button.



About the workspace tabs

The workspace tabs, located to the left of the navigation pane, provide centralized navigation to module components, which display their views in the workspace. You can add or remove custom workspaces, and you can change the display order of the buttons.

Note: Built-in Workspaces cannot be deleted or renamed.

For more information about the workspace tabs, see:

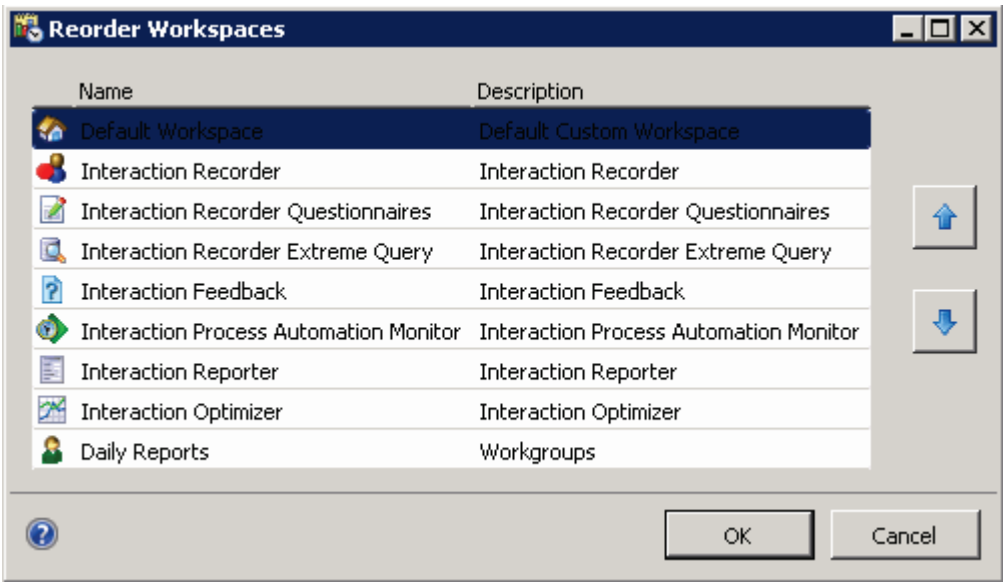
- Add or remove a custom workspace
- Change the workspace order

Change the workspace order

You can change the order in which tabbed workspaces appear in the workspaces tab area of the IC Business Manager interface.

Change the workspace order

1. Open the **Workspaces** menu and select **Reorder workspaces**. The **Reorder Workspaces** dialog opens.



2. Highlight the name of a Workspace and click the up and down arrow buttons, as needed, to move the Workspace to a new location in the list.
3. Click the **OK** button.

Working with Views

Working with Views

A view is a window that displays data. You can add views to built-in or custom Workspaces. Views for built-in Workspaces are limited to the selections available for a particular module. Views for custom Workspaces allow you to add views according to your needs, and you can add views from different modules to a custom Workspace.

You can also remove or rename any view not required in a Built-In Workspace, and you can remove or rename any view from a Custom Workspace. You can close a single view, or you can close all views in the Workspace. The ability to remove or rename a view may vary depending on the module in the Workspace.

Note: When you close a view in a built-in or custom workspace, IC Business Manager does not save configuration you set up, if applicable. You can choose to display the view again at a future date, but you must reconfigure any custom modifications. Use caution when removing views from a workspace.

For more information on adding, renaming, or removing Views, see the following topics:

- Add a New View to the Workspace
- Rename a View
- Remove a View

In addition, you can arrange views within a workspace. See the following topics:

- Understanding the Docking Architecture
- Arrange Views in a Workspace
- Create Horizontal, Vertical, or Tabbed Group Views
- Resize a View

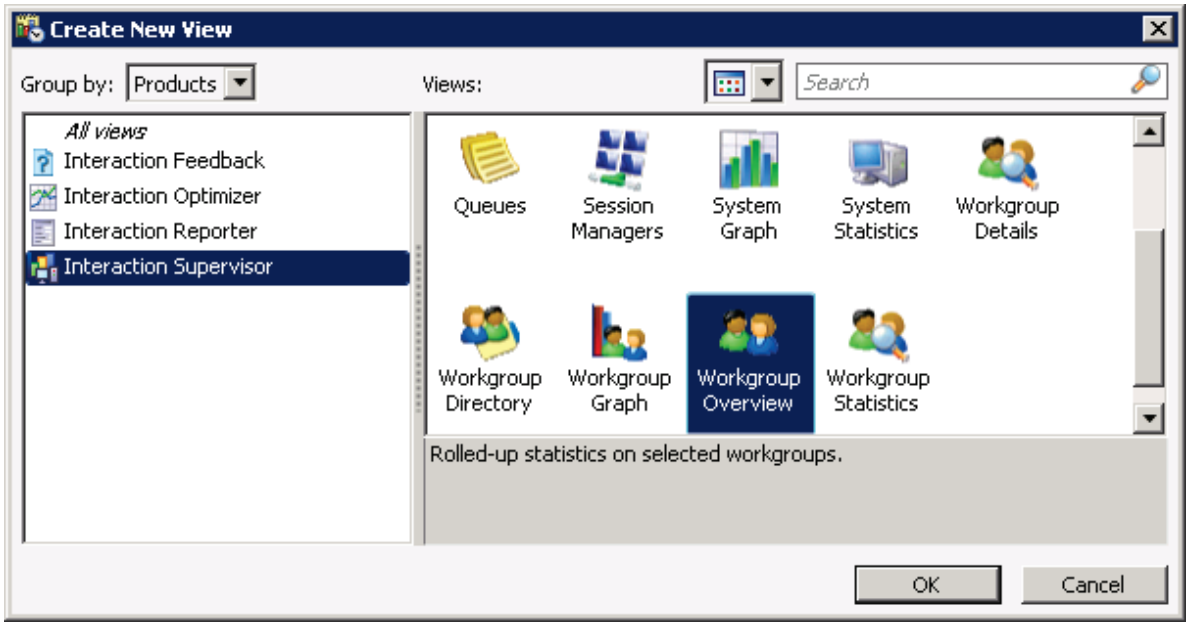
Add a new view to the workspace

You can add views to built-in or custom workspaces. Views for built-in workspaces are limited to the selections available for a particular module. Views for custom workspaces allow you to add views according to your needs, and you can add views from different modules to a custom workspace.

Add a view

1. Open the workspace for which you want to add a new view and do one of the following:
   - From the **File** menu, select **New** and click **View**.
   - Click the **New** button on the toolbar.
   - Press the shortcut keys **Ctrl+Shift+N**.

   Result: The **Create New View** window opens.



2. To group the available views according to the active modules in IC Business Manager, click the **Group by** drop down list and select **Products**.

   Or...

   To display available views by category (e.g. Agents and Workgroups, Historical Reports, System Status), click the **Group by** drop down list and select **Categories**.

3. To display the list of available views by icon, click the **Views** drop down list and choose **Icon View** ( ).

Note: IC Business Manager returns a brief description of the selected view in the grey area below the icons.

Or...

To display a list of views by detail, click the **Views** drop down list and choose **List View** ( ).

Note: The name of the view, the module to which it belongs, and a brief description of the view appear with the view's icon.

4. Double-click the view you want to add to the workspace.

   Or...

   Select the view you want to add to the workspace and click the **OK** button.

Note: Depending on the module's view you select, IC Business Manager may prompt you through configuration options before the new view is added to the workspace. For more information, refer to help topics for the appropriate module.

Rename a view

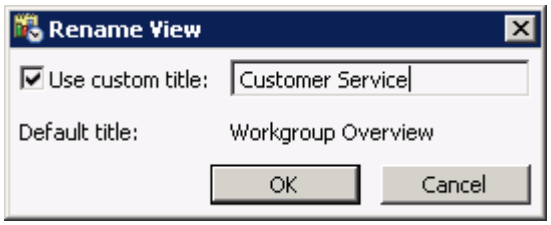
After you add a view to the workspace, you can change the name of the custom view to distinguish it from other views.

Rename a view

1. Do one of the following:

   - Right-click the tab that contains the view you want to rename and select **Rename** from the menu that appears.
   - Open the **Window** menu and choose **Rename**.

   Result: The **Rename View** window opens.



2. Click the **Use custom title** check box and in the field next to it type the name of the custom view.

Note: The **Default title** appears below the custom title field. To revert to the default title at any time, clear the **Use custom title** check box.

3. Click the **OK** button.

Remove a view

You can remove any view not required in a built-in workspace, and you can remove any view from a custom workspace. You can close a single view, or you can close all views in the workspace. The ability to remove a view may vary depending on the module in the workspace.

Note: When you close a view in a built-in or custom workspace, IC Business Manager does not save configuration you set up, if applicable. You can choose to display the view again at a future date, but you must reconfigure any custom modifications. Use caution when removing views from a workspace.

Remove a single view from a workspace

Do one of the following:

- Right-click the tab for the view you no longer want to display and select **Close view** from the menu that appears.
- From the **Window** menu, select **Close view**.

Result: The selected view is removed from the Workspace.

Remove all views from a workspace

Do one of the following:

- Right-click any tab in the workspace and select **Close all views** from the menu that appears.
- From the **Window** menu, select **Close all views**.

Result: IC Business Manager removes all views from the workspace.

Arranging Views

Arranging Views

In addition to adding, renaming, or removing views, you can arrange views within a workspace to suit your environment. See the following topics:

- Understanding the Docking Architecture
- Arrange Views in a Workspace
- Create Horizontal, Vertical, or Tabbed Group Views
- Resize a View

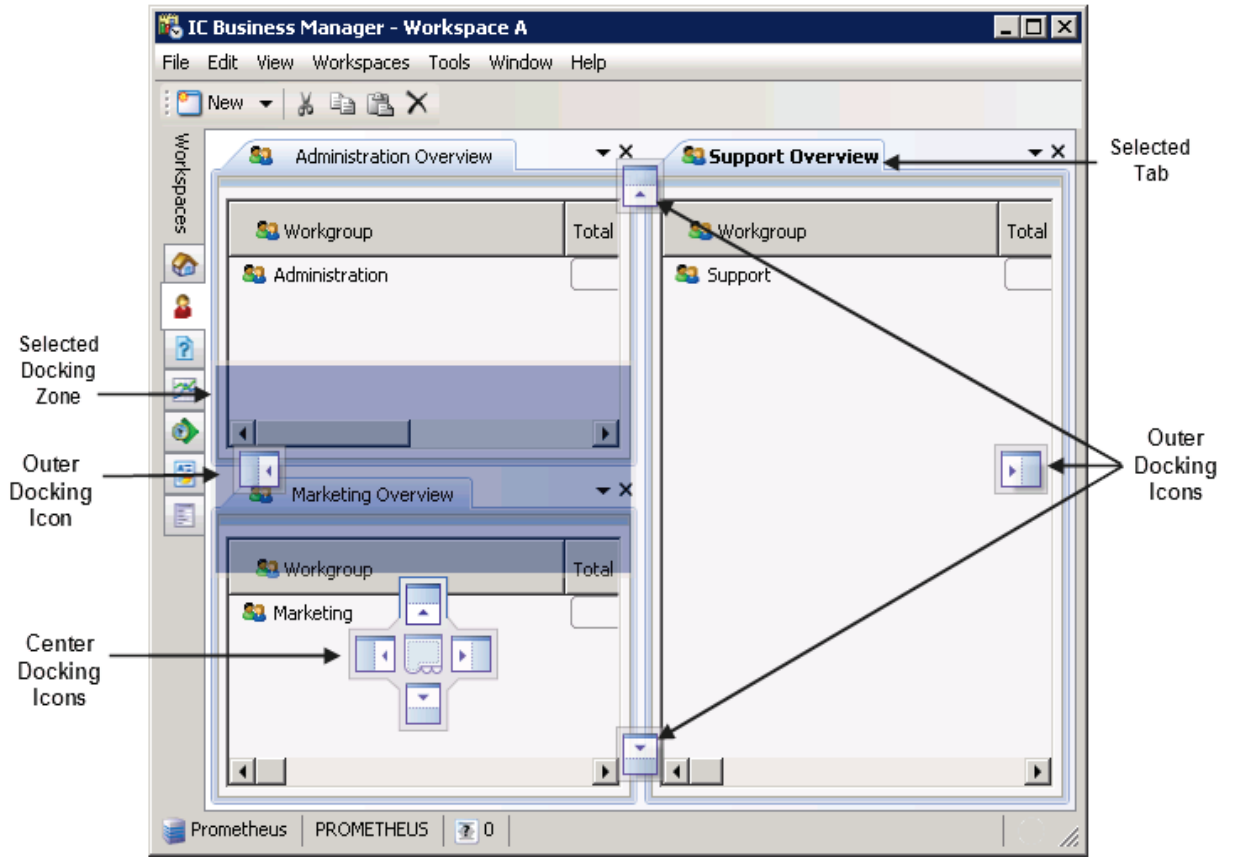
Understanding the docking architecture

Using a flexible docking architecture, you can arrange views within the IC Business Manager interface, placing them in more convenient locations to suit your needs. This capability is helpful if you manage multiple views within a workspace, such as workgroup overviews.

Note: IC Business Manager saves the arrangement of your docked views, so they remain in place if you close and restart the application.

To move a view, click the tab with your mouse and start dragging it. Docking icons appear on the IC Business Manager window, showing you the available locations to which you can move the view.

When you drag the view on top of an arrow, IC Business Manager highlights the area to which the view will move if you release your mouse and "drop" it onto that particular docking arrow. You can also drag a view within its current set of tabs to reorder it.

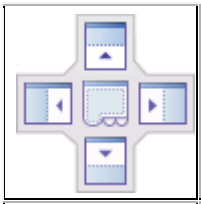


Use the **Outer Docking Icons** to move the selected view to an outer docking zone. For example, if you want to move the Support Overview so that it takes up the right side of the Workspace, click and drag the Support Overview tab to the outer right arrow. The right side of the Workspace will be highlighted. Release the mouse and the Support Overview tab moves to the right side of the Workspace, as shown in the image above.

Use the **Center Docking Icons** to relocate the view based on the view it is currently positioned over. For example, if you want to move the Support Overview so that it is resides above the Marketing Overview , click and drag the Support Overview tab until the center docking icons appear in the Marketing Overview tab, and then position the mouse over the top Center Docking Icon arrow. The area above the Marketing Overview will be highlighted, as shown in the image above. Release the mouse and the Support Overview tab moves to the area above the Marketing Overview view.

Docking icons

Icon	Description
	The outer left docking icon creates a new left dock zone.
	The outer top docking icon creates a new top dock zone.
	The outer right docking icon creates a new right dock zone.
	The outer bottom docking icon creates a new bottom dock zone.

	The center docking icons create a new dock zone based on the view over which they are currently positioned.
	The middle docking icon, located in the center docking icon, relocates the selected view so that it appears first in the currently highlighted dock zone.