



Interaction Connect

Printed help

PureConnect powered by Customer Interaction Center® (CIC)

Last updated November 13, 2018

Abstract

This document is a printable version of the Interaction Connect online help. It explains how to use Interaction Connect. Online help is available within Interaction Connect by clicking the Help icon in the Application bar.

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Interaction Connect

Interaction Connect Help

Important: Customer Interaction Center (CIC) supports two interaction management client applications. This documentation uses the term "CIC client" to refer to either Interaction Connect or Interaction Desktop. CIC client also refers to the PureConnect Integration to Oracle Service Cloud. The full product name appears at the top of each help topic. The full product name may also be used in a help topic when necessary to distinguish between CIC clients.

Welcome to CIC client, a powerful interaction management application for desktop or laptop PCs. The CIC client offers more functionality than your telephone. Use it to manage your electronic communications, including phone calls, voice mail, conference calls, ACD routed email messages, and web chats.

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

- [Set Your Status](#)
- [Answer an Incoming Interaction](#)
- Place a call to a number [inside](#) or [outside](#) your organization
- [Forward calls to remote telephone numbers](#)
- [Transfer a call to another person](#)
- [Transfer a call to your voice mail](#)
- [Make conference calls](#)
- [Change the sound of your incoming interactions](#)

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

Need Help?

- In the Application bar, click the **Help** icon.

Note: A printable version of the CIC client help is available on the Genesys website at https://help.genesys.com/cic/desktop/printable_documentation.htm

Using the Search Feature

You can search for specific terms in the help. A search text box is available on each page of the help. Just type whatever single word or phrase you want to search and press **Enter**. A list of topics containing that word or phrase appears. When searching for a phrase, use quotation marks to enclose the phrase. For example, use "directory toolbar" to return only topics that contain that exact phrase.

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

Feedback and PureConnect Customer Care

You can learn more about Genesys products, promote and share ideas about PureConnect software, access technical support, and submit feedback about bugs and enhancement requests.

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

- To visit the Genesys **home page**, go to <http://www.genesys.com>.
- To access the PureConnect Customer Care website, go to <https://www.genesys.com/inin/about/services/support-services>.

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

- To visit the **PureConnect Community Forum**, go to <http://community.inin.com>.

Note: The PureConnect Community Forum is a free and public service provided by Genesys to promote an online community devoted to the sharing of ideas and information regarding PureConnect software.

- Use our social media/crowdsourcing site to submit ideas for enhancing Genesys products. Vote on which ideas submitted by others best describe the enhancements you want. Go to https://pureconnect.ideas.aha.io/portal_session/new.
- 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.
 - Send an email message to PureConnectDoc@genesys.com.

CIC 2018 R5, revised 11/13/2018

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](#).

Access Control Right	Description
View Directory Status	Determines which status columns you can add to a directory view.

Columns	<p>Rights to these status columns can be separately assigned.</p> <p>These columns include: Activated, Forward Number, Logged On, Notes, On Phone, Status, Status Summary, Time in Status, and Until.</p> <p>Logged In: In addition to controlling whether you can display a CIC client user's logged in status, you need the View Directory Status Columns right for the Logged In column in order to initiate a Chat session.</p>
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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 . 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 <i>Telephone User Interface User's Guide</i> or <i>Quick Reference Card</i> 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 . 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 <i>Telephone User Interface User's Guide</i> or <i>Quick Reference Card</i> 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.

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.

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
- ACD Wait Reason
- Agent Score
- Associated Process
- Attachments
- Chat Response Time
- Customer Score
- Details
- Duration
- Importance
- Interaction ID
- Line
- Lstns
- Name
- Number
- Queue
- Recs
- Security
- State
- Station
- Subject
- Time in Status
- Time in Workgroup Queue
- User
- 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	<p>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.</p> <p>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.</p>

Shift Trading

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

Access Control Right	Description
View	<p>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.</p> <p>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.</p>

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 <i>modify</i> actions you can perform on interactions in a selected Station Queue. <i>Modify</i> actions include Disconnect , Hold , Mute , Pickup or Transfer interactions.
Monitor Station Queues	Determines which <i>monitor</i> actions you can perform on interactions in a selected Station Queue. <i>Monitor</i> 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 <i>modify</i> actions you can perform on interactions in a selected User Queue. <i>Modify</i> actions include Disconnect , Hold , Mute , Pickup or Transfer interactions.
Monitor User Queues	Determines which <i>monitor</i> actions you can perform on interactions in a selected User Queue. <i>Monitor</i> actions include Coach , Join , Listen , Preview , Record , or Snip interactions.

Users

This right controls whether you can [Set Another User's Status](#).

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

Workgroup Queues

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

Access Control Right	Description
View Workgroup Queues	Determines which Workgroup Queue views you can display in the CIC client.
Modify Workgroup Queues	<p>Determines which <i>modify</i> actions you can perform on interactions in a selected Workgroup Queue. <i>Modify</i> actions include Disconnect, Pickup or Transfer interactions.</p> <p>Other <i>Modify</i> actions include the ability to Activate Self. For more information, see Change Your Workgroup Activation Status.</p> <p>Also, <i>Modify</i> actions include the ability to Activate Others. For more information see Change a User's Activated Workgroups and Change a Workgroup's Activated Users.</p>
Monitor Workgroup Queues	<p>Determines which <i>monitor</i> actions you can perform on interactions in a selected Workgroup Queue. <i>Monitor</i> actions include Coach, Join, Listen, Monitor, Record, or Snip interactions.</p> <p>Determines which <i>monitor</i> actions you can perform on interactions in a selected Workgroup Queue. <i>Monitor</i> actions include Coach, Join, Listen, Monitor or Record interactions.</p>
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. This right can be granted to all or selected workgroups.

Related Topics

[Security Rights](#)

Security Rights

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

Client Rights

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

This security right	Description
Account Code Verification	Enables you to assign Account Codes to incoming and outgoing interactions. You also need the View Account Codes Access Control right to display Account Code fields. For more information, see Understanding Account Codes .
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: <ul style="list-style-type: none">• Customize Configuration settings in the CIC client.• Add Views. However, displaying certain views can require additional Access Control Rights. For more information, see Configuration Options.• Change the columns in a queue view. See Add or Remove View Columns or Customize Columns.• Change the buttons in a queue view. See Customizing Queue Control Toolbars
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 .

<p>Multiple Calls</p>	<p>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."</p> <p>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.</p> <p>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.</p>
<p>Persistent Connections</p>	<p>This right gives you the option of keeping your remote telephone connected until you log off.</p> <p>It enables you to select Persistent when using a Dynamic Remote Client Connection.</p>
<p>Receive Voicemail</p>	<p>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.</p> <p>If you do not have this right, callers are returned to the Interaction Attendant main menu.</p>
<p>Response Management</p>	<p>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.</p>
<p>Status Notes</p>	<p>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.</p>
<p>User-defined Telephone Number on Remote Logon</p>	<p>Enables you to enter a new Remote Number when logging on. For more information, see Dynamic Remote Client Connections.</p>
<p>Workgroup Statistics</p>	<p>Enables you to display the Workgroup Statistics view, Workgroup Overview, and Agent Statistics.</p>
<p>Workgroup/Profiles Tab</p>	<p>Enables you to display the Workgroup and Profiles view. This</p>

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.

Voicemail	Displays the Voicemail button and the Send to Voicemail command.
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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.
Snip Interactions	Enables you to record an interaction and store this recording in the CIC database. Administrators can use Interaction Recorder to find and playback 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.

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 .

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](#).

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 .

Related Topics

[Access Control Rights](#)

What's New in Interaction Connect

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

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.

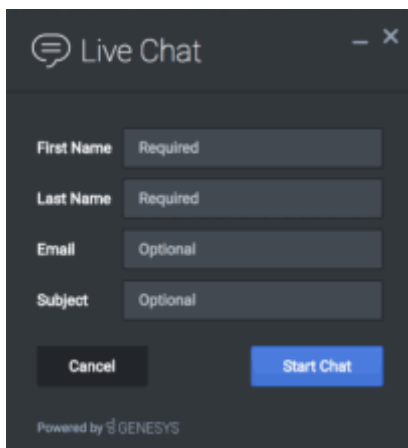
- **Email Scorecard**

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](#).

A screenshot of a Genesys Live Chat widget. The window has a dark background and a title bar with a speech bubble icon and the text "Live Chat". Below the title bar are four input fields: "First Name" (Required), "Last Name" (Required), "Email" (Optional), and "Subject" (Optional). At the bottom left is a "Cancel" button, and at the bottom right is a blue "Start Chat" button. At the very bottom, it says "Powered by GENESYS".

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 serverless, 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](#).

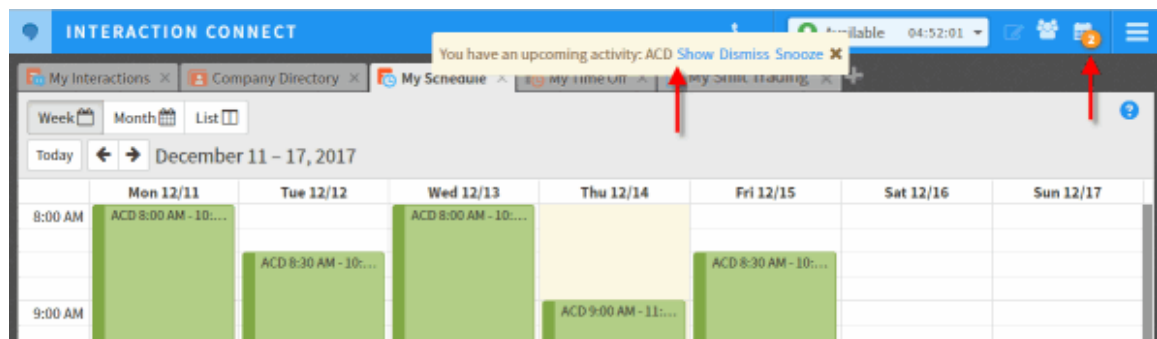
Note: Custom scripts written to run in Interaction Scripter .NET Client must be modified to run in Interaction Connect. Developers can find information about the required modifications in the [Interaction Scripter Developer's Guide](#) in the PureConnect Documentation Library.

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 'PureCloud for CIC' feature as outlined in the [PureCloud for CIC 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](#)

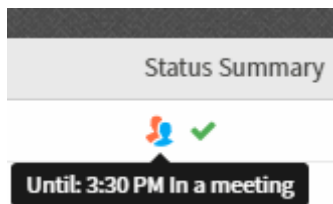
2017 R1

- **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 reverse 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.

- **PureCloud for CIC**

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 PureCloud for CIC, you can experience the collaborative features of PureCloud. PureCloud for CIC 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 PureCloud for CIC, you can experience the collaborative features of PureCloud. PureCloud for CIC 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](#)

[Initiate a Chat Session](#)

[Personal Prompts Options](#)

[PureCloud for CIC](#)

[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](#)

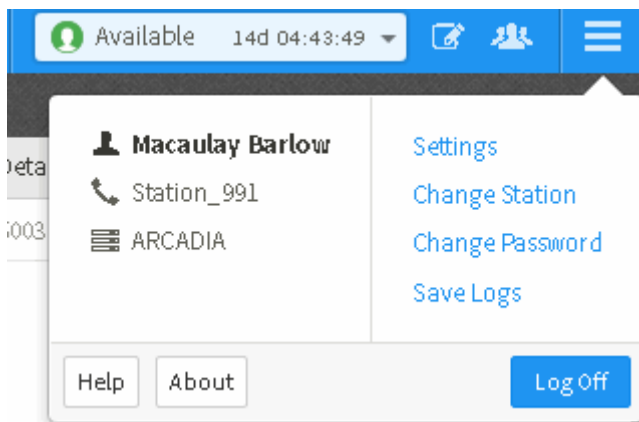
- [Working with Email Messages](#)
- [Working with Directories](#)
- [Working with Other Directories](#)
- [Working with Response Management](#)
- [Working with Text Messages](#)

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. Click the menu icon and then click **Save Logs**.



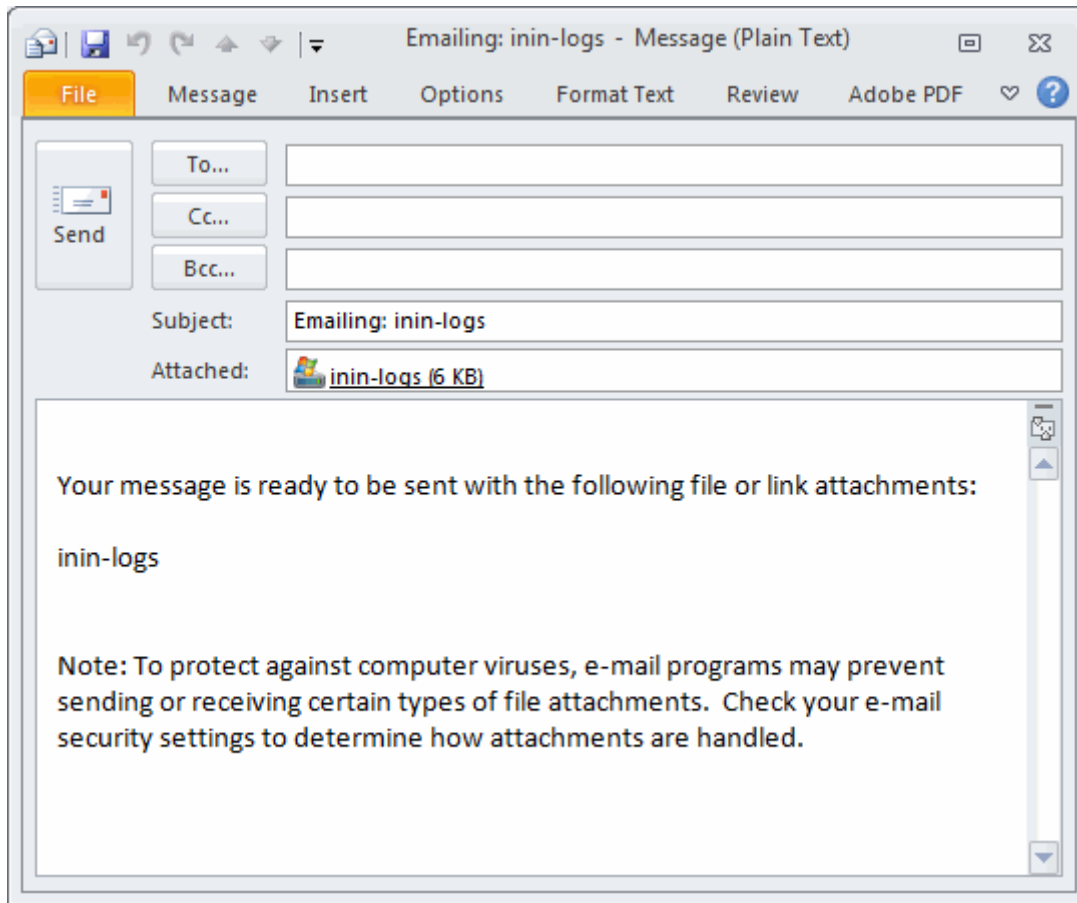
Result: The CIC client generates a log file named **inin-logs.txt** and places it in your Windows **downloads directory**. It appends a number to the log file name if you created this file previously.

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

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

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

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



PureCloud for CIC

PureCloud for CIC

PureCloud for CIC 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 PureCloud for CIC, you can experience the collaborative features of PureCloud. PureCloud for CIC 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.

PureCloud features are available in two ways in the CIC client:

- You can use the **PureCloud directory view** from inside the CIC client to search for and communicate by phone with PureCloud users. Use built-in Interaction Client features to call PureCloud user, transfer calls to them, or set up call conferences.
- Or, you can access the full-featured **PureCloud Collaborate** in a browser and chat with PureCloud users or share files. You can also complete your PureCloud profile.

In both the PureCloud directory view and PureCloud Collaborate, you can search for individuals and groups in your organization.

Related Topics

PureCloud Directory view

The PureCloud Directory view is a directory that is optimized for display within the CIC client. Use it to communicate by phone with PureCloud users without leaving your familiar CIC client. You can:

- **Call** PureCloud users.
- **Direct transfer** calls
- **Consult transfer** calls
- **Call conference**

Display the PureCloud Directory view

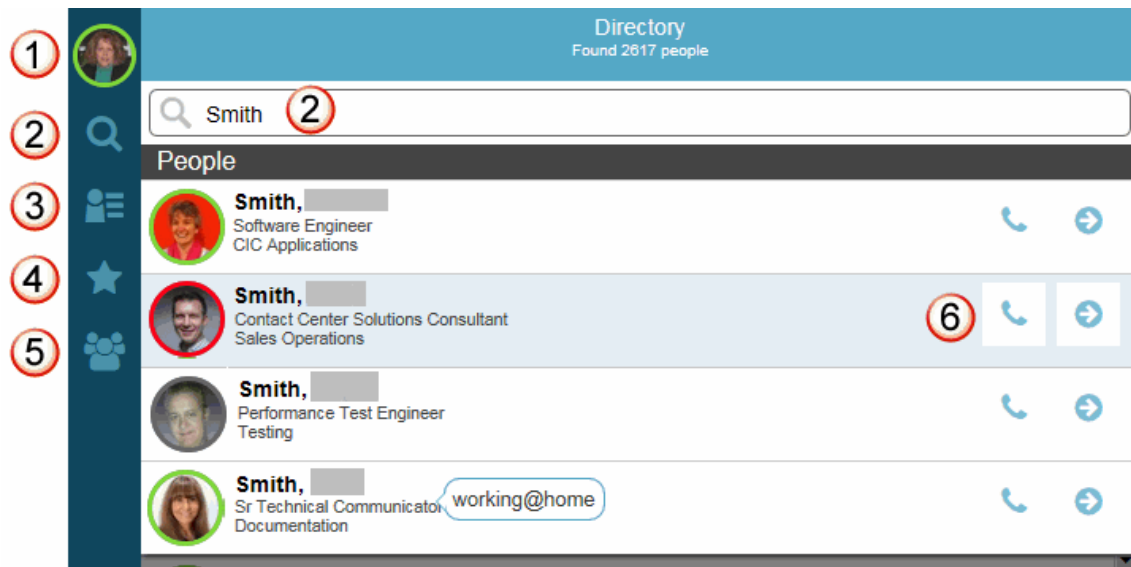
Requirements: You need the [Customize Client](#) Security right to add views.

You add the PureCloud Directory view to your CIC client as you would any other view. 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](#).

Use the PureCloud Directory view

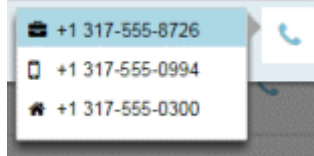
The streamlined PureCloud Directory view is slightly different from the full PureCloud Collaborate interface. It focuses on the controls for locating PureCloud users and making calls.

Note: The PureCloud Directory view will change and improve independently of CIC releases. This screen capture is just a guide to some of the available features.



1	Profile	Click your profile picture to: <ul style="list-style-type: none">• View your status. <p>Important: When you first display the PureCloud Directory</p>
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		<p>view, your CIC user status determines your PureCloud presence. However, you can change this in Preferences and enable your PureCloud presence to determine your CIC user status.</p> <ul style="list-style-type: none"> • View your profile. <p>Tip: To edit your profile, use PureCloud Collaborate.</p> <ul style="list-style-type: none"> • Click Preferences to <ul style="list-style-type: none"> • Set your default presence source to either CIC or PureCloud. • Click About to <ul style="list-style-type: none"> • Check the version number and build date for the PureCloud for CIC integration. • View our Privacy Policy. • Learn more about PureCloud. • Set the tracing level and filters for a log that displays diagnostic information about the PureCloud directory view.
2	Search	To find a PureCloud or CIC user, use the Search text box or the Search icon. Enter any keyword such as a name, title, department, skills, or anything else in the user's profile.
3	Directory	Display the PureCloud directory.
4	Favorites	Display a list of your favorite PureCloud contacts. Favorites are the people and groups you contact most often. Note: You designate favorites in PureCloud Collaborate .
5	Directory entry	Each directory entry displays a photo (if available), job title and department. The color of the presence indicator around the photo indicates the person's current status.
5	Call and Transfer/Conference	<p>All of your PureCloud call operations are available from the directory entry Call and Transfer/Conference icons..</p> <ul style="list-style-type: none"> • To call a PureCloud user, right-select PureCloud user, select the Call icon, and then select a phone number. <p>Tip: The icons indicate work, cell, and home phone numbers.</p>



- To transfer a call to a PureCloud user, select a connected call in **My Interactions**, select a PureCloud user, and then select the **Transfer/Consult** icon. Select **Transfer** or **Consult Transfer** and then select a phone number.

Tip: The CIC client handles the call transfer in the usual manner. For more information, see [Transfer a Call After Consulting the Recipient](#) or [Transfer a Call Without Consulting the Recipient](#).

- To create a call conference with a PureCloud user, select a connected call in **My Interactions**, select a PureCloud user, and then select the **Transfer/Consult** icon. Select **Conference** and then select a phone number.

Tip: You can add CIC users or other PureCloud users to this conference call. For more information about adding CIC users, see [Making Conference Calls](#).

PureCloud Collaborate

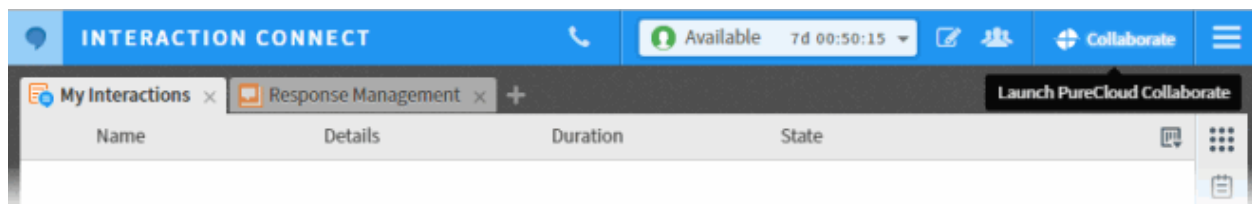
Here are a few things you can do in Collaborate:

- **Profiles** – Complete your profile – add contact information, photo, and so on. Set your status.
- **Search** – Search across the Directory 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 PureCloud Collaborate

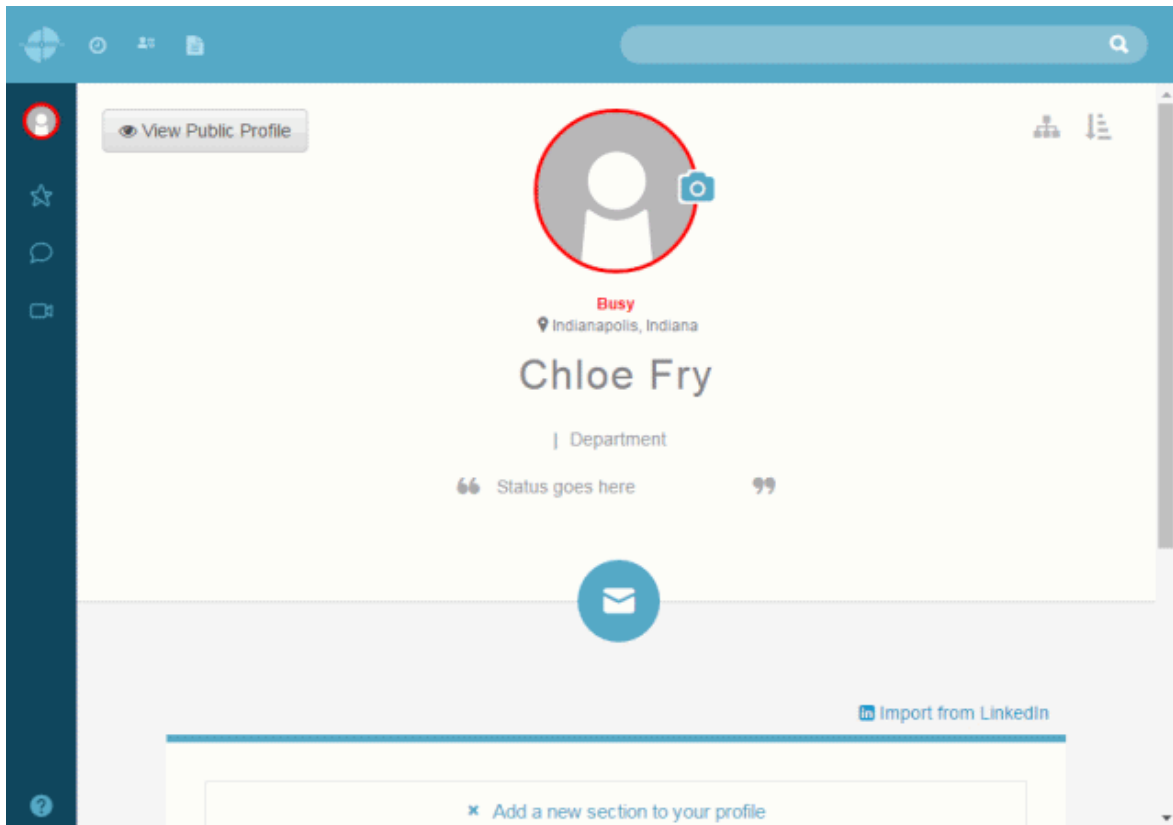
If your CIC administrator enabled PureCloud for CIC, a **Collaborate** button appears in the CIC client.

Click the **Collaborate** button.



PureCloud Collaborate appears in a new browser tab. You log on automatically to PureCloud.

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



Use Collaborate

For more information about using PureCloud Collaborate, click the **Help** button on any page or go to the PureCloud 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 PureCloud instructional and educational information about the many features in Genesys PureCloud.

Web-Based Phone

Web-Based Phone

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.

User requirements: Your PureCloud Telephony Administrator must assign you an extension number from a PureCloud 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 CIC web-based phone feature](#).

Workstation Requirements:

Speakers and microphone (or headset)

Supported web browser: Google Chrome - version 47 or higher or Mozilla Firefox - version 44 or higher. (Internet Explorer does not support WebRTC phones.)

CIC Requirements: PureCloud Communicate integration license for CIC, PureCloud Edge appliance, and CIC 2017 R2 or later for on premise CIC or CIC 2017 R3 for PureConnect Cloud.

Related Topics

[Change your Web-Based Phone settings](#)

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](#).

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**.

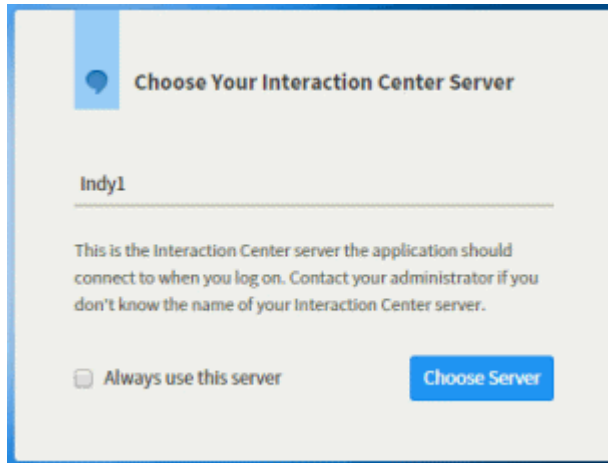
2. If your organization uses more than one CIC server, you can choose a server:

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.

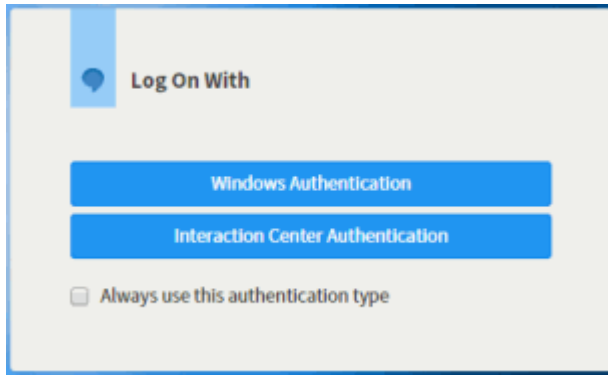


- c. Optionally, to save your selections, select the **Always use this server** check box.
- d. Click **Choose Server**.
3. Optionally, change the language used in the interface. In the **Application bar**, click the name of the currently selected language and select a different language.

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.



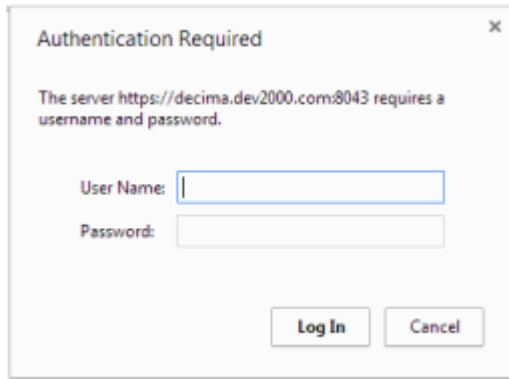
Note: The **Log on With** dialog box is available only if you can use more than one type of credentials to log on.

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**, in the **Authentication Required** dialog box, enter your **Windows user name** and **password**. Click **Log 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.

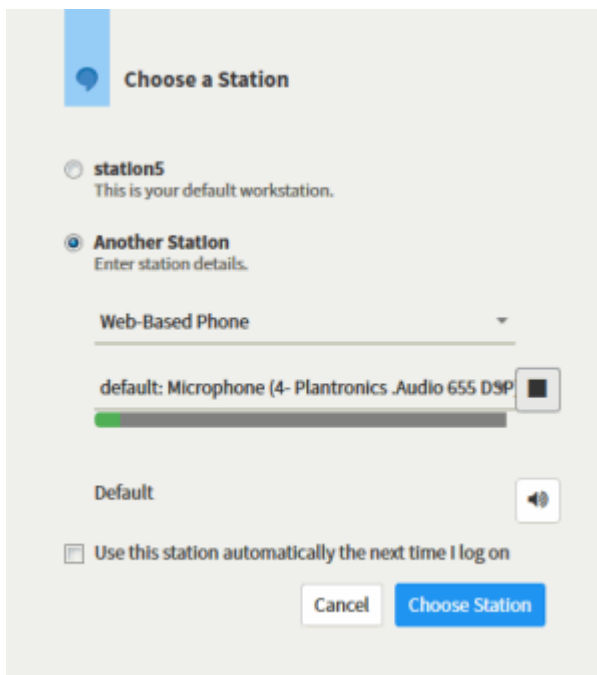


- If you selected another Identity Provider in the **Log on With** dialog box, follow your CIC administrator's instructions for entering credentials and logging on.
6. In the **Choose a Station** dialog box, select **Another Station**.
 7. From the **Station Type** drop-down list, select **Web-Based 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.

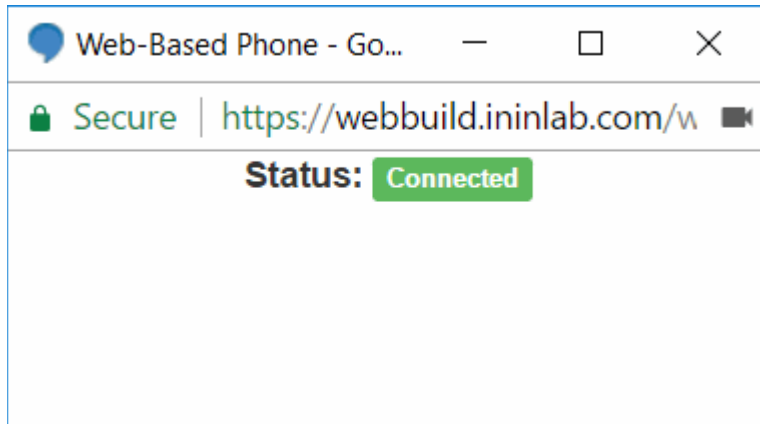
Result: A progress bar appears. Green indicates a comfortable volume for your listener. Yellow indicates the volume is too loud. A blank progress bar indicates a failed test.



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](#).

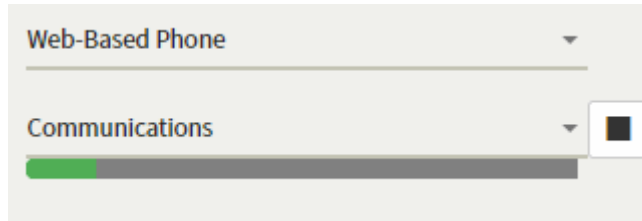
If your current station is a web-based phone, you can change your phone settings at any time.

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](#)

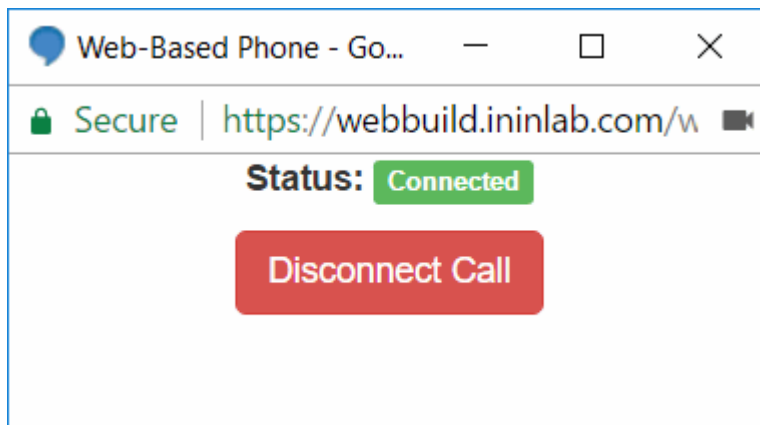
Use a Web-Based Phone

Requirements: Your CIC administrator must enable this feature and set it up for you. For more information, see [Web-Based Phone](#).

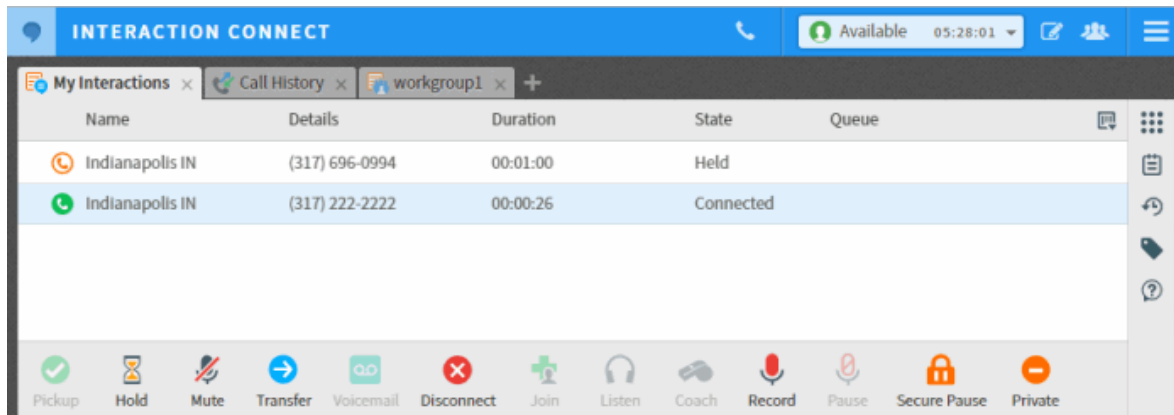
You can use your workstation's microphone and speakers or headset to participate in phone conversations.

Tip: Don't refresh your browser while you are on a connected call and using a web-based phone. This disconnects the call.

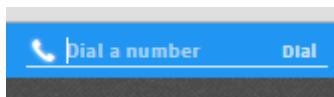
- Use the Web-Based Phone dialog box to monitor the connection status of your WebRTC phone. You can use the **Disconnect Call** button to disconnect a call. This is similar to hanging up a physical phone to end a call. This additional method of disconnecting is useful if Interaction Connect becomes unavailable 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.

Starting and Exiting

Starting and Exiting

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

- [Auto Reconnect](#)
- [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.

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.

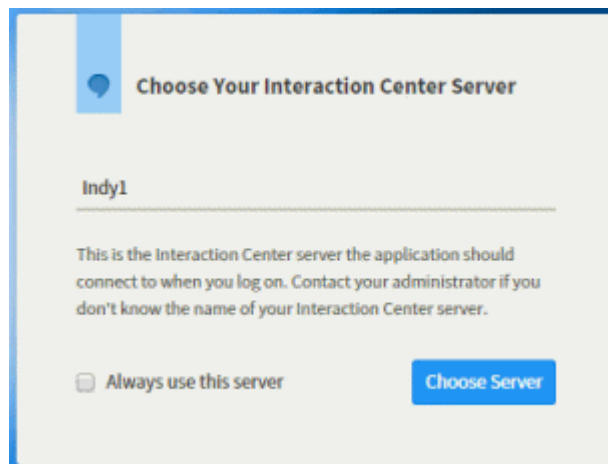
- a. If available, in the logon page, in the **Application Bar**, click the name of the currently selected server.



- 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.



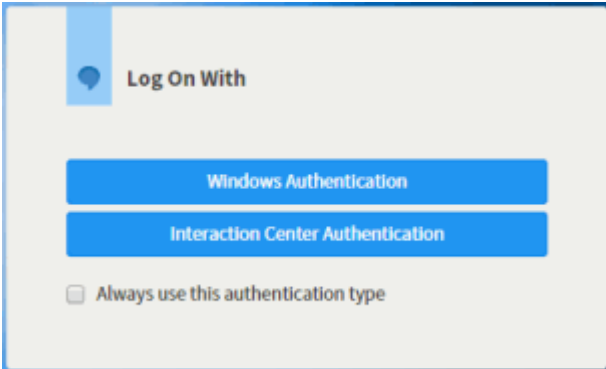
- c. Click **Choose Server**.

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:



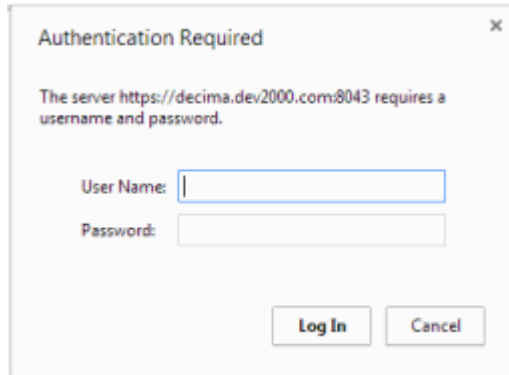
- Click **Windows Authentication** to use your Windows user ID and password to log on.
- Click **Interaction Center Authentication** to use your CIC user name and password to log on.
- Click the button for the alternate Identity Provider configured by your CIC administrator.

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**.

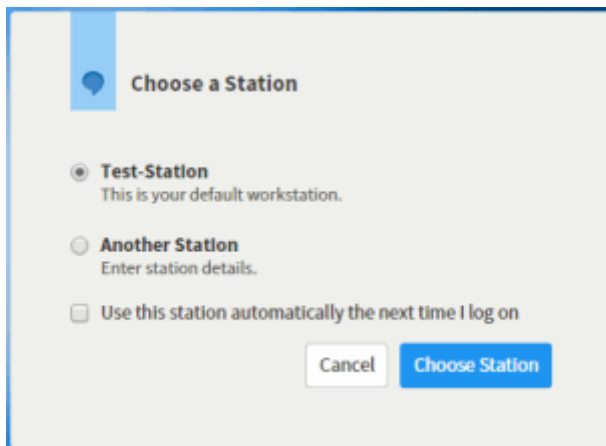
Note: You also see this dialog box if your CIC administrator has not enabled [Single Sign On](#) or you have a CIC 2015 R1 server.

- If you selected **Windows Authentication**, in the **Authentication Required** dialog box, enter your **Windows user name** and **password**. Click **Log 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

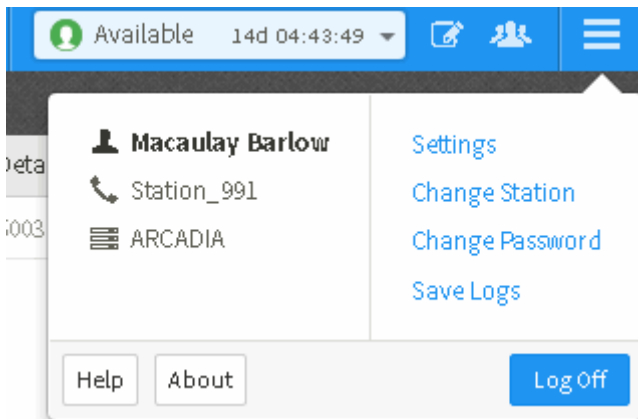
Even though dynamic remote stations are not configured in Interaction Administrator, each dynamic station connection is counted toward the total number of station licenses "in use" on your CIC server. The number of current dynamic station connections is added to the number of configured stations (i.e.,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

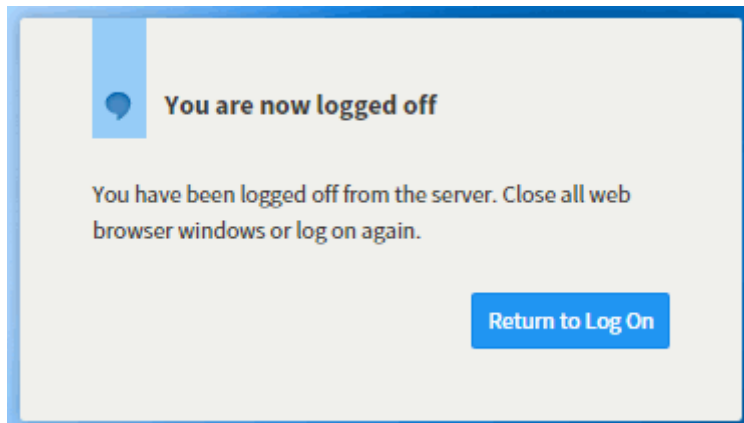
[Running the CIC client from a Remote Location](#)
[Logging On](#)

Logging Off

You can log off by clicking the menu icon and then 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.

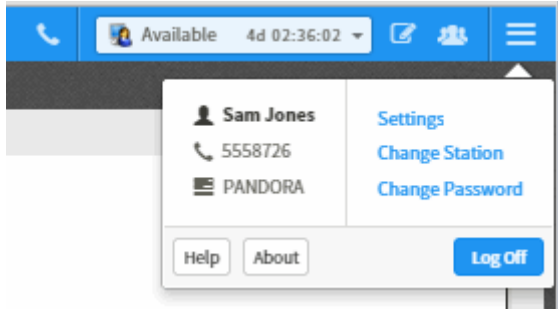
If your password is going to expire soon, a prompt appears periodically (usually once per day or on the next logon) asking if you want to change your password now. If you select **Yes**, then the Change Password dialog box appears.

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.

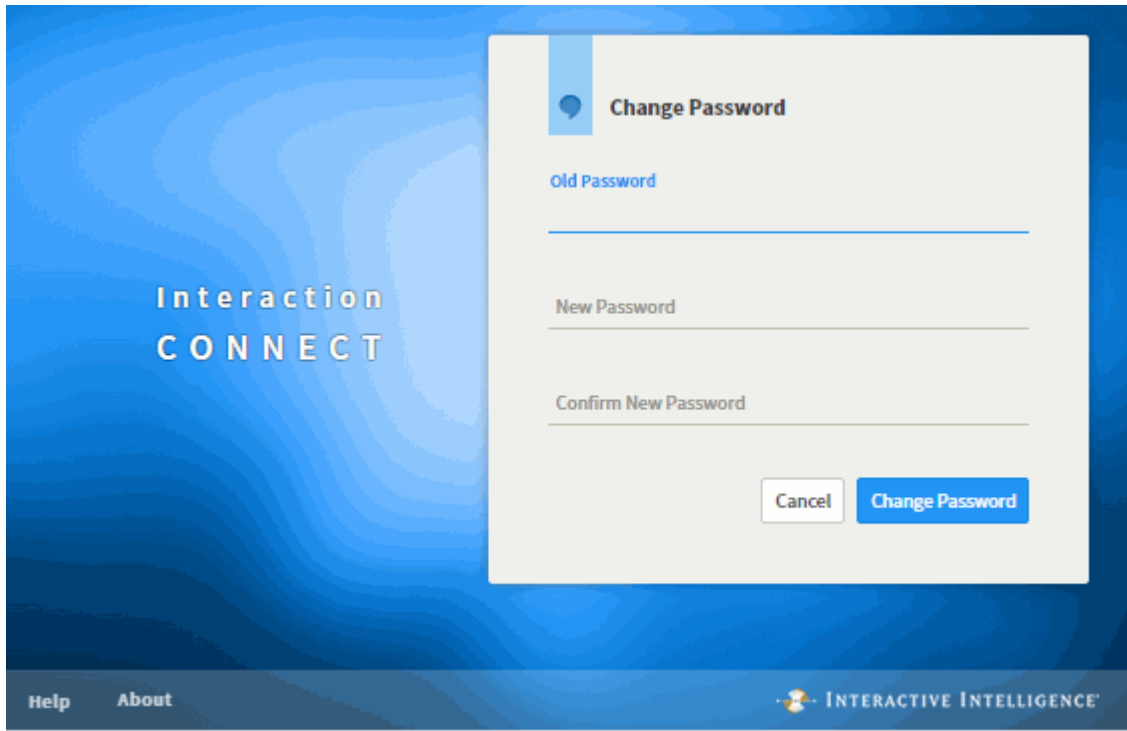
To change your password at any time:

1. Click the Menu icon in the top right corner.



2. Select **Change Password**.

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



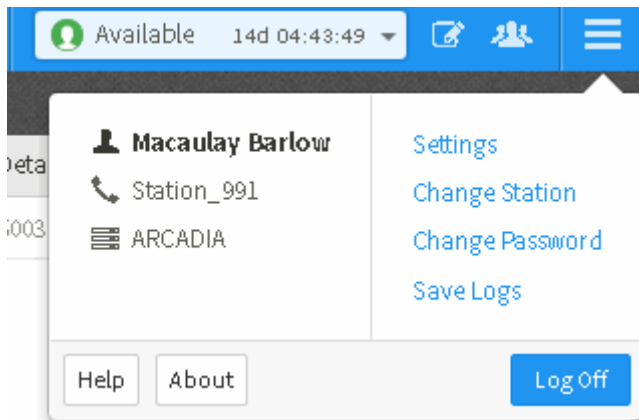
3. In **Old Password**, enter your current CIC password.
4. In **New Password**, enter your new CIC password.
5. In **Confirm New Password**, type your new password again.
6. Click **Change Password**.

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. Click the Menu icon in the top right corner.



2. Select **Change Station**.
3. In the **Choose a Station** dialog box, select a station. For more information, see the instructions for choosing a station in [Logging On](#).
4. Click **Change 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.

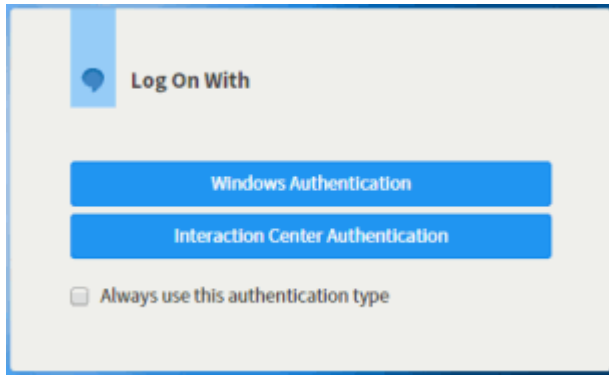
Related Topics

[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](#)

Views and Dialog Boxes

Using Views and Dialog Boxes

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

- [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:

- Click the Menu icon in the top right corner and then click **About**.

Interaction Connect

2018 R2 Pre-release

Server Version: CIC 2018 R1

Warning: this computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.

Patent: www.genesys.com/patents



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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 views...

2 Queues

- My Interactions
Your personal queue of interactions to manage
- Station Queue
The collection of interactions for a station
- User Queue
The collection of interactions for a user
- Workgroup Queue
The collection of interactions for a workgroup

3 Interactions

- Call History
A listing of your recent phone calls
- Current Interaction
Work area for the selected item in My Interactions
- Response Management
Quickly respond to customers with pre-built responses

4 Directories

- Company Directory
Contact information for everyone in your organization
- General Directories
Directories containing a list of contacts
IC Private Contacts
- IC Private Contacts
- IC Public Contacts
- Station Groups Directory
A listing of stations in a station group
- Workgroup Directory
Contact information

5 Administration

- Account Codes
Manage account code settings

6 Extras

- Agent Statistics
Statistics for an agent's activity within a workgroup
- Fax
View a list of current faxes and open their contents
- Interaction Scripter
Campaign log on for Interaction Dialer
- My Quality Results
Dashboard for viewing personal quality results and metrics.
- My Schedule
View your Interaction Optimizer schedule

Selected: General Directories

Cancel Add View

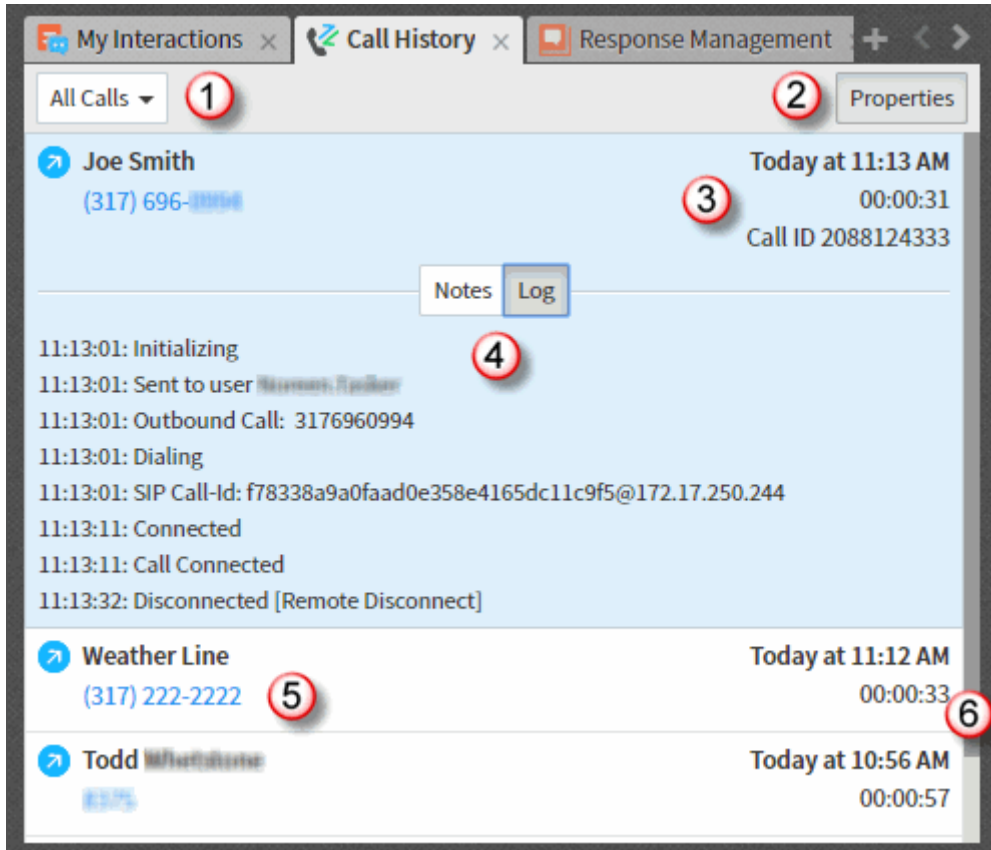
1	Search text box	To display a list of views with matching names, type all or part of a view name in the Search text box.
2	Categories	Views are grouped by category.
3	Views list	Each category displays the names and descriptions of the included views. Selected views are highlighted.
4	Select a view	To select a view, select its check box.
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. 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. 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.

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

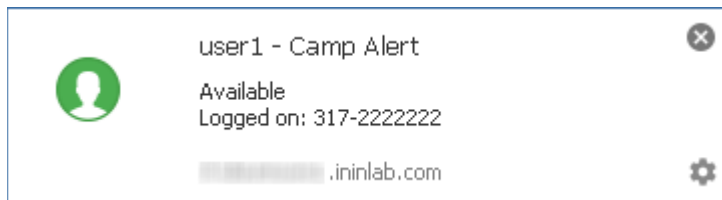
Tip: Call History items are added to your Call History dialog box when a call leaves your queue. When a call disconnects, it stays in the queue for a couple of minutes before it is automatically removed.

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

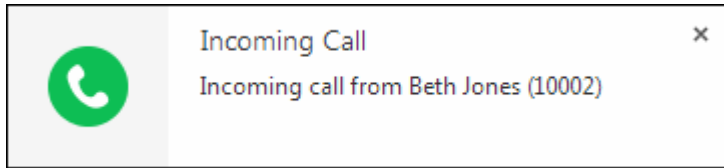
- [Camp on an Internal Extension](#)
- [Desktop Alerts](#)

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.

Tip: Desktop alerts do not currently work in Internet Explorer or Microsoft Edge. However, if you use Internet Explorer, you can make Interaction Connect a pinned site. The Interaction Connect taskbar

icon then flashes when you receive an alerting interaction. For instructions on pinning a website in Internet Explorer, see [https://msdn.microsoft.com/en-us/library/gg618532\(v=vs.85\).aspx](https://msdn.microsoft.com/en-us/library/gg618532(v=vs.85).aspx).



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.

Properties For Bob Smith

General

First Name: Last Name:

Display Name: Company:

Home Phone: Dial Business Phone: Dial

Auto Dial Extension Auto Dial Extension

Mobile Phone: Dial

Auto Dial Extension

Cancel Save

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.

Properties For Bob Smith

Access Rights

Allow Change

Allow Delete

Cancel Save

Related Topics

- [Properties Button on the Directory Toolbar](#)
- [View and Edit Directory Entries](#)
- [Working with Directories](#)

Interaction

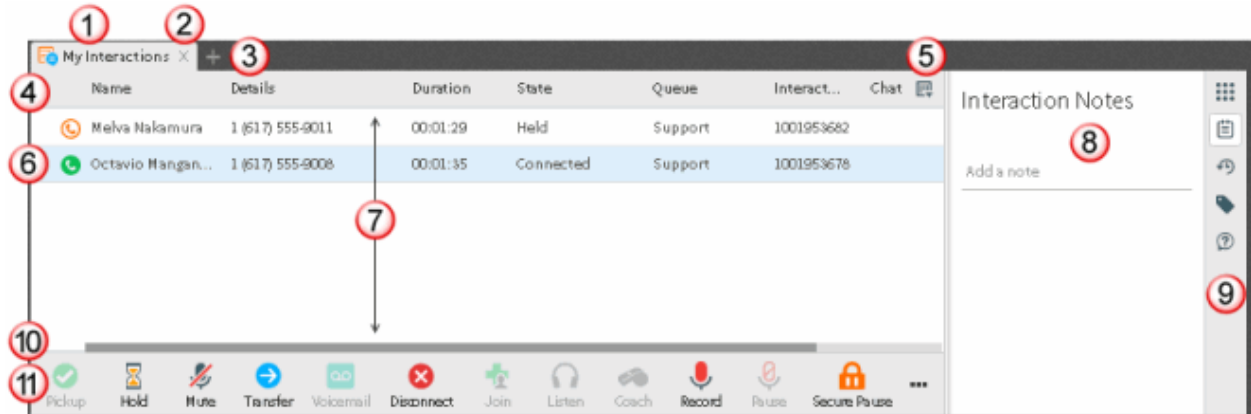
In the CIC client, an interaction is a communication between two parties. An example would be a telephone call. Each interaction is represented by a queue item in [My Interactions](#).

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. 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	<p>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.</p> <p>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.</p>
10	Scroll bar	<p>Use the horizontal scroll bar to view any queue columns that do not fit in the current browser window size.</p>
11	Queue Control Toolbar	<p>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.</p> <p>Tip: You can add, remove, or rearrange buttons on the CIC client toolbars. For more information, see Customizing Queue Control Toolbars.</p>

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	<p>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.</p>
ACD Wait Reason	<p>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.</p>
Associated	<p>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</p>

Process	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	<p>This column displays context-specific information based on the interaction type.</p> <ul style="list-style-type: none"> • For calls, it displays the Remote Address (phone number) that you dialed or the phone number of the party on an incoming call. • For callbacks, it displays the subject entered by the website visitor requesting the callback. For more information, see Working with Callback Requests. • 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. • 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 <i>PureConnect Data Dictionary</i> in the PureConnect Documentation Library for more details.
Line	The line queue on which the interaction is located.
Lstns	<p>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.</p> <p>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</p>

	<p>a queue view.</p>
Name	<p>The name of the person or organization with whom a CIC client user is interacting. For more information about how Interaction Center identifies a caller, see Caller Name.</p> <p>Note: Voice Mail appears in the Name column for voice mail messages played back through your Telephone Handset.</p>
Number	<p>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.</p> <p>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.</p>
Queue	<p>The Queue column contains an icon indicating the interaction type and its state. If this is an ACD-routed interaction, the name of the ACD workgroup queue to which the interaction was routed also appears here.</p>
Recs	<p>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.</p> <p>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.</p>
Security	<p>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."</p>
State	<p>The current condition of an interaction. For more information, see Understanding a Call's State.</p>
Station	<p>The station queue on which the interaction is located.</p>
Subject	<p>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.</p>
User	<p>The user queue on which the interaction is located.</p>
Work Item	<p>Each work item can be associated with a category. The names of the categories of</p>

Category	<p>your current work items appear in the Category column of My Interactions.</p> <p>Note: When My Interactions contains Work Items, you can filter the view and display only Work Items from selected categories.</p>
Work Item Created On	<p>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.</p>
Work Item Description	<p>A description of the Work Item.</p>
Work Item Due Date	<p>The date by which this Work Item must be completed.</p>
Work Item Error	<p>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.</p> <p>For more information, see Working with Interaction Process Automation.</p>
Wrapup Code	<p>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.</p>

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.

Set Status - Beth Jones

Status: Available

Notes:

Cancel Change Status

Related Topics

[Set Another User's Status](#)

Shortcut Keys

Interaction Connect does not currently support keyboard shortcuts for buttons and fields.

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.

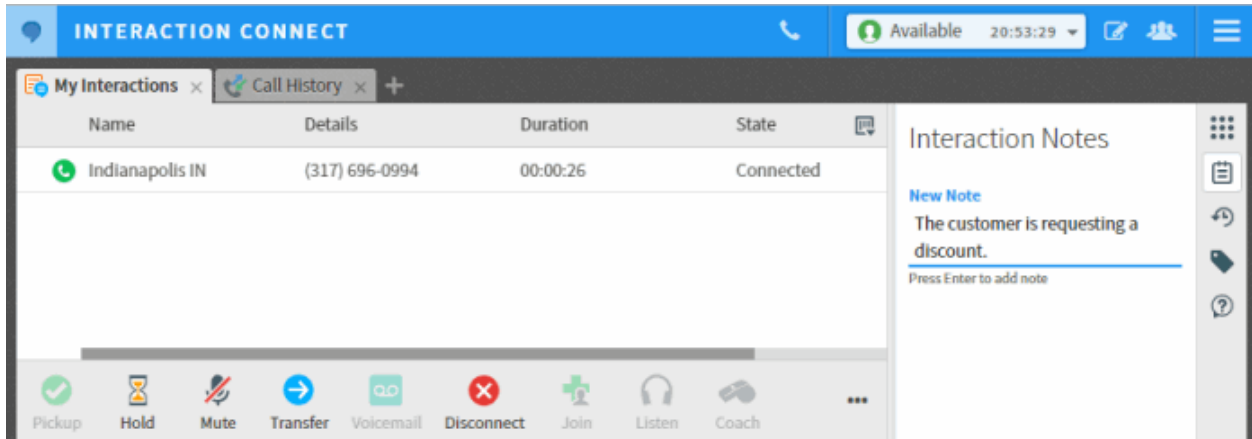
Dial Pad

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

The screenshot displays the Interaction Connect interface. At the top, the status is 'Available' with a timer at 20:43:56. The main area is divided into a sidebar on the left and a main content area on the right. The sidebar contains 'My Interactions' and 'Call History' tabs. The main content area shows a 'Dial Pad' with numbers 1-9, *, 0, and #. Below the Dial Pad is a toolbar with icons for Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, and Coach.

Interaction Notes

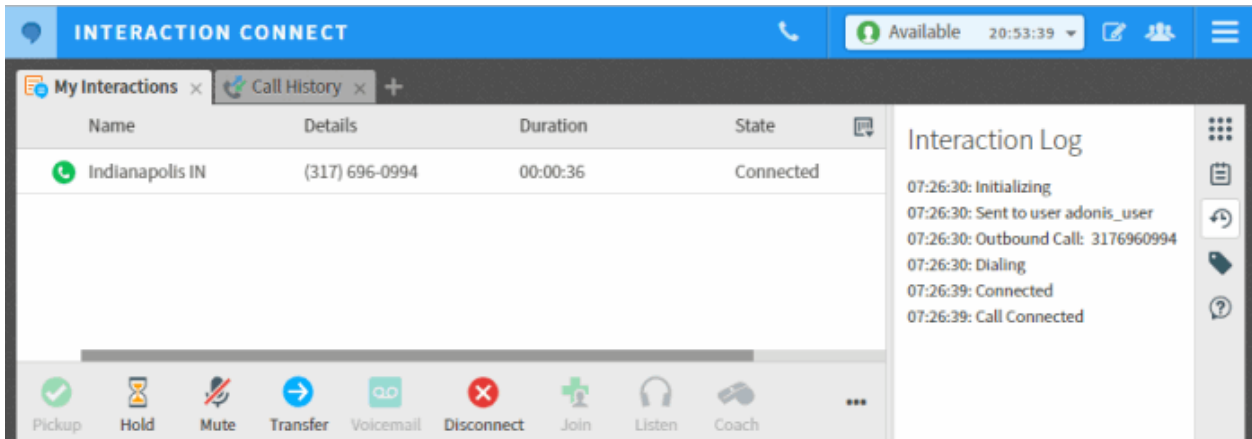
Select a connected interaction and make notes in the Interaction Notes sidebar. To add a note to the interaction, click the Plus sign.



The screenshot shows the 'INTERACTION CONNECT' interface. At the top, there's a status bar with 'Available' and a timer '20:53:29'. Below that, there are tabs for 'My Interactions' and 'Call History'. A table lists interactions with columns for Name, Details, Duration, and State. One interaction is shown: 'Indianapolis IN' with details '(317) 696-0994' and duration '00:00:26', in a 'Connected' state. To the right, the 'Interaction Notes' sidebar is open, showing a 'New Note' section with the text 'The customer is requesting a discount.' and a prompt 'Press Enter to add note'. At the bottom, there's a toolbar with icons for Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, and Coach.

Interaction Log

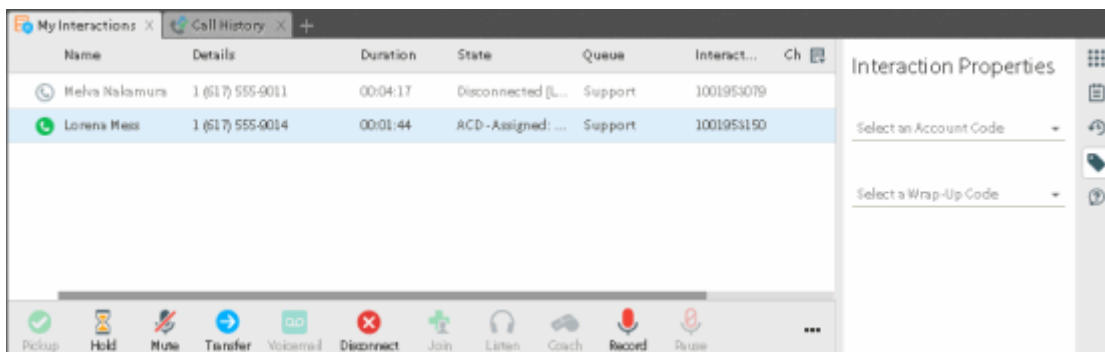
The Interaction Log sidebar displays the connection and routing details for the selected interaction.



The screenshot shows the 'INTERACTION CONNECT' interface. The top status bar is the same as in the previous image. The 'My Interactions' and 'Call History' tabs are present. The table shows the same interaction: 'Indianapolis IN' with details '(317) 696-0994' and duration '00:00:36', in a 'Connected' state. The 'Interaction Log' sidebar is open, displaying a list of events: '07:26:30: Initializing', '07:26:30: Sent to user adonis_user', '07:26:30: Outbound Call: 3176960994', '07:26:30: Dialing', '07:26:39: Connected', and '07:26:39: Call Connected'. The bottom toolbar is the same as in the previous image.

Interaction Properties

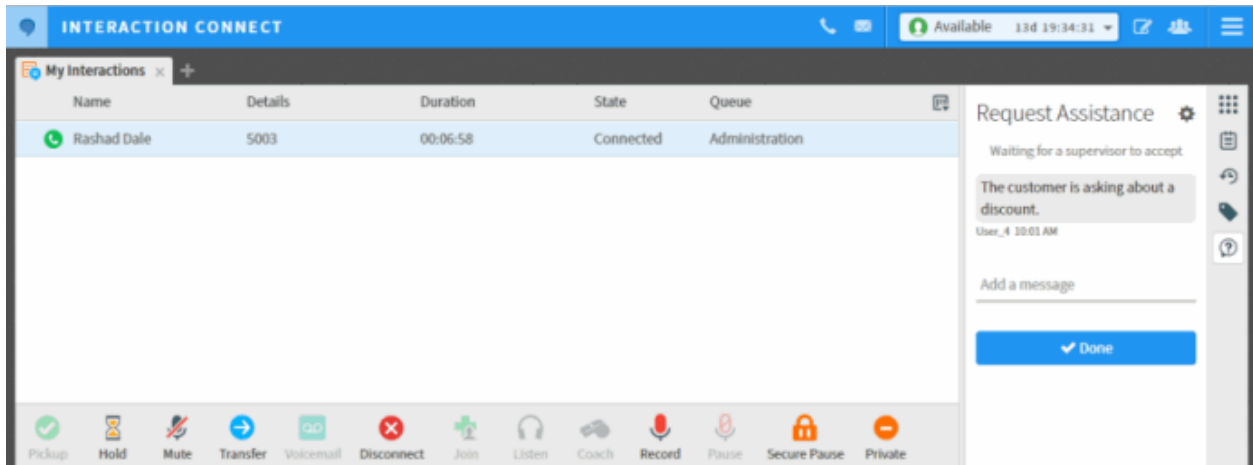
Select an interaction and assign an Account code or Wrap-Up code. Account codes are sometimes used for customer billing purposes. To assign a Wrap-Up code, you must be a member of a workgroup for which the CIC administrator has configured and activated Wrap-Up codes.



The screenshot shows the 'INTERACTION CONNECT' interface. The top status bar is the same. The 'My Interactions' and 'Call History' tabs are present. The table lists two interactions: 'Helva Nalamura' with details '1 (617) 555-9011', duration '00:04:17', state 'Disconnected [L...', queue 'Support', and interact... '1001953079'; and 'Lorena Mess' with details '1 (617) 555-9014', duration '00:01:44', state 'ACD-Assigned: ...', queue 'Support', and interact... '1001953190'. The 'Interaction Properties' sidebar is open, showing two dropdown menus: 'Select an Account Code' and 'Select a Wrap-Up Code'. The bottom toolbar is the same as in the previous images, but it includes 'Record' and 'Pause' icons.

Request Assistance

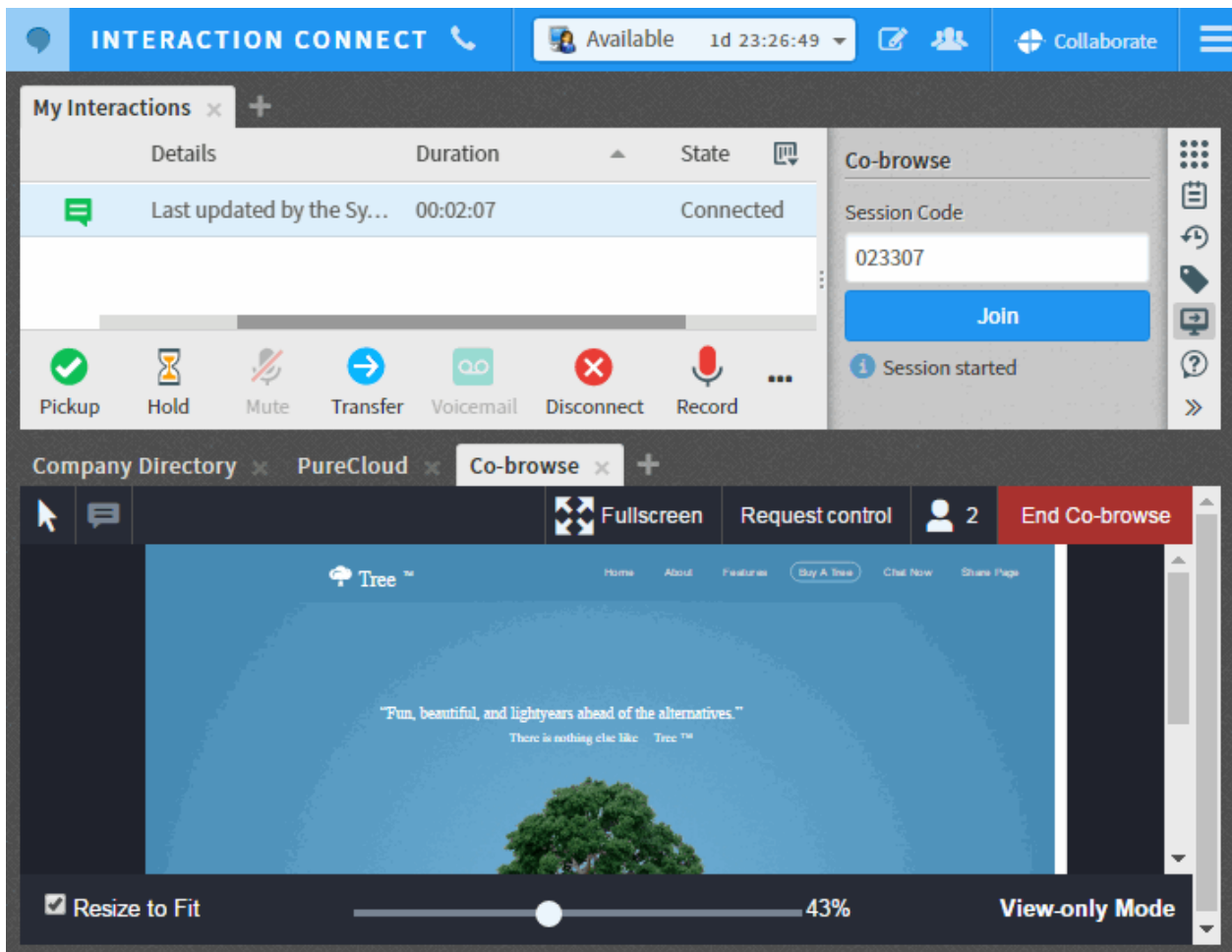
Select an ACD-routed interaction and request assistance from your supervisor.



The screenshot shows the Interaction Connect interface. At the top, there's a blue header with "INTERACTION CONNECT" and a status bar showing "Available" and a timer "1:38 19:34:31". Below the header is a "My Interactions" table with columns: Name, Details, Duration, State, and Queue. The table contains one entry: Rashad Dale, 5003, 00:06:58, Connected, Administration. To the right of the table is a "Request Assistance" sidebar. It contains the text "Waiting for a supervisor to accept", a message from the customer: "The customer is asking about a discount." (User_4 10:01 AM), an "Add a message" input field, and a blue "Done" button. At the bottom of the interface is a toolbar with icons for Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Coach, Record, Pause, Secure Pause, and Private.

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.



The screenshot shows the Interaction Connect interface in Co-browse mode. The top header is blue with "INTERACTION CONNECT" and a status bar showing "Available" and a timer "1d 23:26:49". Below the header is a "My Interactions" table with columns: Details, Duration, and State. The table contains one entry: Last updated by the Sy..., 00:02:07, Connected. To the right of the table is a "Co-browse" sidebar. It contains a "Session Code" input field with the value "023307", a blue "Join" button, and a status message "Session started". Below the sidebar is a toolbar with icons for Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, and Record. The main area of the interface shows a "Co-browse" window with a "Company Directory" tab selected. The window displays a website for "Tree" with a blue background and a tree image. The website text reads: "Fun, beautiful, and lightyears ahead of the alternatives." and "There is nothing else like Tree™". The window has a "Fullscreen" button, a "Request control" button, and a red "End Co-browse" button. At the bottom of the window, there's a "Resize to Fit" checkbox, a zoom slider set to "43%", and a "View-only Mode" button.

Related Topics

[Account Codes](#)

[Add Notes](#)

[Dial Pad](#)

[Request Assistance from Your Supervisor](#)

[Use Co-browse during an interaction](#)

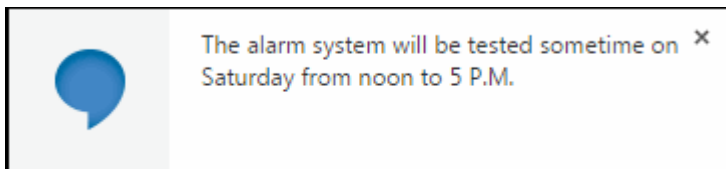
Supervisor Client Memos

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.

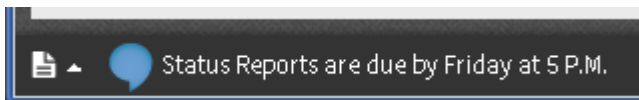
Note: You cannot retrieve a desktop pop-up after you close it.



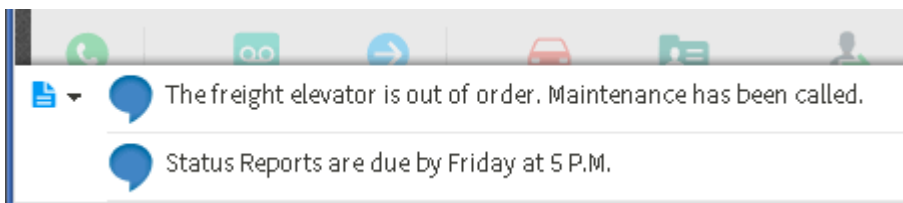
Notification Area

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.

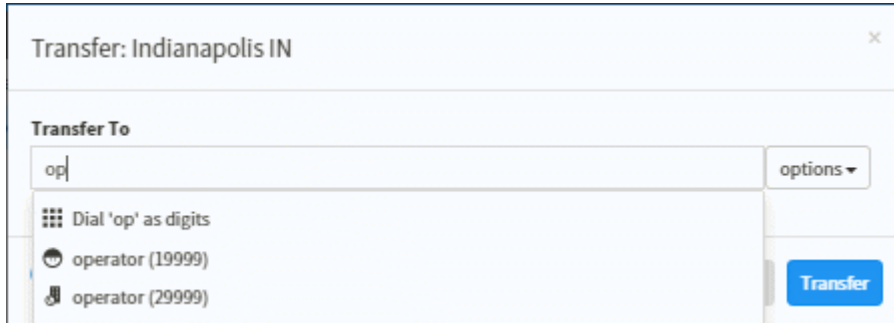


Transfer Dialog Box

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.

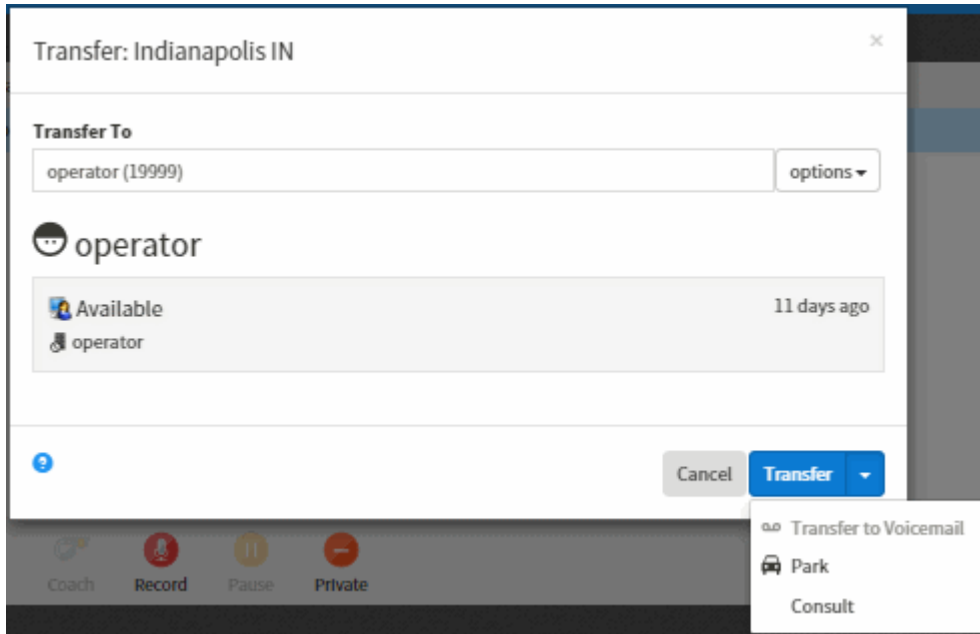
Requirements: [Search Station Queues](#) and [Search Workgroup Queues](#) Access Control rights determine which station and workgroup queues are available as transfer targets.

- 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](#)

Toolbars

Using the Toolbars

The CIC client includes two toolbars:

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

Related Topics

- [Using the Queue Control Toolbar](#)
- [Using the Directory Toolbar](#)

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

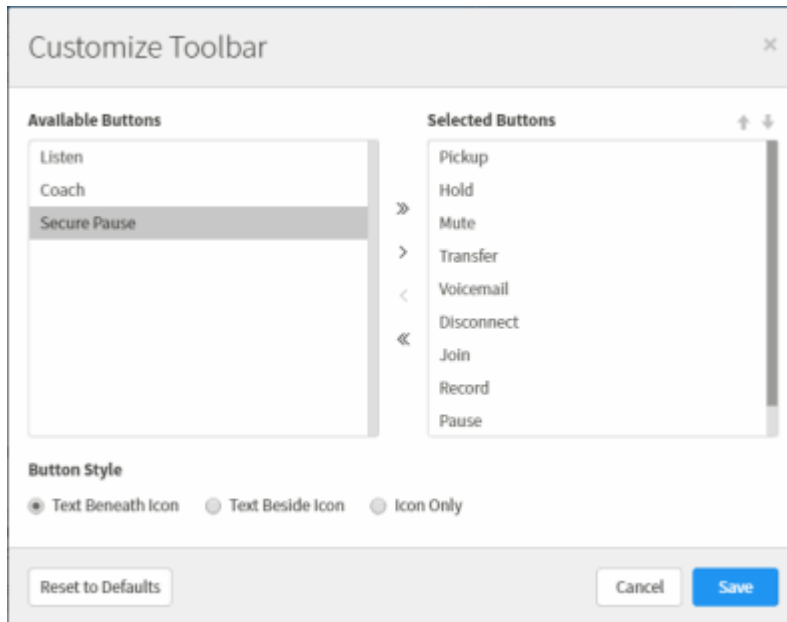
Requirements: The [Customize Client](#) Security Right enables you change the buttons in a Queue Control toolbar. You also need specific rights to add and use buttons on the Queue Control toolbar. For more information, see [Using the Queue Control Toolbar](#).

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.

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](#)

Queue Control Toolbar

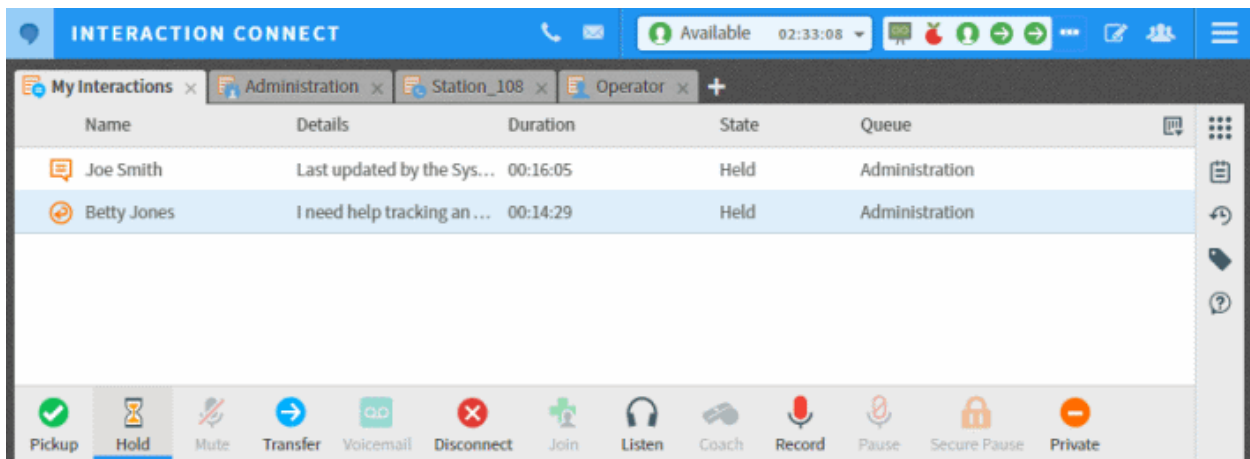
Using the Queue Control Toolbar

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.

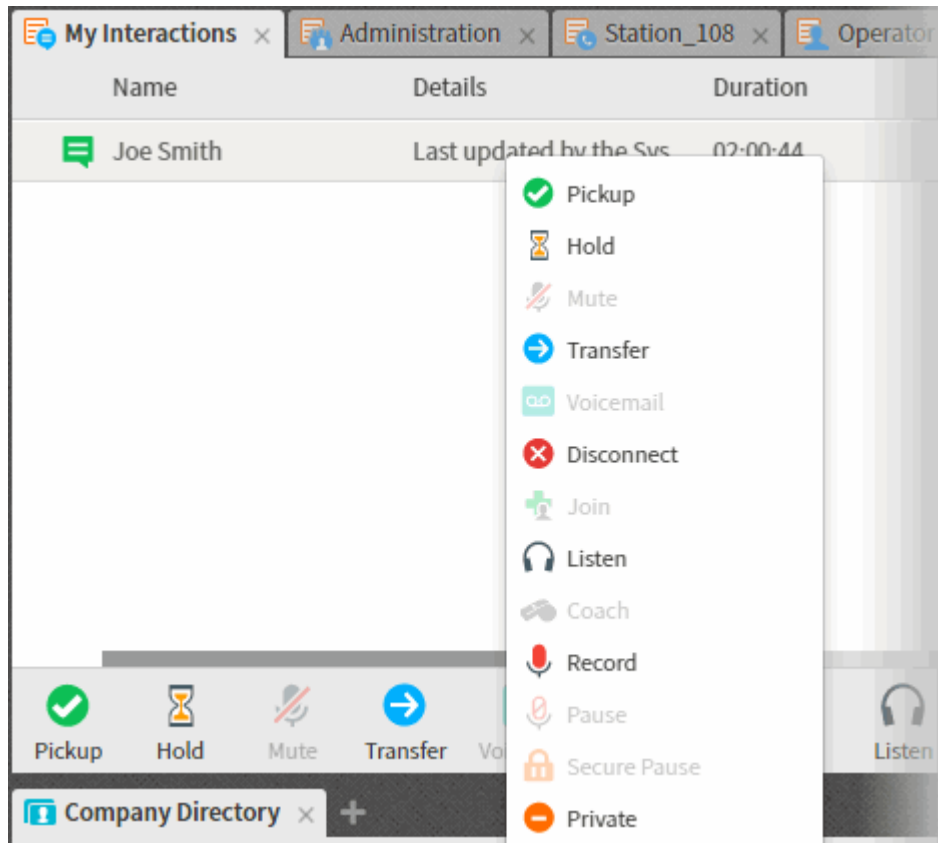
[My Interaction Rights](#) determine the actions you can perform on interactions in [My Interactions](#). Access Control rights determine which actions you can perform on **other queues** you have the rights to display. To **Disconnect, Hold, Mute, Pickup** or **Transfer** interactions, you need the 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

Queue Control Toolbar Buttons

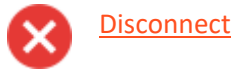
Requirements: You need the appropriate [Interaction Command Right](#) to add a Queue Control button to a Queue Control toolbar. You need the appropriate [My Interaction Right](#) to use the button when it appears in the [My Interactions](#) toolbar. To **Disconnect**, **Hold**, **Mute**, **Pickup** or **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](#)



[Disconnect](#)



[Hold](#)



[Join](#)



[Listen](#)



[Mute](#)



[Pause](#)



[Pickup](#)



[Private](#)



[Record](#)



[Secure Pause](#)



[Snip Button](#)



[Transfer](#)



[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	<p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>


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](#)

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. 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	<p>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.</p> <p>The connected call icon is displayed.</p> 
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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	<p>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.</p> <p>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.</p> <p>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.</p>


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Related Topics

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

Mute Button

Requirements: The "Mute" [Interaction Command Right](#) determines if the Mute button can appear on a toolbar. 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	<p>Click Mute to disable the microphone on your telephone so that the other party or parties cannot hear what you are saying.</p> <p>Click Mute again to reactivate the microphone.</p> <p>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.</p> <p>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.</p>

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.

Click this button to pause the recording session. Click it again to resume the recording session.


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Related Topics

- [Record a Call](#)
- [Record Button](#)
- [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	<p>Click this button to prevent other Customer Interaction Center users from recording or listening to your conversation.</p> <p>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.</p>


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	<p>Click Record to record the currently selected call. A call recording is saved as a wav file.</p> <p>Clicking Record the first time starts the recording session for a call. Clicking Record again stops the recording session for a call.</p> <p>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.</p>

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

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Related Topics

- [Record a Call](#)
- [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	<p>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.</p> <p>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.</p> <div data-bbox="435 1157 607 1268" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="text-align: center; font-size: 1.2em;">00:16</p> <p style="text-align: center; font-size: 0.8em;">Secure Pause</p> </div> <p>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.</p> <div style="border-left: 2px solid black; border-right: 2px solid black; padding: 0 10px;"> <p>Tip: Pressing Secure Pause multiple times during a pause does not increase the duration beyond the maximum time limit.</p> </div> <div style="border-left: 2px solid black; border-right: 2px solid black; padding: 0 10px; background-color: #f0f0f0;"> <p>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.</p> </div>

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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	<p>Queue Control toolbar</p> <p>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.</p>
Description	<p>Click Snip to make a snippet recording of the currently selected call or chat.</p> <p>Note: Snippet recordings of email messages is not enabled by default.</p> <p>Clicking Snip the first time starts the recording session for a call. Clicking Snip again stops the recording session for a call.</p> <p>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.</p>


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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](#)

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. 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](#)

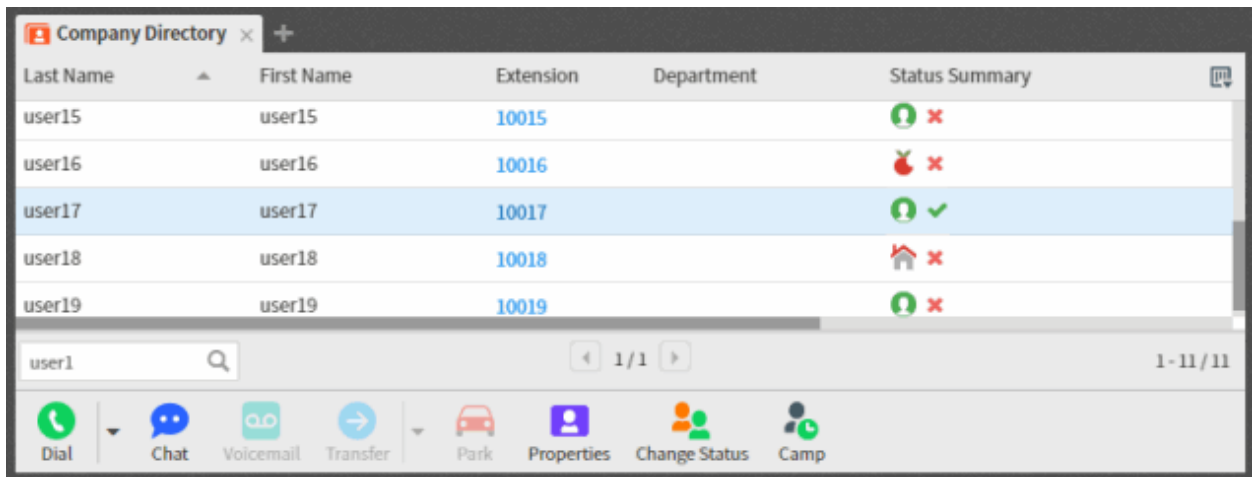
[Transfer a Call to Your Voicemail](#)
[Using the Queue Control Toolbar](#)

Directory Toolbar

Using the Directory Toolbar

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

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






Related Topics






[Directory Toolbar Buttons](#)
[Using the Toolbars](#)

Directory Toolbar Buttons

Directory Toolbar Buttons

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

Toolbar Button	Function
	Dial
	Initiate a Chat Session
	Voicemail


	Transfer
	Park on Queue
	Properties
	Change User's Status
	Camp on an Internal Extension

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. Use this button to watch another user's status. You are alerted when the other user's status changes to an available type.


Related Topics

[Camp Desktop Alert](#)

[Camp on an Internal Extension](#)

Change User's Status Button

Requirements: You need the [Change Status Users](#) right for the selected user to set another user's status.


Icon	
Location	Directory Toolbar Note: The Change User's Status button may not appear on your Directory toolbar by default. Contact your CIC administrator about the necessary user

	rights. For a list of available buttons, see Directory Toolbar Buttons .
Description	You can set another user's status in the Company Directory.

Related Topics

- [Directory Toolbar Buttons](#)
- [Set Another User's Status](#)


Initiate New Chat Button

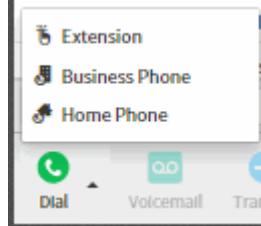
Icon	
Location	Directory Toolbar
Keyboard shortcut	Ctrl+Shift+C
Description	<p>Click this button to start and participate in intercom chats with other CIC client users.</p> <p>Note: To initiate an intercom chat, you need the View Directory Status Columns Access Control right for the Logged In column 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.</p>

Related Topics

- [Initiate a Chat Session](#)

Dial Button


Icon	
Location	Directory Toolbar
Description	<p>Use this button to dial a specific number associated with a selected directory entry by doing one of the following:</p> <ul style="list-style-type: none"> • Select an entry in the Company Directory and then click the Dial button to dial the default number. • Select an entry in the Company Directory and then click the arrow on the Dial button. Click one of the displayed "Dial" entries to dial the associated number.




Related Topics

- [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

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

Properties Button on the Directory Toolbar


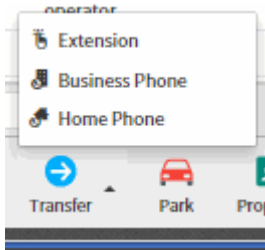
Icon	
Location	Directory Toolbar
Description	<p>The Properties button on your Directory toolbar enables you to view and edit detailed information for the selected directory entry. For more information, see View and Edit Directory Entries.</p>

Related Topics

- [View and Edit Directory Entries](#)

Send to Voicemail Button

Icon	
Location	Directory Toolbar


Icon	
Location	Directory Toolbar
Description	<p>Use this button to transfer a call to a specific number associated with a selected directory entry by doing one of the following:</p> <ul style="list-style-type: none"> • Select an entry in the Company Directory and then click the Transfer button to transfer the call to the default number. • Select an entry in the Company Directory and then click the arrow on the Transfer button. Click one of the displayed "Transfer" entries to transfer the call to the associated number. 

Related Topics

- [Transfer a Call Without Consulting the Recipient](#)
- [View and Edit Directory Entries](#)

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

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

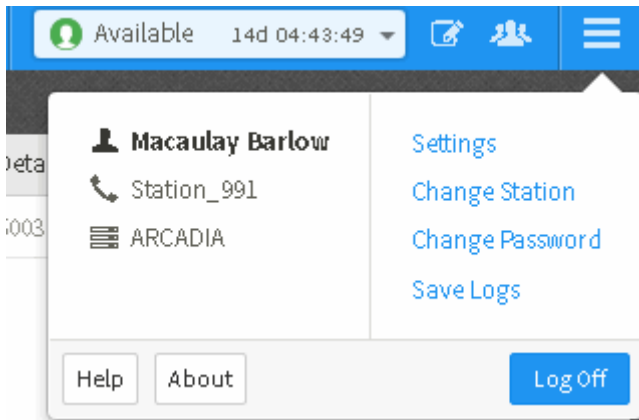
Requirements: You need the [Customize Client](#) Security right to customize your personal CIC client configuration settings.

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

Accessing the Application Settings Dialog Box

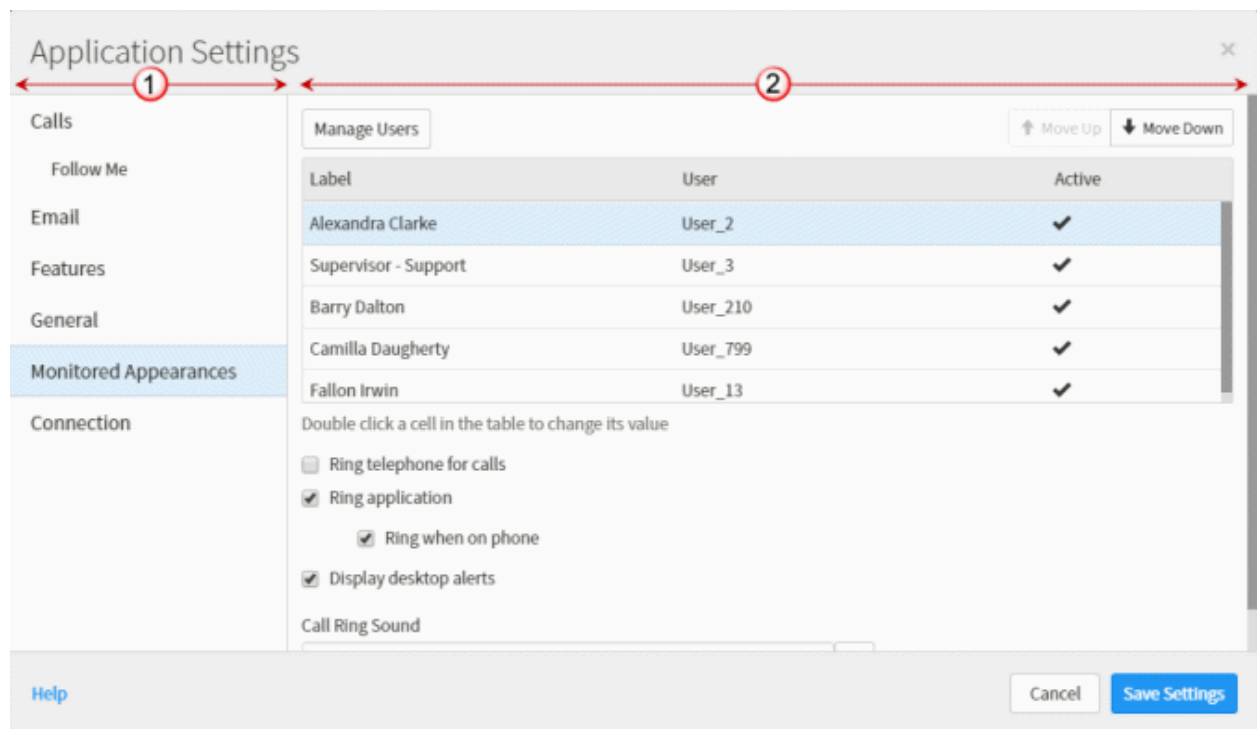
To access the Application Settings dialog box:

- Click the menu icon and then click **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	The settings associated with each node appear in the Properties details

	details pane	pane.
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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

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

- 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.

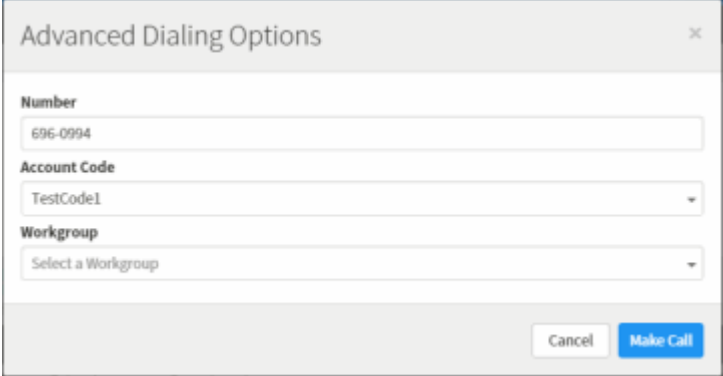
To set calls options:

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.

<p>Timeout for external calls (in seconds):</p>	<p>This option determines the number of seconds your outgoing calls ring before they are disconnected.</p> <p>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.</p>
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<p>Add account codes or workgroup when dialing</p>	<p>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.</p> 
<p>Analyze outgoing external calls</p>	<p>If enabled, Telephony Services (TS) monitors whether the outgoing interaction connects to a person or an answering machine.</p> <p>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.</p>
<p>Show alert dialog when call becomes unsecure</p>	<p>If enabled, a Security Alert dialog box appears when a call is downgraded from secure to non-secure.</p>
<p>Enable call waiting</p>	<p>If enabled, you are notified when another call is coming in while you are on the phone.</p>
<p>Mute calls when transferring</p>	<p>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.</p>
<p>Open new window for incoming calls</p>	<p>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.</p>
<p>Operator target number:</p>	<p>This option determines the telephone number or extension to which callers who choose 0 (zero) to exit out of your voice mail are sent.</p>

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	<p>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.</p> <p>To change the language used in the Interaction Connect interface, do one of the following:</p> <ul style="list-style-type: none">• 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 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	<p>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.</p> <p>Do one of the following:</p> <ul style="list-style-type: none">• To download and display automatically any images included in ACD-routed email messages, select the check box.• To prevent automatic downloading and display of images, clear the check box. <p>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.</p> <p>Note: Blocking automatic image downloads speeds up email message downloads and can help protect you from junk email.</p>
No longer show email after sending	<p>Select this option to clear the Current Interaction view automatically when you click Send.</p> <p>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.</p>
No longer show email after disconnecting	<p>Select this option to clear the Current Interaction view automatically when you click Disconnect.</p> <p>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.</p>

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.

You can also manage the activation status of agents. You need the **Interaction Supervisor Plug-In: Workgroup** license and the **Activate Others** 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](#)
- [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	<p>Enter a telephone number you want the CIC client to call if you are not available.</p> <p>Dialing Pause</p> <p>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.</p> <p>Note: Use of the comma (,) to create a two-second delay is not supported in all platforms.</p>
Timeout	<p>Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds.</p> <p>Note: If the forwarding number is an internal station extension, this timeout value is ignored and the station is alerted for 45 seconds.</p>
Use Pin	<p>To require that you or another call recipient must enter your CIC client password to accept the call, select Use Pin.</p> <p>Note: This feature can prevent someone else from answering your calls through the follow-me routing process.</p>

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	<p>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.</p> <p>Do one of the following:</p> <ul style="list-style-type: none">• Select the check box to display the confirmation dialog box.• Clear the check box to suppress the confirmation dialog box.
Notify me when alert sounds cannot be played	<p>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.</p> <p>Do one of the following:</p> <ul style="list-style-type: none">• Select this check box to display the warning even if you have previously chosen to suppress it.• Clear this check box to suppress the warning.

3. Click **Save Settings**.

Related Topics

- [Drag and Drop a Call on Another Call](#)
- [Understanding the Application Settings Dialog Box](#)

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](#)

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.

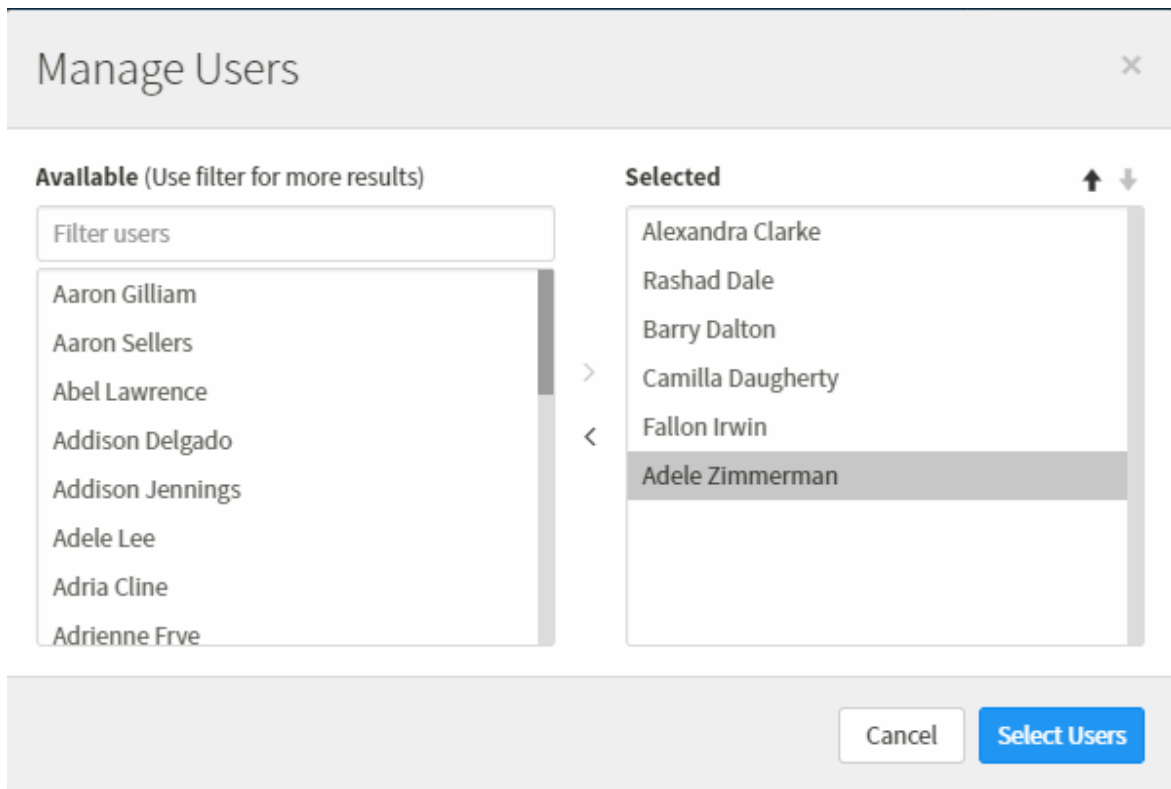
Use the Monitored Appearances property details pane to [add](#), [remove](#), and change the order of user queue in the [Monitored Appearances view](#).

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	<p>Select this to ring your telephone when a new interaction arrives on the monitored queue.</p> <p>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.</p>
Ring application Ring when on phone	<p>Select Ring application to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.</p> <p>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.</p>
Display desktop alerts	<p>Display a desktop alert for alerting interactions on this monitored appearance.</p> <p>Note: Desktop alerts are not supported for all browsers.</p>
Call Ring Sound	<p>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.</p> <p>Note: This setting enables you to select a different sound for each of your monitored queues.</p>

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](#)

Prompts

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](#)

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 the type of prompt you want to record.
 - b. Click **Record**.

Result: CIC initiates a telephone call to your station.

- c. Pick up the call and follow the verbal instructions to record the prompt.
- d. 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 save your 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.

<p>Agent Greeting</p>	<p>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.</p> <p>You must set Agent Greeting to ON to enable this prompt.</p> <p>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".</p> <p>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.</p>
<p>Out of Office</p>	<p>Record a message that is played if:</p> <ul style="list-style-type: none"> ○ You are in a DND status. (Your status is Gone Home, Out of the Office, or some other "not available" status.) <p>and</p> <ul style="list-style-type: none"> ○ You have recorded the Out of Office message. <p>Note: If you are in a DND status, and did not both record and activate the Out of Office message, the caller hears an automated status-based message such as "<i>Your name</i> is At Lunch." If no status-based message is available, the caller hears "<i>Your name</i> is not available."</p>
<p>No Answer</p>	<p>Record a message that is played if:</p> <ul style="list-style-type: none"> ○ You are not in a DND status. (Your status is Available; Available, No ACD; or some other "available" status). <p>and</p>

	<ul style="list-style-type: none"> ○ You do not answer your phone. <p>and</p> <ul style="list-style-type: none"> ○ You have recorded the Record No Answer message. <p>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 "<i>Your name</i> is working at home."</p>
Follow Me	<p>Record a message that is played if your status is set to Available, Follow Me.</p> <p>When you set your status to Available, Follow Me, your <i>Follow Me</i> 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.</p>
Name	<p>Record your name. This recording is used in status-based messages, such as "<i>Your name</i> is At Lunch."</p>
Available, Forward	<p>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.</p> <p>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."</p>

Related Topics

[Understanding the Application Settings Dialog Box](#)

Views

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.

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

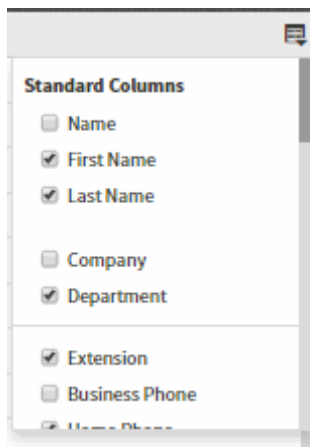
Requirements: The [Customize Client](#) Security Right enables you to add or remove view columns. The [View Directory Status Columns](#) Access Control right determines which Status columns you can add to a **directory view**. The [View Queue Columns](#) Access Control right determines which columns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

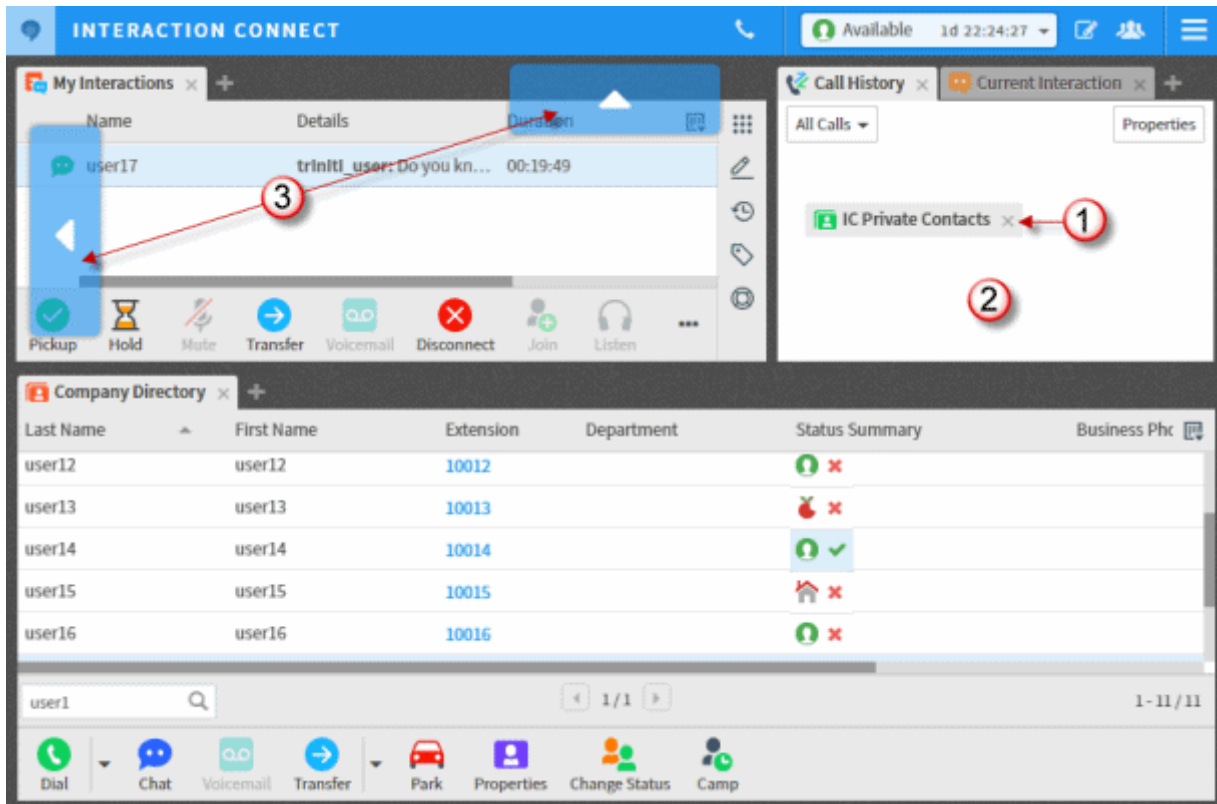
[Change View Layout](#)
[Customize Columns](#)
[Working with the Company Directory](#)
[Working with Other Directories](#)

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. 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

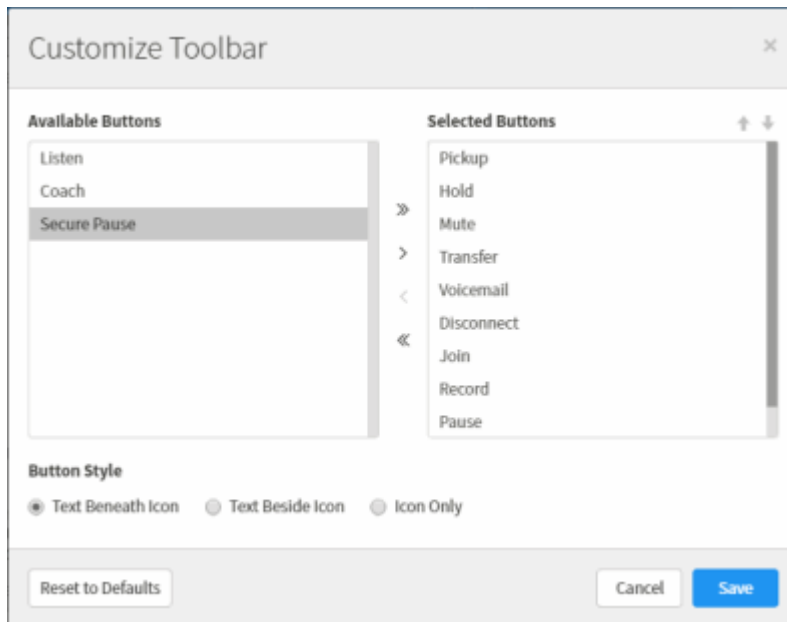
Requirements: The [Customize Client](#) Security Right enables you change the buttons in a Queue Control toolbar. You also need specific rights to add and use buttons on the Queue Control toolbar. For more information, see [Using the Queue Control Toolbar](#).

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.

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 icon](#).
3. Release the button to drop the view in its new location.

Result: The view automatically moves to the chosen area.

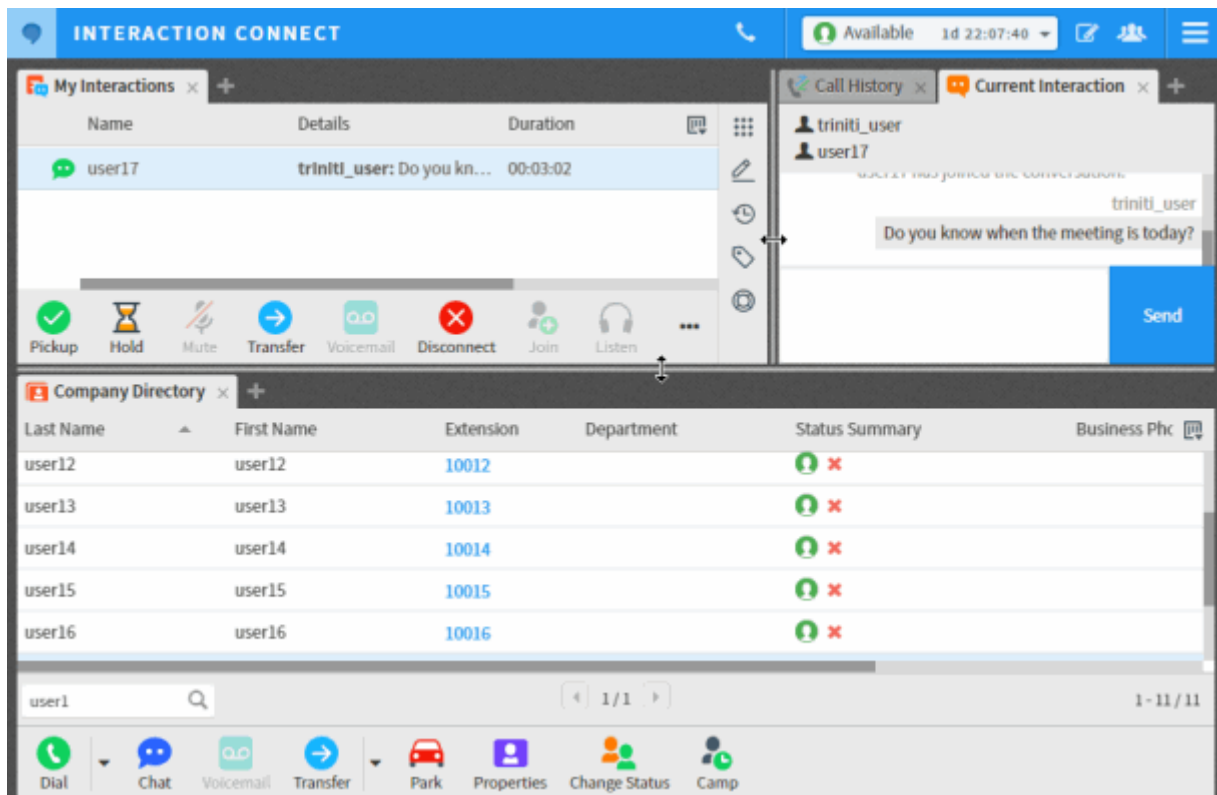
Related Topics

- [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](#)

Account and Wrap-Up Codes

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.

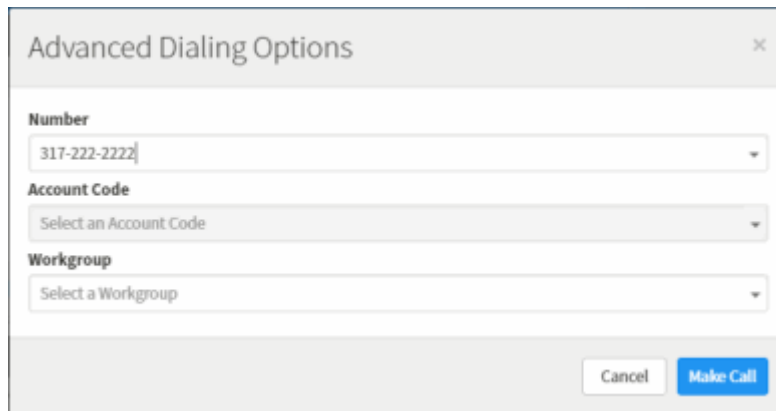
- Assigns you to at least one ACD workgroup.

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](#)

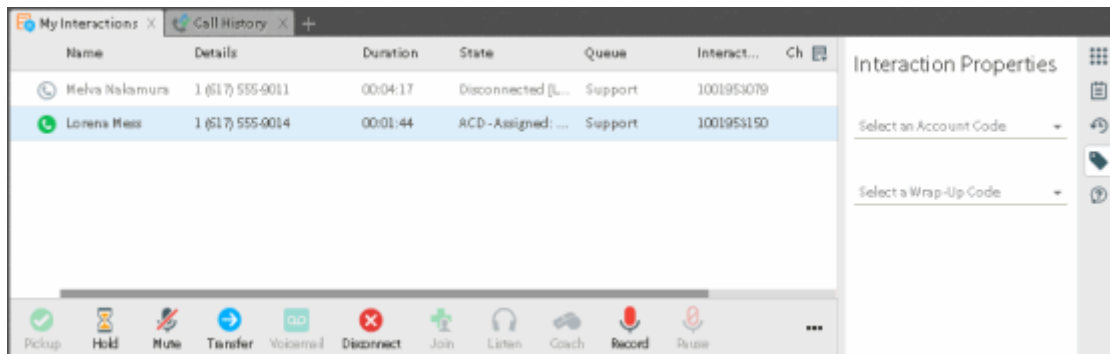
Assign Codes to an Incoming Interaction

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

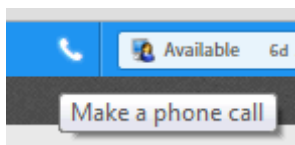
Requirements: See [Working with Account and Wrap-Up Codes](#).

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.

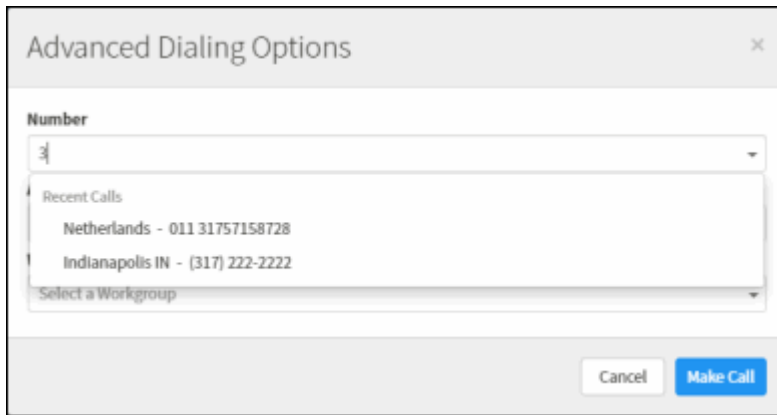
To assign an account code or a workgroup to an outgoing interaction:

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](#).

Advanced Dialing Options

Number
696-0994

Account Code
TestCode1

Workgroup
Select a Workgroup

Cancel Make Call

Related Topics

[Working with Account and Wrap-Up Codes](#)

[Assign Codes to an Incoming Interaction](#)

[Assign Codes to Outgoing Interaction](#)

Understanding Wrap-Up Codes

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

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

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

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

Assigning a Wrap-Up Code

The following rules apply to Wrap-Up codes:

- You can assign Wrap-Up codes to all **incoming** interactions and to **outgoing** interactions that are dialed on behalf of a workgroup.
- You can assign or change a Wrap-Up code any time **during** an interaction.
- If a Wrap-Up code is required and you have not already assigned one, you are prompted to assign a Wrap-Up code **after your part in the interaction ends**.
- You cannot assign, change, or delete a Wrap-Up code **after the interaction disappears** from your My Interactions queue.

- Wrap-Up codes do not have a default value. If you do not select one of the pre-defined Wrap-Up codes, no code is assigned.
- Wrap-Up codes can be used for inbound email messages. Wrap-Up codes are **not used** for email message replies or forwarded email messages.

Wrap-Up Code Prompt

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

Note: If a supervisor assigns a Wrap-Up code for the interaction while the Wrap-Up code prompt is being displayed, the newly selected code appears in the **Wrap-Up Code** drop-down list. You cannot change this code from the prompt. However, you can change it, if needed, in the [Interaction Properties 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.

The screenshot shows a dialog box titled "Assign a Wrap-Up Code:". On the left, there is a green circle containing the number "27". To the right of this is a table with the following information:

Name	John Jones
Remote ID	
Workgroup	Marketing
Interaction ID	3001241026

Below the table is a dropdown menu with the text "Select a Wrap-Up Code" and a downward arrow. At the bottom right of the dialog is a blue button labeled "Assign Wrap-Up".

Related Topics

[Working with Account and Wrap-Up Codes](#)

Callback Requests

[Working with Callback Requests](#)

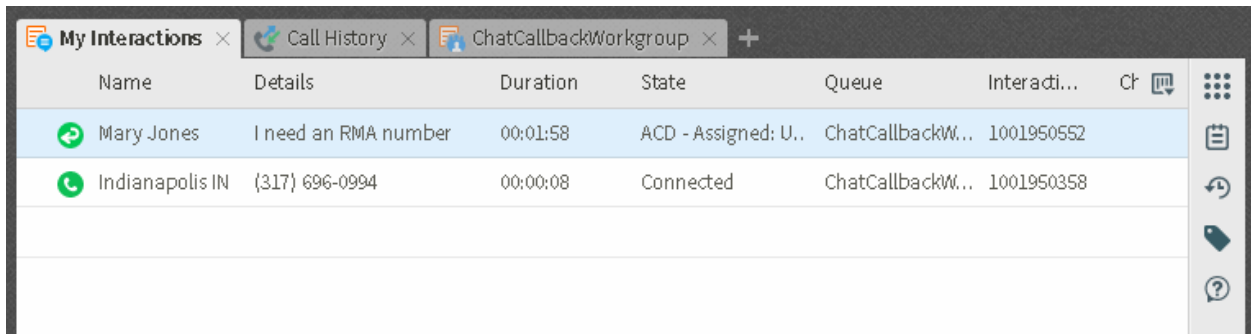
Using the Callback feature, visitors to your company's website can leave a request for an agent to call them back. A visitor starts the Callback process by clicking the appropriate button on a web page and completing information in a Callback dialog box. Customer Interaction Center routes the request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



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

Callback Interaction

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.



Name	Details	Duration	State	Queue	Interactions	Ch
 Mary Jones	I need an RMA number	00:01:58	ACD - Assigned: U..	ChatCallbackW..	1001950552	
 Indianapolis IN	(317) 696-0994	00:00:08	Connected	ChatCallbackW..	1001950358	

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 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

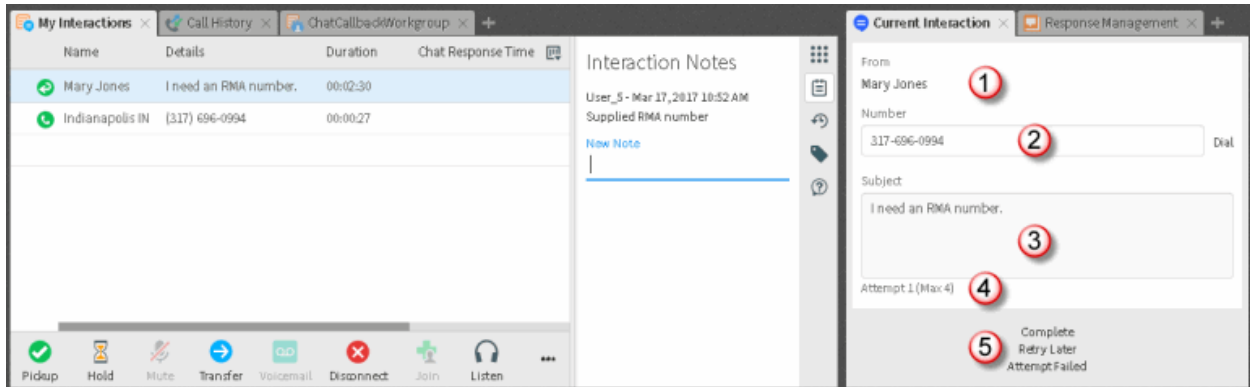
[Callbacks and the Current Interaction View](#)

[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.
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	Complete Retry Later Attempt Failed	<p>After you make the requested call, use these buttons to indicate whether you reached the requester or not.</p> <p>Complete</p> <p>Click this button to indicate you reached the requester and completed the callback interaction.</p> <p>Note: This action disconnects only the callback interaction. You must disconnect the call interaction separately.</p> <p>Retry Later</p> <p>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</p>

available agent in the workgroup. The CIC administrator also configures the maximum number of times agents can retry a callback request.

Attempt Failed

Click this button to indicate that you cannot complete the callback request. It could be that the phone number is incorrect or that no one answered after the last allowed attempt.

Tip: If your CIC system is appropriately configured, you can assign a Wrap-Up code that explains the reason for this failure in the **Interaction Properties** sidebar.

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	<p>Click this button to indicate you reached the requester and completed the callback interaction.</p> <p>Note: This action disconnects only the callback interaction. You must disconnect the call interaction separately.</p>
Retry Later	<p>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.</p> <p>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,</p>

	contact your CIC Administrator.
Attempt Failed	<p>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.</p> <p>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.</p>

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](#)

Calls

Working with Calls

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

- [Making Calls](#)
- [Picking Up Calls](#)
- [Transferring Calls](#)
- [Forwarding Calls](#)
- [Making Conference Calls](#)
- [Using Other Call Features](#)

Making Calls

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.

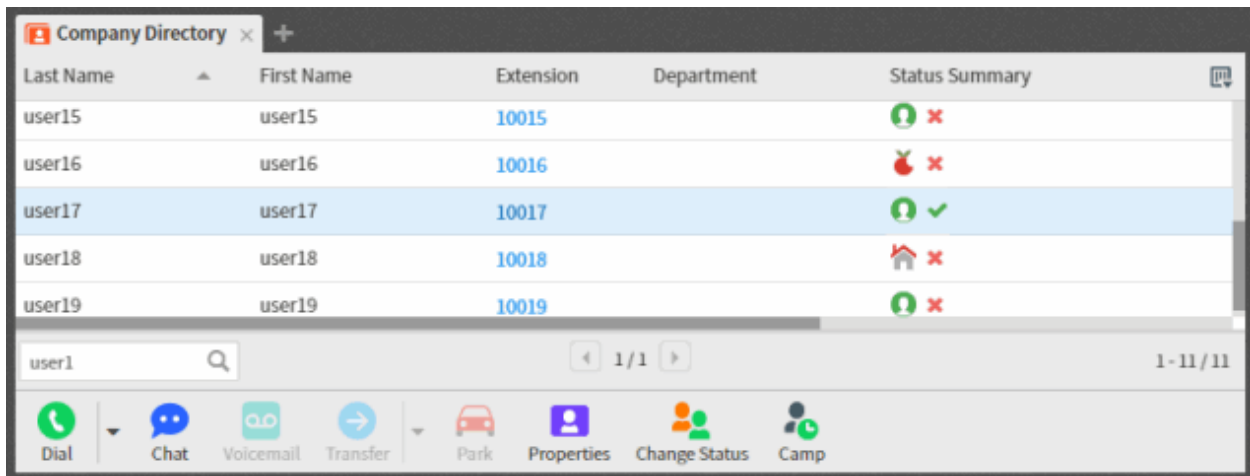
Related Topics

[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.



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

Bob Smith

General Business Home Notes

First Name: Bob Last Name: Smith

Display Name: Bob Smith Company: XYZ Bank

Home Phone: (317) 555-2398 Auto Dial Ext Dial Business Phone: (317) 555-3983 101 Auto Dial Ext Dial

Mobile Phone: (317) 555-9045 Auto Dial Ext Dial

Close

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](#).

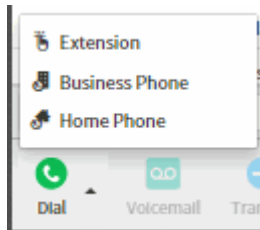
To dial a number inside the organization:

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 [Working with the Company Directory](#).

2. Do one of the following:

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



Related Topics

- [Dial a Long-Distance Number](#)
- [Dial a Number Outside the Organization](#)
- [Dial Button](#)

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

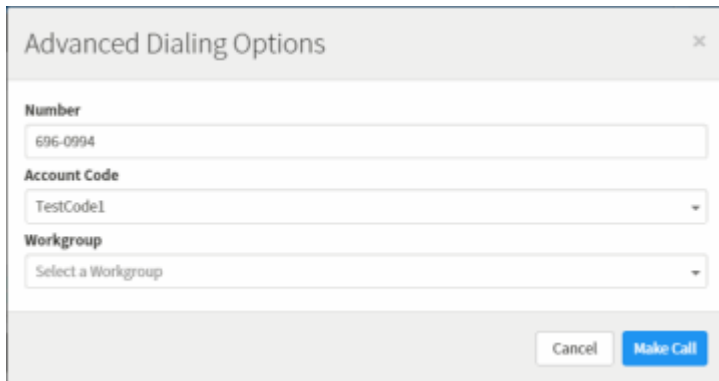
- [Call History](#)
- [Making Calls](#)

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](#).



Advanced Dialing Options

Number
696-0994

Account Code
TestCode1

Workgroup
Select a Workgroup

Cancel Make Call

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.

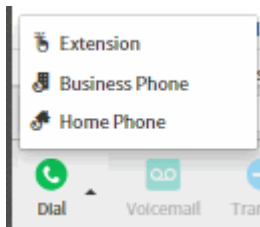
Note: To find out if you have toll call privileges, contact your CIC administrator.

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](#)

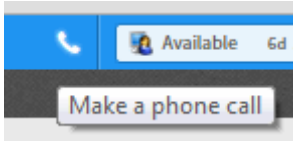
Make a Call using the Dial a number field

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.

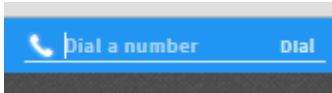
Note: To find out if you have privileges to make toll calls, see your CIC administrator.

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

System		The interaction underwent processing by handlers or other server components of the CIC system.
Voice Mail		The caller left a voice mail message.

Picking Up Calls

Picking Up Calls

Requirements: See [Pickup](#).

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

- [Answer an Incoming Interaction](#)
- [Caller Name](#)
- [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

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.

To transfer by dragging a call onto a name in the company directory or other directory:

1. Tell the caller that he or she is going to be transferred.
2. Scroll (or search) a 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 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:

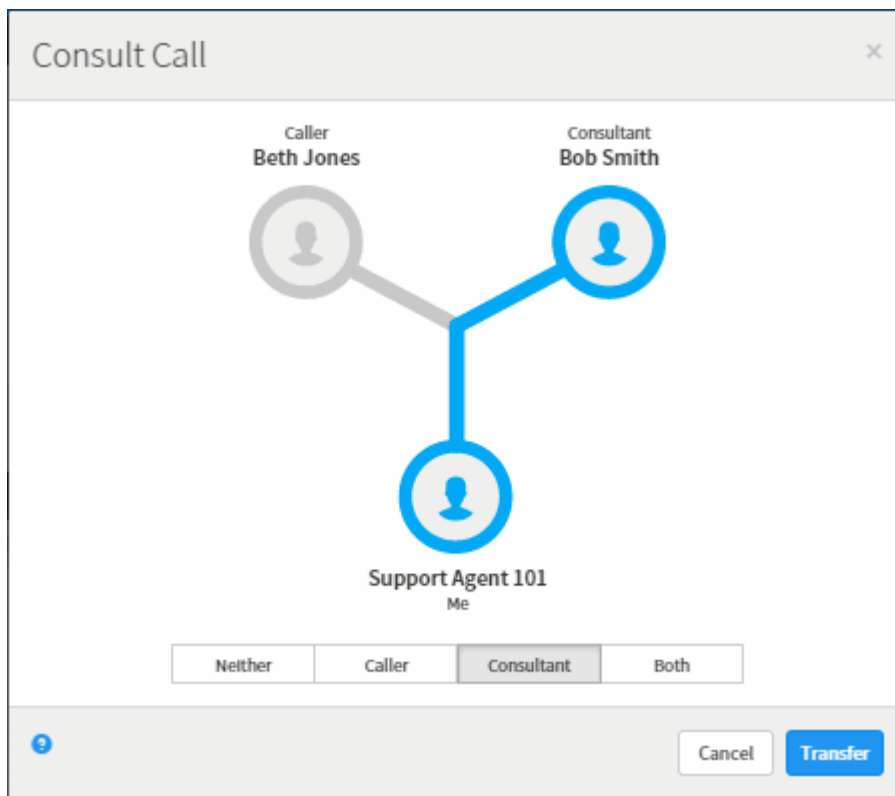
- Select "Dial [your entry] as digits" to convert a text entry into numbers.
- Select the appropriate contact name and associated extension or phone number.

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.

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.

- 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](#)

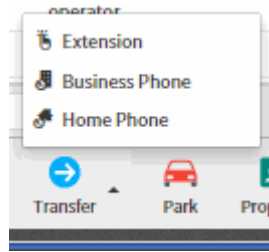
[Transfer a Call Without Consulting the Recipient](#)

[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 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.

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.

Presales			
Interactions Waiting	0	Agents Logged In	14
Longest Interaction Waiting	N/A	Available Agents	14

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 only **inbound call profiles** that are configured in Interaction Attendant to **allow calls to be transferred to them**.

Transferring a Call to an Interaction Attendant Profile

1. Inform the caller that he or she is going to be transferred.
2. 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 only to **inbound call profiles** that are configured in Interaction Attendant to **allow calls to be transferred to them**.

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

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

[Drag and Drop a Call on Another Call](#)
[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 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 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.

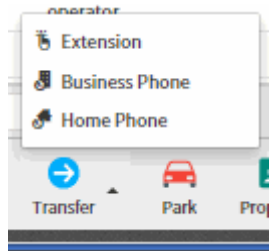
4. Do one of two things:

- 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 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 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](#)

Forwarding Calls

Forwarding Calls

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

Related Topics

- [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.)

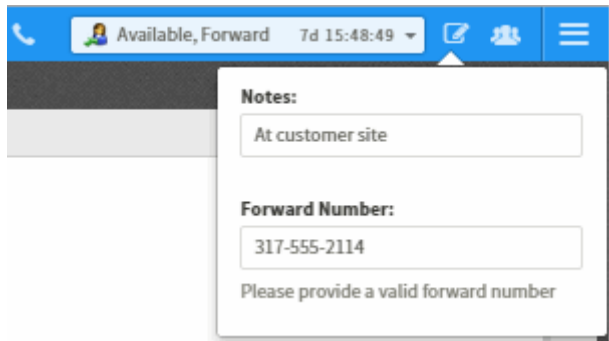
- When you choose to forward calls to a remote telephone number, you must set your status to **Available, Forward**. The CIC server redirects all calls originally targeted at your local extension to the remote number.

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 the **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](#)

Follow-me Routing

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.
---------------------	--

	<p>Dialing Pause</p> <p>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.</p> <p>Note: Use of the comma (,) to create a two-second delay is not supported in all platforms.</p>
Timeout	<p>Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds.</p> <p>Note: If the forwarding number is an internal station extension, this timeout value is ignored and the station is alerted for 45 seconds.</p>
Use Pin	<p>To require that you or another call recipient must enter your CIC client password to accept the call, select Use Pin.</p> <p>Note: This feature can prevent someone else from answering your calls through the follow-me routing process.</p>

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

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.

Name	Details	Duration	State	Queue	Interacti...
Freddie Whitelaw	1 (617) 555-9005	00:02:11	Disconnected [Re...	Support	1001950633
Conference	2005	00:00:11	Connected		1001950686
Lyndsey Deppe	1 (617) 555-9004	00:00:28	ACD - Assigned: U..	Support	1001950675
Aundrea German	1 (617) 555-9015	00:00:10	ACD - Assigned: U..	Support	1001950703

Toolbar buttons: Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Coach, Record, Pause.

- 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](#)

[Drag and Drop a Call on Another Call](#)

[Making Conference Calls](#)

Drag and Drop a Call on Another Call

Requirements: You need the [Conference Calls](#) Security right to create a conference call.

You can create a conference call in My Interactions by dragging and dropping a call on another call in [My Interactions](#).

To create a conference call:

- Dial the number of a participant in the conference call.
Result: The interaction appears in My Interactions.
- Click the Hold button to put the call on hold.
- Repeat steps 1 and 2 for each participant.
- 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.
- 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

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

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](#)

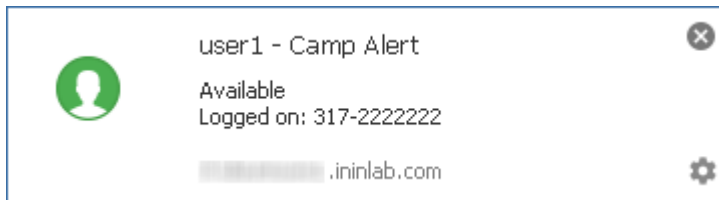
Camp on an Internal Extension

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.

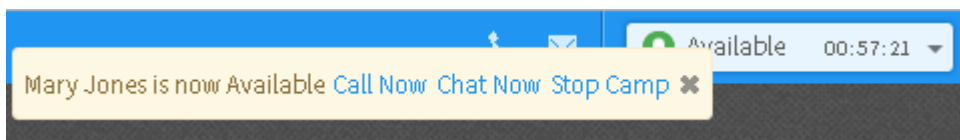
To camp on an internal extension:

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.

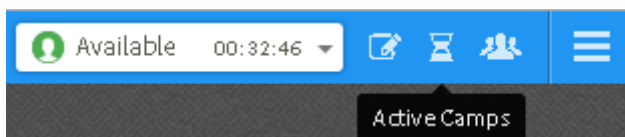
Note: As soon as you start a call by clicking **Call Now**, the camp is stopped on the person you are calling. However, the other may be unable to take your call, even if that person's [status](#) is set to an **Available** type.

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.

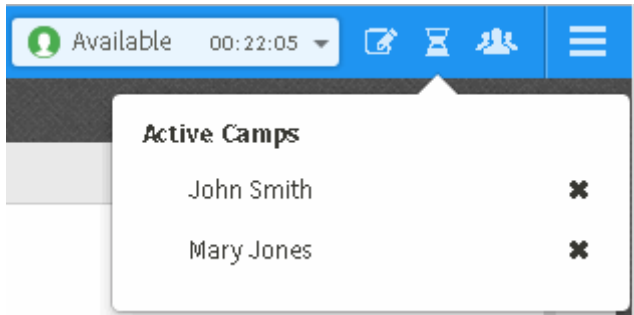
To manage your current camps:

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.



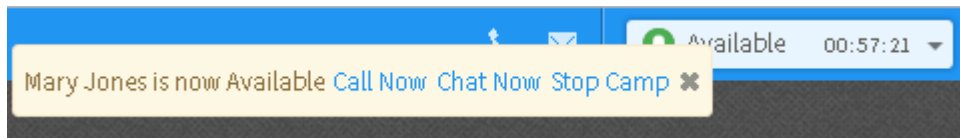
2. Do one of the following:
 - To stop camping on the selected person's extension, click the **X** next to a name
 - To close the list, click anywhere outside the **Active Camps** dialog box.

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.

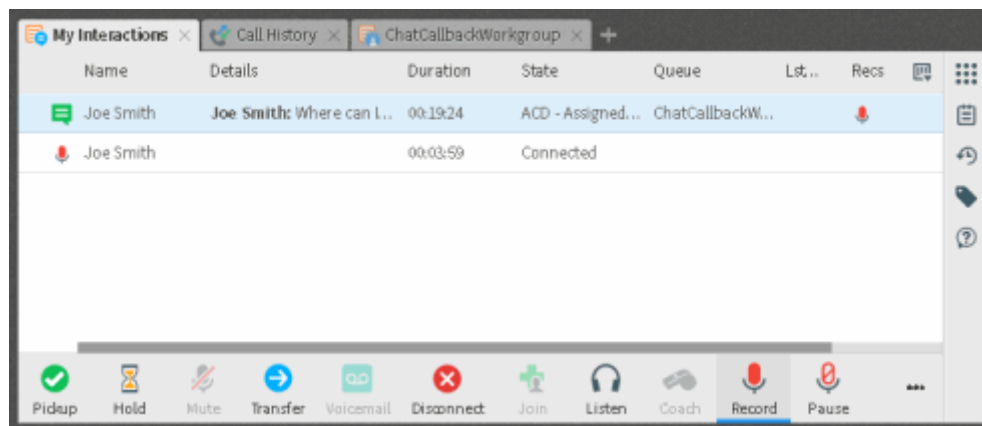
Record Icon

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:

Name	Details	Duration	State	Queue	Recs
user1	Last updated by the System 06:44:37		Connected		
user1		00:00:21	Connected		

- 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).

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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](#)

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](#).

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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 playback 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.

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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.

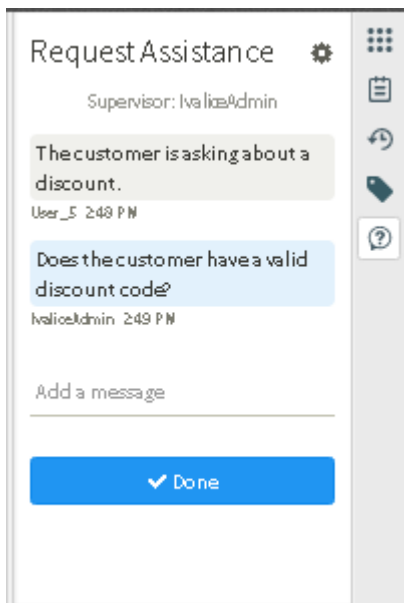
Note: At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

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 click the plus sign (+).

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.

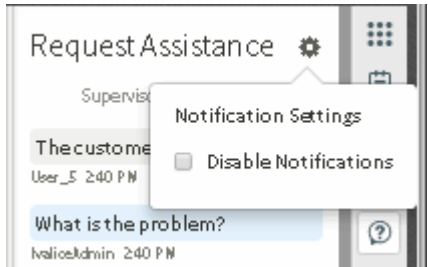


4. When you no longer need assistance and have finished your conversation with your supervisor, click **Done**.

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 your 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](#)

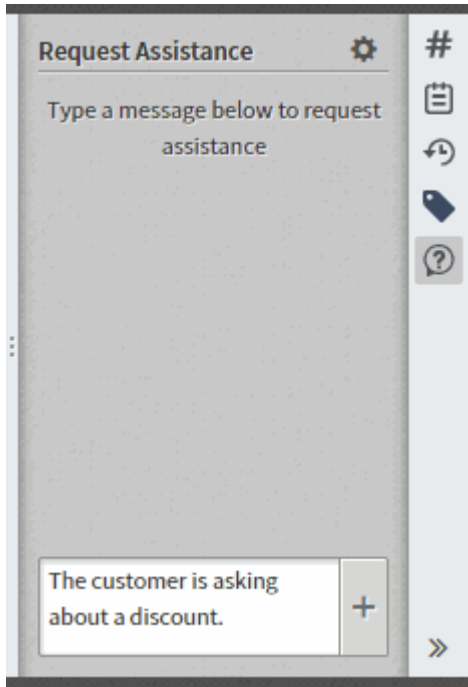
[Manage a Chat Session](#)

[Sidebar](#)

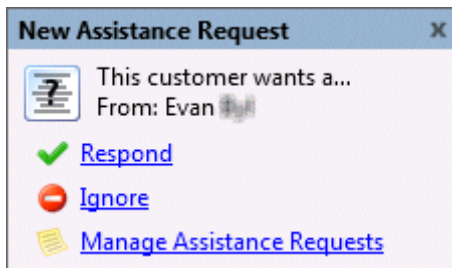
[Working with Chat Sessions](#)

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 click the plus sign (+).



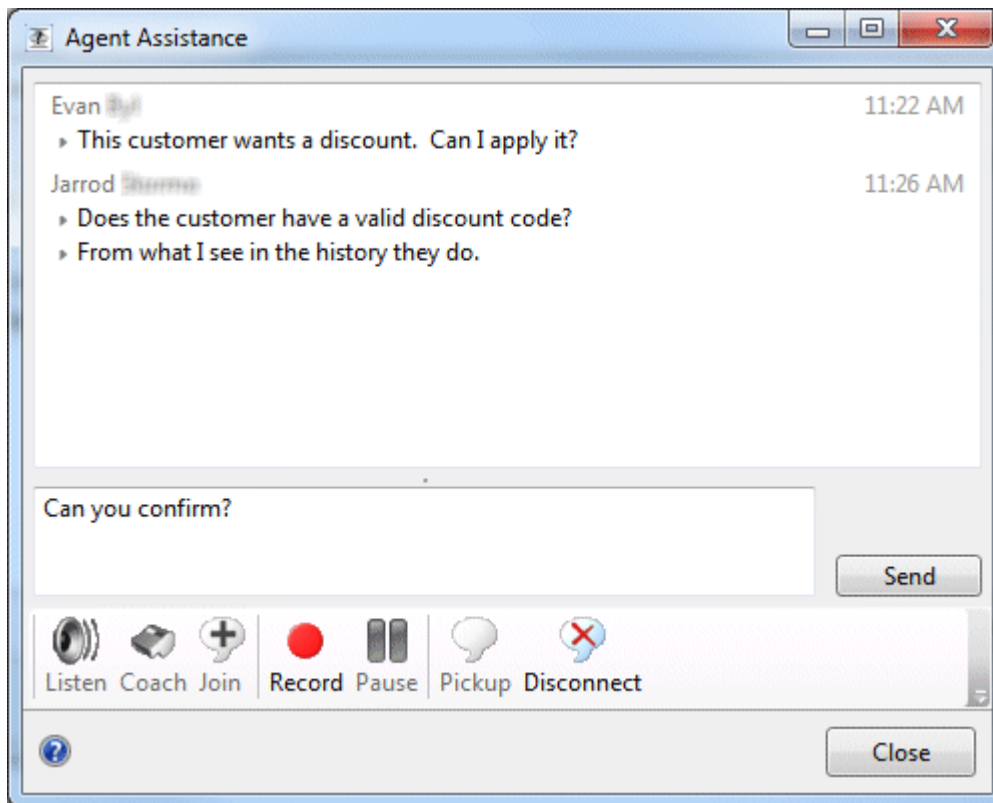
All of the workgroup supervisors on the same CIC server see this assistance request. If a supervisor responds to the request, the toast notification closes automatically for all supervisors.



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.

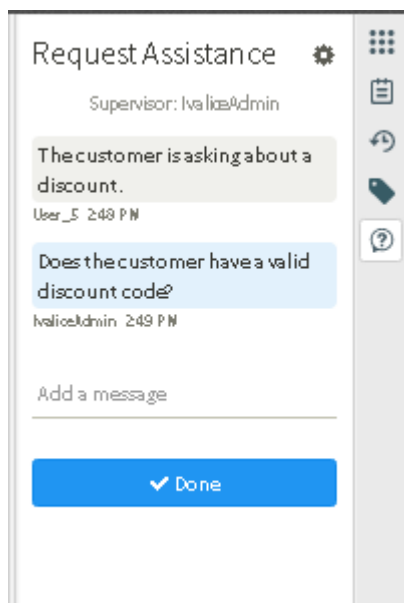
The supervisor responds to the notification by clicking a link:

- **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](#).

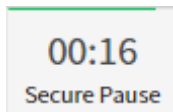
You can use Secure Pause to avoid recording sensitive information, such as a Social Security number or credit card number, during a call. This procedure assumes you are currently connected to a call. You do not have to be currently recording the call interaction.

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.

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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.

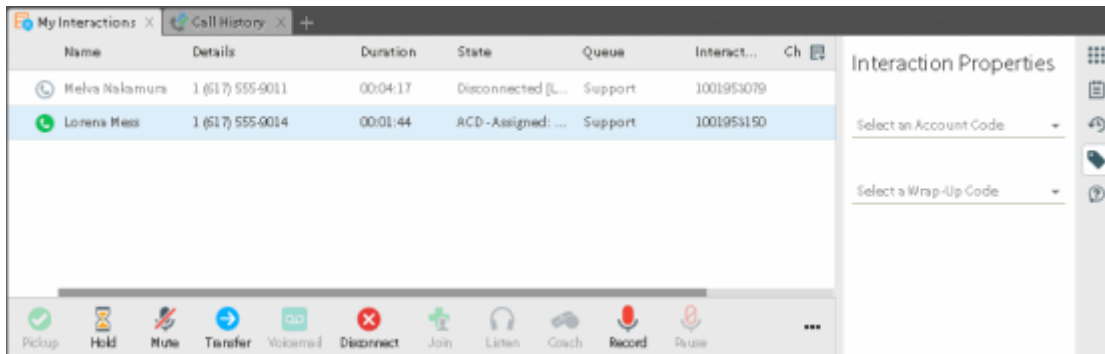
To view interaction details, do one of the following:

- 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

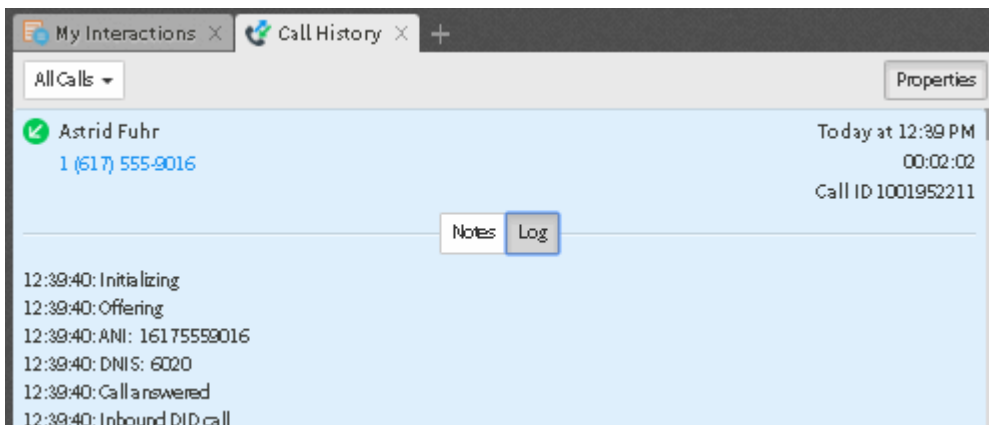
If your system is configured to use Account Codes and Wrap-Up codes and you have the appropriate rights, you can assign these codes in the Interaction Properties sidebar.

Note: The Wrap-Up code you view or assign applies only to the interaction segment created when you were connected to the interaction.



Log

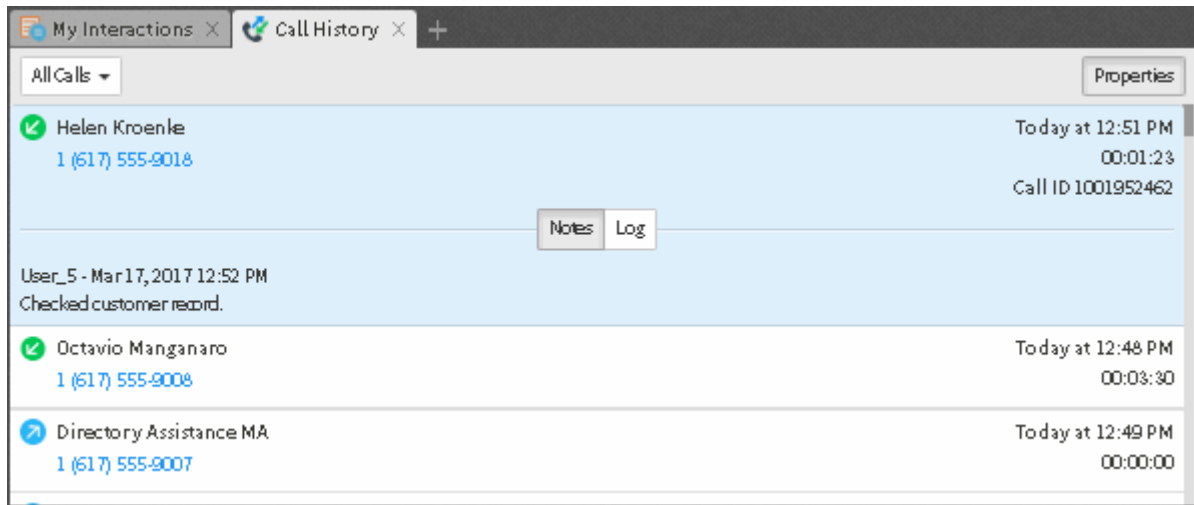
The **Log** describes changes in the interaction's state. This information goes into a log file and is used for reporting purposes.



Notes

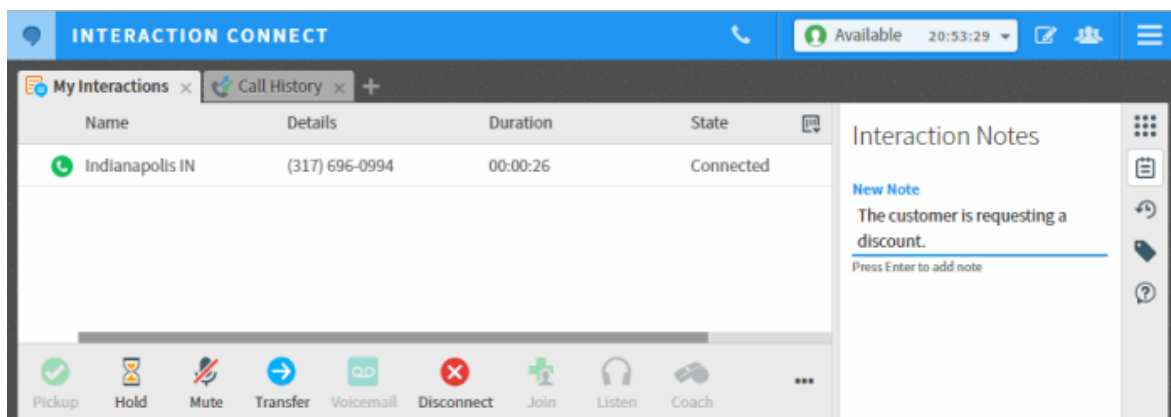
Notes record information typed by an agent about an interaction.

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](#)

Chat Sessions

Working with Chat Sessions

In the CIC client, chat sessions are online, real-time, typed conversations between CIC client users or between a CIC client user and a remote chat participant browsing your website. If 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 two types of chat sessions:

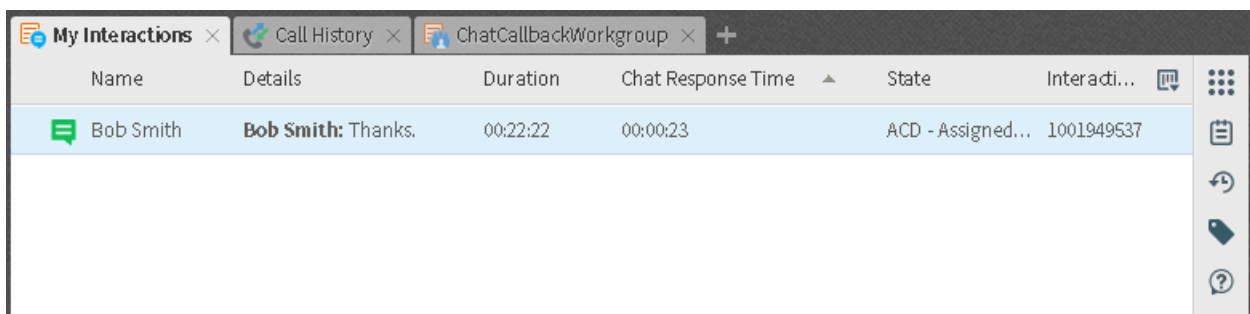
- A CIC user to CIC user chat is an **Intercom chat**. These internal chats can take place only between CIC users on the same CIC server. Intercom chats are not limited to two participants and can include several CIC users. Use Intercom chats to get a quick answer to a question or to pull a team together 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.


- An CIC user to remote participant chat is a **web chat**. A remote user can start the chat by clicking a link on your company's website. Chat requests can be ACD-routed to your queue, much like an incoming call. You then [pick up the chat request](#) in a similar manner to answering an incoming call.

Chat Interactions

A conversation bubble icon identifies a chat interaction in **My Interactions**.



The screenshot shows a browser window with three tabs: 'My Interactions', 'Call History', and 'ChatCallbackWorkgroup'. The 'My Interactions' tab is active and displays a table with columns: Name, Details, Duration, Chat Response Time, State, and Interacti... (Interaction ID). A single row is highlighted in blue, representing a chat interaction with Bob Smith. The 'Name' column shows a green chat bubble icon followed by 'Bob Smith'. The 'Details' column shows 'Bob Smith: Thanks.'. The 'Duration' column shows '00:22:22'. The 'Chat Response Time' column shows '00:00:23'. The 'State' column shows 'ACD - Assigned...'. The 'Interacti...' column shows '1001949537'. On the right side of the table, there is a vertical toolbar with icons for a grid, a calendar, a refresh, a tag, and a help/question mark.

Name	Details	Duration	Chat Response Time	State	Interacti...
 Bob Smith	Bob Smith: Thanks.	00:22:22	00:00:23	ACD - Assigned...	1001949537

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.

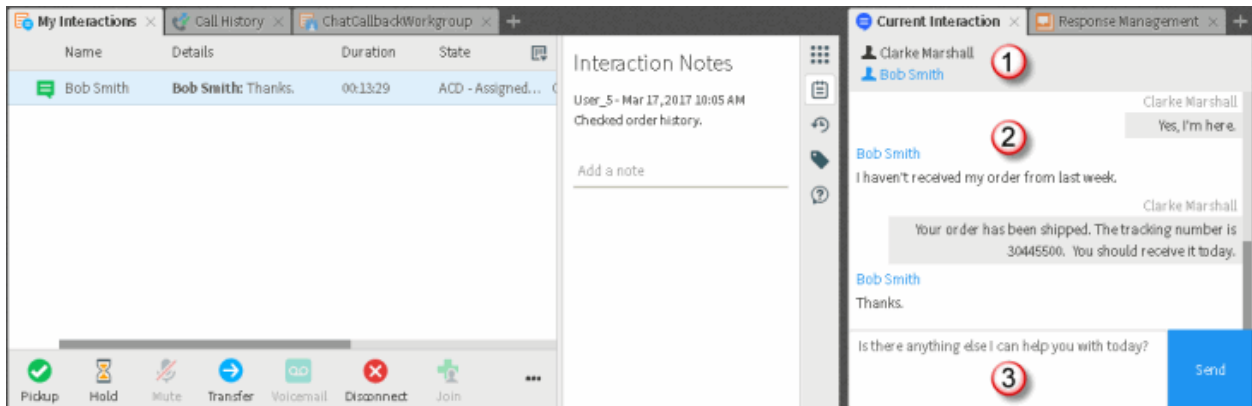
Related Topics

- [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 chat participants. The person who initiates the chat is listed above the separator line. The other chat participants are listed in the Connected With section, in the order in which they entered the chat session.
2	Conversation	The conversation area displays the pre-configured automatic messages that CIC sends when the chat begins, plus all chat text from all participants.
3	Composition	Compose your reply to an ongoing chat, then click Send or press Enter .

area	You can: <ul style="list-style-type: none">• Type a response.• Copy and paste text to or from a Windows application.
------	---

Related Topics

[Add or Close Views Sidebar](#)

Manage a Chat Session

Manage a Chat Session

CIC client users can participate in [intercom chats](#) or [web chats](#). Chat sessions can include two or more users. You can use the **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](#)

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: You do not have to create multiple chat sessions to add CIC client users to a chat. For more information, see [Invite Other Users to Chat](#).

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](#)

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

The screenshot shows an Outlook message window titled "Chat Recording - Message (HTML)". The ribbon includes "Message", "Developer", "Add-Ins", and "Adobe PDF". The ribbon buttons are organized into groups: "Respond" (Reply, Reply to All, Forward, Call), "Actions" (Delete, Move to Folder, Create Rule, Other Actions), "Junk E-mail" (Block Sender, Safe Lists, Not Junk), "Options" (Categorize, Follow Up, Mark as Unread), "Find", and "Send to OneNote".

Message details:
From: Admin, IndyDev
To: Tasker, Noreen
Subject: Chat Recording
Sent: Thu 10/13/2011 9:41 AM

Attachments: ChatRecording1066715674.txt (713 B)

Chat Recording
From: Bishop, Lea
To: Tasker, Noreen

Chat Transcript

```
IC: Welcome to IC!  
IC: Interaction transferred to Bishop, Lea.  
IC: Alerting: Bishop, Lea.  
IC: Bishop, Lea has joined the conversation.  
Tasker, Noreen: I think we need to set up a meeting  
about the project. When would you be free?  
Bishop, Lea: Afternoons are best for me.  
Tasker, Noreen: Do we need to invite everyone on the  
team?  
Bishop, Lea: Just Sarah and Pete for the planning  
meeting.  
Tasker, Noreen: OK. I'll set it up  
IC: Tasker, Noreen has left the conversation.  
IC: Bishop, Lea has left the conversation.#
```

Chat Log
09:40:28: Proceeding
09:40:28: Sent to user Noreen.Tasker
09:40:31: Connected
09:41:21: Disconnected (Local Disconnect)
09:41:21: Interaction disconnected locally.

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.

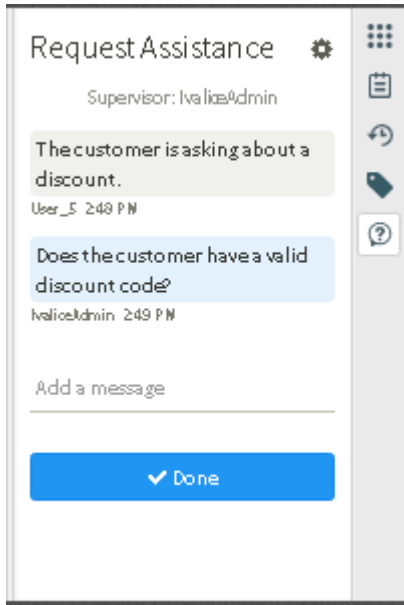
Note: At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

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 click the plus sign (+).

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.

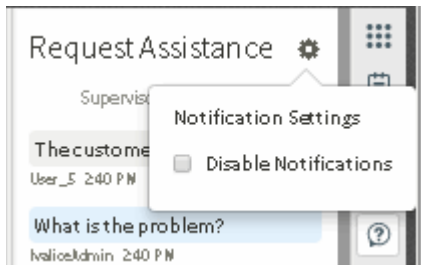


- When you no longer need assistance and have finished your conversation with your supervisor, click **Done**.

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 your 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 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 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.

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

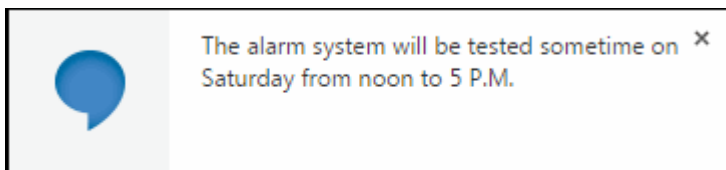
Supervisor Client Memos

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.

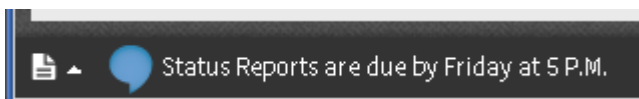
Note: You cannot retrieve a desktop pop-up after you close it.



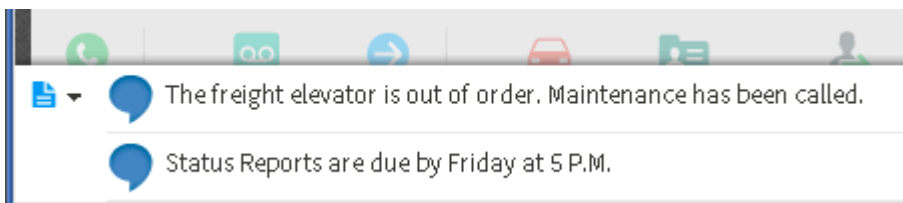
Notification Area

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

The Co-browse feature enables two or more people to view and interact with the same webpage simultaneously. If your CIC administrator enables PureCloud for CIC and completes the necessary [Co-Browse Configuration and Setup procedures](#), you can use the Co-browse feature to give direct assistance to a visitor to your company's website. With the consent of the website visitor, you can take full or limited control of the visitor's view of the webpage and interact directly with it. At the same time, you can talk to or chat with the visitor.

Related Topics

[Co-browse](#)

[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 view

Requirements: You need the [Customize Client](#) Security right to add views. See [Co-browse](#) for requirements for the Co-browse feature.

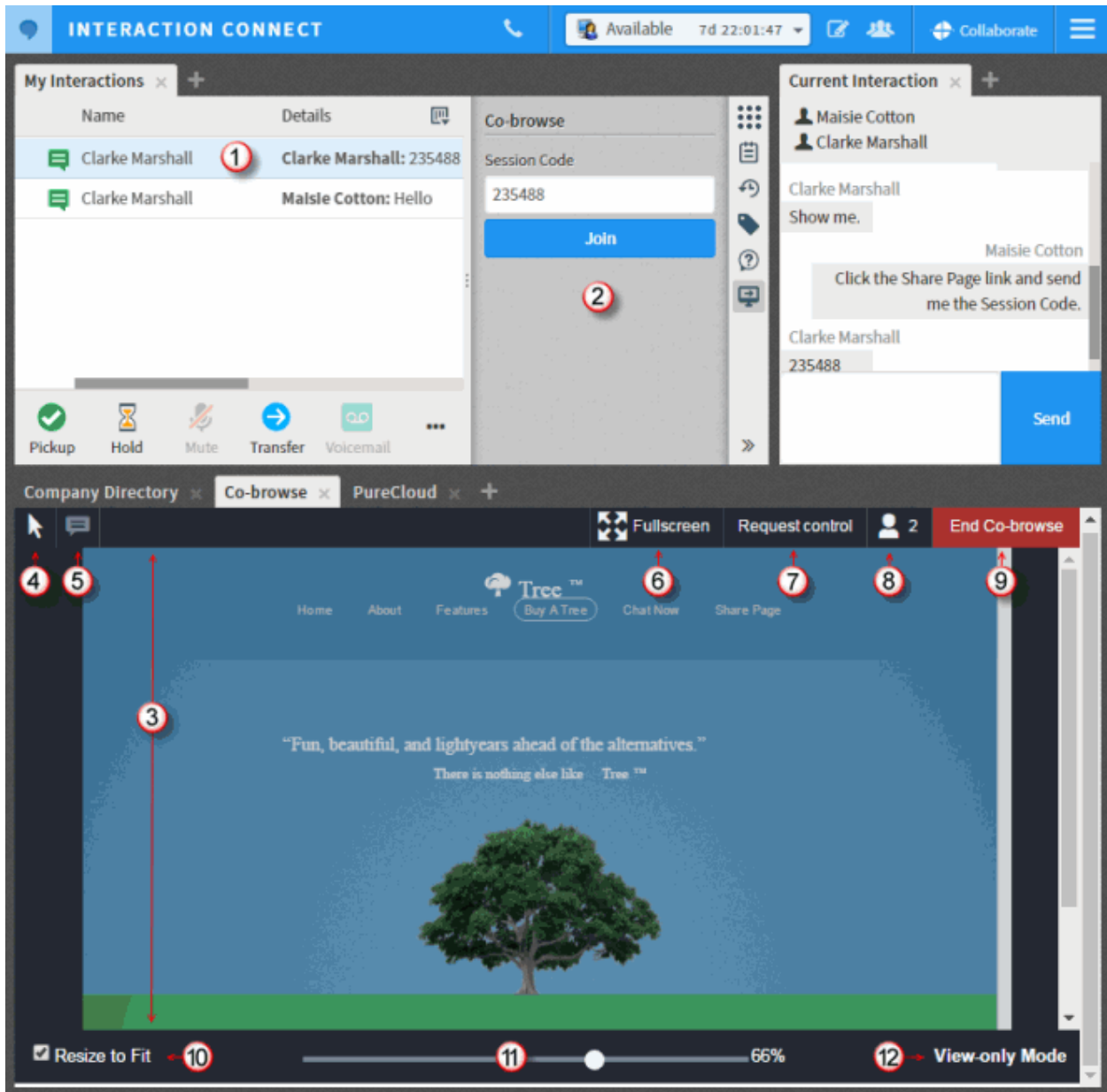
You join a Co-browse session by clicking the Co-browse sidebar button after a visitor to your company's website provides you with a Co-browse session code. For more information, see [Use Co-browse during an interaction](#).

Display the Co-browse view

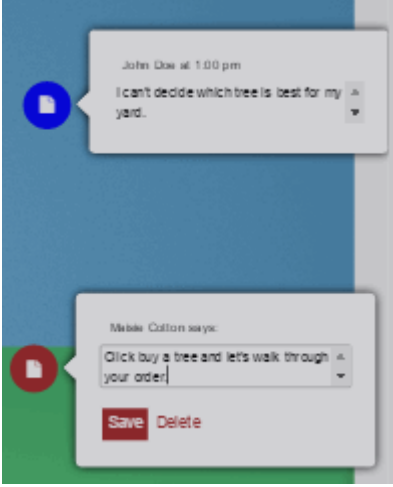

You add the Co-browse view to your CIC client as you would any other view. It is available on the **Quick Picks** list and in the **Add Views** dialog box. For instructions, see [Add or Close Views](#). As with any other view, you also control where the view appears in your CIC client. For more information, 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.



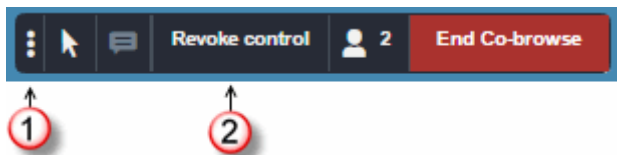
1	Selected interaction	To join a Co-browse session, you must have a selected and connected interaction.
2	Co-browse Sidebar	To enter the Co-browse session code and join the Co-browse session, use the Co-browse Sidebar.
3	Co-browse view	After you join the Co-browse session, the visitor's webpage appears 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.

		<p>Note: You also see the visitor's name and cursor in your Co-browse view.</p>
5	Annotation	<p>To display text directly on the visitor's webpage, click the Annotation icon. You can position the annotation anywhere on the webpage.</p> <p>The visitor has a similar control and can ask questions or respond. You and the visitor see all annotations made on this webpage.</p> 
6	Fullscreen	<p>This control does not apply to the Co-browse view in Interaction Connect.</p>
7	Request Control and Release Control	<p>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.</p> <p>If you have control, you can relinquish it by clicking Release Control.</p>
8	Participants	<p>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.</p> 
9	End Co-Browse	<p>To end your participation in the co-browse session, click this control</p> <p>Note: The website visitor can also end the co-browse session at</p>

		will.
10	Resize to Fit	This control does not apply to the Co-browse view in Interaction Connect.
11	Magnification slider	Adjust the magnification of the webpage view.
12	View-only Mode or Control Enabled	View-only Mode indicates that the website visitor is in control of the webpage. 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	Revoke control	This control tool appears only when an agent is controlling the webpage. The visitor can end an agent's control 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.

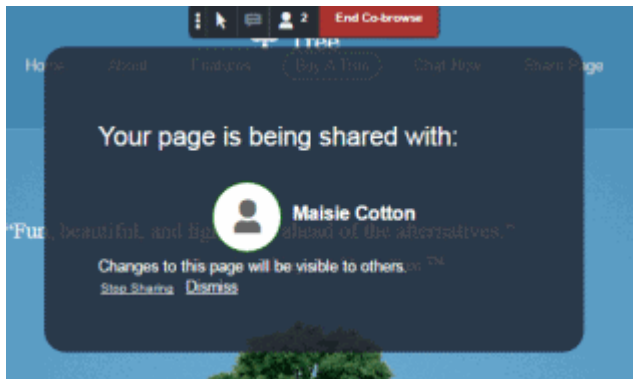
Note: A Co-browse session is always associated with an interaction. To join a Co-browse session, you must have a selected and connected interaction.

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 PureCloud 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**.

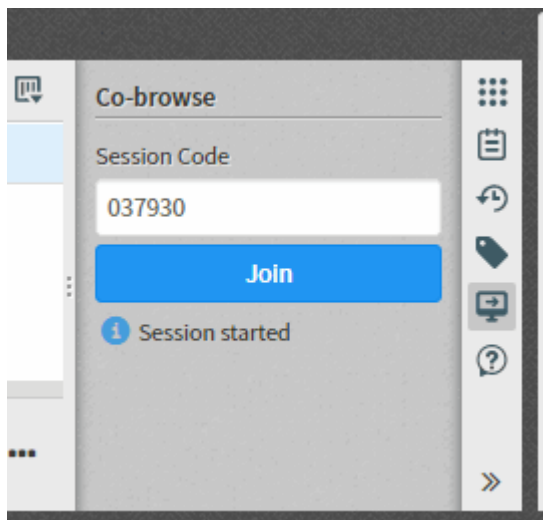
For more information about consult transfers, see [Transfer a Call After Consulting the Recipient](#).

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.

Directories

Working with Directories

Requirements: The [View General Directories](#) Access Control right determines which General Directories you can display. The [Directory Administrator](#) Security right enables you to edit all **public**

directories. 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.

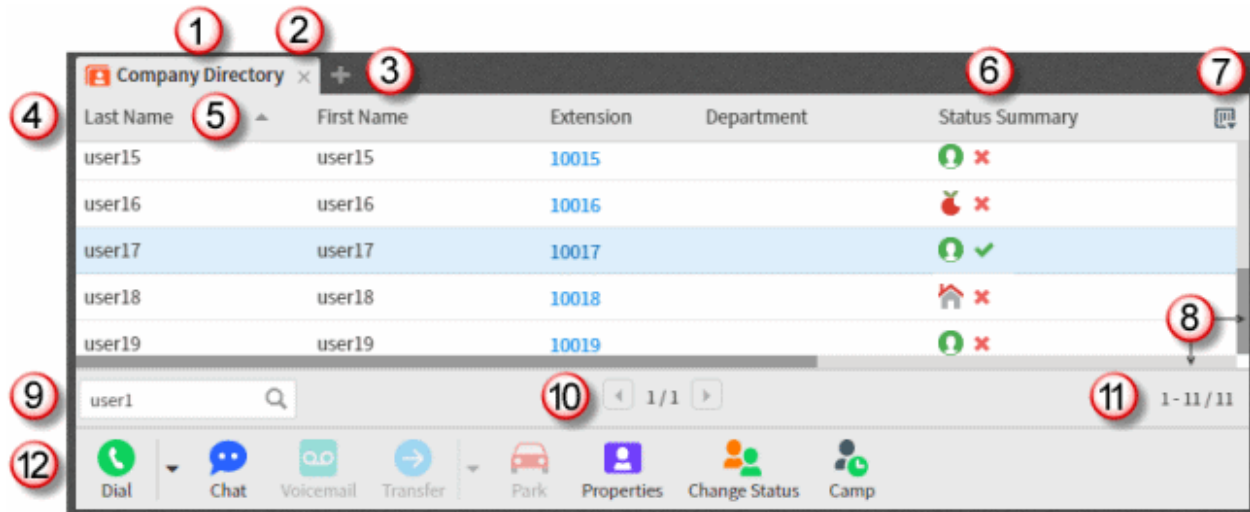
- [View another user's status](#) or [change another user's status](#).
- [Camp on another user's extension](#).
- [Search for a contact](#).
- View a [status summary](#) for all users.

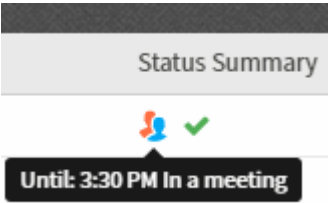
You control the appearance of your directories. You can:

- [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](#).



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	<p>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.</p> <p>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.</p>  <p>Note: General directories contain external contacts. CIC status</p>

		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. 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. 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 . Note: The Chat, Change Status, Camp and Voicemail commands are not available for external contacts in General Directories.

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](#)

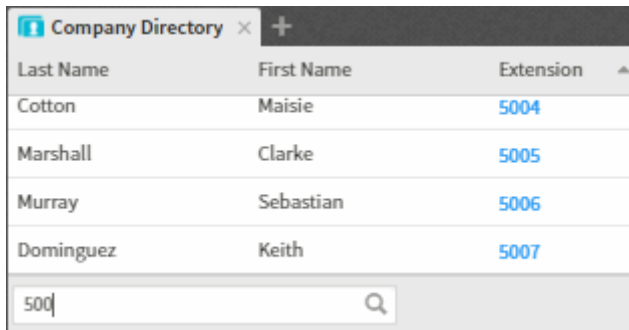
Search a Directory

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.



Last Name	First Name	Extension
Cotton	Maisie	5004
Marshall	Clarke	5005
Murray	Sebastian	5006
Dominguez	Keith	5007

500

- 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.

Related Topics

[View and Edit Directory Entries](#)
[Working with Directories](#)

Sort a Directory

You can sort a directory by clicking on almost any column heading. An ascending sort is indicated by an upward-pointing triangle in the column heading. A descending sort is indicated by a downward-pointing triangle in the column heading. Sort order is indicated by a number next to the triangle in the column heading. For more information, see Sort Direction and Sort Order indicators.

- Click a column heading once to sort the directory in ascending order.
- Click again to sort the directory in descending order.
- To sort by multiple columns, press and hold **SHIFT** and then click selected column headings to add them to the sort.

Related Topics

[Add or Remove View Columns](#)

[Search a Directory](#)

[Working with Directories](#)

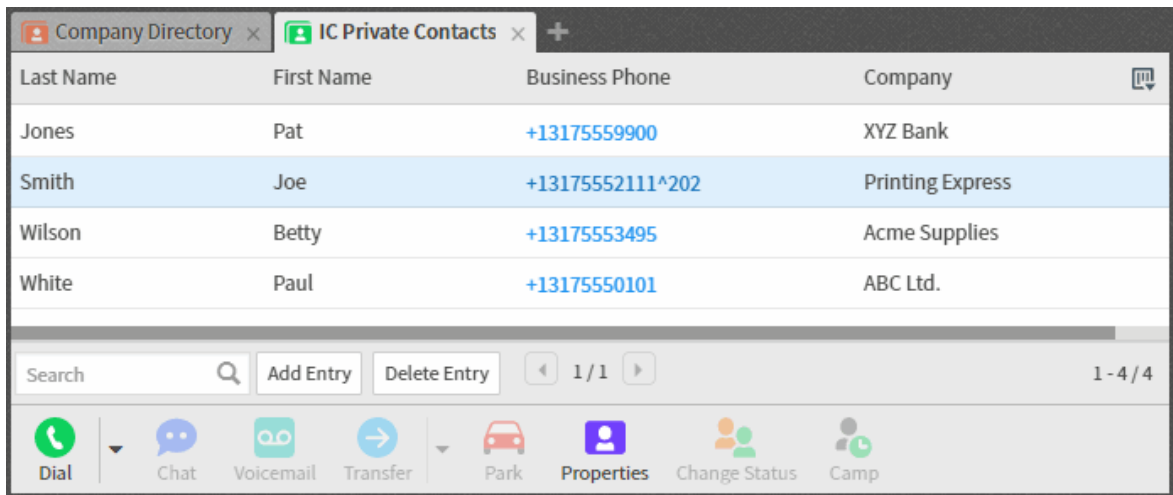
Insert and Delete Directory Entries

Requirements: 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

1.

In some cases, where you have sufficient rights, as in the IC Private Contacts directory, you can edit directory entries.

To view or edit directory entries:

1. Select a directory entry.
2. 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.

1.
 - You can precede a phone number with a comma to create a 2-second pause before the number is dialed when you click the phone number hyperlink. Also, the 2-second pause occurs when you "blind transfer" a call by **dragging and dropping a call on a name in a directory**.
 - If you select **Auto Dial Extension**, when you click to dial this phone number in a directory view, it automatically dials the extension too. For more information, see [Click to Dial a Directory Contact](#).

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

- If you want to auto dial both the phone number and extension in this Properties dialog box, click the **Ext.** hyperlink.

Related Topics

- [Insert and Delete Directory Entries](#)
- [Properties Button on the Directory Toolbar](#)
- [View and Edit Interaction Properties](#)

Working with 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](#)
[Set 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](#)

Email Messages

Working with Email Messages

Requirements: To work with email messages, you or the workstation you select when you log on need an **ACD Access License** associated with the **Email interaction type**. To pick-up and read ACD-routed email messages, you must belong to a **workgroup** configured in Interaction Administrator to **receive email messages**. To create an outbound email interaction, you also need the [View User Queues](#) or [Modify User Queues](#) right to your own user queue. To create an outbound email

interaction, you also must be a member of a **workgroup** configured with an **outbound email mailbox**. If you have any questions about licensing and workgroup configuration, see your CIC administrator.

You can use the CIC client to read and respond to ACD-routed email messages. 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 with [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

Name	Details	Duration	State	
Java Joe	User conference	00:06:42	Disconnected (L...	Support
Java Joe	RE: User conference	00:01:25	Disconnected (L...	Support
Java Joe	User Conference	00:02:28	Connected	Support
Marketing	FW: User Conference	00:01:04	Connected	Support
Java Joe	RE: User Conference	00:00:26	Connected	Support

- 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 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

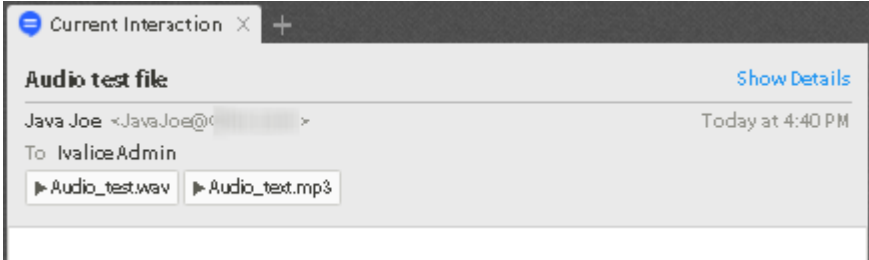
[Working with Email Messages](#)

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.

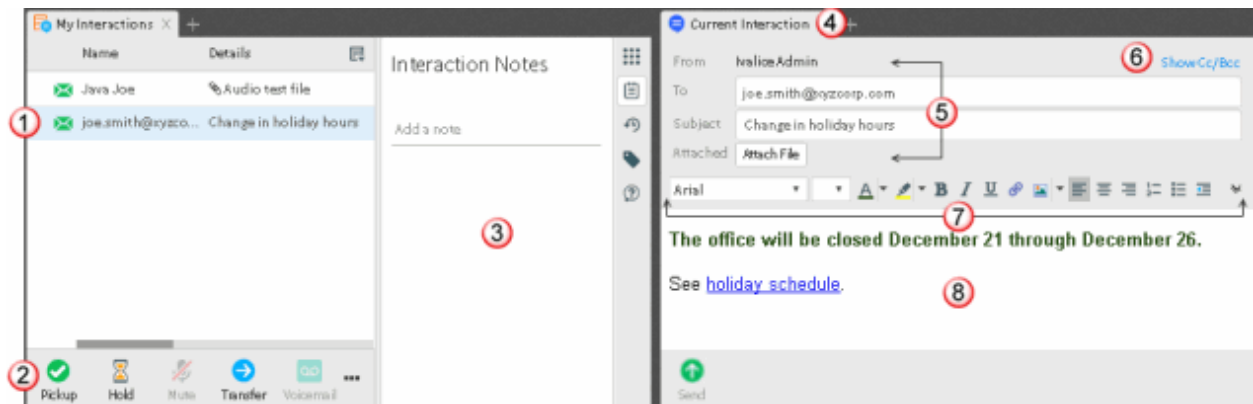
Incoming Interaction

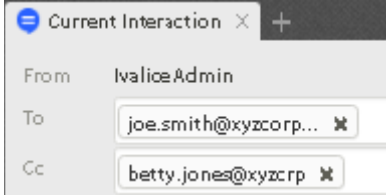
The screenshot shows the 'Current Interaction' view. On the left, a table lists interactions, with the first row (Java Joe, User Conference, 00:02:28, Connected) highlighted and numbered 1. Below the table is a toolbar with icons for Pickup (2), Hold, Mute, Transfer, Voicemail, Disconnect, Join, and Listen. On the right, the 'Current Interaction' (3) details are shown, including the sender 'Java Joe' (4), recipient 'IvailceAdmin', and subject 'Announcement.txt' (6). The message body contains the text: 'I need information about your next user conference. Could you send me the schedule and registration information?'. At the bottom right, there is a toolbar with icons for Reply (7), Reply All, and Forward.

1	Incoming Email	<p>To display or preview an ACD-routed email interaction, select it in My Interactions. Click Pickup to accept the email interaction.</p> <p>Note: An Email configuration option controls whether inline images and other linked content appear in incoming email messages.</p>
2	My Interactions toolbar	<p>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.</p>
3	Selected Email	<p>View and manage the selected email interaction in the Current Interaction view.</p>
4	Show / Hide Details	<p>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.</p>
5	Secure Email icon	<p>The icons for secure email interactions identify whether CIC verified the email message's digital signature.</p>
6	Attached file(s)	<p>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.</p> <p>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.</p> 
7	Current Interaction toolbar	<p>Use the Current Interaction toolbar buttons to reply to or forward the ACD-routed interaction.</p> <p>Note: This creates a new interaction linked to the original interaction.</p>

Outgoing Email Interaction

The Current Interaction view changes to an email editor when you send an email message on behalf of a workgroup.

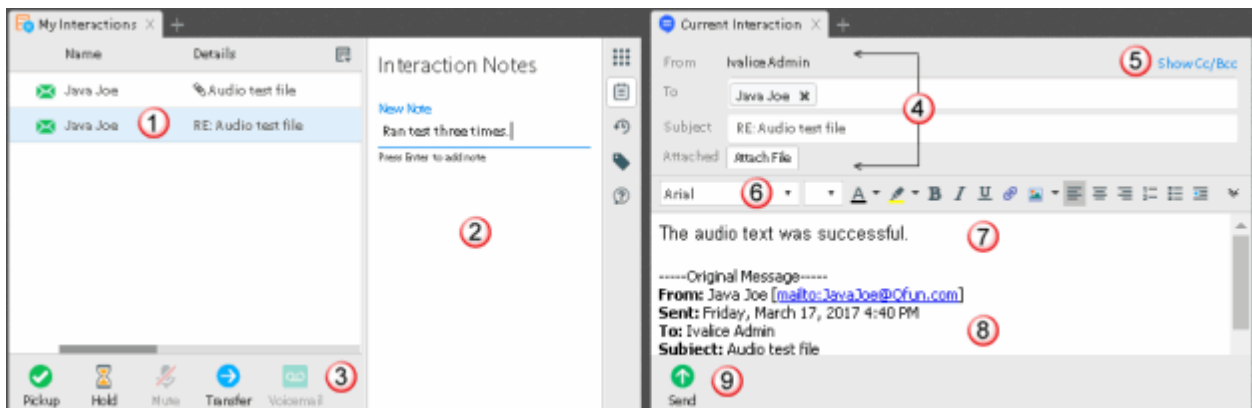


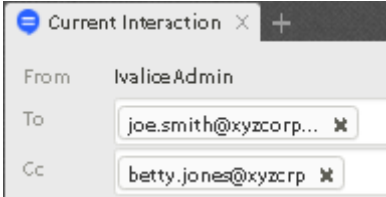
1	Email interaction	When you select an email message in My Interactions , it appears in the Current Interaction view.
2	My Interactions toolbar	The My Interactions toolbar contains buttons for the basic functions for managing an email interaction: picking up, holding, transferring and disconnecting.
3	Sidebar	Use the My Interactions sidebar area to add notes or assign codes to this email message.
4	Current Interaction	The Current Interaction view becomes an email editor when you create an email message.
5	From To, Cc, Bcc Subject Attached	<p>This area contains the standard email message address fields.</p> <ul style="list-style-type: none"> When you send an email message on behalf of a workgroup, the From address defaults to the selected mailbox address for that workgroup. Click the To, Cc, or Bcc buttons to add addresses. Use commas to separate multiple addresses. <p>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.</p>  <ul style="list-style-type: none"> Supply a Subject. <p>Note: Subject is limited to 1024 characters in the CIC client. However, many email clients have much smaller</p>

		<p>limits so the recipient may see a truncated subject line.</p> <ul style="list-style-type: none"> The Attached section displays the names of attached files. The Attach File button enables you to attach additional files. <p>Note: You cannot attach an empty file (a file with a size of 0).</p>
6	<p>Show Cc/Bcc</p> <p>Hide Cc/Bcc</p>	Click this control to display or hide the Cc and Bcc address fields.
7	<p>Current Interaction toolbar</p>	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 .
8	<p>Composition area</p>	<p>Compose your reply to the email message here.</p> <p>You can:</p> <ul style="list-style-type: none"> Type a response. Copy and paste text to or from a Windows application. Locate and insert a Favorite Response or a system-wide response in your reply. <p>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.</p>

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	Sidebar	Use the My Interactions sidebar area to add notes or assign codes to this email reply.
3	My Interactions toolbar	The My Interactions toolbar contains buttons for the basic functions for managing an email interaction.
4	From To, Cc, Bcc Subject Attached	<p>This area contains the standard email message address fields.</p> <ul style="list-style-type: none"> 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. <p>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.</p>  <p>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.</p> <ul style="list-style-type: none"> Subject defaults to the subject of the original email message. <p>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.</p> <ul style="list-style-type: none"> The Attached section displays the names of attached files. The Attach File button enables you to attach additional files. <p>Note: You cannot attach an empty file (a file with a size of 0).</p>

5	Show Cc/Bcc Hide Cc/Bcc	Click this control to display or hide the Cc and Bcc address fields.
6	Formatting toolbar	<p>The text formatting toolbar appears in the E-mail Reply window under certain conditions:</p> <ul style="list-style-type: none"> • 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. • If you are creating an email message to send on behalf of a workgroup, the text formatting tools are always available to you. • If the original email message was sent in plain text (no formatting), the formatting toolbar does not appear. Your email reply is sent in plain text.
7	Reply area	<p>Compose your reply to the email message here.</p> <p>You can:</p> <ul style="list-style-type: none"> • Type a response. • Copy and paste text to or from a Windows application. • Locate and insert a Favorite Response or a system-wide response in your reply. <p>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.</p>
8	Original Email	The original ACD-routed email message appears here.
9	Current Interaction toolbar	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.
	<p>A digital signature is present, but Customer Interaction Center experienced one of the following problems:</p> <ul style="list-style-type: none"> • The signer’s certificate is not trusted. • The email message was modified in transit. • The "From" address in the email header does not match the digital signature.

Related Topics

[Working with E-mail Messages](#)

Manage Email 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.

Note: If the original email message contains an attachment, it automatically remains attached to the email message if you forward it. However, you can delete the original attachments before forwarding the email message.

Tip: You cannot forward an incoming email interaction until you send or disconnect all the email reply interactions that are associated with the original email interaction in an [E-mail conversation](#).

To forward an email message:

1. [Pick up or reopen an email message](#).
2. In the [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 or 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.

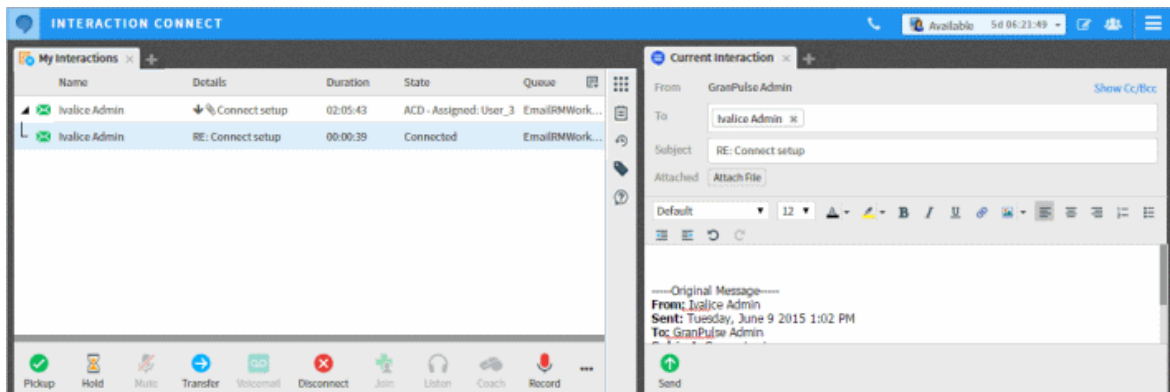
Tip: All of the associated **outgoing** email interactions must be disconnected, transferred or forwarded before you can disconnect the original incoming email interaction.

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](#)

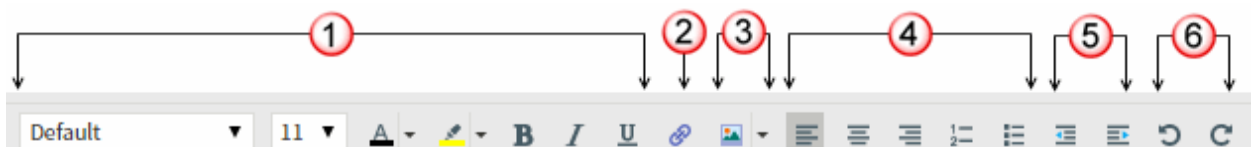
Reply to an HTML Email Message

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.
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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. 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.

4. 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](#).

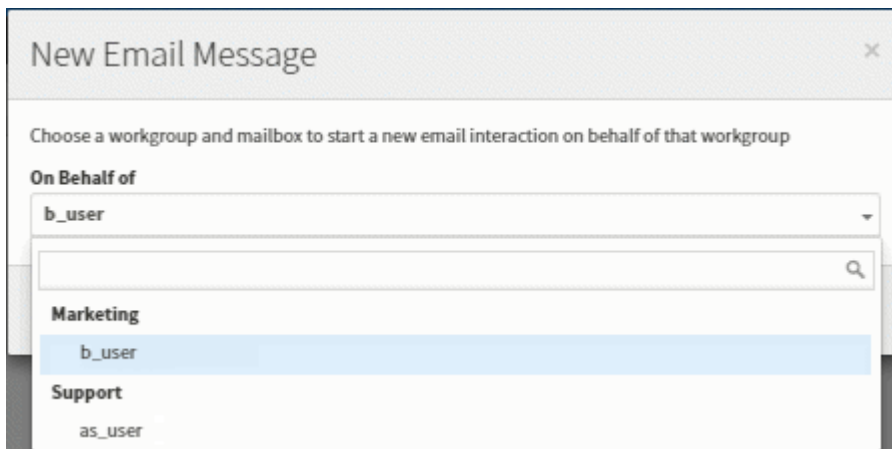
To start an email interaction:

1. Click the **Compose an email** icon.



2. If you belong to more than one workgroup configured with one or more outbound mailboxes, 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 or 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**.

1.

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 in an [E-mail conversation](#).

Note: If the original email message contains an attachment, it automatically remains attached to the email message if you transfer it. You cannot delete original email message attachments.

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](#)

Faxes

Working with Faxes

Requirements: You need the [TIFF Faxes](#) Security right to receive faxes as TIF files attached to email messages. The **Web Client fax format** option on your user account determines if you can select a fax from the Fax Viewer and view it in a browser window.

With the CIC client, you receive faxes in the same place you receive email messages. Any time a caller sends a fax to you, the fax is attached to an email message and sent to your email account.

Faxes are managed in one of these ways in the CIC client:

- If Interaction Fax is installed on your workstation, you use the Interaction Fax viewer to view, edit, print, compose and send fax documents. You receive faxes as **I3F files**.
- If Interaction Fax is not installed on your workstation, you can receive faxes as TIF, 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

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.

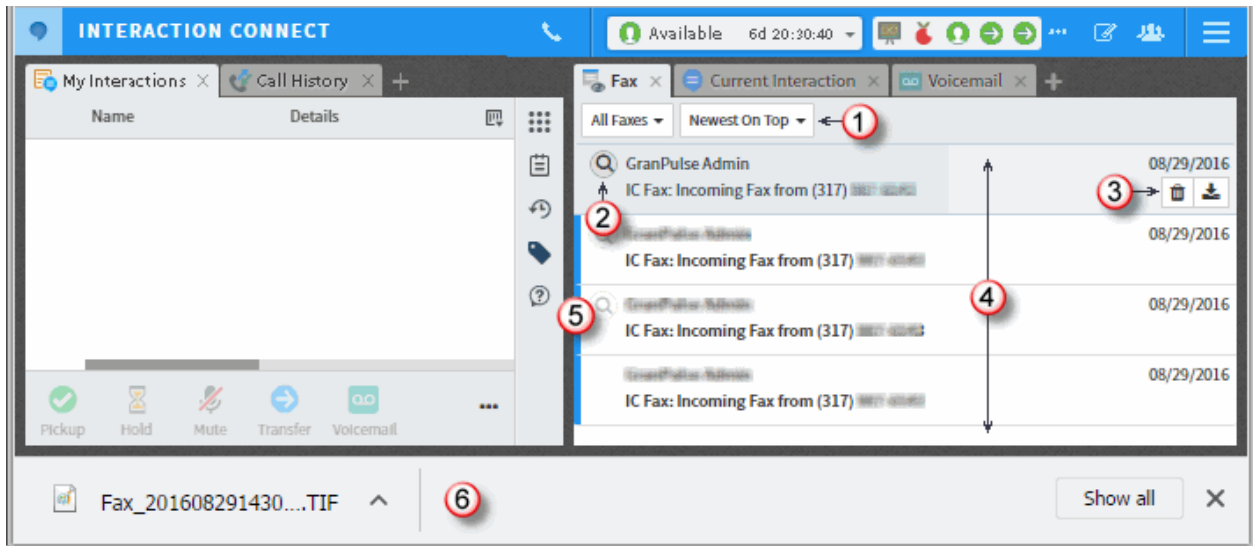
Fax Formats

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	<p>You can select and sort the faxes that appear in the Fax view.</p> <ul style="list-style-type: none"> • Select all, unviewed, or viewed faxes. • Sort the faxes by newest or oldest on top.
2	<p>Click the View button (magnifying glass) to display a PNG or PDF format fax in your browser.</p> <p>If the View button is disabled, this means your browser does not support the fax format.</p> <ul style="list-style-type: none"> • You can use Interaction Fax to view faxes in the I3F format. • You can download faxes in the TIF format and view them in the default Windows application for that format.
3	<p>Delete and Download buttons appear when you select a fax.</p> <p>Note: The currently selected fax appears highlighted.</p>
4	<p>The Fax view contains the Faxes list. This list contains the faxes you have not yet deleted, including both previously viewed and unviewed faxes.</p>
5	<p>A blue bar indicates a fax you have not yet viewed.</p>
6	<p>Downloaded faxes appear in your browser's File Download location. Click to view the fax.</p>

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 Scripter

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	<p>Regular Call</p> <p>Interaction Dialer places the call for the agent. You can disposition the call.</p> <p>Preview Call</p> <p>This presents you with information about the connected party. You can disposition or reschedule the call.</p> <p>Previewing Call</p> <p>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.</p>

		<p>Waiting for Call</p> <p>This occurs when you are in Follow Up or Available status and ends when the next call alerts.</p>
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	<p>In Regular calling mode, this is the number already dialed for you.</p> <p>In Preview calling mode, this is the number Interaction Dialer dials for you after a set interval.</p>
7	Form	<p>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.</p> <p>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.</p>
8	Disposition	<p>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.</p> <p>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.</p> <p>You can press only one disposition button per call. Most calls are disconnected immediately when you press a disposition button.</p>
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	Navigation controls	Forms can contain multiple pages. To navigate to another page, click these controls.
12	Call control toolbar	<p>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.</p> <p>The buttons are unique to the Interaction Scripter view:</p> <p>Dial</p> <p>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.</p> <p>Skip</p> <p>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.</p> <p>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.</p> <p>Break</p> <p>The Break button works as a toggle switch. See Request a Break.</p> <p>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.</p>

Log on to Campaigns

Requirement: See [Interaction Scripter](#).

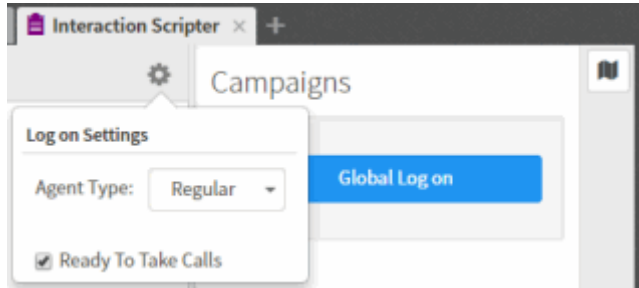
Note: When you log on to a campaign using a **basic** script and also to a campaign using a **custom** script, calls placed by the custom script take precedence.

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**.

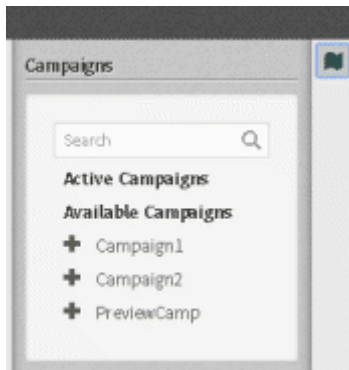
Regular	Regular Agents receive new outbound calls. These agents pitch a product, idea, or service, or perform some other front-end process. Once this up-front work is complete, the campaign's custom script transfers calls to an ACD queue for follow-up processing by Finishing Agents. A custom campaign 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.

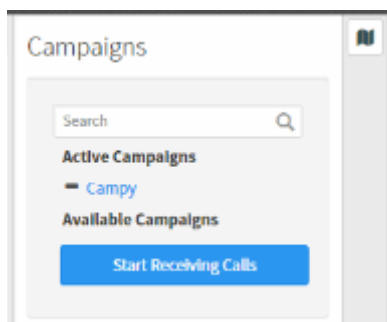
Note: This setting does not apply to base scripts. It applies only to custom scripts. This setting affects all campaigns with custom scripts to which you log on. Clearing this check box prevents you from receiving calls until you click Start Receiving Calls in the Campaigns sidebar or a script carries 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.



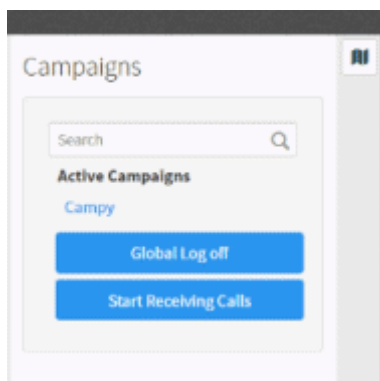
7. Click the **Campaigns** icon again to close the Campaigns sidebar.

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.



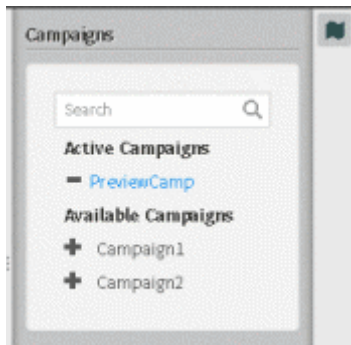
1. Click **Global Logon**.

2. If you cleared the **Ready to Take Calls** check box in Log on Settings, click **Start Receiving Calls**.
3. **Result:** Calls placed by Interaction Dialer for any active campaigns start to appear in the Interaction Scriptor 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 Scriptor view.

4. Click the **Campaigns** icon.
 1. 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 name.



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 Scriptor 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 Scriptor Call](#) or [Consult Transfer a Scriptor 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 Scriptor administrator must map Page Dispositions to Wrap up Codes in the Dialer script .

Blind Transfer a Scriptor 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 Scriptor 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 Scriptor 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 Scriptor 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 Scriptor view.

Consult Transfer a Scriptor 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 Scriptor view, click the **Transfer** button.
3. In the Transfer dialog box, in the **Transfer To:** text box, type all or 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.

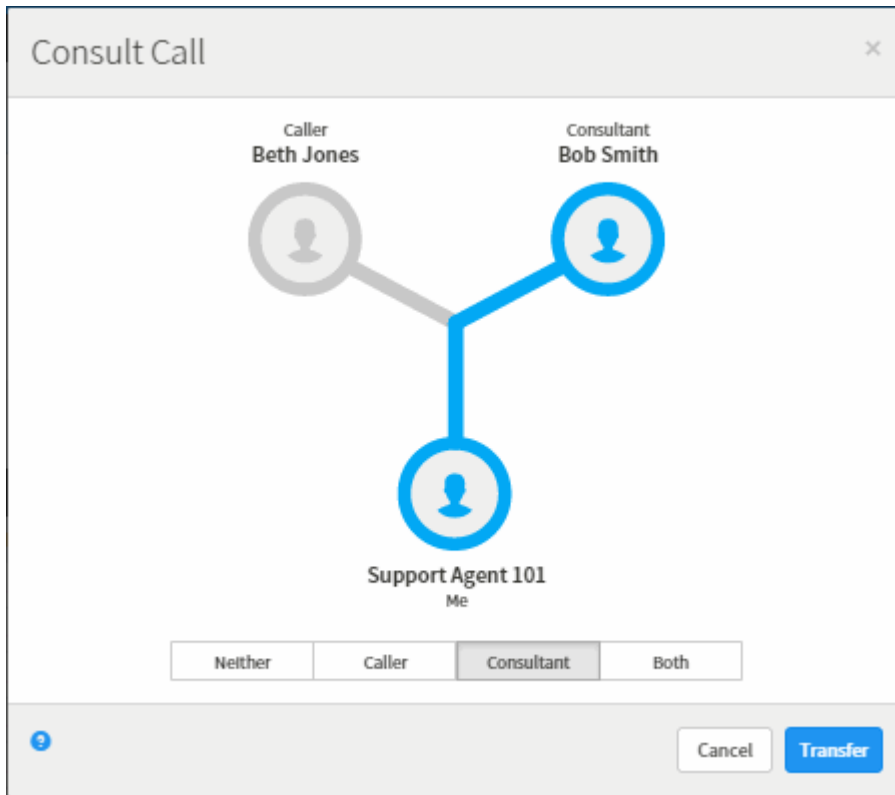
5. If you are transferring the call to an agent who is not participating in the campaign, check **Disposition this contact record after transfer**.

Result: The form remains in the Interaction Scriptor 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 Scriptor 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 Scriptor 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 Scriptor 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 **Timezone**.
 - To use the Central Campaign Server (CCS) timezone, select **Mine**.
 - To use the contact's timezone, select **Theirs**.
5. 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:

Additional Follow Up			
Contact Type	Number	Attempts	Dial
CELLPHONE	(317) 552-6221	9	
Manual	317-555-8726	0	

[Cancel](#)

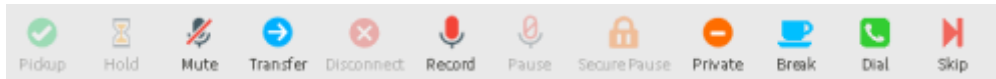
- If the Dialer administrator enables the **Allow editing of Phone Number** option for this campaign script, you can enter a phone number in the **Manual** text box.
- Numbers that can be dialed immediately, have a **dial** button (phone icon)
- Numbers that are blocked, due to DNC block or time zone 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.

Monitored Appearances

Working with Monitored Appearances

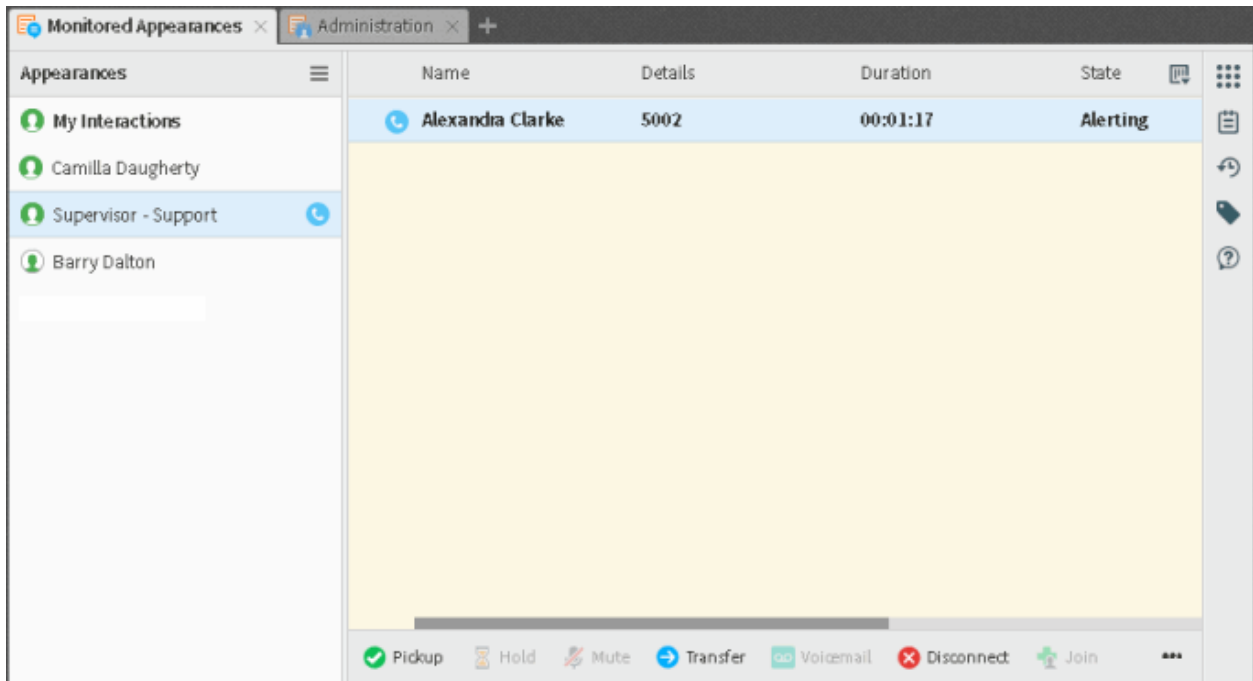
Requirements: Access Control rights determine which queues you can view and what actions you can perform on the interactions in these queues. For more information about the required rights, see the description of the Access Control Rights for [User Queues](#). In addition, Client templates can contain 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

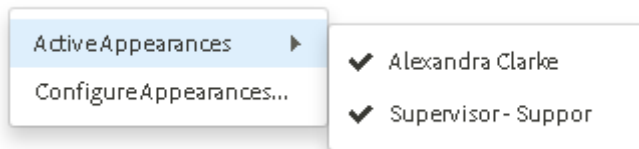
Requirements: For more information about required rights, see [Working with Monitored Appearances](#). Note also that a Monitored Appearance is automatically removed if you lose the rights to view the associated user queue.

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:

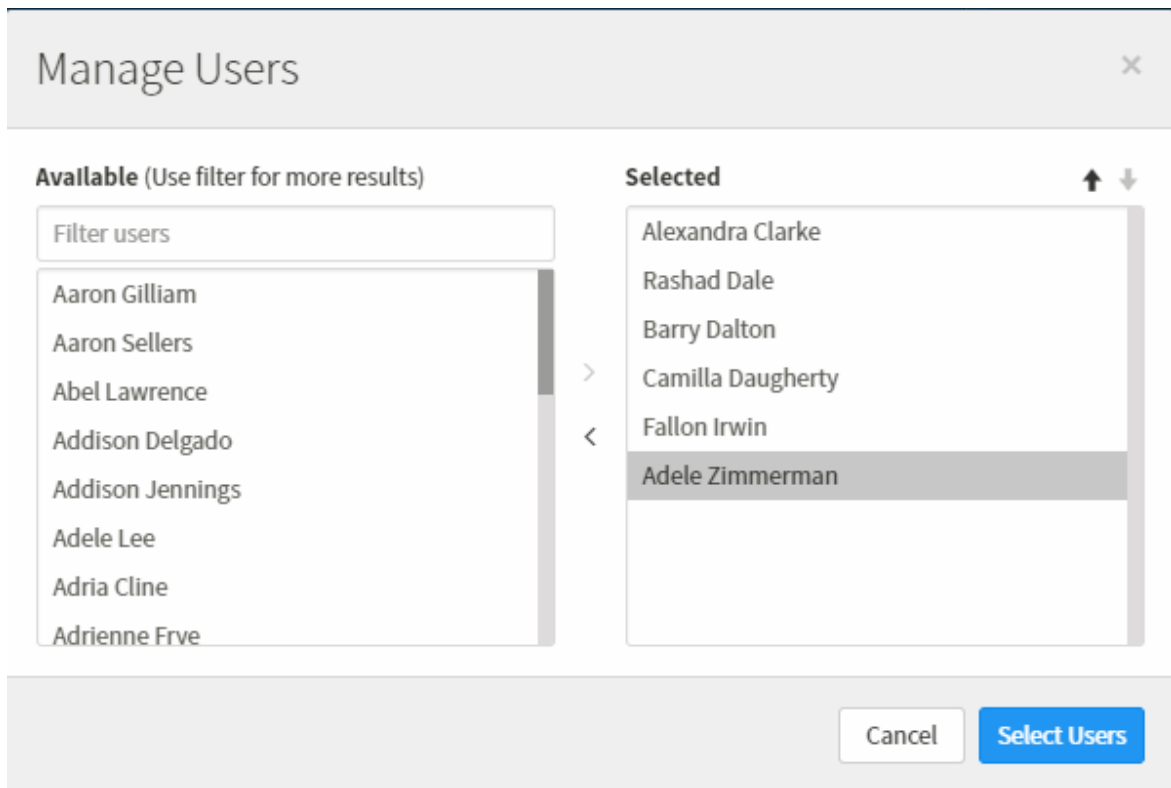
1. Do one of the following:

- 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.

<p>Ring telephone for calls</p>	<p>Select this to ring your telephone when a new interaction arrives on the monitored queue.</p> <p>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.</p>
<p>Ring application Ring when on phone</p>	<p>Select Ring application to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.</p> <p>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.</p>
<p>Display desktop alerts</p>	<p>Display a desktop alert for alerting interactions on this monitored appearance.</p> <p>Note: Desktop alerts are not supported for all browsers.</p>
<p>Call Ring Sound</p>	<p>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.</p> <p>Note: This setting enables you to select a different sound for each of your monitored queues.</p>

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	<p>Select this to ring your telephone when a new interaction arrives on the monitored queue.</p> <p>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.</p>
Ring application Ring when on phone	<p>Select Ring application to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.</p> <p>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.</p>
Display desktop alerts	<p>Display a desktop alert for alerting interactions on this monitored appearance.</p> <p>Note: Desktop alerts are not supported for all browsers.</p>
Call Ring Sound	<p>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.</p> <p>Note: This setting enables you to select a different sound for each of your monitored queues.</p>

4. 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

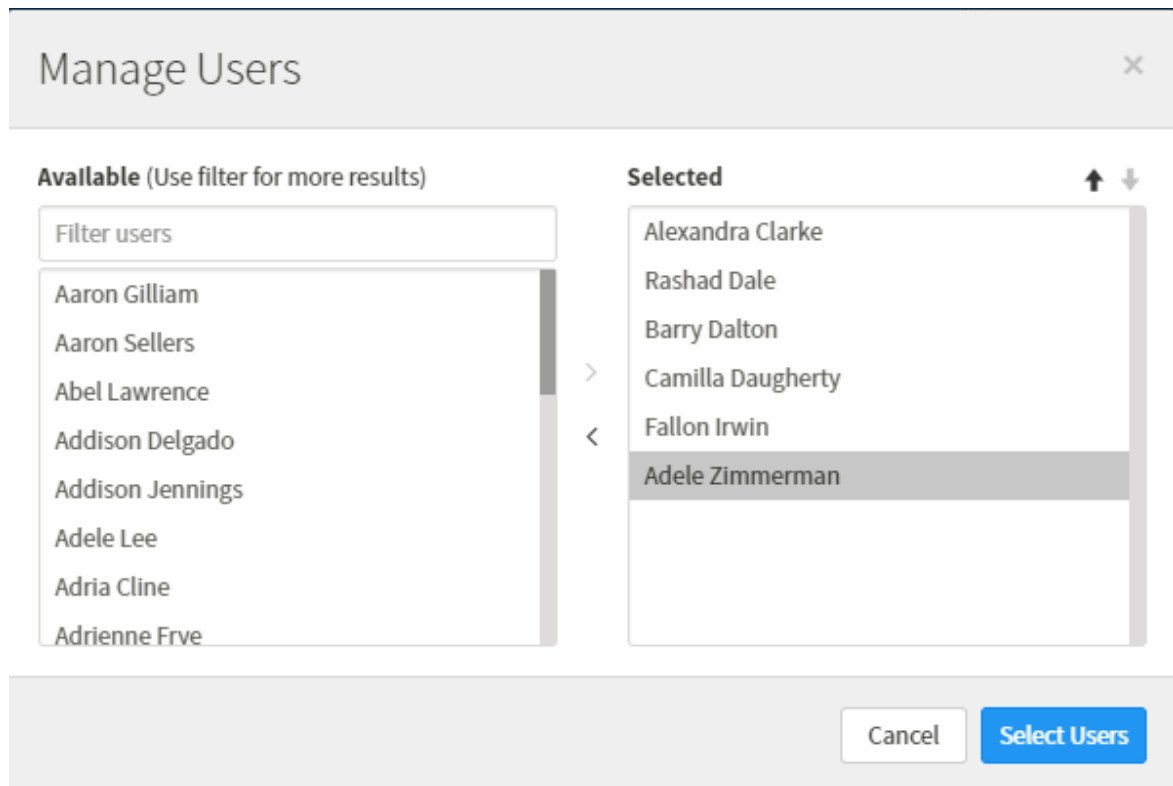
You can permanently delete a monitored appearance from the Monitored Appearances view.

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](#)

Queues

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.

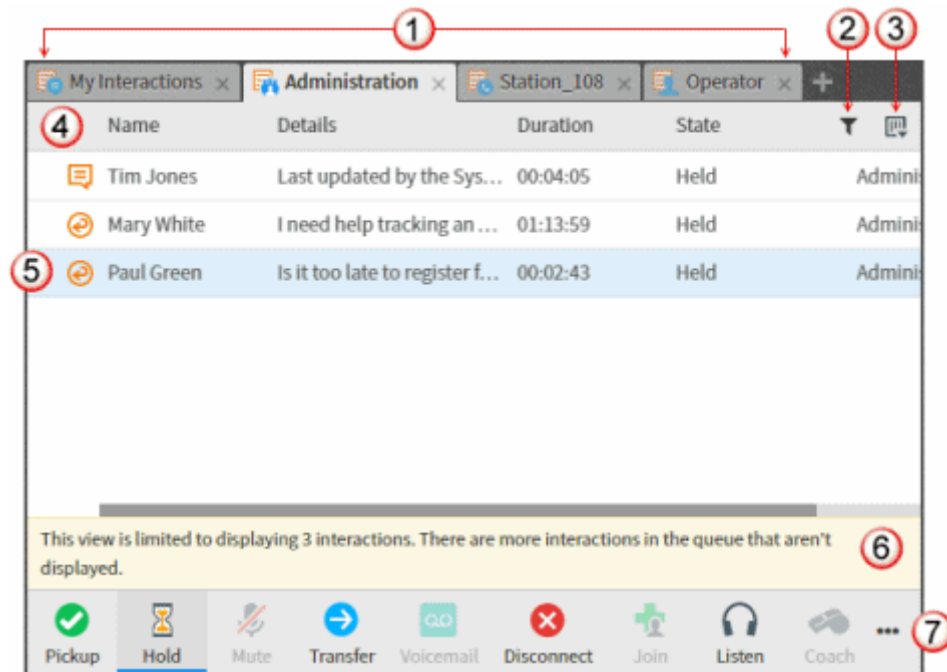
You can see additional queues and the interactions in these queues by adding a view for each queue to the CIC client. The Create New View dialog box displays a list of all the queues which you are able to add to the CIC client. For more information, see [Add or Close Views](#).

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.

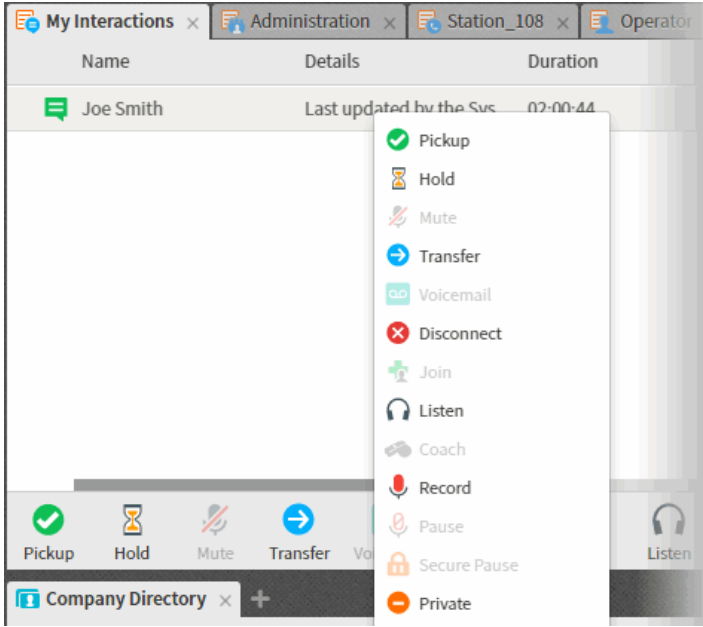
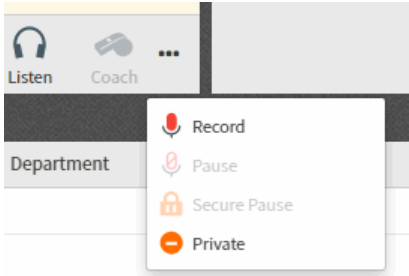
Note: If the tab containing a monitored queue view is not visible (hidden behind another tab), after 30 seconds, the tab "hibernates" by clearing all of its items and remaining inactive until you select it again. When you select a hibernating tab, it "wakes up" and re-populates itself with interactions.

Queue View Features

Queue views have these standard features.



1	Queue view icons	<p>The queue view tabs have distinctive icons. The icon badges distinguish My Interactions, Workgroup queues, User queues, and station queues.</p> <p>Click the X on a tab to close the view.</p> <p>Note: This does not delete a view. You can add back closed views.</p>
2	Configure Queue Filter	<p>To filter interactions in a queue view by type, state, and assigned user, click this control.</p> <p>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.</p>
3	Choose columns	<p>To select the information displayed for each interaction in the queue view, click this control. For more information, see Add or Remove View Columns.</p>
4	Queue columns	<p>The Queue columns organize the information about each interaction in a queue. For more information, see Queue Contents and Understanding an Interaction's State.</p>
5	Selected interaction	<p>Queue views can contain more than one interaction. The currently selected interaction is highlighted.</p> <p>You can use toolbar buttons to manage an interaction or you can right-click an interaction and choose an action from the shortcut menu.</p>

		
6	Queue limit warning	<p>If the number of interactions in a queue exceeds its limit, a warning appears here.</p> <p>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.</p>
7	Queue Control Toolbar	<p>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.</p>  <p>Tip: You can add, remove, or rearrange buttons on the CIC client toolbars. For more information, see Customizing Queue Control Toolbars.</p>

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](#).

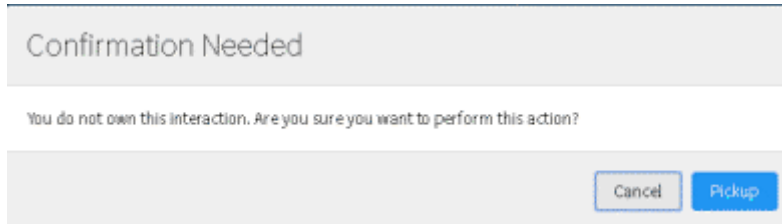
You can pick up a call in any displayed queue if you have the rights to modify calls in that queue.

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.

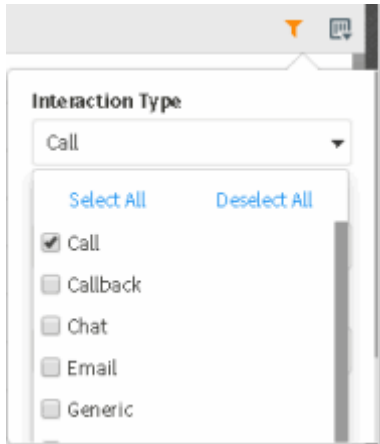
Queue Result Limits

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.

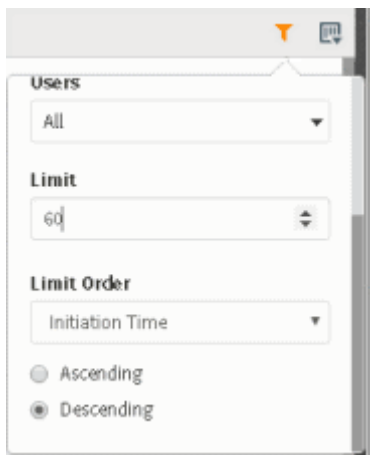
There is also a hard limit of 200 interactions in queues other than My Interactions. If the `InteractionConnectDefaultQueueLimit` server parameter or a user-specified value is higher than this hard limit, CIC uses the hard limit. To override this hard limit, the CIC administrator use the `InteractionConnectMaxQueueLimit` 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**

5. **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](#).

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. <ul style="list-style-type: none"> • For calls, it displays the Remote Address (phone number) that you dialed or the phone number of the party on an incoming call. • For callbacks, it displays the subject entered by the website visitor requesting the callback. For more information, see Working with Callback Requests. • 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

	<p>with E-mail Messages.</p> <ul style="list-style-type: none"> 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 <i>PureConnect Data Dictionary</i> in the PureConnect Documentation Library for more details.
Line	The line queue on which the interaction is located.
Lstns	<p>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.</p> <p>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.</p>
Name	<p>The name of the person or organization with whom a CIC client user is interacting. For more information about how Interaction Center identifies a caller, see Caller Name.</p> <p>Note: Voice Mail appears in the Name column for voice mail messages played back through your Telephone Handset.</p>
Number	<p>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.</p> <p>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.</p>
Queue	The Queue column contains an icon indicating the interaction type and its state.

	If this is an ACD-routed interaction, the name of the ACD workgroup queue to which the interaction was routed also appears here.
Recs	<p>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.</p> <p>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.</p>
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.
User	The user queue on which the interaction is located.
Work Item Category	<p>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.</p> <p>Note: When My Interactions contains Work Items, you can filter the view and display only Work Items from selected categories.</p>
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	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

Error	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. 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](#)

Response Management

Working with Response Management

Requirements: To create and manage personal responses or to search for and use personal and system-wide responses, you need the [Response Management](#) Security right. To use all or selected libraries of the system-wide responses, you need the appropriate [Response Management View](#) Access Control Right. To use an interaction attribute in a Response Macro, you need the [Substitute Queue Columns](#) Access Control Right.

In systems that were upgraded from previous releases, you can also see an older system-wide response library named "Interactions" in the CIC client. Using responses from this older library requires specific Access Control Rights; see [View Interaction Files](#), [View Interaction Messages](#), and [View Interaction URLs](#).

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

You can:

- View, select, and use a stored response during a chat session, 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

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](#)

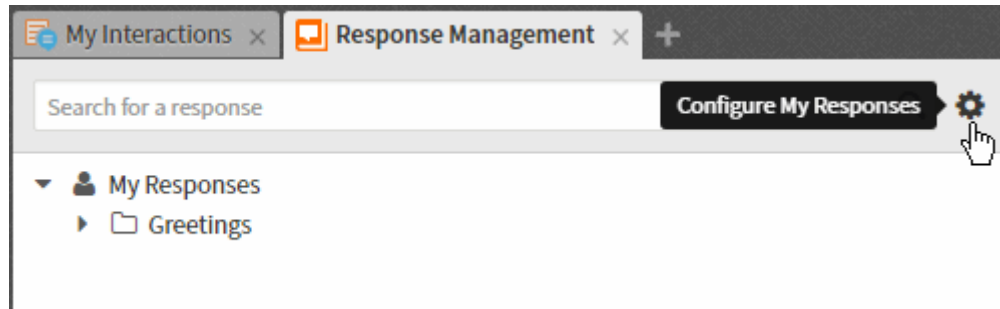
Personal Messages

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.

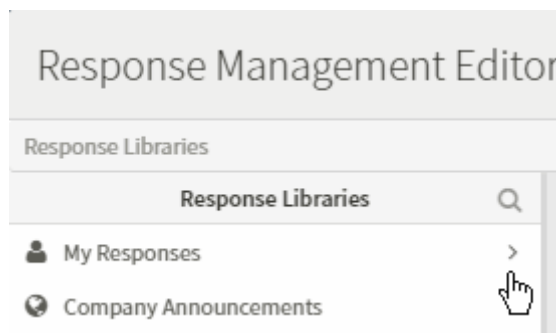
Note: A stored message can contain a working URL hyperlink.

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**.

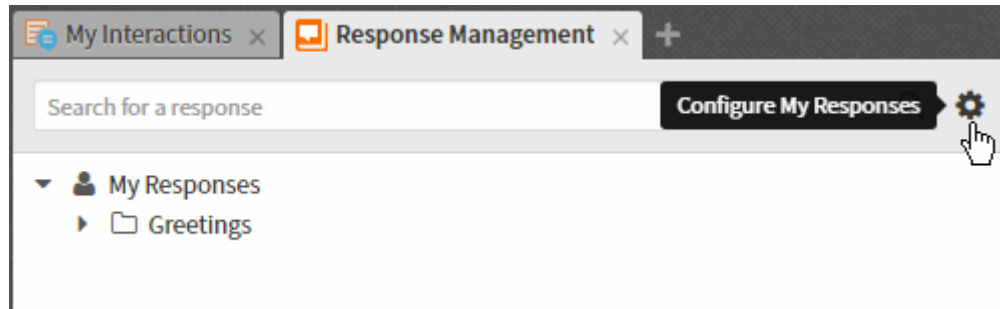
Personal Files

Personal files are files that you upload from your workstation.

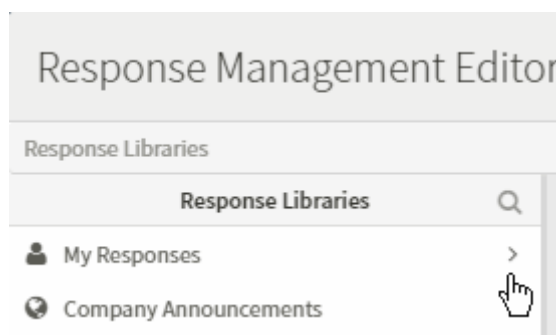
To create a file response item:

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.

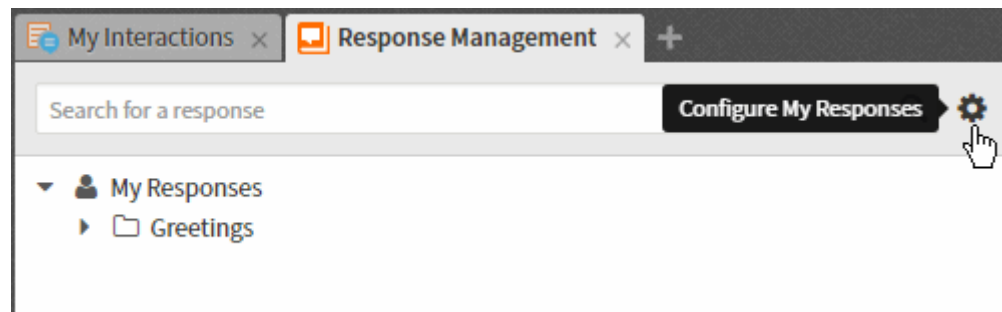
8. Click **Save**.

URLs

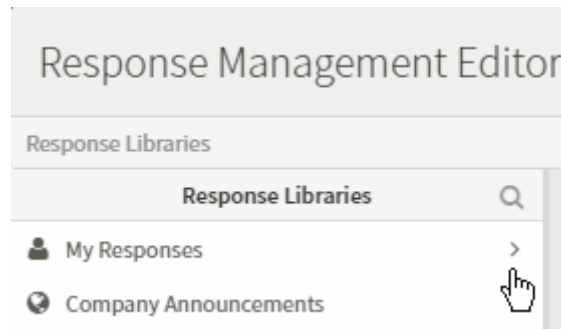
URLs are clickable hyperlinks to web pages.

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](#)

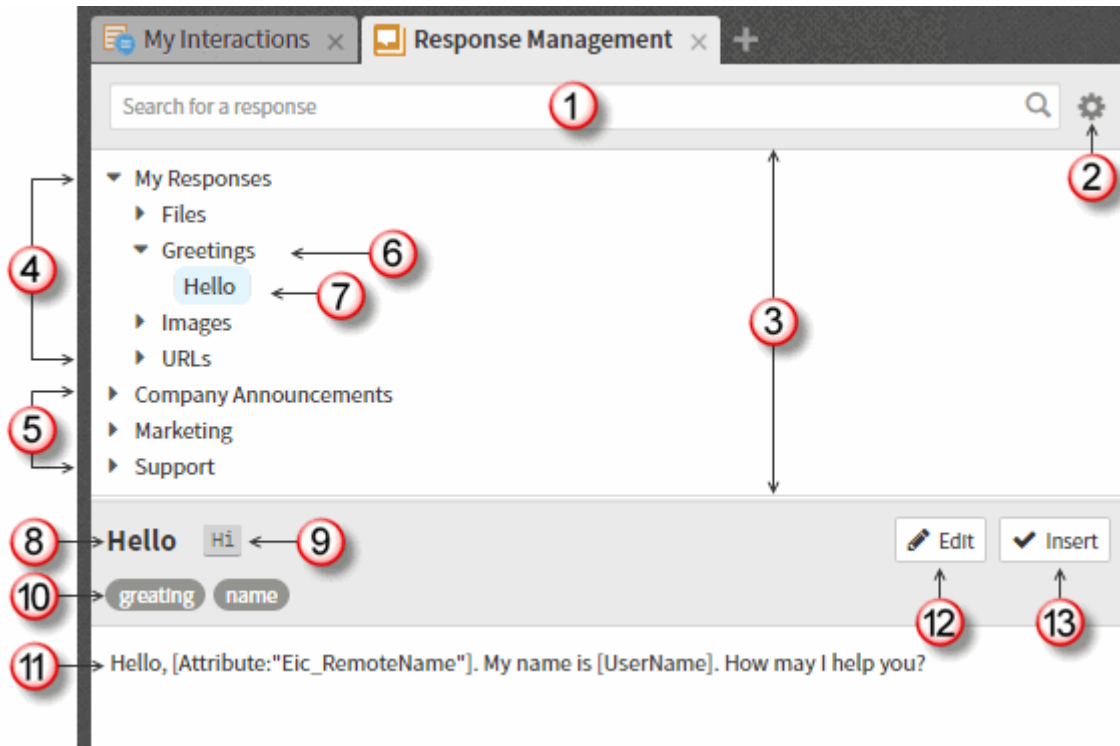
Response Management View

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	<p>To locate a response, use the full-text Search for a response box. For more information, see Search for a Response.</p> <p>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.</p>
2	Configure My Responses	<p>Click this tool to open the Response Management Editor. You can create, edit and delete your personal responses.</p>
3	Navigation Pane	<p>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.</p>
4	My Responses	<p>This folder contains your collection of personal responses. It can be organized into categories.</p> <p>Note: You cannot create personal responses in the current release of Interaction Connect. However, you can create personal</p>

		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. 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](#)

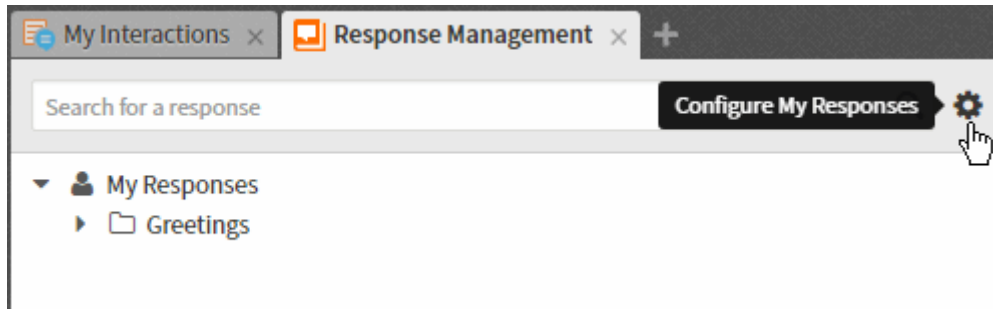
Response Management Editor

Requirements: See [Working with Response Management](#).

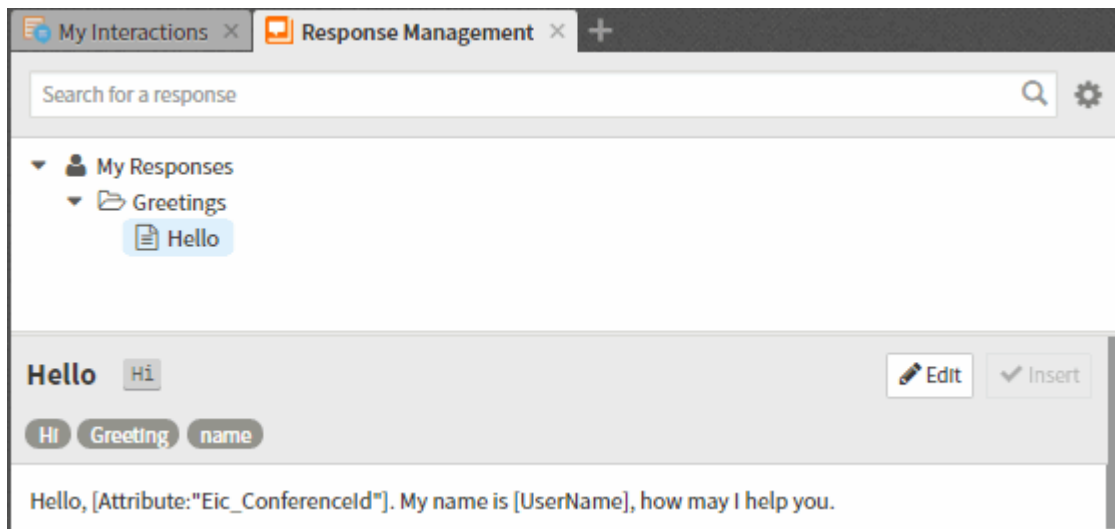
To create and edit response items, use the Response Management Editor. It is a full-featured HTML editor with text formatting tools for messages. You can insert Response Macros, create hyperlinks, and add images.

To access the Response Management Editor:

- In the [Response Management view](#), click the **Configure My Responses** tool.

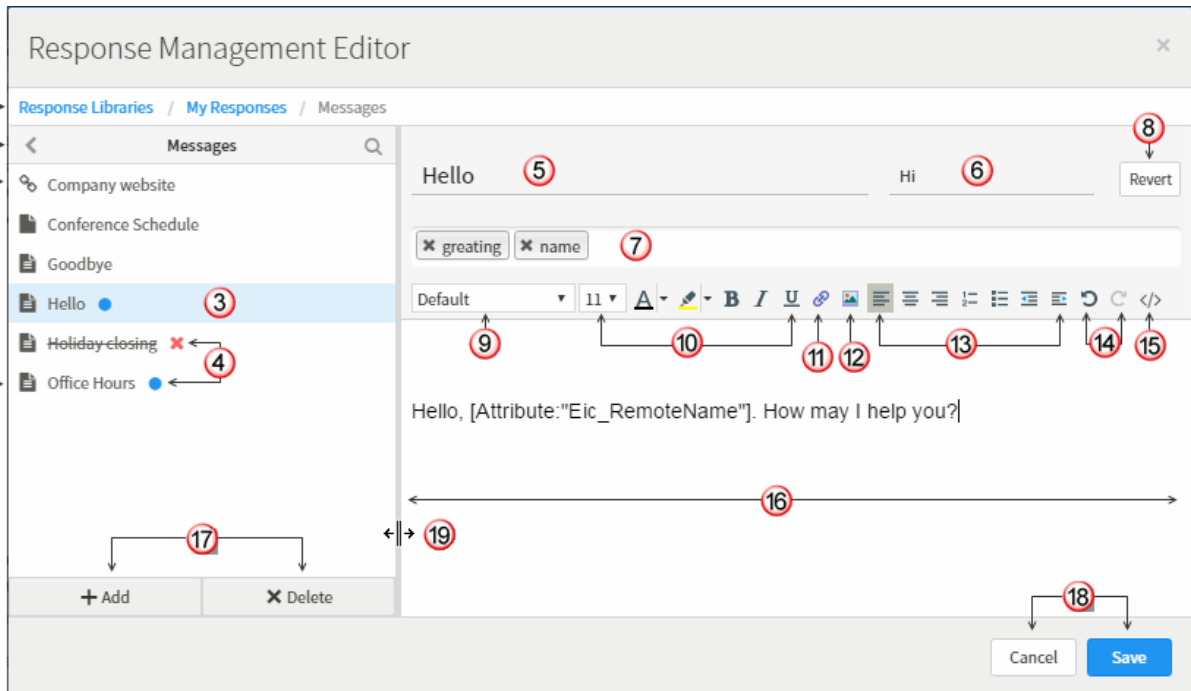


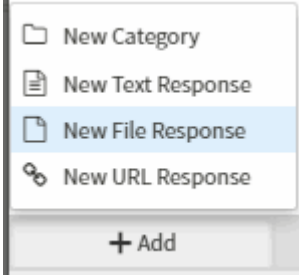
- In the [Response Management view](#), navigate to an existing item in the My Responses folder and click the **Edit** button.



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	<p>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.</p> 
3	Selected item	The currently selected item is highlighted.
4	State	<p>Interaction Connect updates response items only after you press Save.</p> <ul style="list-style-type: none"> • A blue circle indicates that Interaction Connect has not yet saved a new item or changes to an item. • 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

		<p>you do not provide a name, it defaults to the first few characters of a message or a file's directory path.</p> <p>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.</p>
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	<p>You can select a font or use the Default font setting.</p> <p>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.</p>
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	<p>Add a link to the URL for an image. The person receiving this response can click the link to view the image.</p> <p>Tip: You can also copy and paste an image selected in your browser to a stored response.</p>
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	<p>Type, format, and edit your message here.</p> <p>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.</p>
17	Add and Delete	<ul style="list-style-type: none"> • Navigate to the appropriate category and select Add to add a new response item. • Select an item and click Delete to mark the item for deletion.
18	Cancel and Save	<p>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.</p>
19	Splitter	<p>To change the width of the Editing pane, point to the vertical splitter and drag the edge to the left or right.</p> <p>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.</p>

Related Items

- [Create Personal Responses](#)
- [Create Response Macros](#)
- [Response Management View](#)
- [Using Response Management](#)

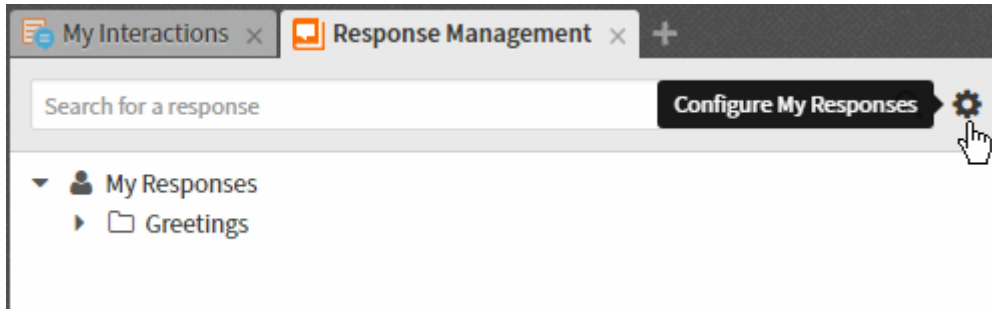
Organize Personal Responses

Requirements: See [Working with Response Management](#).

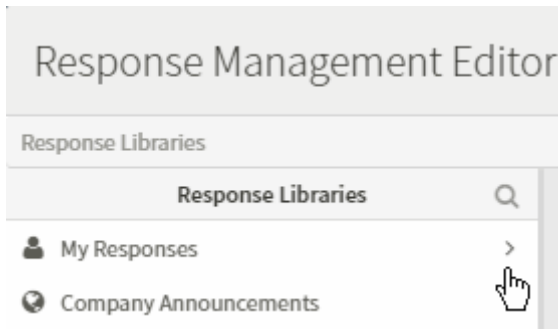
You can make your personal responses easier to locate by storing them in folders. You can nest these folders inside each other to whatever level suits your purpose.

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](#).

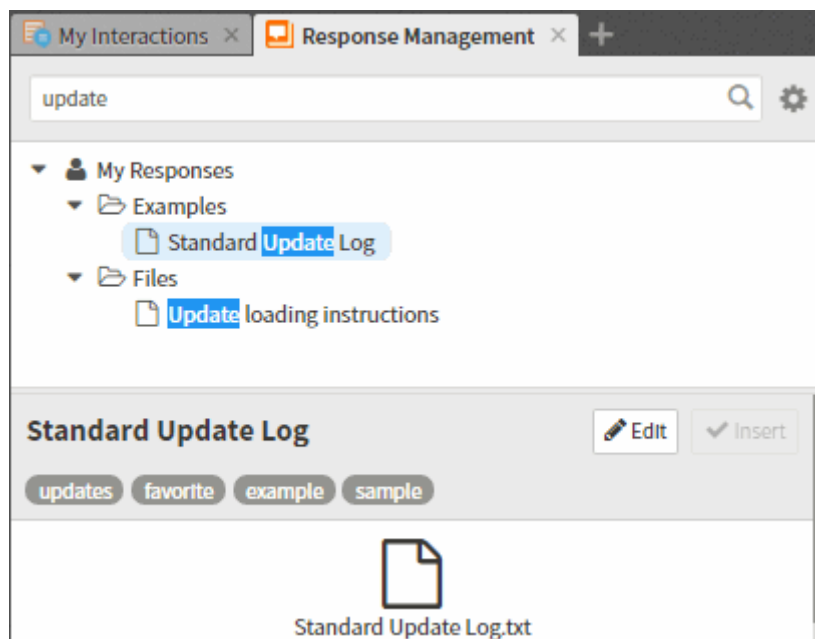
Type all or the first part of the word or words that identify the response item. For example, typing "foo" locates response items associated with or containing "food," "foot," or "football." All searches are case insensitive.

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.

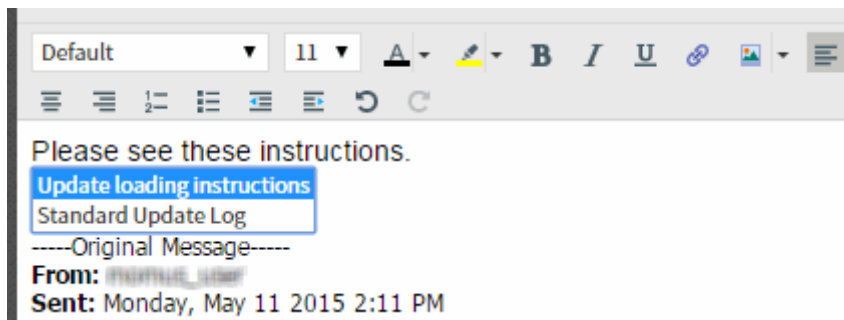
To use a shortcut:

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.

Speed Dial

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

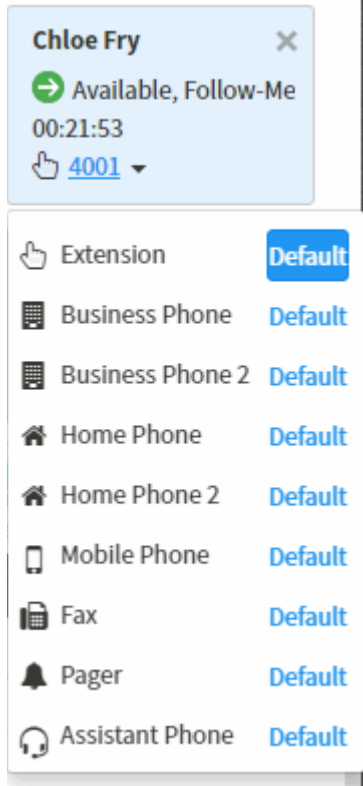
- [Close a Speed Dial View](#)
- [Create a Speed Dial View](#)
- [Delete a Speed Dial View](#)
- [Dial a Number Using Speed Dial](#)
- [Display a Speed Dial View](#)
- [Rename a Speed Dial View](#)

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](#)

Speed Dial Views

Working with Speed Dial Views

Requirements: You need the [Can Create Speed Dials](#) Security right to enable you to [Create a Speed Dial View](#). 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**.

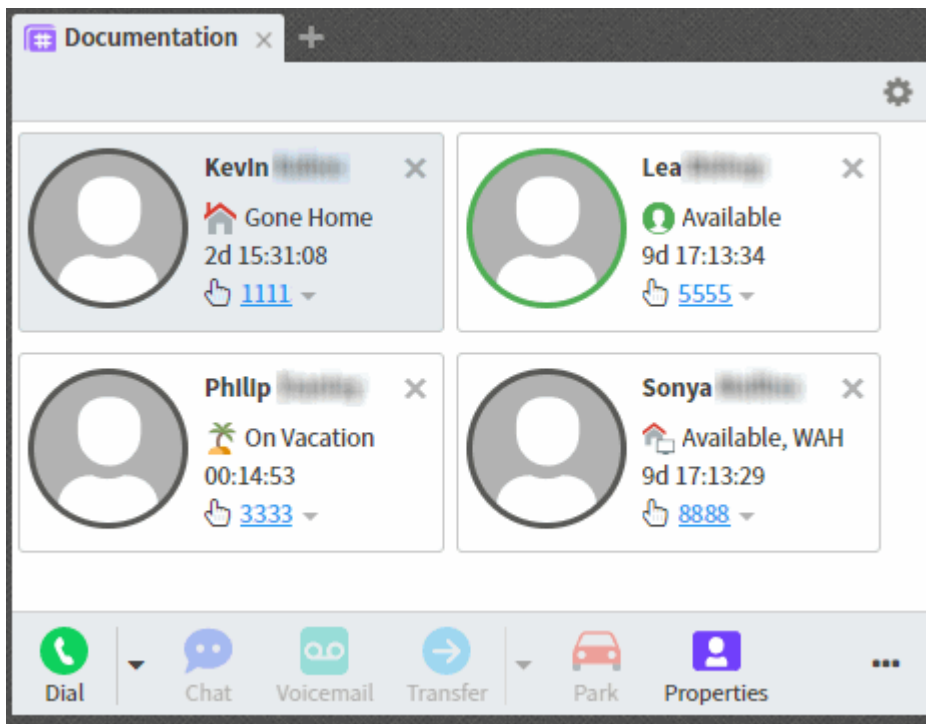
- If the CIC administrator does not define **DefaultSpeedDialPageSize** and the requested number of directory contacts is greater than **MaxSpeedDialPageSize**, the number of contacts returned is less than or equal to 25.

- 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:

- Click the **Add View** icon (plus sign) next to any tab.
- Click **Show all Views**.
- In the **Directories** section, select **Speed Dial**.
- In the Speed Dial list, click **Create a new Speed Dial**.
- Click the **Create** button.

Result: The **Create Speed Dial** dialog box appears.

The screenshot shows a dialog box titled "Create Speed Dial". It has a close button (X) in the top right corner. Below the title bar, there is a text input field labeled "Speed Dial Name" containing the text "Department Heads". Below this field, there is a section titled "Public" with a checked checkbox. Underneath, there is a label "Select how other users may modify this speed dial" followed by four checkboxes: "Add Entries" (checked), "Change Entries" (checked), "Delete Entries" (unchecked), and "Rename the Speed Dial" (unchecked). At the bottom of the dialog, there are two buttons: "Cancel" and "Create Speed Dial".

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](#)

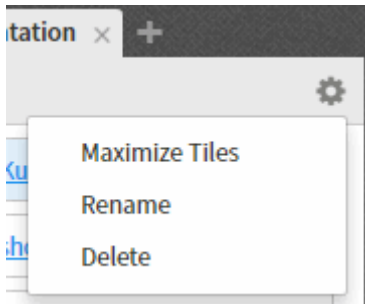
[Display a Speed Dial View](#)

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.

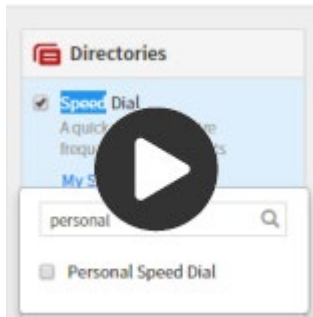
Related Topics

[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](#).

Click to view a simulation





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

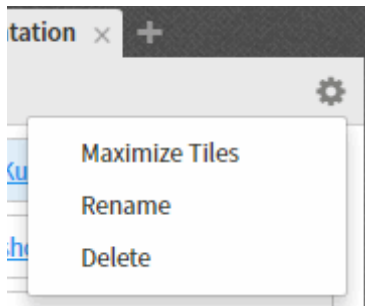
- [Create a Speed Dial View](#)
- [Close a Speed Dial View](#)
- [Speed Dial](#)

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](#)

Speed Dial Entries

Working with Speed Dial Entries

After you have established your speed dial view or views, you can add or delete entries. You can also change the default number for an entry.

Related Topics

- [Add a Directory Contact to a Speed Dial View](#)
- [Change a Speed Dial Entry Default Number](#)
- [Delete a Speed Dial Entry](#)
- [Speed Dial Features](#)

Speed Dial Features

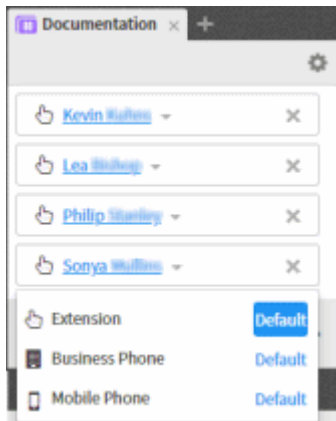
Speed dial views can include photos or images for each entry. The type of entries you see depend on whether your CIC administrator enables this type of display. You can also switch between minimized and maximized tiles in your Speed Dial views.

To switch view types:

- Click the **Configure Directory** icon in the Speed Dial view and select **Minimize Tiles** or **Maximize Tiles**.

Minimized Tiles

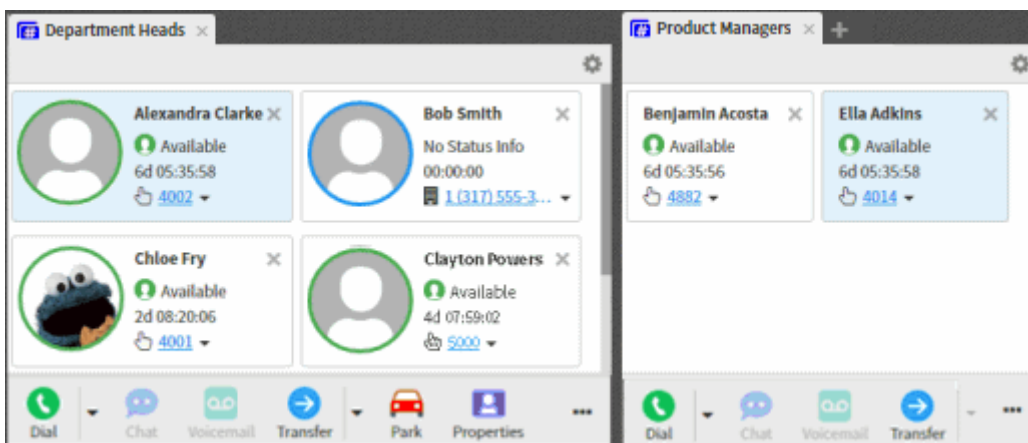
Minimized tiles in a Speed Dial view provide a space-saving, simple list with contact names.



- **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.

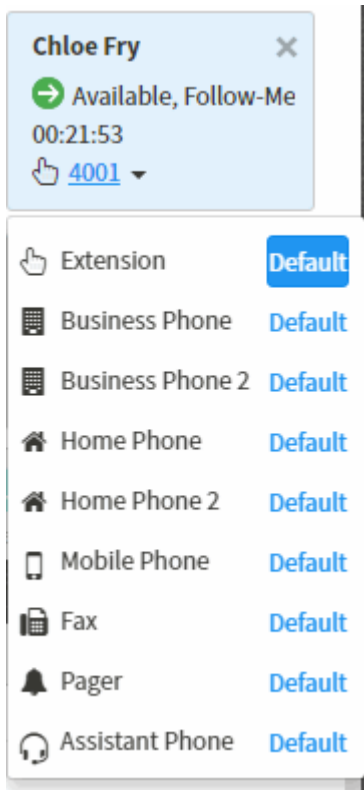
Maximized Tiles

This shows you how the maximized tiles appear in a Speed Dial view; with and without 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

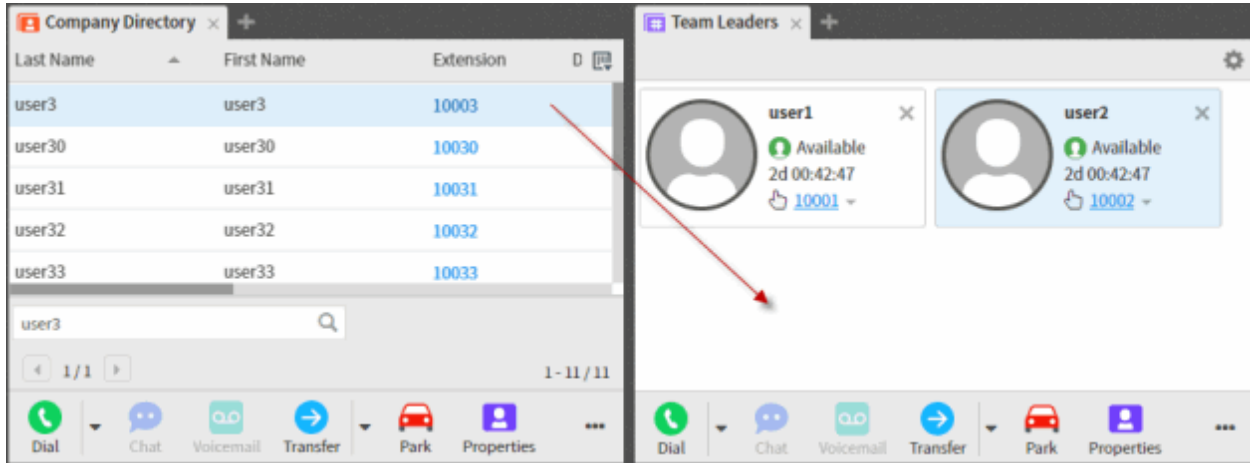
- [Working with Speed Dial Entries](#)
- [Working with Speed Dial Views](#)

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](#)

Status

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.

My Status drop-down list	The My Status drop-down list displays your current status and enables you to change your status. For more information, see Set Your Status .
Time in current status	The time (hh:mm:ss) indicates how long you have spent in your currently selected status. This can help you monitor how long you have been in a not-available status such as "At Lunch," "Away from Desk," or "In a Meeting."
Fast status buttons	Change your status by clicking one of your selected fast status buttons. You determine which fast status buttons appear.
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.
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](#)

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.

The default status values are:



ACD - Agent Not Answering



At a Training Session



At Lunch



Available



Available, Follow-Me

This person is available at one of the numbers on a follow-me list. The caller can leave a message or use follow-me routing to find the person and transfer the call.



Available, Forward

This person is available at a designated remote number.











Available, No ACD

This person is available for all non-ACD interactions.



Away From Desk

-  Do Not Disturb
-  Follow Up
-  Gone Home
-  In a Meeting
-  On Vacation
-  Out of the Office
-  Out of Town
-  Working at Home

Related Topics

- [Set DND Status with Your Phone](#)
- [Set Your Status](#)
- [Set 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. As a convenience, the notes from the last time you selected this status appear. You can make any necessary changes to these notes. Requirements: You need the Status Notes right in order to create or modify Status notes.
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Forward Number	This is enabled only for selected statuses such as Available, Forward . Enter a telephone number to which calls can be forwarded. Note: The last forwarding number you used for this status defaults to the Forward Number box.
Until Date Until Time	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 CIC 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](#)

Text Messages

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

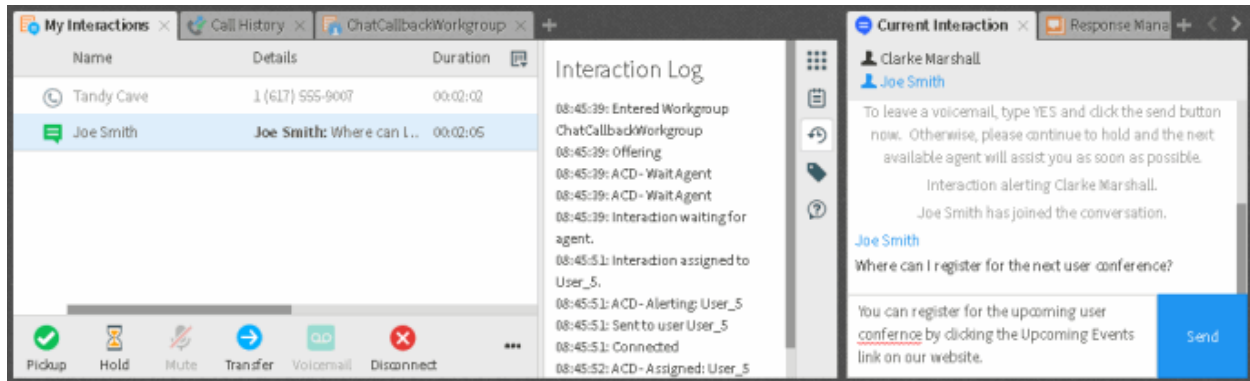
ACD-routed SMS text messages and replies to your text messages can appear in your CIC client as **Chats**. Your CIC administrator controls the routing of inbound SMS text messages. CIC can route SMS text messages as Chats, to a handler, or as a generic object to a queue.

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](#)

Voice Mail

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.

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* available in the PureConnect Documentation Library.

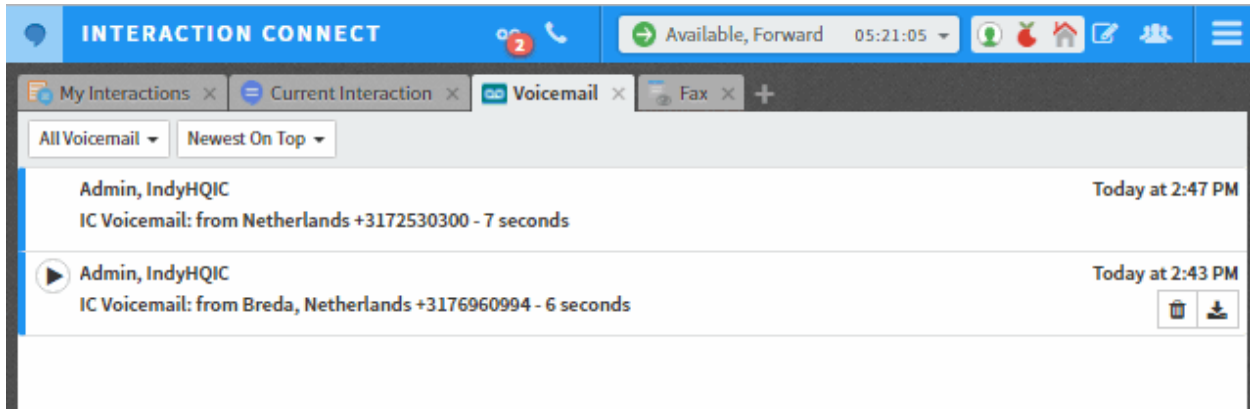
Related Topics

[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
2	Slow down playback.
3	Speed up playback.
5	Rewind message 6 seconds.
6	Fast forward message 6 seconds.
8	Decrease volume.
9	Increase volume.

Related Topics

[Interaction Voicemail Player Controls](#)

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](#)

Voicemail Player

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:

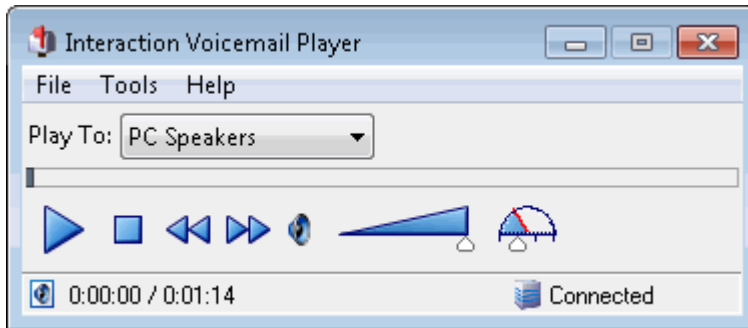
- Play voice mail messages directly from electronic mail.
- Control the playback of voice mail messages.
- Clear a message waiting indicator light

Tip: For more information, see the *Interaction Voicemail Player Help*.

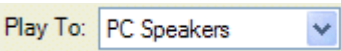
Related Topics









- [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
	<p>Select the device to play your voice mail.</p> <p>Note: If you restart the CIC client, this defaults to the device you selected for your last voice mail.</p> <p>PC Speakers</p> <p>Selecting a playback other than PC Speakers may result in slower</p>

	<p>startup times.</p> <p>Remote Telephone</p> <p>Selecting this device causes CIC to dial the specified number and play the voice mail.</p> <p>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.</p> <p>Note: A DID (Direct Inward Dial) phone number is one that an external caller can reach by dialing a 7-digit phone number.</p>
	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.

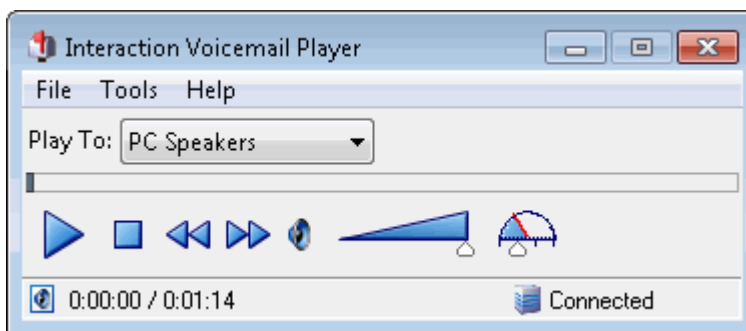
To listen to your voice mail through your Inbox:

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](#)

Voice Mail View

Voice Mail View

The Voice Mail 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 Voice Mail View](#).

To display the Voice Mail 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 **Voice Mail** check box.
4. In the Add Views dialog box, click **Add View**.

Result: The Voice Mail view appears.

Related Topics

- [Change View Layout](#)
- [Use the Voice Mail View](#)
- [Working with Voice Mail](#)

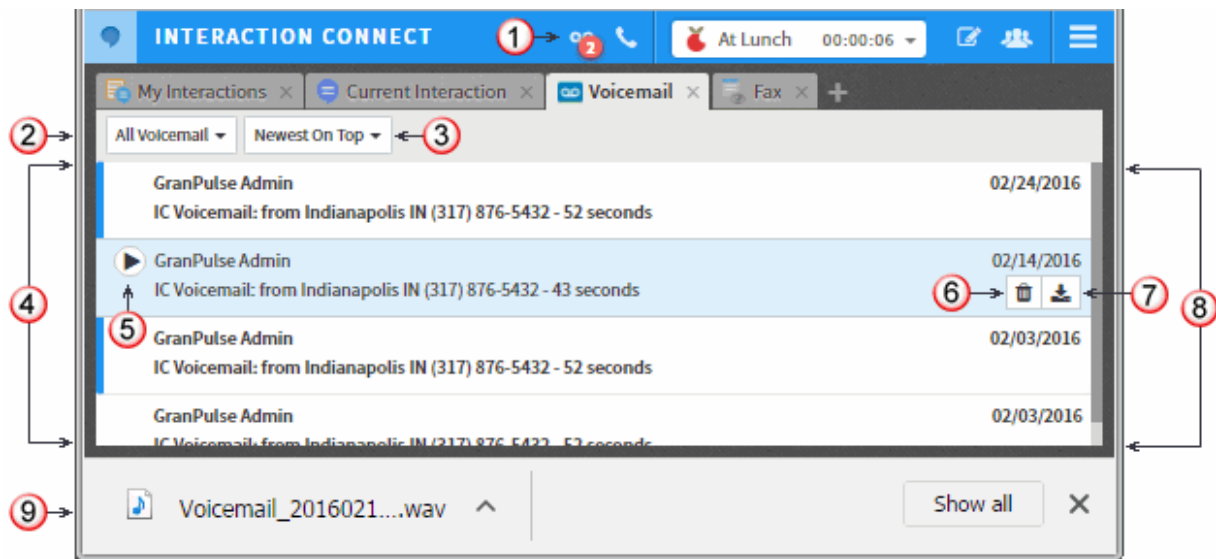
Use the Voice Mail View

Use the Voice Mail 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 Voice Mail Message view, you must make it available as a view in the CIC client. For more information, see [Voice Mail View](#).

Voice Mail View Features

This diagram illustrates the main features of the Voice Mail view.



- | | |
|---|---|
| 1 | The Voicemail Message Waiting Indicator (MWI) appears when you have unheard voice |
|---|---|

	<p>mail messages.</p> <ul style="list-style-type: none"> • The number on the icon indicates the number of unheard messages. • Click the icon to select the Voicemail view and bring it to the front if it is behind another view. <p>Note: Clicking the MWI does not add the Voicemail view to Interaction Connect. For more information on adding this view, see Voicemail View.</p>
2	<p>Select the type of voicemail messages to display in the Voicemail list:</p> <ul style="list-style-type: none"> • All Voicemail • Unopened Voicemail • Opened Voicemail
3	<p>Select a sorting option:</p> <ul style="list-style-type: none"> • Newest on top • Oldest on top
4	<p>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.</p> <p>Tip: A blue bar indicates an unheard message.</p> <p>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.</p>
5	<p>The currently selected voice mail message appears shaded. Click the Play control to listen to the currently selected voice mail message.</p>
6	<p>Click the Delete control to delete the currently selected voice mail message.</p> <p>Tip: To delete multiple messages at the same time, press and hold the Ctrl key and select the messages, then click the Delete control.</p>
7	<p>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.</p> <p>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.</p>
8	<p>A vertical scroll bar appears if you have more voice mail messages than can be displayed</p>

	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](#)

[Playback messages in the Voicemail View](#)

Playback 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 playback 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](#)

Workgroups

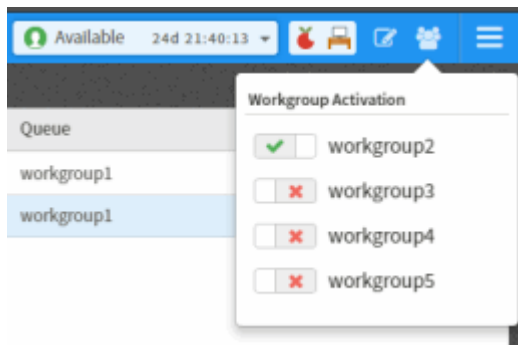
Change Your Workgroup Activation Status

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 [Activate Others](#) Access Control right for the selected workgroup.

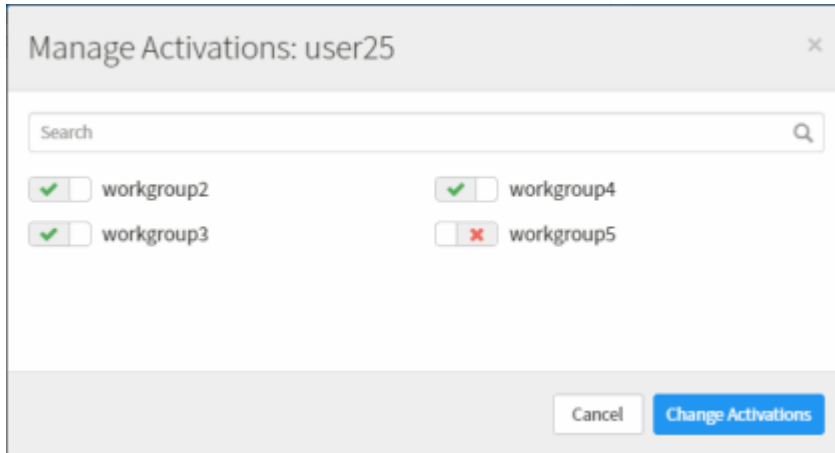
If you have the appropriate license and right, you can manage other users' workgroup activation status from various places in Interaction Connect.

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 **Activate Others** Access Control right for the selected workgroup.

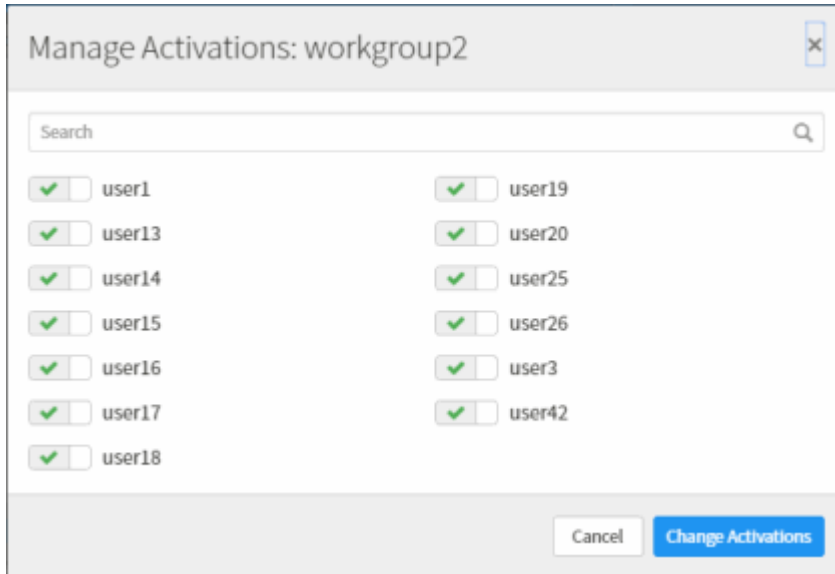
If you have the appropriate license and right, you can manage the activation status of all the members of a workgroup from various places in Interaction Connect.

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 indicates 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.

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.

Transfer: Blanch Buresh x

Transfer To

Presales (3001) options ▾

Presales

Interactions Waiting	0	Agents Logged In	14
Longest Interaction Waiting	N/A	Available Agents	14

Cancel
Transfer

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

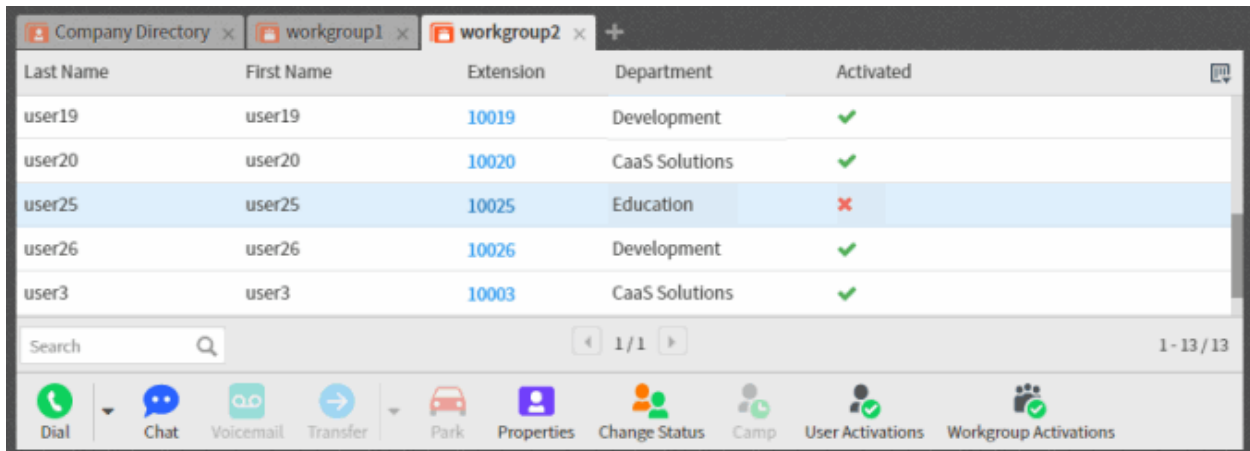
Requirements: You need the [View Directory Status Columns](#) Access Control right for the **Activated** column to display the Activated column in a Workgroup directory. The [View Workgroups](#) Access

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](#).



Last Name	First Name	Extension	Department	Activated
user19	user19	10019	Development	✓
user20	user20	10020	CaaS Solutions	✓
user25	user25	10025	Education	✗
user26	user26	10026	Development	✓
user3	user3	10003	CaaS Solutions	✓

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. 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**.

The screenshot shows the 'Agent Statistics' view for 'Hardie, Racquel' in the 'Marketing' workgroup. The interface includes a navigation bar with 'Marketing', 'Hardie, Racquel', and 'Current Shift' dropdowns, and buttons for 'Manage Activations' and 'Configure'. The main content area features a profile card for 'Hardie, Racquel' with a photo, status 'Available', a timer '08:41:08', and 'Activated' checkmark. To the right, it shows 'Average Talk Time' as 00:01:59 and 'Longest Talk Time' as 00:02:00. Below the profile is a table titled 'CURRENT SHIFT INTERACTIONS' with columns for 'Interactions Received' (118), 'Interactions Answered' (118), 'Interactions Completed' (117), and 'Interactions Held' (0). Underneath is another table titled 'CURRENT INTERACTIONS' with columns for 'Name', 'Details', 'Duration', 'State', and 'Queue'. One interaction is listed for 'Oliver Saeed' with details '(617) 555-9022', duration '00:00:03', state 'Alerting', and queue 'Marketing'. At the bottom, a toolbar contains icons for 'Pickup', 'Transfer', 'Disconnect', 'Join', 'Listen', 'Coach', 'Record', 'Pause', and 'Private'.

<p>Select a Workgroup drop-down list</p>	<p>Click the down arrow and select a workgroup from the drop-down list or use the search text box to find a workgroup.</p>
<p>Select an agent</p>	<p>Click the down arrow and select an agent belonging to the selected</p>

drop-down list	workgroup.
Select a shift/period drop-down list	Click the down arrow and select the current or previous shift or period.
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. <div style="border: 1px solid black; background-color: #f0f0f0; padding: 5px;"> <p>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.</p> </div>
Agent information	This section displays the agent's photo, CIC status, time in CIC status, and Workgroup Activation status. The circle around the agent's photo also indicates CIC status: <ul style="list-style-type: none"> • Green indicates that the agent is in an ACD Available status and activated in one or more workgroups. • Blue indicates that the agent is available, but not in an ACD Available status. • Red indicates the agent is in a DND status; for example, At Lunch or In a Meeting, • 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. <ul style="list-style-type: none"> • Received is the number of interactions that alerted on this agent's queue during the current period. • Answered is the number of interactions that were answered by the agent. • Completed is the number of interactions picked up by the agent and then transferred or disconnected. • Held is the number of interactions placed on hold by the agent during

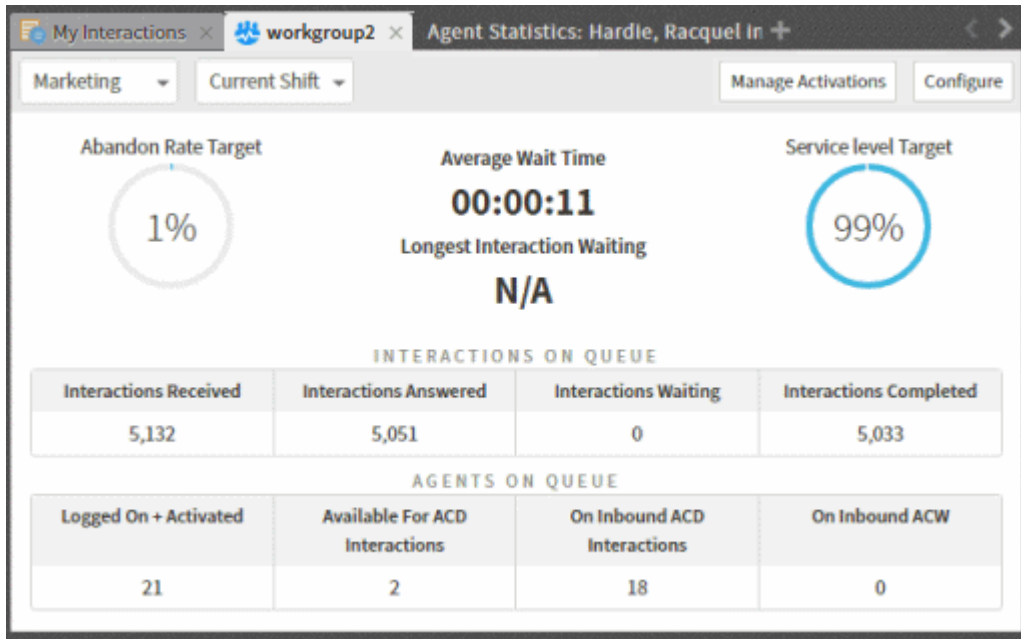
	the current period.
Current Interactions	This section displays the interactions currently on the agent’s queue. Tip: To select which columns to display, use the Choose Column control on the right side of the column heading row.
Queue Control Toolbar	To assist with or monitor an agent’s interaction, select 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. 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	<p>To select and arrange the displayed statistics, click Configure. See Display and Configure the Workgroup Statistics view.</p> <p>Requirement: To configure which statistics appear in this view, you need the Interaction Supervisor Plugin: Workgroups license.</p>
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	<p>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.</p> <p>Tip: N/A indicates that no interactions are currently in the ACD-Wait Agent state.</p>
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	<p>The default arrangement displays the total number of non-disconnected interactions on this workgroup queue during the selected shift or period.</p> <ul style="list-style-type: none"> • Received is the number of interactions that alerted on this workgroup queue. • Answered is the number of interactions that an agent answered. • Waiting is the number of interactions currently alerting or on hold. • Completed is the number of interactions picked up by agents and then transferred or disconnected. <p>Tip: If you have the Interaction Supervisor Plugin: Workgroups license you can select and arrange the statistics in this section. See Display and</p>

	<p style="text-align: center;">Configure the Workgroup Statistics view.</p>
<p>Agents on Queue</p>	<p>The default arrangement displays the number of agents belonging to the selected workgroup during the selected shift or period:</p> <ul style="list-style-type: none"> • Logged on + Activated: Agents who logged on to an Interaction Client with their workgroup activation status set to an "Active" type. • Available for ACD Interactions: Agents with their CIC status set to an Available type. • On Inbound ACD: Agents working on an ACD-routed interaction. • 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. <p>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.</p>

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.

Workgroup & Activation Status Interactions Waiting Logged On On Inbound ACD Interactions Longest Interaction Waiting

✓ Marketing	0	21	0	N/A
✗ Presales	0	17	0	N/A
CompanyOperator	0	0	0	N/A

Shift/Period Statistics for Marketing

Shift Statistics	You	Workgroup	Period Statistics	You	Workgroup
Average Talk Time	N/A	00:00:52	Average Talk Time	N/A	N/A
Longest Talk Time	N/A	N/A	Longest Talk Time	N/A	N/A
Interactions Received	0	5,644	Interactions Received	0	0
Interactions Answered	0	5,542	Interactions Answered	0	0
Interactions Completed	0	5,542	Interactions Completed	0	0

1	Workgroup Activation Status	<p>A check mark indicates that your status is "Activated." An X indicates that your status is "Deactivated."</p> <p>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.</p>
2	Workgroup Name	<p>The name of the workgroup as defined in Interaction Administrator.</p>
3	Workgroup Statistics	<p>Tip: Click a column heading to sort the contents of the view. Click the same column heading to sort the contents in reverse order.</p> <p>These default statistics appear for each workgroup:</p> <ul style="list-style-type: none"> • Interactions waiting: Number of interactions waiting on this workgroup queue. • Logged on agents in this workgroup: Total number of logged-on agents in this workgroup, regardless of their status. • On inbound ACD interactions: Total number of agents working on inbound ACD interactions in this workgroup queue. • Longest interaction waiting: The longest connection time of any of the currently connected interactions. "N/A" indicates that there are no currently connected interactions. • Longest talk time: The longest amount of time any currently

		<p>connected call has been connected.</p> <ul style="list-style-type: none"> • Agents available: The number of logged-on and activated agents in this workgroup who have an "Available" status. • On inbound ACW: Total number of agents performing after call wrap-up work to conclude an inbound ACD interaction on this workgroup queue. • On outbound ACW: Total number of agents performing after call wrap-up work to conclude an outbound ACD interaction on this workgroup queue.
4	Configure	<p>To choose the workgroups and select the statistics displayed in this view, click the Configure button.</p> <p>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.</p>
5	Shift/Period Statistics control	<p>To display or hide a statistical summary of the current shift or period for the currently selected workgroup, click this control.</p> <p>Note: The interval statistics do not update when you hide this section.</p>
6	Shift/Period Statistics	<p>For more information, see Shift\Period Statistics.</p>
7	Configure Statistics	<p>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.</p> <p>Requirement: To configure which statistics appear in this view, you need the Interaction Supervisor Plug-In: Workgroups license.</p> <p>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.</p>
8	Manage Activations	<p>To change the activation status for members of this workgroup, click Manage Activations. See Change a Workgroup's Activated Users.</p>

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: You need the [Customize Client](#) Security right to add views. To display an Agent Overview **for yourself or other agents**, you need the **Interaction Supervisor Plug-In: Workgroups** license. To use this license, you must also [enable supervisor features](#). To display this view, you also need the [Workgroup Statistics](#) Security right. The [View Directory Status Columns](#) Access Control right enables you to display an agent's status information.

This is an overview of the activity of an agent within a workgroup. You can add as many Agent Overviews as you need, but CIC 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.

- 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.

- 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:

- 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.

1. **Note:** You can rearrange and remove statistics only in the **Current Interactions** section. This arrangement and selection is saved separately for each Agent Overview.

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 [Activate Others](#) 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. Do any of the following:

Note: You can rearrange and remove statistics only in the **Interactions on Queue** and **Agents on Queue** sections.

- 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**.
 9. Click **Done**.

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 [Activate Others](#) 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	<p>Average connection time for all currently connected calls. Total amount of time spent on different ACD interactions, divided by number of ACD interactions.</p> <p>Note: If there are no currently connected calls, Average Talk Time is N/A (not applicable).</p>
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. 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 an 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](#)

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