



**INTERACTIVE  
INTELLIGENCE**  
DELIBERATE INNOVATION

# Interactive Intelligence Oracle Service Cloud Integration

## Printable Help

Interactive Intelligence Customer Interaction Center® (CIC)

2016 R2

Last updated 12/15/2015

### Abstract

This document is a printable version of the Interactive Intelligence Oracle Service Cloud online help. It explains how to start and exit, configure and use Interaction Client. Online help is available by clicking the Help button on the Interactive Intelligence Media Bar.

Interactive Intelligence, Inc.  
7601 Interactive Way  
Indianapolis, Indiana 46278  
Telephone/Fax (317) 872-3000  
[www.ININ.com](http://www.ININ.com)







# Table of Contents

Interactive Intelligence Oracle Service Cloud Integration .....	1
Interactive Intelligence Oracle Service Cloud Integration Help .....	1
Need Help? .....	2
Using the Search Feature .....	2
Feedback and Access Support .....	3
Features.....	4
Access Control Rights .....	5
Account Codes .....	5
Attendant Profiles .....	5
Client Buttons .....	6
Directory Status .....	6
e-FAQ's .....	6
Phone Number.....	6
Plug-ins .....	7
Processes .....	7
Queue Columns .....	7
Response Management .....	8
Station Queues.....	8
Stations.....	9
Status Messages.....	9
User Queues.....	9
Users.....	9
Workgroup Queues.....	10
Workgroups.....	10
Security Rights .....	10
Client Rights .....	10
Interaction Command Rights.....	12
My Interaction Rights.....	12
Tracker Policy Rights.....	14
User Rights.....	14
What's New in CIC client 4.0 .....	14
Documentation Library.....	16
What's New in CIC client 4.0 Service Updates.....	16
4.0 SU 1 .....	16
4.0 SU 2 .....	16
4.0 SU 3 .....	17
4.0 SU 4 .....	18
4.0 SU 5 .....	18
What's New in CIC client 2015 Releases .....	19
2015 R2 .....	19
Starting and Exiting.....	20
Starting and Exiting.....	20
Auto Reconnect .....	20
Change Your Password.....	20
Password Policies .....	20
Changing Station .....	21
Exiting .....	22
Language Setting.....	22
Logging On.....	23
Using Profiles to Log On to the Interactive Intelligence Oracle Service Cloud Integration .....	24
Logon Settings.....	25

Logging On Remotely.....	28
Logging Off.....	28
Logon Dialog Box.....	28
Profiles.....	28
Display the Logon dialog box.....	28
Using the Logon dialog box.....	29
Remote Station Types.....	29
Dynamic Remote Client Connections (Remote Number).....	29
Configured Remote Stations (Remote Workstation).....	30
SIP Stations are not Remote.....	30
Remote Station Licenses.....	30
Running the CIC client from a Remote Location.....	31
Answer and Make Calls.....	31
Answer Calls.....	31
Make Calls.....	31
Keep a Persistent Connection to the IC Server.....	32
Single Sign On.....	32
Using the Interactive Intelligence Media Bar.....	33
Using the Interactive Intelligence Media Bar.....	33
Associate Interaction with Workspace Button.....	36
Change Station Button.....	36
Conference Manager Button.....	36
Configuration Button.....	36
Disconnect Button.....	37
Help Button.....	37
Hold Button.....	38
Interactions Drop-Down List.....	38
Logon or Logoff Button.....	39
Make Call / Click to Dial Button.....	39
Mute Button.....	40
Pause Button.....	41
Pickup Button.....	41
Record Button.....	42
Set Status Details Button.....	43
Show Interaction Client Button.....	43
Status Drop-Down List.....	43
Transfer Button.....	44
Voicemail Button.....	45
Using Views and Dialog Boxes.....	45
Using Views and Dialog Boxes.....	45
About dialog box.....	46
Call History.....	47
Displaying the Call History View.....	48
Using Call History to Make Calls.....	48
Call History Retention.....	49
Camp Desktop Alert.....	49
Create New View Dialog Box.....	49
Using the Dial Pad.....	50
Directory Properties Dialog Box.....	51
Interaction.....	52
Interaction Information View.....	52
Interaction Properties Dialog Box.....	54
Access from User Queue.....	54
Access from Call History.....	55

My Interactions .....	55
Options Dialog Box .....	57
Phone Number Controls .....	58
Set Status Dialog Box .....	58
Shortcut Keys .....	59
My Interactions and Other Queue Shortcuts .....	59
Directory Shortcuts .....	60
Viewing Shortcut Keys .....	60
Supervisor Client Memos .....	61
Desktop pop-ups .....	61
Notification Area .....	61
Tips and Tricks .....	61
Transferring Calls .....	62
Copying Information to the Clipboard .....	62
Transfer Dialog Box .....	62
Using the Transfer dialog box .....	63
Status Information for Transfer recipient .....	64
Using the Toolbars .....	64
Using the Toolbars .....	64
Custom Buttons .....	65
Customizing Toolbars .....	65
Add, Remove, or Rearrange Buttons .....	65
Using the Queue Control Toolbar .....	67
Using the Queue Control Toolbar .....	67
Queue Control Shortcuts and the shortcut menu .....	67
Queue Control Toolbar Buttons .....	68
Custom Buttons .....	69
Assistance Button .....	69
Coach Button .....	70
Disconnect Button .....	71
Help Button .....	72
Hold Button .....	72
Join Button .....	73
Listen Button .....	73
Mute Button .....	74
Park on Orbit Button .....	75
Pause Button .....	75
Pickup Button .....	76
Private Button .....	77
Properties Button on the Queue Control Toolbar .....	77
Record Button .....	77
Secure Input Button .....	78
Secure Pause Button .....	79
Transfer Button .....	80
Voicemail Button .....	80
Using the Directory Toolbar .....	81
Using the Directory Toolbar .....	81
Default Directory Toolbars .....	82
Customizing Toolbars .....	82
Directory Toolbar Shortcuts .....	82
Directory Shortcuts and the shortcut menu .....	83
Directory Toolbar Buttons .....	83
Camp Button .....	85
Change User's Status Button .....	85

Conference Button .....	86
Consult Transfer Buttons .....	86
Dial Buttons .....	87
Lync-enabled Company Directory Dial Button .....	87
Initiate New Chat Button .....	88
Park on Queue Button .....	88
Properties Button on the Directory Toolbar .....	89
Send Email Message Buttons .....	89
Send to Voicemail Button .....	90
Blind Transfer Buttons .....	90
Configuration Options .....	91
Configuration Options .....	91
Understanding the Configuration Dialog Box .....	92
Accessing the Configuration Dialog Box .....	92
Using the Configuration Dialog Box .....	93
Shortcut Keys .....	93
More Information .....	94
Miscellaneous Configuration Options .....	94
Automatic Status Changer .....	95
Special Circumstances .....	95
Configuring Automatic Status Changer .....	95
Configure Your IP Phone .....	97
Connection Tab of the Logon dialog box .....	98
General Configuration Options .....	99
General Options .....	100
Options Tab of the Logon dialog box .....	102
Outlook Dialing .....	102
Installation and Configuration .....	103
Verify Installation .....	103
Configure Outlook Dialing .....	103
Dial a Microsoft Outlook Contact .....	104
Voicemail Message View .....	104
Alerting Options .....	105
Alerting Options .....	105
Desktop Alerts .....	105
Setting Up Desktop Alerts .....	105
Using Desktop Alerts .....	106
General Alerting Options .....	106
My Interactions Ring Sounds .....	108
Changing Ring Sounds .....	108
My Interaction Ring Sounds Options .....	108
Parked Call Alerting Options .....	109
Voice Mail / Fax Paging .....	109
Call Options .....	111
Call Options .....	111
Calls Configuration .....	111
Calls Options .....	111
Set Up Follow-me Routing .....	112
Call Coverage Options .....	114
Coverage Options .....	114
Coverage Number .....	115
Forward Calls When You Do Not Answer .....	115
Forward Calls When You Are in Do Not Disturb Status .....	117
Forward Calls When You Are on the Phone .....	118



Forward Calls Regardless of Status .....	119
About Personal Prompts .....	121
Personal Prompts Options .....	121
Personal Prompts Types .....	122
Monitored Appearances .....	123
Working with Monitored Appearances .....	123
Monitored Appearances View .....	124
Activate and Deactivate Monitored Appearances .....	124
Configure Monitored Appearances .....	127
Customize Monitored Appearance Alerts .....	129
Delete a Monitored Appearance .....	131
Views .....	131
Customizing the Interface .....	131
Add or Remove View Columns .....	132
Add or Close Views .....	133
Adding a View .....	134
Closing a View .....	134
Change View Layout .....	135
Docking Icons .....	136
Change View Order .....	136
Customize Columns .....	136
Customizing Toolbars .....	137
Add, Remove, or Rearrange Buttons .....	137
Move Views .....	138
Reset Queue Column Display .....	140
Reset View Layout .....	140
Resize a Docking Zone .....	142
Plug-ins .....	142
Plug-ins .....	142
Enabling a Plug-in .....	143
Plug-ins Properties Details Pane .....	143
SIP Soft Phone .....	144
SIP Soft Phone .....	144
Starting the SIP Soft Phone .....	144
Security .....	144
Requirements .....	144
Audio Tuning Wizard .....	145
SIP Soft Phone Provisioning Wizard .....	146
SIP Hard Phone .....	146
SIP PC Audio .....	146
USB Audio Device .....	147
Audio Device Requirement .....	147
Working with Account and Wrap-Up Codes .....	147
Working with Account and Wrap-Up Codes .....	147
Advanced Dialing Options .....	148
Configuration Requirements .....	148
Using the Advanced Dialing Options Dialog Box .....	148
Assign Codes to an Incoming Interaction .....	149
Assign Codes to an Outgoing Interaction .....	150
Numerically Sort Account Codes .....	151
Understanding Account Codes .....	152
Account Code Restrictions .....	152
Understanding Wrap-Up Codes .....	153
Assigning a Wrap-Up Code .....	153

Wrap Up Code Prompt.....	153
Working with Callback Requests.....	154
Working with Callback Requests.....	154
Callback Interaction .....	154
Callback Window .....	155
Respond to a Callback Request.....	156
Monitor a Callback Request .....	157
Use Response Management for an Incoming Interaction.....	158
Working with Calls.....	159
Working with Calls.....	159
Call Security.....	159
Call Security Icons and Alerts.....	160
Emergency Call Alerts .....	161
E-mail Message Alert.....	161
Alert Message Hyperlink.....	162
Pop-up alert .....	162
Working with Emergency Call Alerts .....	163
Making Calls .....	164
Making Calls.....	164
Call an Operator .....	165
Call Back a Disconnected Call.....	165
Click to Dial a Directory Contact .....	166
Click to Dial an Oracle Service Cloud Contact.....	166
Dial a Long-Distance Number.....	167
Dial a Number Inside the Organization.....	168
Dial a Number Outside the Organization.....	169
Dial a Number Using Speed Dial.....	169
Dial a Recently Dialed Number .....	170
Dial on Behalf of a Workgroup .....	171
Disconnect a Call.....	171
Entering Telephone Numbers .....	172
Make a Call Using a Dial Button.....	172
Make a Call Using the Make Call Button .....	172
Make a Call Using the Number Field.....	174
Place a Call on Hold.....	175
Understanding an Interaction’s State.....	176
Picking Up Calls.....	178
Picking Up Calls.....	178
Answer an Incoming Interaction .....	178
Unable to Pick Up Interaction.....	179
Caller Name.....	179
Park a Call on Orbit.....	180
Pick Up a Call From a Queue .....	181
Pick Up a Call from an Orbit.....	181
Pick Up a Call from Voice Mail.....	182
Place a Call on Hold.....	182
Transferring Calls.....	183
Transferring Calls .....	183
Drag and Drop a Call on a Name in a Directory.....	183
Park a Call on Another Person’s Extension .....	184
Call Parking Tips .....	184
Transfer a Call After Consulting the Recipient .....	185
Transfer a Call to a Directory Entry.....	188
Transfer a Call to a Workgroup.....	189

Using the Workgroups and Profiles Directory to Transfer a Call.....	191
Transfer a Call to an Attendant Profile .....	191
Transferring a Call to an Interaction Attendant Profile.....	191
Using the Workgroups and Profiles Directory to Transfer a Call.....	192
Transfer a Call to Another Person’s Voice Mail.....	193
Transfer a Call to Your Voice Mail.....	194
Transfer a Call Using a Transfer Button .....	195
Transfer a Call Using the Directory Toolbar .....	195
Transfer a Call Using the Queue Control Toolbar .....	196
Transfer a Call Without Consulting the Recipient.....	197
Forwarding Calls .....	198
Forwarding Calls.....	198
Call Coverage Options.....	199
Coverage Options.....	199
Coverage Number .....	200
Forward Calls to Your Remote Telephone Number .....	200
Understanding Follow-me Routing.....	201
How Follow-me Routing Works.....	202
Set Up Follow-me Routing.....	202
Start Follow-me Routing.....	204
Making Conference Calls .....	204
Making Conference Calls.....	204
Conferencing Features.....	205
Create or Join a Conference Call Using Join.....	206
Create or Expand a Conference Call by Adding Parties .....	206
Drag and Drop a Call on Another Call .....	207
Disconnect Someone from a Conference Call.....	208
Using Other Call Features .....	208
Using Other Call Features.....	208
Associate an Interaction with a Workspace.....	208
Camp on an Internal Extension.....	209
Stopping Camping .....	210
Change the Sound of Your Incoming Calls.....	211
Coach an Interaction .....	211
Determine if Someone is Listening to or Recording Your Interactions .....	212
Lstns and Recs Columns.....	212
Listen Icon.....	212
Record Icon.....	212
Join an Interaction .....	213
Listen to a Call.....	214
Record a Call.....	214
Remove Disconnected Interactions from a Queue.....	215
Request Assistance from Your Supervisor.....	215
Workgroup Supervisors.....	215
Requesting Assistance .....	216
Assistance Process.....	217
Secure Input .....	220
Secure Pause a Recording.....	220
Start a Secure Input Session.....	221
View and Edit Interaction Properties .....	222
Log .....	223
Notes.....	223
Working with Chat Sessions.....	224
Working with Chat Sessions.....	224

Chat Interactions .....	225
Chat Configuration, Window and View .....	226
Configure Chat Options .....	226
Chat Window .....	227
Configure Chat Window .....	230
Chat View .....	230
Manage a Chat Session .....	233
Manage a Chat Session .....	233
Chat Window Toolbar .....	233
Chat Window Menus .....	234
Add Notes to an Interaction .....	235
Assign Codes to an Interaction .....	235
Conference Two or More Chat Sessions .....	236
Copy and Paste Text During a Chat .....	236
Disconnect a Chat Session .....	237
Initiate a Chat Session .....	237
Mark a Chat Session as Private .....	238
Monitor a Chat .....	238
Pick Up a Chat Request .....	239
Place a Chat Session on Hold .....	240
Print a Chat Session .....	240
Record a Chat Session .....	241
Recording a Chat Session .....	241
Pausing a Chat Session Recording .....	242
Request Assistance from Your Supervisor .....	243
Workgroup Supervisors .....	243
Requesting Assistance .....	243
Send a Chat Session Request to Voicemail .....	245
Transfer a Chat Session .....	245
Use e-FAQ in a Chat or E-mail Reply Interaction .....	246
Use Response Management During a Chat Session .....	247
Working with Directories .....	247
Working with Directories .....	247
Directory shortcut menu .....	250
Change a Directory Contact's Default Number .....	251
Employee Photo and Office Location .....	251
Insert and Delete Directory Entries .....	252
Search a Directory .....	254
Search Fields Context Menu .....	255
Sort a Directory .....	255
View and Edit Directory Entries .....	255
Working with Other Directories .....	257
Working with the Company Directory .....	258
Working with e-FAQ .....	258
Working with e-FAQ .....	258
e-FAQ Section and e-FAQ View .....	258
e-FAQ view .....	260
Using e-FAQ .....	261
Configure e-FAQ .....	262
e-FAQ Searches .....	263
Natural Language Query .....	263
Boolean Search .....	263
Boolean Wildcards .....	264
Boolean Proximity Matching .....	264

Boolean Frequency Matching .....	265
Use e-FAQ in a Chat or E-mail Reply Interaction .....	266
Working with Email Messages.....	266
Working with Email Messages .....	266
Email Interactions .....	267
Email Window for Incoming Messages .....	268
Email Window for Outgoing Messages.....	270
Secure Email Messages .....	273
Overview of Secure E-mail Messages.....	274
Secure E-mail Interaction Icons .....	274
Manage Email Messages.....	275
Add Notes to an Interaction .....	275
Assign Codes to an Interaction.....	276
Forward an Email Message.....	276
Monitor an Email Message and Reply .....	278
Park an Email Message on Another Person's Queue.....	280
Pick Up or Reopen an Email Message.....	281
Print an Email Message .....	281
Reply to an Email Message.....	281
E-mail Conversation.....	282
Email conversation in a queue view .....	282
Reply to an HTML Email Message .....	285
Format Text.....	285
MSHTML Toolbar.....	285
Telerik Toolbar .....	285
Create a Hyperlink .....	286
Insert an Image .....	287
Send an Email Message .....	288
Transfer an Email Message .....	289
Use e-FAQ in a Chat or E-mail Reply Interaction .....	290
Use Response Management for an Incoming Interaction.....	290
Use Response Management in an Email Message .....	291
Working with Faxes.....	292
Working with Faxes.....	292
Open a Fax From Your Inbox.....	292
Send a Fax.....	293
Fax Viewer List View.....	294
Use the Fax Viewer List View.....	294
Working with Generic Objects.....	296
Understanding Generic Object Routing.....	296
Working with Interaction Process Automation .....	296
Interaction Process Automation .....	296
Using IPA .....	296
User Licenses.....	296
User Rights.....	297
Types of Access Control Rights for Processes .....	297
User Status.....	297
IPA Security Specifications .....	298
Interaction Process Automation Terminology.....	299
Processes.....	300
Processes.....	300
Display the Search Processes View.....	300
Search for a Process.....	301
Launch a Process.....	303

Associate an Interaction with a Process.....	304
Using the shortcut menu.....	304
Using Drag and Drop.....	305
Remove a Process Association.....	306
View Process Details.....	307
Process Details dialog box.....	307
Tabs.....	308
Buttons.....	308
Add Notes to a Process Instance.....	309
Work Items.....	310
Work Items.....	310
Work Item States.....	310
My Work Items View.....	311
Displaying the view.....	311
View contents.....	311
ACD-routed work items.....	312
Working with Work Items.....	312
Work Item View Features.....	312
Work Item Icons.....	312
Categories.....	313
List Customization.....	313
Work Item Alerts.....	313
Sections.....	313
State.....	313
Toolbar.....	314
Pick Up a Work Item.....	314
Tips for Completing Work Items.....	315
Put a Work Item on Hold.....	316
Transfer a Work Item.....	317
Licenses and Other Conditions.....	317
Work Item Transfer Dialog Box.....	317
Remove a Work Item from a Queue.....	318
Work Item Alerts.....	319
Work Item Warnings.....	320
Work Item Reminders.....	321
Work Item Reminder dialog box.....	321
Using the Work Item Reminder dialog box.....	322
Work Item Toolbar.....	322
Working with Interaction Tracker.....	323
Working with Interaction Tracker.....	323
Tracker Licensing and Rights.....	323
Recording License and Rights.....	324
Contact Resolution.....	324
Contact Resolution.....	324
Contact Resolution Process.....	324
Resolve a Contact.....	325
How to Resolve a Contact.....	325
Interaction Resolution.....	326
Working with Interaction Tracker Filtered Directories.....	329
Working with Interaction Tracker Filtered Directories.....	329
Close an Interaction Tracker Filtered Directory View.....	330
Create an Interaction Tracker Filtered Directory.....	330
Delete an Interaction Tracker Filtered Directory View.....	332
Display an Interaction Tracker Filtered Directory View.....	333

Edit an Interaction Tracker Filtered Directory View .....	333
View Tracker Directory Entries.....	334
Working with Tracker Information .....	335
Working with Interaction Tracker Information .....	335
Search Control.....	335
Add a Tracker Contact .....	336
Quick Add a Contact .....	346
Find a Tracker Contact.....	348
Modify Tracker Contact Information .....	351
Delete a Tracker Contact .....	355
Add a Tracker Organization .....	356
Find a Tracker Organization .....	364
Modify Tracker Organization Information.....	367
Delete a Tracker Organization.....	371
Add a Tracker Location.....	372
Modify Tracker Location Information.....	380
Assign Interaction Tracker Attributes .....	383
Working with Related Interactions.....	384
Display the Related Items View .....	385
Configure the Interactions Tab .....	386
Find Related Interactions.....	386
Playback a Recorded Interaction.....	387
Playback a Call.....	388
Playback a Chat Interaction .....	388
Playback an Email Interaction.....	389
View Interaction Properties .....	390
Interaction History.....	391
Use the Related Items View.....	392
Tips for Using the Interactions Tab .....	393
Use the Conversation History Tab .....	394
Use Interaction Notes .....	395
Working with the Microsoft Lync Integration.....	396
Working with the Microsoft Lync Integration.....	396
Lync Integration Status Synchronization .....	397
Synchronization Configuration Profiles.....	397
Mappings Example.....	398
Lync Integration User Types.....	399
Lync Embedded Client.....	399
Display the Lync Embedded Client.....	400
Lync-enabled Company Directory .....	401
Display the Lync-enabled Company Directory.....	403
Audio Calls and the Lync Embedded Client .....	404
Working with the Microsoft Outlook Interaction Client Add-in .....	404
Working with the Microsoft Outlook Interaction Desktop Add-In.....	404
Sign In.....	405
Use the Interaction Desktop Group to Dial a Number .....	405
Use the Outlook Shortcut Menu to Dial a Number .....	406
View User Status in Outlook .....	407
Working with Orbit Queues.....	408
Orbit Queues .....	408
Displaying the Orbit Queue View.....	409
Park a Call on Orbit.....	409
Pick Up a Call from an Orbit.....	410
Working with Personal Rules .....	411

Personal Rules .....	411
Setting Up Personal Rules .....	411
Create a Personal Rule .....	411
Specify an Attribute Name or Value .....	413
Playing Audio Files to Caller .....	413
Copy a Personal Rule .....	414
Edit a Personal Rule .....	414
Rearrange Personal Rule Processing Order .....	414
Turn a Personal Rule On or Off .....	414
Delete a Personal Rule .....	414
Creating Quick Call Rules .....	415
Working with Queues .....	418
Introduction to Queues .....	418
Monitor Two or More Queues at the Same Time .....	418
Pick Up a Call From a Queue .....	419
Queue Contents .....	420
Remove Disconnected Interactions from a Queue .....	422
Workgroup Statistics View .....	422
Workgroup Statistics .....	422
Shift\Period Statistics .....	424
Displaying the Workgroup Statistics View .....	424
Working with Response Management .....	425
Working with Response Management .....	425
Response Organization .....	426
Using Response Management .....	426
Responses Sidebar .....	427
Response Management View .....	428
Search for a Response .....	428
Full-Text Search .....	429
Context Search .....	430
Search Language .....	430
Boolean Operators .....	430
Exact Phrase .....	430
Grouping .....	430
Fields .....	430
Use a Response Shortcut .....	430
Working with Screen Pops .....	431
Site-Specific Screen Pops .....	431
Working with Speed Dial .....	431
Working with Speed Dial Views .....	431
Working with Speed Dial Views .....	431
Close a Speed Dial View .....	434
Create a Speed Dial View .....	434
Delete a Speed Dial View .....	436
Display a Speed Dial View .....	436
Refresh a Speed Dial View .....	437
Rename a Speed Dial View .....	437
Working with Speed Dial Entries .....	438
Working with Speed Dial Entries .....	438
Add a Directory Contact to a Speed Dial View .....	438
Speed Dial Features .....	439
Change a Speed Dial Entry's Default Number .....	439
Delete a Speed Dial Entry .....	440
Resize Speed Dial Entries .....	440



Using Speed Dial .....	441
Using Speed Dial.....	441
Dial a Number Using Speed Dial.....	441
Drag and Drop Transfer to a Speed Dial Entry.....	442
Understanding Speed Dial Hyperlinks.....	442
Working with Status Settings.....	443
Setting Status .....	443
Automatic Status Changer .....	443
Special Circumstances.....	443
Configuring Automatic Status Changer .....	444
My Status.....	445
Possible Status Values .....	446
Set Another User's Status.....	447
Set DND Status with Your Phone.....	448
Set Status Details .....	448
Set Your Status.....	449
Status Notes.....	450
Status Summary.....	451
Unavailable Status Reminder .....	451
View Another User's Status .....	451
Workgroup Activation Button .....	452
Working with Voicemail .....	452
Working with Voice Mail.....	452
Overview of Interaction Voicemail Player.....	453
Installing Interaction Voicemail Player.....	453
Configuring Interaction Voicemail Player.....	453
Using Interaction Voicemail Player.....	454
Interaction Voicemail Player and .wav files.....	454
Interaction Voicemail Player Controls.....	454
Listen to Someone Leave a Voice Mail Message .....	455
Open a Voice Mail Message From Your Inbox.....	456
Tips.....	456
Pick Up a Call from Voice Mail.....	457
Transfer a Call to Another Person's Voice Mail.....	457
Transfer a Call to Your Voice Mail.....	459
Use the Telephone Dial Pad to Control Playback .....	459
Voicemail Message View .....	459
Use the Voicemail Message View .....	460
Working with Workgroups.....	461
Change Your Workgroup Activation Status .....	461
Display the Workgroup and Profiles View .....	462
Display the Workgroup Statistics View.....	463
Transfer a Call to a Workgroup.....	463
Using the Workgroups and Profiles Directory to Transfer a Call.....	464
View Other Workgroup Members' Activation Status .....	465
View Members of a Workgroup .....	465
Workgroup Statistics View.....	466
Workgroup Statistics .....	466
Shift\Period Statistics .....	467
Displaying the Workgroup Statistics View .....	468
Interaction Client Systems and Subsystems.....	469
Managed IP Phone.....	469
About Session Manager.....	470
Switchover.....	470

General Information.....	470
Copyright and Trademark Information.....	470
Index.....	473

## Interactive Intelligence Oracle Service Cloud Integration

### Interactive Intelligence Oracle Service Cloud Integration Help

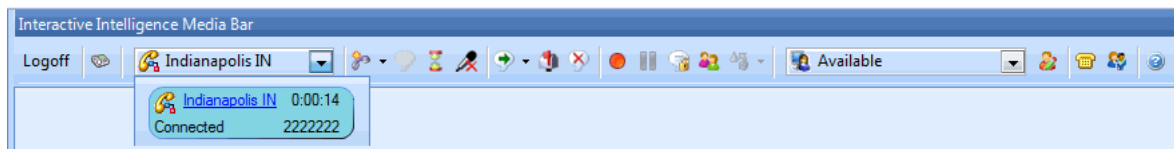
**Important:** Customer Interaction Center (CIC) supports several interaction management client applications. This documentation uses the term "CIC client" to refer to these applications, which include Interaction Connect, Interaction Desktop, and Interaction Client Web Edition. CIC client also refers to the Interactive Intelligence Oracle Service Cloud Integration. 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.

The Interactive Intelligence Oracle Service Cloud Integration incorporates the CIC client in your familiar Oracle Service Cloud interface. The CIC client is a powerful interaction management application for desktop or laptop PCs. You can use the CIC client to manage your electronic communications, including phone calls, voice mail, conference calls, ACD routed email messages, and web chats.

The CIC client is fully integrated with Oracle Service Cloud. You can perform all standard call handling functions directly from Oracle Service Cloud. When you make or receive a call, the CIC client can "screen pop" the appropriate workspace record (contact, incident, opportunity, etc.) to help you handle the call.

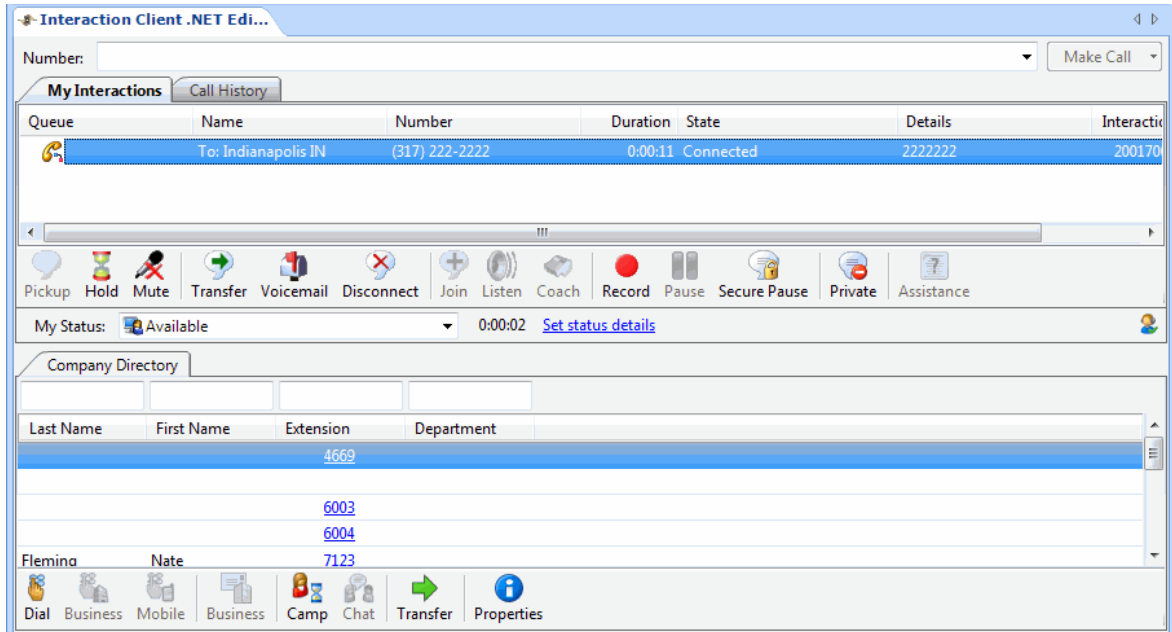
The Interactive Intelligence Oracle Service Cloud integration is available in two forms:

- The **Interactive Intelligence Media Bar** appears in the Oracle Service Cloud Console. Once the Media Bar integration is enabled, you can log on as a CIC agent from the toolbar and perform basic call handling functions, set your status, or adjust your Interactive Intelligence Oracle Service Cloud integration configuration. For more information, see [Interactive Intelligence Media Bar](#).



- **CIC client workspace.** The CIC client can appear in a Oracle Service Cloud workspace if you have the appropriate license and user rights. This full-featured CIC client works just as if you were running it as a separate application with the added advantages of access to all your Oracle Service Cloud information.

**Licensing:** Certain features within the CIC client, such as Interaction Process Automation and Interaction Tracker require additional Interactive Intelligence licenses and user rights.



See the following topics for information about some of the most frequently used CIC client features:

- 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 calls

**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 on a different station". You can run multiple instances of the CIC client on the same machine using different user logons and the same station.

### Need Help?

Click the Help button on the Interactive Intelligence Media Bar. The Help window displays the currently selected help topic along with Contents, Index, and Search tabs.

**Note:** A printable version of the CIC client help is available on the Interactive Intelligence website at [http://help.inin.com/cic/desktop/Printable\\_Documentation.htm](http://help.inin.com/cic/desktop/Printable_Documentation.htm).

### Using the Search Feature

You can search for specific terms in both the HTML and the Web Help versions of the help. There is a basic search and an advanced search available from the Search tab.

A basic search is simple: just type whatever single word or phrase you want to search, press [enter] or click the **List Topics** button (HTML version only), and a list of topics containing that word or phrase is displayed. 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.

### Some basic facts

- 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.

An advanced search involves wildcard (HTML version only) and Boolean expressions. Wildcard expressions allow you to search for one or more characters using an asterisk or question mark. Wildcard search examples:

Search Term(s)	Returns...
init*	initial, initiate, etc.
1?3	123, 133, 143, etc.

Boolean searches involve the use of "OR", "AND", and "NOT". Boolean search examples:

Search Term(s)	Returns...
alert AND configuration	Topics containing both the words "alert" and "configuration"
conference OR chat	Topics containing the word "conference" or "chat" or both
speed NOT dial	Topics containing the word "speed" but not the word "dial"

## Feedback and Access Support

The Interactive Intelligence website enables you to learn more about Interactive Intelligence's products, promote and share ideas about Interactive Intelligence's software, access technical support, and submit feedback about bugs and enhancement requests.

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

- To visit the Interactive Intelligence home page, go to <http://www.inin.com>.
- To access the Interactive Intelligence technical support website, go to <https://my.inin.com/products/Pages/default.aspx>.

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

- Interactive Community is a free and public service provided by Interactive Intelligence to promote an online community devoted to the sharing of ideas and information regarding Interactive Intelligence software. To visit the Interactive Intelligence **Interactive Community**, go to <http://community.inin.com>.
- Use our new social media/crowdsourcing site to submit ideas for enhancing Interactive Intelligence products. Vote on which ideas submitted by others best describe the enhancements you want. Go to <http://ideas.inin.com>.
- 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
 

**Result:** An email window opens. The "To" address is set to [documentation@inin.com](mailto:documentation@inin.com). The "Subject" line includes information that helps us identify the help topic where you clicked the link. Enter your comments or questions in the body of the email message and then send us the message.
  - Send an email message to [documentation@inin.com](mailto:documentation@inin.com).

## Related Topics

Using the Interactive Intelligence Media Bar

## Features

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

### Configuration

- Configuration Options
- Customize Columns
- Customize the Toolbar
- Desktop Alerts
- Change View Layout
- Logon dialog box
- Personal Prompts

### Ease of Use

- Auto Reconnect
- Change Remote Numbers and Stations On-the-Fly
- Desktop Alerts
- Shortcut Keys
- Quick Call Rules

### Information Organization

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

### Interaction Management

- Call Parking
- Call Transfer
- Camping
- Conferencing
- Fax
- Interaction Notes
- Personal Rules
- Queue Control

- Queue Monitoring
- Voicemail
- Voicemail Message View

#### **SIP Audio**

- SIP PC Audio
- Dial Pad
- SIP Soft Phone Audio Tuning Wizard
- Provisioning Wizard

#### **Status Management**

- Status Notes
- Unavailable Status Reminder
- Auto Status Changer

#### **Integrations and Optional Components**

- e-FAQ
- Integration to Microsoft Lync
- Interaction Process Automation
- Interaction Tracker
- Interactive Intelligence Oracle Service Cloud Integration

## **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.

<b>Access Control Right</b>	<b>Description</b>
<b>View Account Codes</b>	Determines whether account code fields are visible in dialog boxes. 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 targets 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
<b>Email Profiles</b>	Determines which Interaction Attendant <b>email profiles</b> are available.
<b>Inbound Profiles</b>	Determines which Interaction Attendant <b>inbound profiles</b> are available.
<b>Operator Profiles</b>	Determines which Interaction Attendant <b>operator profiles</b> are available.
<b>Outbound Profiles</b>	Determines which Interaction Attendant <b>outbound profiles</b> 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
<b>View Client Buttons</b>	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
<b>View Directory Status Columns</b>	<p>Determines which status columns you can add to a directory view. 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><b>Logged In:</b> 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 <b>Logged In</b> column in order to initiate a Chat session.</p>

### e-FAQ's

e-FAQ is a centrally managed database of Frequently Asked Questions and answers. If your company purchased the e-FAQ knowledge management program and you have the View e-FAQ's, you can use e-FAQ to respond to your customers' questions.

Access Control Right	Description
<b>View e-FAQ's</b>	Enables you to use e-FAQ to in a chat session, in an email reply or when responding to a callback request. For more information, see Using e-FAQ.

### 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
<b>Classifications</b>	Determines the type of phone numbers you can call from the CIC client.
<b>Classifications Follow-me</b>	Determines the type of phone numbers you can use as Follow-me numbers.



	<p>For more information, see Set Up Follow-me Routing.</p> <p><b>Note:</b> 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 CIC Documentation Library</p>
<b>Classifications Forward</b>	<p>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.</p> <p><b>Note:</b> 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 CIC Documentation Library.</p>
<b>Classifications TUI</b>	<p>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.</p>

## Plug-ins

This right controls which plug-ins you can add to the CIC client to provide extended functionality.

Access Control Right	Description
<b>View Plug-ins</b>	Determines which plug-ins you can add to the CIC client.

## Processes

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

Access Control Right	Description
<b>View Processes</b>	<p>Enables you to search for and view processes in the CIC client. For more information, see Search for a Process and View Process Details.</p> <p><b>Note:</b> You automatically have view rights to any process you launched.</p>
<b>Launch Processes</b>	<p>Enables you to Launch a Process.</p> <p><b>Note:</b> Processes are created in the IPA Designer and must be published before they can be launched.</p>
<b>Manage Processes</b>	<p>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. In the CIC client, this right also enables you to Remove a Process Association.</p> <p><b>Note:</b> 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 <i>Interaction Process Automation Monitor Help</i>.</p>

## Queue Columns

Queue Column rights determine which columns you can display in a queue view. Queue columns include the following:

- Account Code
- ACD Wait Reason
- Agent Score
- Associated Process
- Attachments
- Chat Response Time
- Customer Score
- Details
- Duration
- Importance
- Interaction ID
- Line
- Lstns
- Name
- Number
- Process ID
- Queue
- Recs
- Security
- State
- Station
- Subject
- Time in Status
- Time in Workgroup Queue
- User
- Work Item Category
- Work Item Created On
- Work Item Description
- Work Item Due Date
- Work Item Error
- Wrap-up Code

Access Control Right	Description
<b>View Queue Columns</b>	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.

### 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
<b>View</b>	Each Response Management Library created in Interaction Administrator by your system administrator has a unique name. You can be assigned the right to use <b>all</b> of these libraries or <b>selected</b> libraries.  <b>Note:</b> These libraries are also called Response Management server documents in Interaction Administrator. Each of these libraries can contain multiple items such as text messages or stored files.

### Station Queues

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

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

	interactions.
<b>Search Station Queues</b>	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
<b>Logon Stations</b>	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
<b>View Status Messages</b>	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
<b>View User Queues</b>	Determines which User Queue views you can display in the CIC client.
<b>Modify User Queues</b>	Determines which <i>modify</i> actions you can perform on interactions in a selected User Queue. <i>Modify</i> actions include <b>Disconnect, Hold, Mute, Pickup or Transfer interactions</b> .  The Modify User Queues right is also required to enable the <b>Ring telephone for calls</b> or <b>Ring computer</b> alerting options for a monitored appearance. For more information, see Configure Monitored Appearances.
<b>Monitor User Queues</b>	Determines which <i>monitor</i> actions you can perform on interactions in a selected User Queue. <i>Monitor</i> actions include <b>Coach, Join, Listen, Preview</b> or <b>Record</b> interactions.

### Users

These rights control whether you can Set Another User's Status or display the Interaction Tracker Related Items view.

Access Control Right	Description
<b>Change Status Users</b>	Determine which users' status you can change. You can be granted the Change Status right to all or selected users.
<b>View History Users</b>	Determines whose interactions can appear in the Interaction Tracker Related

	Items view. The CIC administrator can grant you rights to the interactions belonging 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
<b>View Workgroup Queues</b>	Determines which Workgroup Queue views you can display in the CIC client.
<b>Modify Workgroup Queues</b>	Determines which <i>modify</i> actions you can perform on interactions in a selected Workgroup Queue. <i>Modify</i> actions include <b>Disconnect</b> , <b>Pickup</b> or <b>Transfer</b> interactions. <i>Modify</i> actions also include the ability to <b>Activate Self</b> . For more information, see Change Your Workgroup Activation Status.
<b>Monitor Workgroup Queues</b>	Determines which <i>monitor</i> actions you can perform on interactions in a selected Workgroup Queue. <i>Monitor</i> actions include <b>Coach</b> , <b>Join</b> , <b>Listen</b> , <b>Monitor</b> or <b>Record</b> interactions.
<b>Search Workgroup Queues</b>	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

These rights control which workgroup directory views you can add to the CIC client and which workgroups can appear in the Workgroup Queue view.

Access Control Right	Description
<b>View Workgroups</b>	Determines which Workgroup directory views you can display in the CIC client. This right also determines which Secure Input forms you can use. See Secure Input.
<b>Statistics Workgroups</b>	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
<b>Account Code Verification</b>	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.
<b>Can Create Speed Dials</b>	Enables you to create a Speed Dial view.
<b>Conference Calls</b>	Enables you to create a Conference call.
<b>Customize Client</b>	Enables you to: <ul style="list-style-type: none"> <li>• Customize Configuration settings in the CIC client.</li> <li>• Add Views. However, displaying certain views can require additional Access Control Rights. For more information, see Configuration Options.</li> <li>• Change the columns in a queue view. See Add or Remove View Columns or Customize Columns.</li> <li>• Change the buttons in a queue view. See Customizing Toolbars.</li> </ul>
<b>Manage Client Templates</b>	Enables you to create and edit client templates. For more information, see Manage Templates.
<b>Mini Mode</b>	Enables you to display Mini Mode.
<b>Monitor Columns</b>	Enables you to add the <b>Lstns</b> column and <b>Recs</b> 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.
<b>Multiple Calls</b>	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." 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. 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.
<b>Orbit Queue</b>	Enables you to park a call on orbit.
<b>Persistent Connections</b>	This right gives you the option of keeping your remote telephone connected until you log off. It enables you to select Allow Persistent Connection when using a Dynamic Remote Client Connection.
<b>Personal Rules</b>	Enables you to set up Personal Rules or create a Quick Call rule. Selected interactions trigger these rules to perform specific actions automatically.
<b>Receive Voicemail</b>	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. If you do not have this right, callers are returned to the Interaction Attendant main menu.
<b>Status Notes</b>	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.
<b>User-defined Telephone Number on Remote Logon</b>	Enables you to enter a new <b>Remote Number</b> when logging on. For more information, see Dynamic Remote Client Connections.
<b>Workgroup Statistics</b>	Enables you to display the Workgroup Statistics view.
<b>Workgroup/Profiles Tab</b>	Enables you to display the Workgroup and Profiles view. This view lists workgroups and Attendant Profiles by name.

### Interaction Command Rights

These rights determine which buttons can appear on the Queue Control Toolbar, or in the toolbars for the Callback window, Chat window, Email Window for Incoming Messages, or Email Window for Outgoing Messages. Also, they control whether a command appears on the interaction shortcut menu and whether it is available via a keyboard shortcut.

This security right	Description
<b>Assistance</b>	Displays Assistance button and the Request Assistance command.
<b>Coach</b>	Displays the Coach button or Whisper Button and the Coach or Whisper command.
<b>Disconnect</b>	Displays the Disconnect button and the Disconnect command.
<b>Hold</b>	Displays the Hold button and the Hold command.
<b>Join</b>	Displays the Join button and the Join command.
<b>Listen</b>	Displays the Listen button and the Listen In command.
<b>Mute</b>	Displays the Mute button and the Mute Call command.
<b>Park</b>	<ul style="list-style-type: none"> <li>• Displays the Park on Orbit button and the Park on Orbit command.</li> <li>• Controls whether the Park button appears on the Transfer dialog box.</li> </ul>
<b>Pause</b>	Displays the Pause button and the Pause Recording command.
<b>Pickup</b>	Displays the Pickup button and the Pickup command.
<b>Private</b>	Displays the Private button and the Private command.
<b>Record</b>	Displays the Record button and the Record command.
<b>Secure Input</b>	Displays the Secure Input button and the Secure Input command.
<b>Secure Recording Pause</b>	Displays the Secure Record Pause button and the Secure Pause command.
<b>Transfer</b>	Displays the Transfer button and the Transfer command.
<b>Voicemail</b>	Displays the Voicemail button and the Send to Voicemail command.

### My Interaction Rights

These rights determine the actions you can perform in My Interactions.

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

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

- To **Coach, Join, Listen** or **Record** interactions, you need the appropriate Monitor Station Queues, Monitor User Queues, or Monitor Workgroup Queues, Access Control rights.

**Note:** The actions you can perform in the Callback window, Chat window, Email Window for Incoming Messages, and Email Window for Outgoing Messages depend on the queue where the interaction is currently. For example, if the Chat interaction is in your My Interactions queue, the actions you can perform in the Chat window depend on these My Interaction Rights. If the Chat interaction is in another queue, then the actions you can perform depend on whether you have the appropriate "Modify" or "Monitor" rights on that queue.

This security right	Description
<b>Coach Interactions</b>	Enables you to coach an interaction by adding yourself to another agent's interaction.
<b>Disconnect Interactions</b>	Enables you to disconnect an interaction using the CIC client instead of hanging up the telephone.
<b>Initiate Secure Input Interactions</b>	Enables you to initiate Secure Input to collect confidential information from a customer.
<b>Join Interactions</b>	Enables you to join an interaction, thus creating a conference call.
<b>Listen in on Interactions</b>	Enables you to listen to a call. You can hear both sides of a call.
<b>Mute Interactions</b>	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.
<b>Park Interactions</b>	Enables you to park a call on orbit. <b>Note:</b> You can park only calls appearing in My Interactions.
<b>Pause Interactions</b>	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.
<b>Pickup Interactions</b>	Enables you to pick up an interaction. For more information, see Picking Up Calls.
<b>Private Interactions</b>	Enables you to prevent other CIC client users from recording or listening to your conversation. For more information, see Private Button.
<b>Put Interactions on Hold</b>	Enables you to place a selected interaction on hold. For more information, see Hold button.
<b>Record Interactions</b>	Enables you to record an interaction. The recordings are stored in files.
<b>Request Assistance from Supervisors</b>	Enables you to request assistance from your supervisor.
<b>Secure Recording Pause Interactions</b>	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.
<b>Transfer Interactions</b>	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.
<b>Transfer Interactions to Voice Mail</b>	Enables you to transfer a call to your voice mail.

## Tracker Policy Rights

This security right	Description
<b>Add Individuals</b>	Enables you to add a Tracker contact or Quick add a contact.
<b>Add Organizations</b>	Enables you to add a Tracker organization.
<b>Delete Individuals</b>	Enables you to delete a Tracker contact.
<b>Delete Organizations</b>	Enables you to delete a Tracker organization.
<b>Have Private Contacts</b>	Enables you to designate a Tracker contact as private and prevent other users from viewing or using information for this contact. For more information, see the Allow others access to this Contact setting in the Add Contact Wizard.
<b>Modify Individuals</b>	Enables you to modify Tracker contact information.
<b>Modify Organizations</b>	Enables you to modify Tracker organization information.
<b>Related Interactions Page</b>	Enables you to use the Related Items view.
<b>Tracker Administrator</b>	Grants you all the Tracker Policy Rights, enabling you to perform all the Tracker functions that require any Tracker Policy Right.
<b>View Other People's Private Interactions</b>	Enables you to view other users' private interactions in the Related Items view and to have these interactions included in search results in the Find Interaction dialog box. A user can indicate that an interaction is "Private" to prevent other users from recording or listening to it. For more information, see Private Button.

## User Rights

This security right	Description
<b>Directory Administrator</b>	Enables you to edit public directories that other users created. For more information, see View and Edit Directory Entries.
<b>Follow Me</b>	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.
<b>Intercom Chat</b>	Enables you to start intercom chats with other CIC client users on the <b>same</b> IC server.
<b>Require Forced Authorization Code</b>	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.
<b>TIFF Faxes</b>	Enables you to receive faxes as TIF files attached to email messages. For more information, see Working with Faxes.

## Related Topics

Access Control Rights

## What's New in CIC client 4.0



The 4.0 version of the Interactive Intelligence Oracle Service Cloud Integration was first released in SU 3. Changes and enhancements introduced in the CIC client 4.0 GA version and subsequent Service Updates are incorporated in the Interactive Intelligence Oracle Service Cloud Integration.

**Note:** The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

The following changes and enhancements were introduced in version 4.0:

- **Access Control Rights and Security Rights:** The new rights available to you in this release are described in Access Control Rights and Security Rights. Rights required for specific features and functions are described in a new *Requirements* section at the beginning of the appropriate help topics.
- **Attached email message:** You can view email messages attached to an incoming email message. For more information, see E-mail Window for Incoming Messages.
- **Assistance Request:** You can chat with your supervisor when you request assistance with an interaction. For more information, see Request Assistance from Your Supervisor.
- **Conference Button:** A new Conference Button appears in the Directory Toolbar. This enables you to add any directory contact to an existing call and create a conference call. You can then add additional parties by selecting other contacts and adding them to the conference call. For more information, see Create or Expand a Conference Call by Adding Parties.
- **Consult Transfer:** You can establish a three-way conversation between the caller, the consultant, and you during a Consult Transfer. For more information, see Transfer a Call After Consulting the Recipient.
- **E-Mail Conversations:** An email reply interaction can be associated with the original incoming email interaction in an Email Conversation. See Reply to an E-mail Message for details. Two distinct types of email windows are used for incoming and outgoing email messages. For more information, see E-mail Window for Incoming Messages and E-mail Window for Outgoing Messages for details. A new Conversation History tab is also available for Interaction Tracker users.
- **Listen In / Monitor:** If you have the appropriate rights, you can now listen in or monitor interaction types other than calls. For more information, see Monitor a Chat, Monitor an E-mail Message and Reply and Monitor a Callback Request.
- **Outlook Dialing:** The Outlook Dialing feature is now supported on 64-bit Windows systems. For more information, see Outlook Dialing.
- **Minimize Option:** A new configuration option enables you to choose between minimizing the CIC client to the notification area or the task bar. For more information, see General Options.
- **"Speak to Both" during a Consult Transfer:** This enhancement enables you to speak to both the caller and the consultant at the same time when preparing to transfer a call. A redesigned Consult Call dialog box graphically illustrates your options and current connection. For more information, see Transfer a Call After Consulting the Recipient.
- **Voicemail Playback:** You can use telephone dial pad keys to control the speed of playback. For more information, see Use the Telephone Dial Pad to Control Playback.
- **Workgroup Activation Status:** You can view the activation status of all members of a workgroup by adding the **Activated** column to a Workgroup directory. For more information, see View Other Workgroup Members Activation Status.
- **Wrap-Up Codes:** You can now assign a wrap-up code to a transferred or conference interaction. Previously only the agent who first picked up the interaction was able to assign a wrap-up code. For more information, see Working with Account and Wrap-Up Codes.

## Documentation Library

The latest version of the Interaction Center Documentation Library is available at [http://help.inin.com/cic/desktop/Welcome\\_Page.htm](http://help.inin.com/cic/desktop/Welcome_Page.htm). You may be prompted for your User ID and password before you can access this site.

### Related Topics

What's New in CIC client 4.0 Service Updates

## What's New in CIC client 4.0 Service Updates

The 4.0 version of the Interactive Intelligence Oracle Service Cloud Integration was first released in SU 3. Changes and enhancements introduced in the Interaction Client .NET Edition 4.0 GA version and subsequent Service Updates are incorporated in the Interactive Intelligence Oracle Service Cloud Integration.

**Note:** The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

### 4.0 SU 1

- **Incident ID column in Related Items View**

You can now display an Incident ID column in the Related Items view. Incident IDs were available in previous releases. Your CIC administrator determines whether Incident IDs are assigned to interactions. If your company uses Incident IDs, you can search by Incident ID to find related interactions.

- **Outlook Dialing**

This feature which enables Microsoft Outlook to dial telephone numbers, such as contacts is now supported on 64-bit systems. For more information, see Outlook Dialing.

- **Reset Queue Column Display**

User rights determine which columns you can display in a queue view such as My Interactions. If you have the appropriate rights, you can add these columns to a queue display with a single command instead of selecting them one by one. For more information, see Reset Queue Column Display.

- **Schedule Bidding**

If you have the appropriate licenses and rights, you can use schedule bidding to rank and bid on proposed work schedules. For more information, see Working with Schedule Bidding.

### 4.0 SU 2

- **Agent Photo and Office Location**

Your CIC administrator can enable the Company Directory shortcut menu to display an employee photo and a link to an office location map for each person in your company. For more information, see Employee Photo and Office Location.

- **Chat Interactions Display Enhancements**

The new Chat View enables you to handle multiple chat interactions in a single view. The Chat View is an alternative to using multiple Chat Windows to manage multiple ongoing chats. You control whether your current chat interactions appear in individual Chat Windows or the Chat View. See Chat View.

Chat interactions now display the time that has elapsed since anyone involved in the chat entered some text. This elapsed time appears in the **Chat Response Time** column in My Interactions or other queue views. For chat interactions, the **Details** column displays the name of the last person to type during this chat and part of the text. If someone involved in the chat is currently typing, the Details column also displays an icon. For more information, see Working with Chat Sessions.

- **Response Management**

The Responses Sidebar includes a search option that enable you to locate and preview a response before using it in a chat or email reply. See Responses Sidebar.

- **New Queue Columns**

If you have the appropriate View Queue Columns Access Control rights, you can add new queue columns to My Interactions or other queue view. These new columns include Attachments, Chat Response Time, Details, and Importance.

- **Phone Number Classifications Access Control Rights**

The new Classifications-Follow Me and Classification-Forward Access Control rights determine the type of phone numbers you can use as Follow-me or Forwarding numbers. Your CIC administrator classifies phone numbers into types such as Blocked, Emergency, Local, and Long Distance.

## 4.0 SU 3

- **Create New View dialog box**

You can now search for a view by name or switch the display from icon to list view. See Create New View Dialog Box.

- **e-FAQ view**

You can add the dockable e-FAQ view to the CIC client. You can use the e-FAQ view to search the e-FAQ database and configure e-FAQ options.

- **Email Spelling Checking Language Selection**

A new configuration option enables you to select a language to use for spell checking your email messages. See Email Configuration.

- **Interaction Information View**

Use the Interaction Information view to add notes or comments about an interaction. If you have the appropriate rights, you can assign an Account code. If the associated interaction is an ACD-routed interaction, you can use this view to assign a Wrap Up Code. See Interaction Information View.

- **Lync-enabled Company Directory**

The Lync-enabled Company Directory combines CIC client users and Lync-enabled CIC client users in a single directory view. It features a toolbar designed to make it easy to use the IM, Share Desktop, and Video chat functions of the Lync Integration. See Lync-enabled Company Directory.

- **Park Email Messages**

You can park an ACD-routed e-mail message on the queue for another user or workgroup. See Park an Email Message on Another Person's Queue.

- **Playback a Recording**

If you have the appropriate licenses and rights, you can playback a recorded interaction. You can playback recordings of calls, chats, and email interactions. The type of recording depends on the type of interaction. For example, a chat session recording is a transcript of the chat. For more information, see Playback a Recorded Interaction.

- **Shortcuts for Cycling between Chats**

You can use Ctrl+Up or Ctrl+Down to change which Chat is selected in My Interactions. This in turn changes which chat appears in the Chat view. See Chat Display View.

- **Text Filtering**

If your CIC administrator enables text filtering, certain sensitive information such as credit card numbers or Social Security numbers is blocked from view. You see only some replacement text such as ##### instead of the numbers. See Chat Window and Email Window for Incoming Messages.

#### 4.0 SU 4

- **Lync Integration**

If you are a Lync-enabled CIC client user, you can use either the CIC client or Lync to indicate your availability. If your CIC administrator has configured Lync Integration Status Synchronization, status or presence changes made in one of these applications are mirrored in the other.

Customer Interaction Center now supports integration with Microsoft Lync Server 2013 in addition to Microsoft Lync Server 2010.

- **Tracker Related Interactions**

The Related Items view is now available for installations that use Oracle for the database.

#### 4.0 SU 5

- **Auto-Answer on SIP stations**

A new Interaction Administrator configuration option can enable or disable Auto-Answer for incoming calls on a SIP station. For more information, see Answer an Incoming Interaction.

- **Callback Retry**

Agents can put Callback requests into a "Snoozed" state if one or more attempts to reach the callback requestor are not successful. A "Snoozed" callback interaction is removed from the agent's queue and is routed back to the appropriate workgroup queue. After an interval configured by your CIC administrator, normal ACD processing of the callback request resumes. ACD processing routes this callback request to the first available agent in the workgroup.

The CIC administrator controls whether this feature is available. The CIC administrator configures how many retry attempts can be made and how long a "Snoozed" callback request remains on the workgroup queue before it is routed back to the agent. For more information, see [Working with Callback Requests](#).

- **Email configuration options**

Two new configuration options are available for email messages: **No longer show email after sending** and **No longer show email after disconnecting**. For more information, see [Email Configuration](#).

- **Time in Status**

If you have the appropriate Queue Columns Access Control right, you can display a Time in Status column in any Workgroup, Station, or User queue view. For more information, see [Access Control Rights](#) or [Add or Remove View Columns](#).

#### Related Topics

[What's New in CIC client 4.0](#)

## What's New in CIC client 2015 Releases

**Note:** The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first of the new releases. CIC 2015 R1 or later can be applied to any CIC 4.0 SU.

The following changes and enhancements were introduced in CIC client 2015 Releases:

### 2015 R2

- **Email Editor**

You have improved controls for formatting and spell-checking email messages. You can also copy and paste addresses from the email reply address fields to a third-party CRM system, if you need to look up customer records by email address.

- **Microsoft Lync Integration**

Lync Server 2010 is no longer supported for the Microsoft Lync Integration.

- **Oracle Service Cloud Integration**

The Interactive Intelligence RightNow Integration was renamed to the Interactive Intelligence Oracle Service Cloud Integration.

- **Response Management**

Response Management includes the new **Inherited font** feature. 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.

#### Related Topics

[Use Response Management in an Email Message](#)  
[What's New in CIC client 4.0 Service Updates](#)

## 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](#)
- [Logging On Remotely](#)
- [Logging Off](#)
- [Logon Dialog Box](#)
- [Private Mode](#)
- [Remote Station Types](#)
- [Running the CIC client from a Remote Location](#)
- [Single Sign On](#)

### Auto Reconnect

If the CIC client loses the connection to the IC server, it automatically attempts to re-establish the connection every 20 - 40 seconds. The range in seconds allows random reconnection attempts which prevents all clients reconnecting at the same time and eases the load on the IC server. 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, even if you use your Windows User ID and password to log on to the CIC client. 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 [Use Windows Authentication or Single Sign On](#).

### Related Topics

Logon Dialog Box

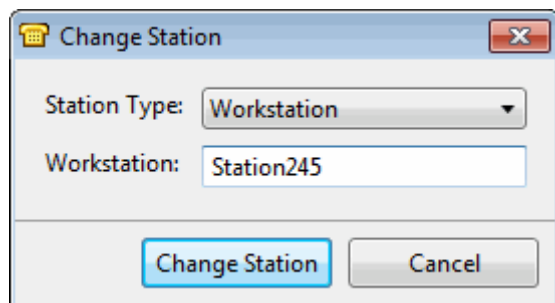
## Changing Station

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.

### To change station:

1. Click the **Change Station** button in the Interactive Intelligence Media Bar.

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



2. Complete the required fields in the Change Station dialog box. These settings are the same as the Logon Settings. For more information, click these links:
  - Station Type
  - Workstation
  - Remote Number
  - Persistent

**Note:** If you used the default client profile when you logged on to the CIC client, any changes you make to these settings are saved. The CIC client uses these settings the next time you log on using the default client profile. Also, if you use the default profile at logon, any information associated with each station type is saved and appears here if you change station. For example, if you change your station type from SIP Soft Phone to Workstation, the previously used Workstation name appears as a default. For more information about client profile settings, see [Connection Tab of the Logon Dialog Box](#).

3. Click **Change Station**.

### Related Topics

Change Station button

## Exiting

Exiting Oracle Service Cloud also exits the Interactive Intelligence Media Bar and the full CIC client, if running.

**Note:** Closing the CIC client workspace does not exit the application. The CIC client continues to run. The Minimize to the notification area instead of the task bar configuration setting enables you to control whether the CIC client icon continues to appear in the Windows taskbar after you close the CIC client workspace.

### Related Topics

Logging Off

## Language Setting

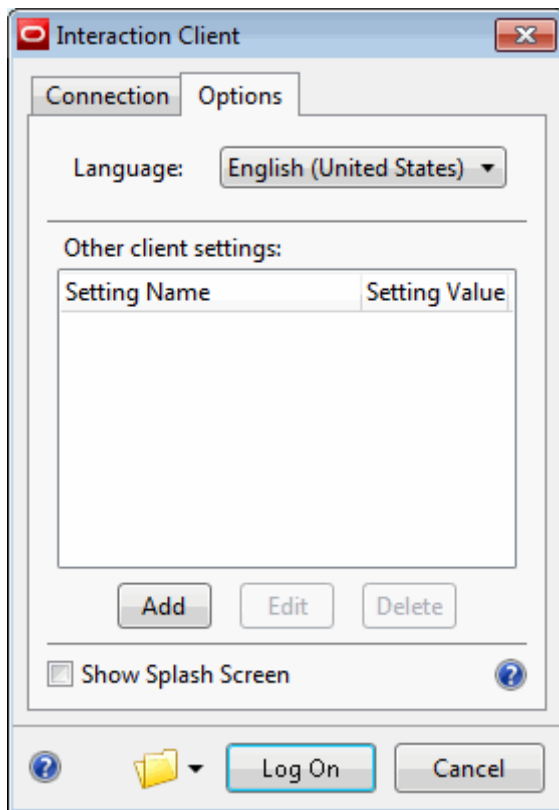
If your CIC administrator has installed the appropriate Language Pack on the IC server, you can select a language other than English for the CIC client interface and help.

**Note:** This setting is independent of the Microsoft Windows **Regional and Language Options** setting.

### To select a language:

1. In the Logon dialog box, select the **Options** tab.
2. From the **Language** drop-down list, select the appropriate language for the CIC client interface and help.

**Note:** This setting is independent of the Microsoft Windows Regional and Language Options setting. It is available only if your CIC administrator installed one or more Language Packs on the IC server.





- To test your configuration changes by logging on to the CIC client, in the Logon dialog box, click **Log On**.

**Related Topics**

- Configuration Options
- Logon Dialog Box

**Logging On**

**Requirements:** You need the Logon Stations right to a specific station to be able to log on to it. To log on automatically or use profiles to log on, your CIC administrator must allow the use of cached credentials. Some Interaction Centers prevent automatic log on for security reasons.

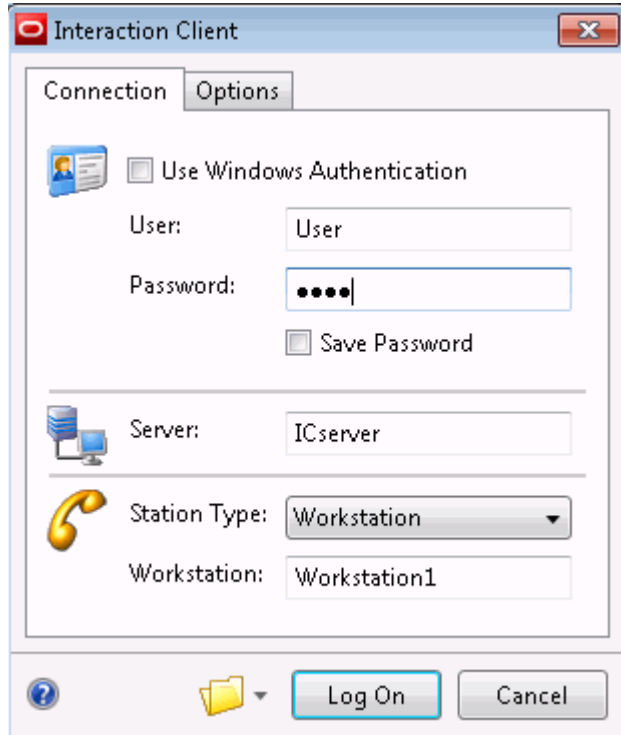
You can log on to only one CIC client station at a time, for security reasons. If you log on to a different station, the system drops the original station connection. For example, if you try to run a second instance of the Interactive Intelligence Oracle Service Cloud Integration at the same time you are running it on a different station, the original connection is dropped. You receive a message at the original station stating "Your connection has been dropped due to a subsequent log on 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.

**To log on to the Interactive Intelligence Oracle Service Cloud Integration:**

- Start Oracle Service Cloud and click the Logon button in the Interactive Intelligence Media Bar.

**Note:** While Interactive Intelligence Oracle Service Cloud Integration is establishing a connection, the **Logon** button is dimmed and labeled as "Working."

**Result:** The **Logon** dialog box appears.



**Note:** If your CIC administrator has enabled the Single Sign On feature, the appearance of your Logon dialog box may be slightly different.

2. Complete the required settings. For more information, see Log on Settings.
3. After completing the fields, click **Log On**.

**Result:** You connect to Interactive Intelligence Oracle Service Cloud Integration. In the Interactive Intelligence Media Bar, a **Logoff** button replaces the **Logon** button, your status appears in the Status drop-down list and the appropriate toolbar buttons are enabled. Some toolbar buttons are not enabled until you have an active interaction.

## Using Profiles to Log On to the Interactive Intelligence Oracle Service Cloud Integration

The CIC client automatically creates a default profile the first time you log on. The default profile is used for future logons. You can create alternate profiles for different users who share a workstation or remote users who use different workstations to log on.

**Note:** If you use the default client profile when you log on and then change your CIC client station, any changes you make to profile settings are saved. These settings are used the next time you log on using the default client profile.

### To save a profile:

1. Complete the fields on the Connection Tab of the Logon dialog box.
2. Optionally, on the **Options** tab, select another language for the CIC client interface and help.
3. Click the drop-down arrow next to the **Profile** (folder) icon. Select **Save Profile As**.

**Result:** The **Save As** dialog box appears.

4. If you changed any settings, do one of the following:
  - If you selected an alternate profile in step 2, verify that the appropriate name appears in the **File name** drop-down list box and click **Save**.
  - To change your default settings, in the **File name** drop-down list box, select **Default.i3client** and click **Save**.
  - To create a set of log on settings, in the **File name** drop-down list box, enter a new file name in this format: *filename.i3client*. Click **Save**.
5. Click **Log On**.

### To use a profile to log on:

**Note:** You can select a profile only when you start the CIC client. You cannot use a profile if you log off but do not exit the CIC client and then use the Logon button to log on again.

1. In the **Logon** dialog box, click the drop-down arrow next to the **Profile** (folder) icon. Select **Load Profile**.
2. In the **Open** dialog box, select the appropriate profile and click **Open**.
3. In the Logon dialog box, click **Log On**.

### Related Topics

Auto Reconnect  
Exiting  
Logging Off  
Logon dialog box  
Remote Station Types  
Running the CIC client from a Remote Location

## Logon Settings

This section describes the settings available in the Logon dialog box and the Connection tab of the Logon dialog box.

**Note:** If you need more information about these settings, contact your CIC administrator.

<b>Use Windows Authentication</b>	<p>Select this check box to log on to the CIC client using your Windows user ID and password.</p> <p><b>Note:</b> The CIC administrator must first enable this option by allowing Windows authentication and by linking Windows user names and the CIC client user names.</p>								
<b>Credentials</b>	<p>This drop down list appears only if your CIC administrator has enabled the Single Sign On feature. The Single Sign On feature automatically uses the same user ID and password you have already used to log on to a secure system to automatically log you onto the CIC client.</p> <p>Select the appropriate set of credentials from this drop down list.</p> <table border="1" data-bbox="540 764 1386 1247"> <tr> <td data-bbox="540 764 802 873"> <b>Logged-On User</b> </td> <td data-bbox="810 764 1386 873">           Select this option to log on using the Windows's user name and password you used to log onto your workstation.         </td> </tr> <tr> <td data-bbox="540 879 802 953"> <b>Interaction Center</b> </td> <td data-bbox="810 879 1386 953">           Log on using your Customer Interaction Center user ID and password.         </td> </tr> <tr> <td data-bbox="540 959 802 1136"> <b>Alternate Windows</b> </td> <td data-bbox="810 959 1386 1136">           Log on using a Window's user name and password that is different than the one used to log onto your workstation.            For example, a supervisor could log onto the CIC client on your workstation in order to assist you.         </td> </tr> <tr> <td data-bbox="540 1142 802 1247"> <b>(other)</b> </td> <td data-bbox="810 1142 1386 1247">           Other Identity Providers may be listed in this drop down list. Contact your CIC administrator for more information about using these credentials.         </td> </tr> </table>	<b>Logged-On User</b>	Select this option to log on using the Windows's user name and password you used to log onto your workstation.	<b>Interaction Center</b>	Log on using your Customer Interaction Center user ID and password.	<b>Alternate Windows</b>	Log on using a Window's user name and password that is different than the one used to log onto your workstation. For example, a supervisor could log onto the CIC client on your workstation in order to assist you.	<b>(other)</b>	Other Identity Providers may be listed in this drop down list. Contact your CIC administrator for more information about using these credentials.
<b>Logged-On User</b>	Select this option to log on using the Windows's user name and password you used to log onto your workstation.								
<b>Interaction Center</b>	Log on using your Customer Interaction Center user ID and password.								
<b>Alternate Windows</b>	Log on using a Window's user name and password that is different than the one used to log onto your workstation. For example, a supervisor could log onto the CIC client on your workstation in order to assist you.								
<b>(other)</b>	Other Identity Providers may be listed in this drop down list. Contact your CIC administrator for more information about using these credentials.								
<b>User</b>	<p>Enter the name of your user account:</p> <ul style="list-style-type: none"> <li>• If you selected <b>Use Windows Authentication</b> or are using <b>Logged-On user credentials</b>, you do not need to enter your user name. This field is dimmed.</li> <li>• If you are using <b>Customer Interaction Center</b> credentials, this is the name of your account as configured in Interaction Administrator. To verify your user account name, contact your CIC administrator.</li> <li>• If you are using <b>Alternate Windows</b> credentials in a Single Sign On system, type a user name that is different from the one used to log on to the workstation.</li> </ul> <p>This user name can include a domain name in the format <i>domain\username</i> or <i>user@domain</i>. Include a domain name if these alternate credentials belong to a different domain than the one for the credentials used to log into the workstation.</p>								
<b>Password</b>	<p>Some secure systems require you to enter your password every time you log on. If prompted, enter the appropriate password:</p> <ul style="list-style-type: none"> <li>• If you are using <b>Customer Interaction Center</b> credentials, enter your CIC</li> </ul>								

	<p>user account password. If you have forgotten your password, contact your CIC administrator.</p> <ul style="list-style-type: none"> <li>• If you selected <b>Use Windows Authentication</b>, you may not need to enter a password.</li> <li>• If you are using <b>Logged-on user</b> credentials in a Single Sign On system, you do not need to enter your password.</li> <li>• If you are using <b>Alternate Windows</b> credentials in a Single Sign On system, type the password associated with this alternate Windows account.</li> </ul>										
<p><b>Save Password</b> or <b>Save Credentials</b></p>	<p>Select this check box if you do not want to enter your password each time that you log on to the CIC client.</p> <p><b>Note:</b> The CIC administrator must first enable this option by allowing the use of cached credentials. The password is saved to the profile securely and is only valid for this computer and this log on. For example, if you attempt to use this profile on a different computer, the password cannot be decrypted.</p>										
<p><b>Server</b></p>	<p>Enter the name of the appropriate server. This server is the machine running the Session Manager. For most installations, this server is the IC server.</p>										
<p><b>Station Type</b></p>	<p>This station is the one you use to run the CIC client. To run from a remote station or a remote number, see Remote Station Types and Running the CIC client from a Remote Location.</p> <table border="1" data-bbox="539 926 1390 1839"> <tr> <td data-bbox="539 926 805 1178"> <p><b>&lt;this computer&gt;</b></p> </td> <td data-bbox="805 926 1390 1178"> <p>Select this option if you move around the office and log on from different <b>local</b> workstations. This option ensures that your calls are routed to the station associated with this computer, not the last workstation to which you logged on.</p> <p><b>Note:</b> When you use this option, the name of the current station appears in <b>Workstation</b>.</p> </td> </tr> <tr> <td data-bbox="539 1178 805 1287"> <p><b>Workstation</b></p> </td> <td data-bbox="805 1178 1390 1287"> <p>Use a computer and telephone connected via telecom outlet (SIP or analog phone) to the IC server.</p> </td> </tr> <tr> <td data-bbox="539 1287 805 1432"> <p><b>Remote Station</b></p> </td> <td data-bbox="805 1287 1390 1432"> <p>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.</p> </td> </tr> <tr> <td data-bbox="539 1432 805 1577"> <p><b>Remote Number</b></p> </td> <td data-bbox="805 1432 1390 1577"> <p>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.</p> </td> </tr> <tr> <td data-bbox="539 1577 805 1839"> <p><b>SIP Soft Phone</b></p> </td> <td data-bbox="805 1577 1390 1839"> <p>Use the computer as the telephone. (also called a <i>soft phone</i>.)</p> <p><b>Note:</b> Your CIC administrator must appropriately configure your station in Interaction Administrator. Also, the SIP Soft Phone application and a supported USB audio device are required.</p> </td> </tr> </table>	<p><b>&lt;this computer&gt;</b></p>	<p>Select this option if you move around the office and log on from different <b>local</b> workstations. This option ensures that your calls are routed to the station associated with this computer, not the last workstation to which you logged on.</p> <p><b>Note:</b> When you use this option, the name of the current station appears in <b>Workstation</b>.</p>	<p><b>Workstation</b></p>	<p>Use a computer and telephone connected via telecom outlet (SIP or analog phone) to the IC server.</p>	<p><b>Remote Station</b></p>	<p>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.</p>	<p><b>Remote Number</b></p>	<p>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.</p>	<p><b>SIP Soft Phone</b></p>	<p>Use the computer as the telephone. (also called a <i>soft phone</i>.)</p> <p><b>Note:</b> Your CIC administrator must appropriately configure your station in Interaction Administrator. Also, the SIP Soft Phone application and a supported USB audio device are required.</p>
<p><b>&lt;this computer&gt;</b></p>	<p>Select this option if you move around the office and log on from different <b>local</b> workstations. This option ensures that your calls are routed to the station associated with this computer, not the last workstation to which you logged on.</p> <p><b>Note:</b> When you use this option, the name of the current station appears in <b>Workstation</b>.</p>										
<p><b>Workstation</b></p>	<p>Use a computer and telephone connected via telecom outlet (SIP or analog phone) to the IC server.</p>										
<p><b>Remote Station</b></p>	<p>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.</p>										
<p><b>Remote Number</b></p>	<p>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.</p>										
<p><b>SIP Soft Phone</b></p>	<p>Use the computer as the telephone. (also called a <i>soft phone</i>.)</p> <p><b>Note:</b> Your CIC administrator must appropriately configure your station in Interaction Administrator. Also, the SIP Soft Phone application and a supported USB audio device are required.</p>										

<b>Workstation</b>	If you select Workstation, Remote Workstation, or SIP Soft Phone as your station type, enter the name of the workstation here. If you select Remote Number, then this field is dimmed.
<b>Remote Number</b>	<p>For remote access only, enter the telephone number Customer Interaction Center uses to call the agent.</p> <p><b>Note:</b> If you enter a Remote Number, it appears in the Status bar in place of your Station name.</p>
<b>Persistent</b>	<p><b>Requirements:</b> Some secure systems do not allow persistent connections. You need the Persistent Connections Security Right to select a persistent connection when you are using a Dynamic Remote Client Connection.</p> <p>If you are using a Configured Remote Station, the <b>Station Connections are Persistent</b> setting in Interaction Administrator Station Configuration controls whether you have a persistent connection.</p> <ul style="list-style-type: none"> <li>• If you select this option, the connection to the IC server remains connected from the first time you require a voice connection until you log off the system.</li> <li>• If you do not select this option, the IC server ends calls to your remote phone when either side disconnects for any reason.</li> </ul> <p>From that point on, the agent can keep the telephone's handset off-hook and use the CIC client to pick up, disconnect, and listen to calls or to record prompts. If the agent hangs up between calls, CIC must redial the agent's telephone and wait for the agent to answer before completing the operation.</p> <p><b>Explanation:</b> When you select Persistent, the call to your remote phone stays connected (an open line to the IC server). If you leave the remote phone off-hook, and disconnect via the CIC client, the IC 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.</p> <p><b>Note:</b> Usually this preferred setting prevents excessive long-distance charges and keeps lines free.</p>
<b>Folder icon</b>	<p>This icon and its associated drop-down list enable you to load a different profile or save settings as a new profile.</p> <p>The first time you start the CIC client, it creates a default profile called Default.i3client.</p> <p>Instead of using the default profile, you can use the <b>Save Profile As</b> option to save the file to your desktop or another convenient place. When you double-click that file you bypass the initial log on screen and connect to the CIC client.</p> <ul style="list-style-type: none"> <li>• Save Profile As In the Save As dialog box, type a profile name in the File name box. Use the format <i>filename.i3client</i> for the file name. You can save the profile to your desktop, and double-clicking it automatically logs you in. This method bypasses the Logon dialog box.</li> </ul> <p><b>Tip:</b> You can create a profile and add the profile (or a shortcut to it) to the Windows Startup folder so the CIC client starts automatically when</p>

you start your computer.

- Load Profile  
If you want to open a profile other than the default profile (default.i3client), select Load Profile and select another profile. You can also right-click an i3client file and select **Edit** to open up the Logon dialog box to change settings.

### Related Topics

Connection Tab of the Logon dialog box  
Logging On  
Logon Dialog Box  
Single Sign On

## 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 in the Connection Tab of the Logon Dialog Box

### Related Topics

Remote Station Types  
Running the CIC client from a Remote Location

## Logging Off

You can log off the CIC client and keep Oracle Service Cloud running by clicking the Log off button on the Interactive Intelligence Media Bar. You can also log off the CIC client by exiting Oracle Service Cloud.

**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

## Logon Dialog Box

The Logon dialog box enables you to edit and save your preferred authentication details, server connection information and other startup settings.

### Profiles

Your startup configuration settings are stored in a profile. Your default settings are stored in **Default.i3client**. You can create and save alternative profiles in the Logon dialog box. For more information about creating alternate profiles, see Connection Tab of the Logon Dialog Box.

**Tip:** In Windows 7, your default client profile is typically stored in `\Users\user.name\AppData\Roaming\RightNow_Technologies`.

## Display the Logon dialog box

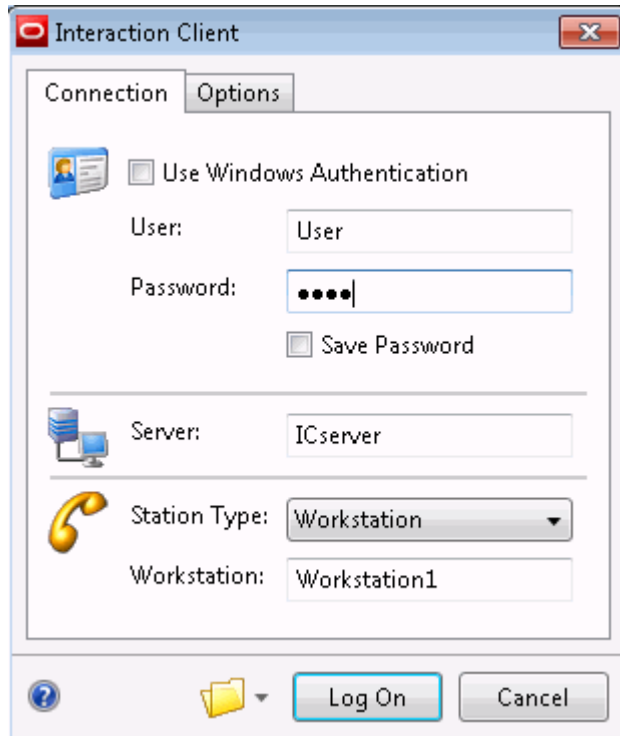
If you previously selected the **Use Windows Authentication** check box in the Logon dialog box and **Attempt auto-login at Oracle Service Cloud startup** is set to **Always** in General Configuration Options, starting Oracle Service Cloud automatically logs you on to the CIC client and bypasses the Logon dialog box. To display the Logon dialog box:

- Right-click a \*.i3client file (startup profile) and select **Edit**.

### Using the Logon dialog box

The Logon dialog box has two tabs: Connection and Options.

**Tip:** Click the Help icon on the Connection or Options tabs if you have questions about any of the required entries.



**Note:** If your CIC administrator has enabled the Single Sign On feature, the appearance of your Logon dialog box may be slightly different.

### Related Topics

- Connection Tab of the Logon dialog box
- Options Tab of the Logon dialog box

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

### Related Topics

Running the CIC client from a Remote Location  
Logging On

## 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 IC 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 IC 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. Do one of the following:
  - Click the **Pickup** button in the Interactive Intelligence Media Bar.
  - In the My Interactions tab of the CIC client workspace, double-click the alerting call.
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 IC 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.

1. Click the **Make Call** button on the Interactive Intelligence Media Bar, enter the number in the New Call dialog box, and click Make Call.

**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 IC 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 IC 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 IC 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  
Logon Settings  
Remote Station Types  
Switchover

### 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.

### Related Topics

Logging On  
Logon Settings

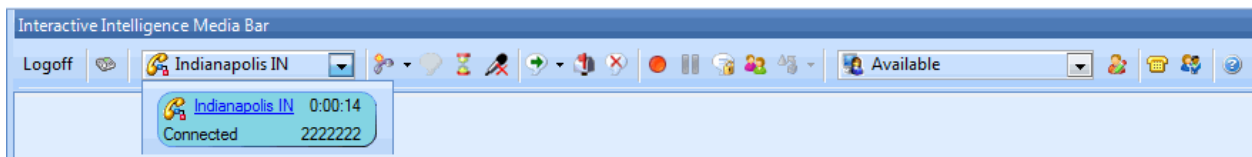
## Using the Interactive Intelligence Media Bar

### Using the Interactive Intelligence Media Bar

The Interactive Intelligence Media Bar is a fully functioning CIC client located on a toolbar in the Oracle Service Cloud Console. This toolbar controls CIC client functions within Oracle Service Cloud and is integrated into the Oracle Service Cloud interface. It contains buttons for logging on or logging out, making calls, setting your status, as well as other basic CIC client functions.







**Tip:** The most reliable method for call control is to use the buttons available in the Interaction Intelligence Media Bar.








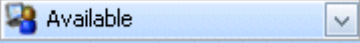



**Note:** Any of these buttons can be unavailable if the currently selected interaction is not in a state in which the action associated with the button can be performed. For example, "Pickup" is not available if you do not have a currently selected interaction.




These buttons appear on the Interactive Intelligence Media Bar:

Icon or Label	Function
<p>Logon</p> <p>Logoff</p>	The label on the <b>Logon / Logoff</b> button changes, depending on whether you are currently logged on to the CIC client. For more information, see Logging On and Logging Off.
	Click <b>Change Station</b> to switch your current station between your desktop workstation and a configured remote station, if necessary. For more information, see Changing Station.
	<p>The <b>Interactions drop-down list</b> displays the interactions currently in your queue. Use this list to select an interaction, then use the buttons on the media bar to handle the interaction. For more information, see Interactions Drop-Down List.</p> <p><b>Tip:</b> The currently selected interaction in this drop down list does not correspond to any interaction you may have selected in the embedded CIC client. The selected interaction and the available controls in the Interactive Intelligence Media Bar and the embedded CIC client are independent.</p> <p><b>Note:</b> This control "flashes" when an interaction is in the dialing or alerting state; i.e., the background color flashes to get your attention. Additionally, new interactions (alerting or dialing state) are automatically selected. Pre-selecting interactions makes call control actions like picking up a call faster and easier.</p>
	<p>The <b>Make Call / Click to Dial</b> button enables you to either make a call or dial the phone number for a contact.</p> <ul style="list-style-type: none"> <li>Click the icon to enter a phone number and make a call. For more information, see Make a Call Using the Make Call</li> </ul>

	<p>Button.</p> <ul style="list-style-type: none"> <li>○ Click the arrow to dial a phone number for the contact associated with the selected workspace record. If no workspace record is selected, or if no contact is associated with the selected workspace record, then the drop-down list is unavailable. For more information, see <a href="#">Click to Dial an Oracle Service Cloud Contact</a>.</li> </ul>
	<p>Click <b>Pickup</b> to answer the current interaction, or to take the current interaction off hold. For more information, see <a href="#">Pick up a call from a queue or Pick Up a Call From Voicemail</a>.</p>
	<p>Click <b>Hold</b> to place the selected interaction on hold. Click <b>Hold again</b> to pick up a held interaction. For more information, see <a href="#">Place a Call on Hold</a>.</p> <ul style="list-style-type: none"> <li>○ If the selected interaction is on hold, then this button appears to be pressed down.</li> <li>○ When you click this button, the icon for the selected call changes to a Hold icon .</li> </ul> <p><b>Tip:</b> Your CIC administrator can configure a maximum hold time for calls. By default, calls on hold for longer than fifteen minutes are disconnected. Your administrator can change the amount of time a call can remain on hold and/or the behavior that occurs once the hold time is exceeded. For example, your administrator may choose to transfer calls on hold longer than twenty minutes to another queue. For more information, see your CIC administrator.</p>
	<p>Click <b>Mute</b> to disable the microphone on your telephone so that the other party or parties cannot hear what you are saying. Click <b>Mute</b> again to reactivate the microphone.</p> <p>If the selected interaction is muted, then this button appears to be pressed down.</p> <p><b>Tip:</b> If you are in a conference call hosted by a different IC 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>Click <b>Transfer</b> to open the Transfer dialog box, where you can enter a transfer recipient and select the type of transfer operation you want to perform.</p> <p>To send the interaction directly to the recipient, enter the recipient's extension (internal number) or a phone number (external number), select the recipient from the drop-down list and click <b>Transfer</b>.</p> <p>For more information, see:</p> <ul style="list-style-type: none"> <li><a href="#">Transfer a Call After Consulting the Recipient</a></li> <li><a href="#">Transfer a Call to Another Person's Voicemail</a></li> <li><a href="#">Transfer a Call Using a Transfer Button</a></li> <li><a href="#">Transfer a Call Without Consulting the Recipient</a></li> </ul>
	<p>Click <b>Voicemail</b> to transfer a selected call to your voice mail</p>


	<p>account. Use this button if you want to send an incoming call to your voice mail instead of speaking with the caller.</p> <p>For more information, see:</p> <p>Send to Voicemail Button</p> <p>Transfer a Call to Another Person's Voicemail</p> <p>Transfer a Call to Your Voicemail</p>
	<p>Click <b>Disconnect</b> to disconnect the current call. When you click Disconnect, the icon for that call changes to a Disconnect icon.</p>  <p>For more information, see Disconnect a Call or Disconnect Someone From a Conference Call.</p>
	<p>Click <b>Record</b> to record the currently selected call. This recording is saved as a .wav file. For more information, see Record a Call.</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>Click <b>Pause</b> to control a recording session. Click this button to <b>pause</b> the recording session. Click it again to <b>resume</b> the recording session. For more information, see Record a Call.</p>
	<p>Click <b>Secure Pause</b> to avoid recording sensitive information, such as a Social Security number or credit card number, when you are connected to a call interaction. For more information, see Secure Pause a Recording.</p>
	<p>Click <b>Conference Manager</b> to create a conference call for two or more currently active calls. For more information, see Create a Conference Call Using Drag and Drop.</p>
	<p>Click <b>Associate Interaction with Workspace</b> to associate a selected interaction with a Oracle Service Cloud Incident workspace record. For more information, see Associate an Interaction with a Workspace.</p>
	<p>The <b>Status</b> drop-down list both displays your current status and enables you to change it easily by selecting a different status from the drop-down list. For more information, see Set Your Status.</p>
	<p>Depending on your current status, you can click <b>Set Status Details</b> to add status notes, provide a forwarding phone number, and indicate the 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. For more information, see Set Status Details.</p>
	<p>Click <b>Configuration</b> to adjust your CIC client logon settings or client configuration. You can also create personal call rules or display the Interactive Intelligence Media Bar Integration About dialog box. For more information, see Configuration Options and Understanding the Configuration Dialog Box.</p>
	<p>If you have the appropriate license and user rights, you can click <b>Show Interaction Client</b> to run the full CIC client in a workspace. For more information, see CIC client workspace.</p>

	Click this icon to view the CIC client Help. For more information, see Need Help?
---	---

**Related Topics**

Using the Toolbars


**Associate Interaction with Workspace Button**

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Click this button to associate the currently selected interaction with a selected workspace record.

**Related Topics**

Associate an Interaction with a Workspace


**Change Station Button**

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Click this button to change your station type. For more information, see Change Station.

**Related Topics**

Change Station  
Using the Interactive Intelligence Media Bar


**Conference Manager Button**

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Click this button to create a conference call.

**Related Topics**

Conferencing Features  
Disconnect Someone From a Conference Call  
Drag and Drop a Call on Another Call  
Making Conference Calls

**Configuration Button**

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar



<b>Description</b>	Click this button to adjust your CIC client configuration options, set up Personal Call Rules, or to view your Interactive Intelligence Media Bar version number and other important system information.
--------------------	--

**Related Topics**

About dialog box  
 Configuration Options  
 Setting Up Personal Rules

**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 or is available via a keyboard shortcut. 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.


<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+D</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click Disconnect to disconnect the current interaction. When you click Disconnect, the icon for that interaction changes to a Disconnect icon. 

**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

**Help Button**



<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Click the Help button to display the Interactive Intelligence Oracle Service Cloud Integration help.

**Related Topics**

Using the Interactive Intelligence Media Bar

## 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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+H</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click Hold to place the selected interaction on hold. To take the interaction off hold, click Hold again, or click Pickup, or double-click the interaction in your My Interactions queue. When you click this button, the icon for the selected interaction changes to a Hold icon 

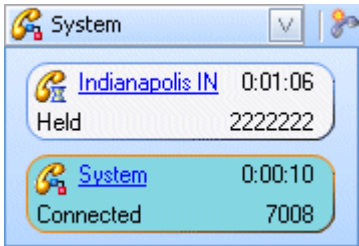
**Note:** The Hold button is unavailable if the interaction is not in a state in which this action can be performed.

**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

## Interactions Drop-Down List

<b>Control</b>	
<b>Location</b>	Interactive Intelligence Media Bar





<b>Description</b>	<p>Use this drop-down list to view the interactions in your queue. The use of color in the drop-down list is important. The currently connected interaction is highlighted in a sea green color. All other interactions have a white background. The currently selected interaction is outlined in orange.</p> <p>Each listed interaction displays information that includes the duration of the call, the origin of the call (phone number or email address), an interaction state icon and text (Held, Connected), and an interaction label (although this is underlined, it is not a link.)</p> <p><b>Tip:</b> The currently selected interaction in this drop down list does not correspond to any interaction you may have selected in the embedded CIC client. The selected interaction and the available controls in the Interactive Intelligence Media Bar and the embedded CIC client are independent.</p> <p><b>Note:</b> This control “flashes” when an interaction is in the dialing or alerting state; i.e., the background color flashes to get your attention. Additionally, these new interactions are automatically selected. Pre-selecting interactions makes call control actions like picking up a call faster and easier.</p>
--------------------	--

**Related Topics**

Using the Interactive Intelligence Media Bar


**Logon or Logoff Button**

<b>Icon</b>	 
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Log on or log off the CIC client. The label for this button changes depending on your logon status.

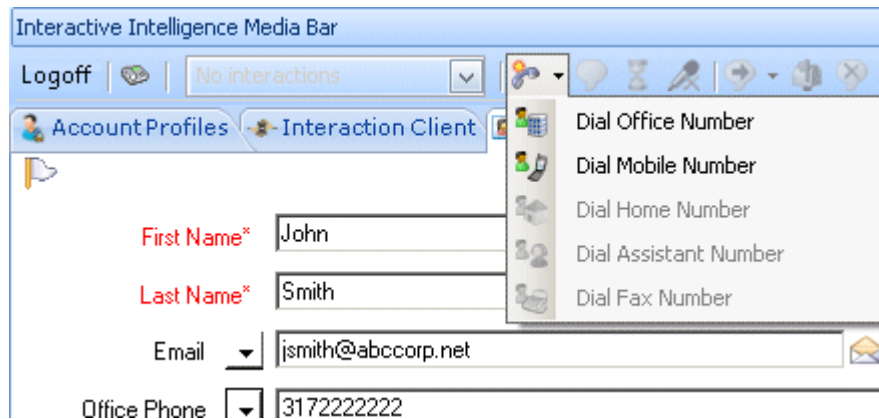
**Related Topics**

Logging On  
 Logging Off  
 Using the Interactive Intelligence Media Bar

**Make Call / Click to Dial Button**

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	<p>This is a two-part button.</p> <ul style="list-style-type: none"> <li>▪ Click the <b>Make Call icon</b> to open the New Call dialog box. In this dialog box, you can make a call by typing a phone number, or you can drag and drop a CIC client directory entry to the Number field, then click the Make Call button.</li> <li>▪ Click the <b>Click to Dial down arrow</b> to display a list of phone numbers belonging to the contact associated with the currently selected workspace record. Then click one of the numbers in the list and the CIC client automatically dials the selected phone number. The Click To Dial feature is available for open</li> </ul>

contacts or for any workspace that has an associated contact.



### Related Topics

- Make a Call Using the Make Call Button
- Making Calls

## Mute Button

**Requirements:** The "Mute" Interaction Command Right determines if the Mute button can appear on a toolbar. It also controls whether the Mute Call command appears on a shortcut menu or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar
<b>Keyboard shortcut</b>	<b>Ctrl+U</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click <b>Mute</b> to disable the microphone on your telephone so that the other party or parties cannot hear what you are saying.  Click <b>Mute</b> again to reactivate the microphone.  If you are in a conference call hosted by a different IC 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.  Also, if you are currently being assisted by a supervisor, the customer no longer hears you, but the supervisor can continue to converse with you. For more information, see Coach Button.


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

## Related Topics

Using the Queue Control Toolbar

## Pause Button

**Requirements:** The "Pause" Interaction Command Right determines if the Pause button can appear on a toolbar. It also controls whether the Pause Recording command appears on a shortcut menu or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+E</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Use this button to control a recording session.  Click this button to pause the recording session. Click it again to resume the recording session.

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



**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

## Related Topics

Record a Call  
Record Button  
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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Work Item Toolbar Callback Window Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+P</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click this button to pick up the current interaction, or to take the current interaction off hold. When you click this button, the icon for a call changes to a Connected icon. 


**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
- Pick Up a Work Item
- Using the Queue Control Toolbar

**Record Button**

**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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+R</b> <b>Tip:</b> Toolbar shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click Record to record the currently selected call or chat. A call recording is saved as a .wav file. A chat recording is saved as a .txt file.  Clicking Record the first time starts the recording session for a call. Clicking Record again stops the recording session for a call.  <b>Note:</b> You can press the Record button more than once to stop or continue recording your interaction. The CIC client stores each part of the recorded conversation in separate audio files or text files, and sends them to you in email message attachments after you end the call.


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

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

### Related Topics

Record a Call  
Record a Chat Session  
Using the Queue Control Toolbar


## Set Status Details Button

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Click this button to set your CIC client user status. For more information, see Set Your Status.

### Related Topics

Set Your Status

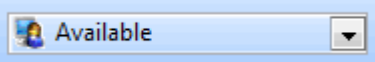
## Show Interaction Client Button

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Click this button to display the CIC client in an Oracle Service Cloud workspace if you have the appropriate license and user rights.

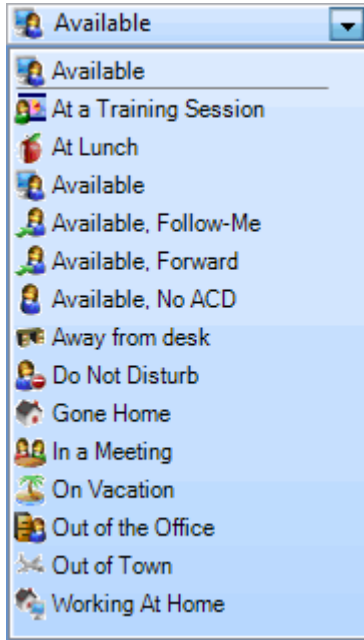
### Related Topics

Interactive Intelligence Oracle Service Cloud Integration

## Status Drop-Down List

<b>Control</b>	<p>Your current status appears as the button text.</p>  <p>If you are not currently logged onto the CIC client, the Status drop-down list is disabled.</p>
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	<p>Click the Status drop-down list to select your CIC user status. For more information, see Set Your Status.</p> <p>The status list:</p> <ul style="list-style-type: none"> <li>Displays up to 10 of your most-recently-used statuses at the top of the list. Your current status appears first, followed by the next most recently used statuses in order.</li> </ul>

- Uses a line to visually separate the most recently used statuses from a list of all selectable statuses.
- Displays the icon assigned to each status. For more information, see Possible Status Values.



**Related Topics**

Working with Status Settings

**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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+T</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click this button to open the Transfer dialog box where you can enter a transfer recipient in the <b>Transfer to:</b> text box and select the type of transfer operation you want to perform. To send the interaction directly to the recipient, enter the recipient's extension (internal

number) or a phone number (external number), select the recipient from the drop-down list and click **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 Send to Voicemail command appears on a shortcut menu or is available via a keyboard shortcut. The Transfer Interactions to Voice Mail Security right enables you to transfer an interaction appearing in My Interactions to your voice mail.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+M</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	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

### Using 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

- Call History
- Camp Desktop Alert
- Change View Layout
- Configuration Dialog Box
- Dial Pad
- Directories
- Directory Properties Dialog Box
- Fax Viewer
- Interaction Properties Dialog Box
- Logon Dialog Box
- My Interactions
- Queues
- Set Status Dialog Box
- Shortcut Keys
- Supervisor Client Memos
- Transfer Dialog Box

## About dialog box

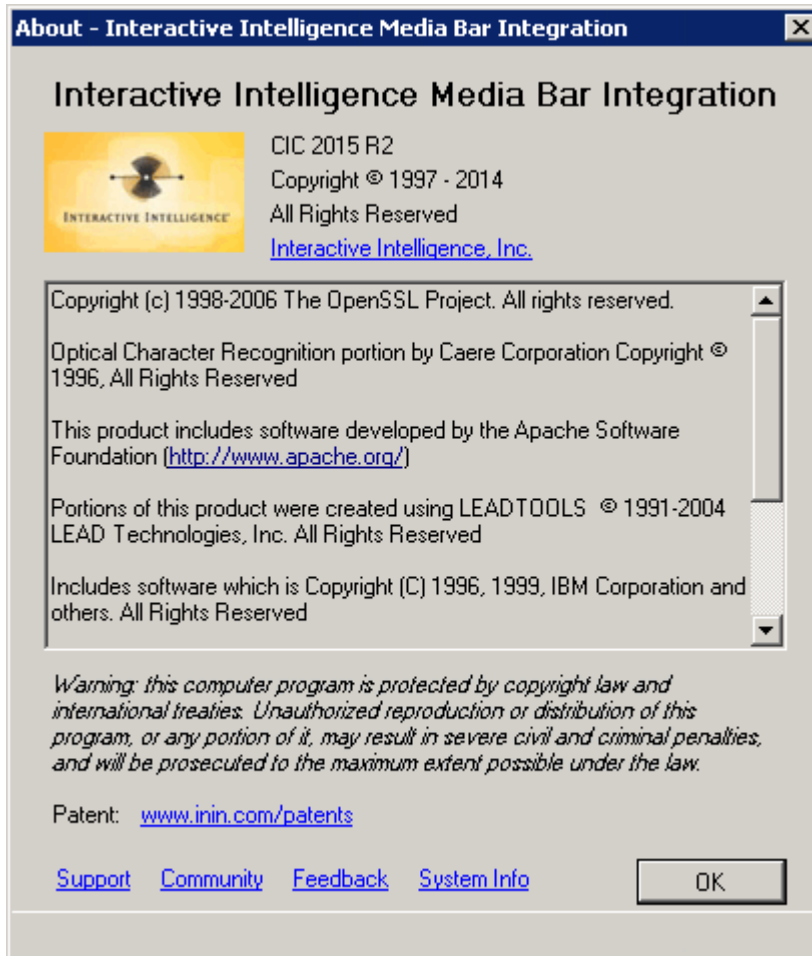
### To access the About - Interactive Intelligence Media Bar Integration dialog box:

- In the Options dialog box, click **About**.

The About - Interactive Intelligence Media Bar Integration dialog box displays:

- Current version number
- Information about included third-party software
- Links to websites for Interactive Intelligence Support, Interactive Community, and Product Feedback.
- A link to the Microsoft System Information window which displays information about the configuration of your system.





## Related Topics

## Call History

The Call History view displays a listing of your incoming and outgoing calls.

**Note:** The Call History view is available in the full CIC client. The CIC client can appear in an Oracle Service Cloud CRM workspace if you have the appropriate license and user rights. For more information, see [CIC client workspace](#).

Some of the call information available includes **Start** date and time, **End** time, **Number**, **Name**, and **Disposition** as shown below. By default, the newest call appears first, but you can sort this view by clicking on any column heading. Your preferred sort order is used anytime you view Call History.

**Tip:** You can copy the details of a selected interaction to the Windows clipboard. For more information, see [Copying Information to the Clipboard](#).

My Interactions		My Work Items		Call History		
Disposition	Name	Number	Start	End	Duration	Call Id
Called	Weather Line	<a href="#">(317) 222-2222</a>	Today, 1:19 PM	Today, 1:20 PM	0:00	1088760257
Called	Camel IN	<a href="#">(317) 846-6107</a>	Today, 1:21 PM	Today, 1:23 PM	1:59	1088760270
Answered	Kell, Jo	<a href="#">8888</a>	Today, 4:27 PM	Today, 4:29 PM	2:13	1088766242
Called	Weather Line	<a href="#">(317) 222-2222</a>	Today, 5:46 PM	Today, 5:46 PM	0:11	1088768039

<b>Disposition</b>	<ul style="list-style-type: none"> <li>• <b>Answered:</b> An incoming call that was answered.</li> <li>• <b>Called:</b> An outbound call.</li> <li>• <b>Missed:</b> An incoming call that was not answered.</li> <li>• <b>Unknown:</b> This is displayed if the server has no information on whether the call was inbound or outbound (i.e. N.A.).</li> </ul>
<b>Name</b>	<p>The name of the caller or the person called as found on the IC server or delivered by the PSTN (Public Switched Telephone Network) as part of Caller ID.</p> <p><b>Note:</b> Voice Mail appears in the Name column for voice mail messages played back through your Telephone Handset.</p>
<b>Number</b>	<p>For an outbound call, this is the number that was dialed. For an inbound call, this is the number of the caller.</p> <p><b>Tip:</b> Click this phone number hyperlink to dial the number.</p>
<b>Start</b>	The time when the call is added to your queue.
<b>End</b>	The time when the call disconnected if it was still in your queue. If the call leaves your queue before being disconnected, the end time is when the call left your queue.
<b>Duration</b>	The difference in time between <b>Start</b> and <b>End</b> .
<b>Call ID</b>	<p>The call identifier for the call can be handy if users must report a problem with a call to their administrator.</p> <p><b>Note:</b> By default, this column is not displayed. For more information, see Add or Remove View Columns.</p>

### Displaying the Call History View

The Call History view appears by default for first-time users, but you can choose not to display it. If you manually remove the Call History view, you can add it back with the following steps:

1. In the **Create New View dialog box**, from the **Categories** list, select **Call History**.
2. In the **Views** list, select **Call History**.
3. Click **OK**.

**Result:** The Call History view appears.

### 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.

## 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 IC 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 view 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. To make the removal happen more quickly, right-click the disconnected call and select **Remove From Queue** on the pop-up menu to add the call to your Call History.

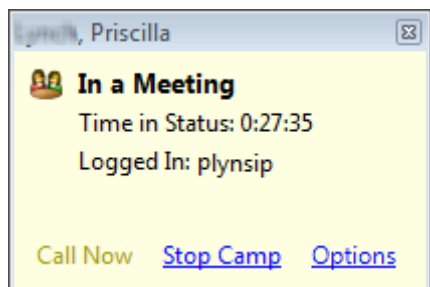
### Related Topics

Customizing the Interface  
Dial a recently dialed number  
Use the Voicemail Message View

## Camp Desktop Alert

**Note:** "Camping" is a feature available in the full CIC client. The CIC client can appear in an Oracle Service Cloud CRM workspace if you have the appropriate license and user rights. For more information, see CIC client workspace.

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

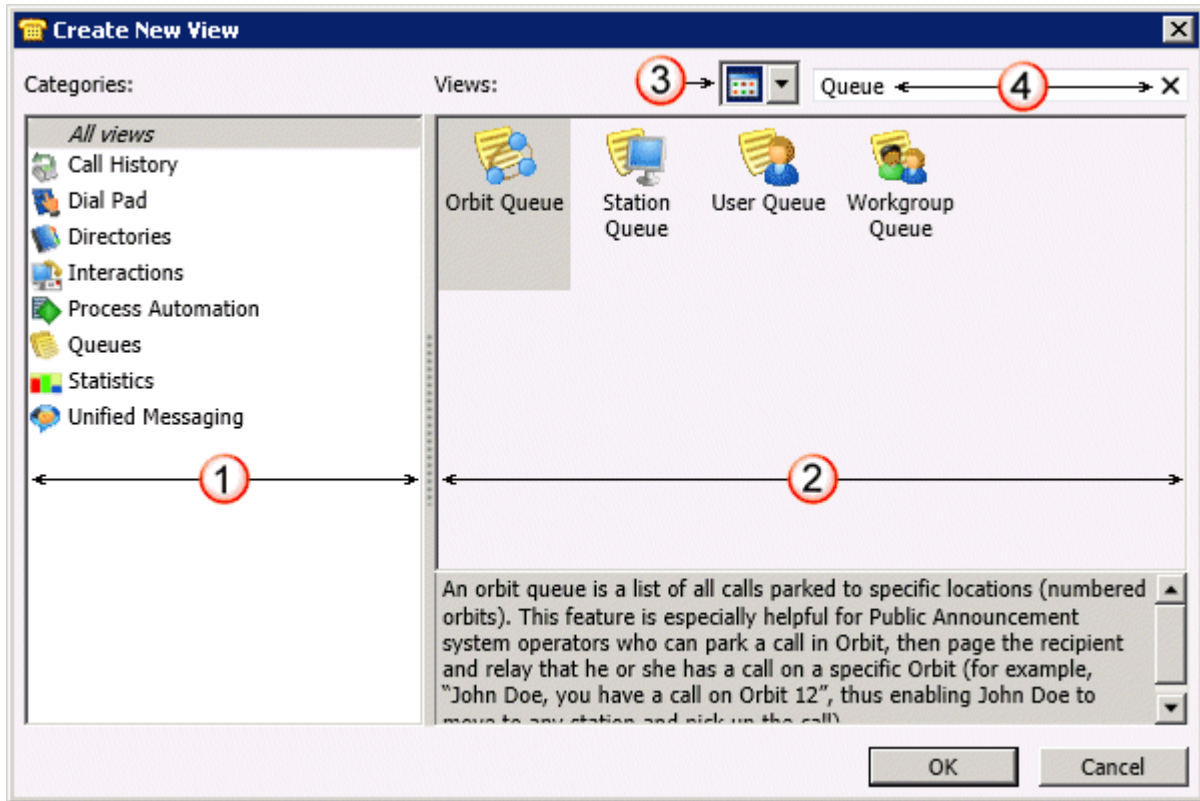
## Create New View Dialog Box

Use the **Create New View** dialog box to choose the views you want to display in the CIC client.

**To display the Create New view dialog box:**

- Right-click a tab in the area where you want to add a view and click **New View**.

**Result:** The **Create New View dialog box** appears.



1	<b>Categories list</b>	The <b>Categories</b> list displays the names of view categories. Click any category name to display a list of views available in the selected category.
2	<b>View names</b>	This section displays the names and descriptions of the selected views.
3	<b>View display mode</b>	Click this control to switch the display between <b>List</b> view and <b>Icon</b> view. <b>Note:</b> This screen capture shows the <b>List</b> view. In the <b>Icon</b> view, the view description for the selected view appears at the bottom of the <b>Views</b> list.
4	<b>Search text box</b>	Enter all or part of a view name in the <b>Search</b> text box and press <b>Enter</b> to display a list of views with matching names.  Click the X in the Search text box to clear your search term.  <b>Tip:</b> In the <b>Categories</b> list, select <b>All views</b> to search for every matching view, not just matching views in the currently selected category.
5	<b>OK</b>	Click <b>OK</b> to add the selected view to the CIC client.

### Related Topics

Add or Close Views

## Using the Dial Pad

**Requirements:** The Dial Pad is available in the complete CIC client. The CIC client can appear in an Oracle Service Cloud CRM workspace if you have the appropriate license and user rights. For more information, see [CIC client workspace](#).

The Dial Pad enables you to dial a phone number to place a call, send DTMF tones to a connected call, or make selections from an automated telephone menu system. You can also use the Dial Pad to dial and make another call while the selected interaction is on hold. The Dial Pad can also send DTMF tones through a connected SIP Soft Phone.

The Dial Pad is just one of several ways of initiating phone calls. For more information, see [Making Calls](#).

#### To display the Dial Pad:

1. In the **Create New View dialog box**, from the **Categories** list, select **Dial Pad**.
2. In the **Views** list, select **Dial Pad**.
3. Click **OK**.

#### To use the Dial Pad:

1. Display the Dial Pad.
2. Do one of the following:
  - Click the appropriate buttons on the Dial Pad to dial a phone number.
  - Select the Dial Pad tab and type the phone number on your keyboard.

**Note:** If you select the Dial Pad before you type a phone number, the corresponding dial pad keys are highlighted as you type.

3. 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 Number field. Click the **Make Call** button and the number is dialed.
  - If you have a recent interaction selected in the **Number** dropdown list, the Number field is cleared and the numbers you press on the Dial Pad appear. Click the **Make Call** button and the number is dialed.
  - 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.
4. Optionally, after the call is connected, click buttons on the dial pad to make selections from an automated telephone menu system. It's just like using a touch tone phone dial pad.
5. 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 call and choose **Disconnect** from the shortcut menu.

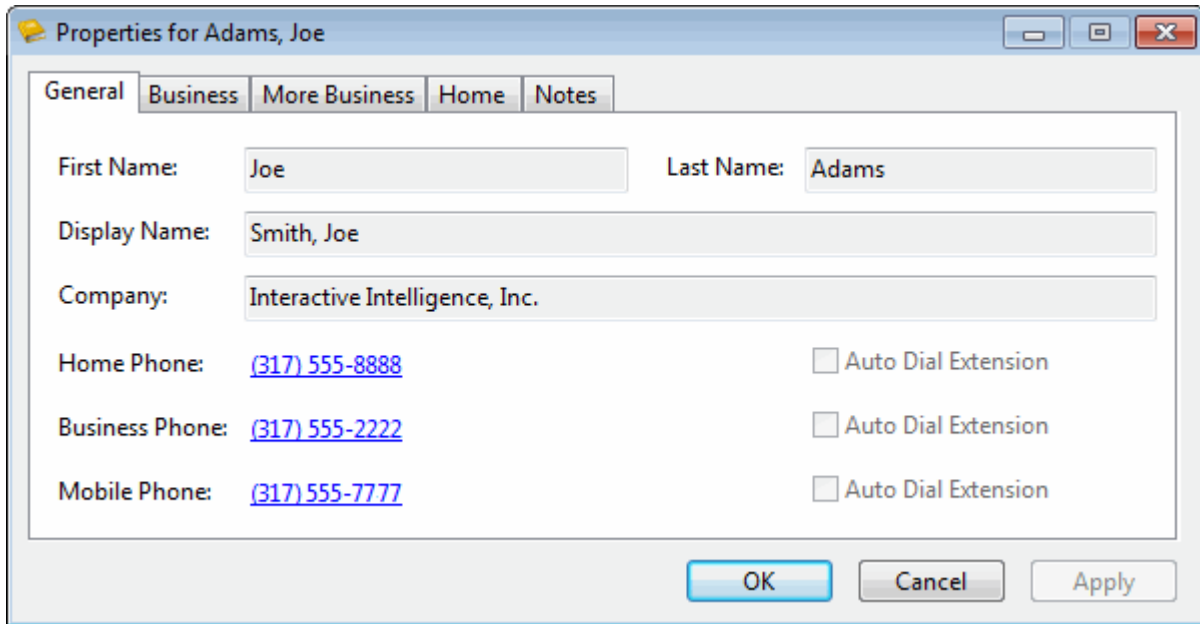
#### Related Topics

[Disconnect button](#)  
[Making Calls](#)

## Directory Properties Dialog Box

**Note:** Directory views are available in the full CIC client. The CIC client can appear in an Oracle Service Cloud Workspace if you have the appropriate license and user rights. For more information, see CIC client workspace.

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



**Related Topics**

- Interaction Properties Dialog Box
- 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 or an intercom chat. Each interaction is represented by a queue item in a station or user queue, or 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.

**Interaction Information View**

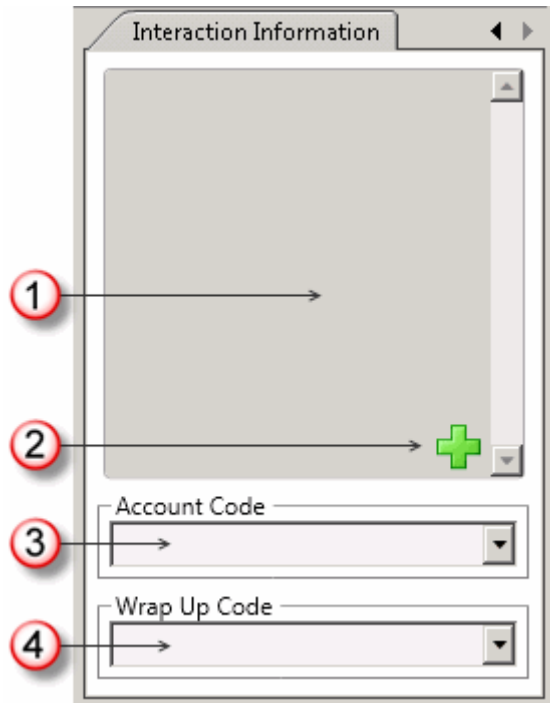
**Requirements:** If you do not have the View Account Codes Access Control right, you do not see Account Code fields. If you do not have the Account Code Verification Security Right, you cannot assign an Account Code to an interaction. To assign a wrap-up code, you must be a member of a workgroup for which wrap-up codes are configured and activated.

Use the Interaction Information view to add notes or comments about an interaction. If you have the appropriate rights, you can assign an Account code. If the associated interaction is an ACD-routed interaction, you can use this view to assign a Wrap Up Code.

**To display the Interaction Information view:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Interactions**.
2. In the **Views** list, select **Interaction Information**.
3. Click **OK**.

**Result:** The Interaction Information view appears.



1	<b>Notes</b>	Use the Notes section to add notes or comments about the interaction. If this interaction is a chat, other participants do not see these notes. For more information, see <a href="#">Add Notes to a Callback, Chat, or E-mail Interaction</a> .  <b>Note:</b> These notes are visible to other CIC client users who are "Listening to" (monitoring) a chat. For more information, see <a href="#">Monitor a Chat</a> . After a web chat is disconnected, these notes can be available in the Notes section of the Related Items view if the remote party is identified and the Interaction Center system collects this information. For more information, see your CIC administrator.
2	<b>Add a Note icon</b>	Click this icon to open the Notes text box and add a note to the chat. For more information, see <a href="#">Add Notes to an Interaction</a> .
3	<b>Account Code</b>	Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to a chat interaction. For more information, see <a href="#">Understanding Account Codes and Assign Codes to an Interaction</a> .
4	<b>Wrap-up Code</b>	If you are a member of a workgroup for which Wrap-up codes are configured, you can use this drop-down list to assign the code. For more information, see <a href="#">Understanding Wrap-Up Codes and Assign Codes to an Interaction</a> .

## Related Topics

Add or Close Views  
Customizing the Interface

## Interaction Properties Dialog Box

**Note:** The Interaction Properties dialog box is available in the full CIC client. If you have the appropriate license and user rights, the CIC client can appear in an Oracle Service Cloud Workspace. For more information, see [CIC client workspace](#).

Use the Interaction Properties dialog box to add notes to an interaction or view the interaction log. You can also use the Interaction Properties dialog box to assign account codes and wrap-up codes to interactions. For more information, see [Working with Account and Wrap-Up Codes](#).

**Tip:** You can automatically display the Interaction Properties dialog box every time you receive a call. For more information, see [Calls Configuration](#). You can also use the Interaction Information view to add notes or assign Account codes and Wrap-up codes to an interaction.

### Access from User Queue

You can access the Interaction Properties dialog box during or just after an interaction; that is before it is removed from My Interactions or other user queue. You can add notes or view the log for the interaction. If you make notes on an interaction in another user's queue, only that other user can view the notes. Also, if your company uses these codes and you have permission to use these features, you can assign Account Codes or Wrap Up Codes. For more information, see [Working with Account and Wrap-Up Codes](#).

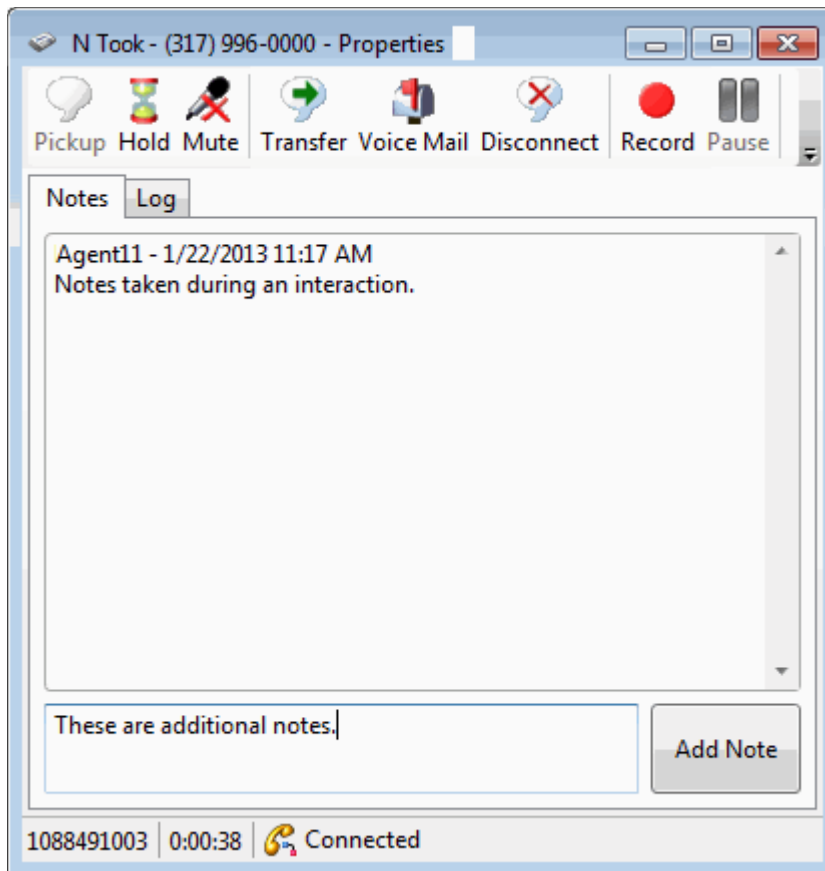
#### To access the Interaction Properties dialog box from a queue:

While the interaction is ongoing or still appears in My Interactions or other user queue, do one of the following:

- Right-click the interaction and select **Properties**.
- Select the interaction and click the Properties button on the Queue Control toolbar.

**Result:** The Interaction Properties dialog box appears.





### Access from Call History

When you access the Interaction Properties dialog box from Call History, you can view Notes taken during the interaction or select the **Log** tab to view interaction connection information. You cannot make additional notes or assign Account or Wrap-up codes to an interaction that is no longer in My Interactions or other user queue.

#### To access the Interaction Properties dialog box from Call History:

- Right-click an interaction and select **Properties**.

**Result:** The Interaction Properties dialog box appears.

#### Related Topics

Assign Codes to an Incoming Interaction  
 Assign Codes to an Outgoing Interaction  
 View and Edit Interaction Properties  
 Working with Account and Wrap-Up Codes

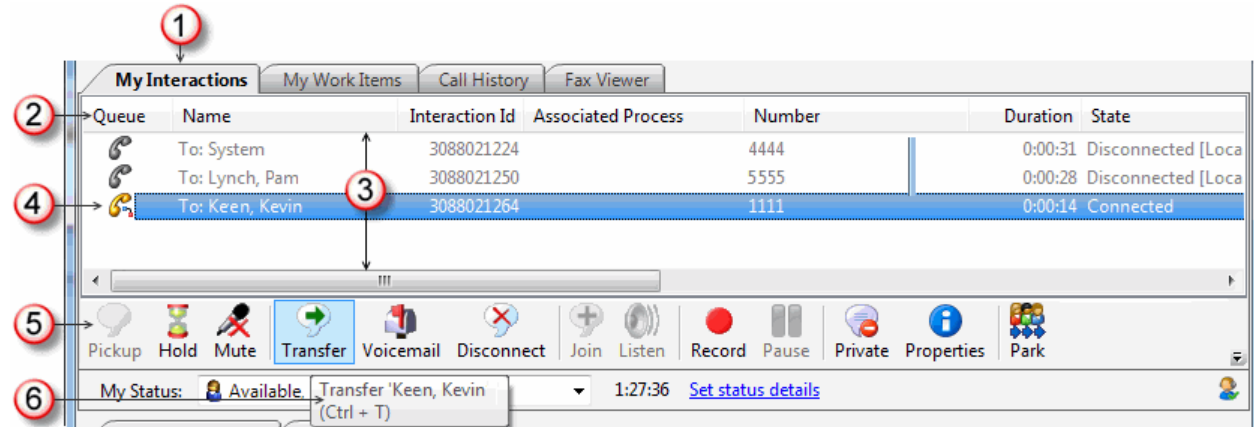
## My Interactions

**Note:** The **My Interactions** view is available in the full CIC client. The CIC client can appear in an Oracle Service Cloud Workspace if you have the appropriate license and user rights. For more information, see CIC client workspace.

The My Interactions view shows the current interactions in your user queue. These are the interactions you currently manage. If you set up Monitored Appearances to observe the activity of several personnel at the same time, these

monitored appearances appear on your My Interactions view. If you are monitoring more than one queue, you also see other view tabs in the client.

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 is displayed in the Queue column. For more information, see Queue Contents.



1	<b>My Interactions tab</b>	Select this tab to display the My Interactions view. <b>Note:</b> You cannot remove the My Interactions view or move it.
2	<b>Queue columns</b>	The Queue columns organize the information about each interaction in a queue. For more information, see Queue Contents and Understanding an Interaction's State. You can: <ul style="list-style-type: none"> <li>• Select the columns displayed here. For more information, see Add or Remove View Columns.</li> <li>• Reset the column display to the default set determined by your user rights. For more information, see Reset Queue Column Display.</li> </ul>
3	<b>Queue contents</b>	All interactions in the My Interactions queue are displayed here. Disconnected interactions are removed after a set interval. You can: <ul style="list-style-type: none"> <li>• Right-click on a disconnected interaction and remove it from the queue immediately. For more information, see Remove Disconnected Interactions from a Queue.</li> <li>• Call back a disconnected call while it remains in My Interactions.</li> <li>• Automatically hide all disconnected interactions. For more information, see General Options.</li> </ul>
4	<b>Selected interaction</b>	My Interactions can contain more than one interaction. The currently selected interaction is highlighted.
5	<b>Queue Control Toolbar</b>	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. <b>Tip:</b> You can add, remove, or rearrange buttons on the CIC client toolbars. For more information, see Customizing Toolbars.
6	<b>Toolbar Button</b>	Pointing to a toolbar button displays a tooltip that explains its action and its

<b>Tooltip</b>	keyboard shortcut. <b>Tip:</b> Toolbar shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you use the shortcut keys.
----------------	--

**Related Topics**

Queue Contents

**Options Dialog Box**

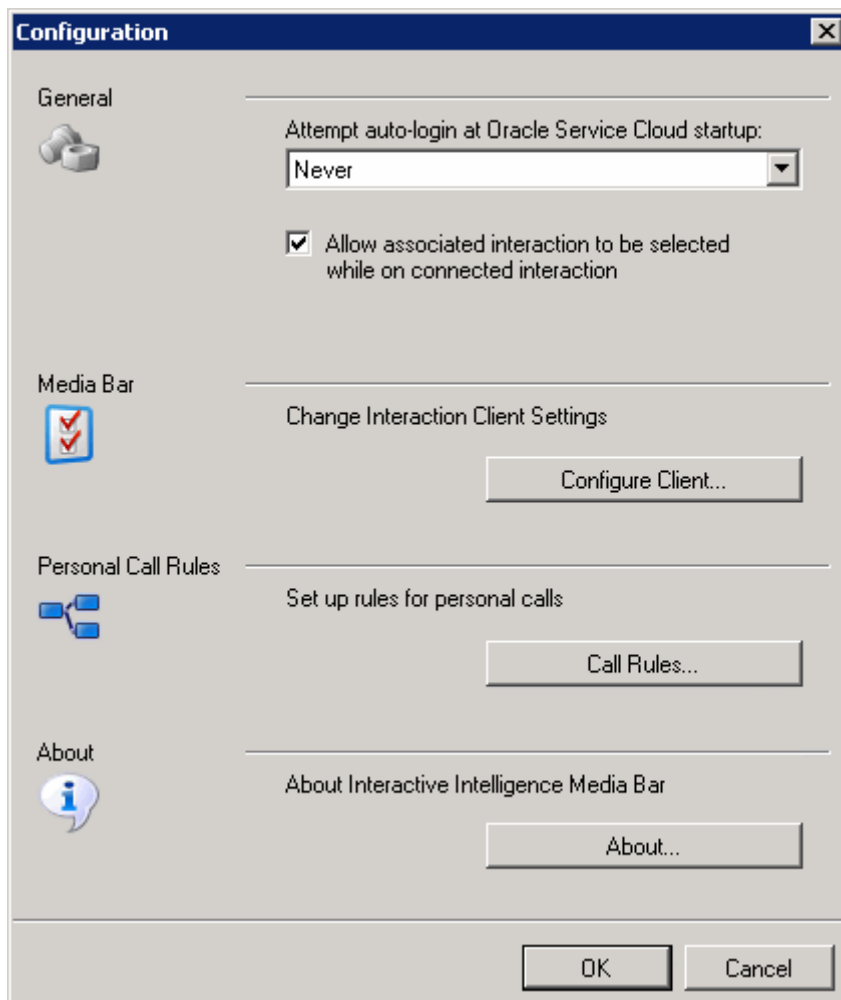
You use the Options dialog box to set General Configuration Options, access options that control the appearance and behavior of the CIC client and configure call rules.

**Note:** In the Interaction Intelligence Oracle Service Cloud Integration, the Options dialog box is titled the Configuration dialog box. Another dialog box is also titled "Configuration," so the name "Options dialog box" is used when discussing general configuration options.

**To access the Options dialog box:**

- On the Interactive Intelligence Media Bar, click Configuration.

**Result:** The Options dialog box appears.







## Related Topics



Understanding the Configuration Dialog Box

## Phone Number Controls

The CIC client verifies phone numbers that you enter 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.

Home Phone:    

Business Phone:   Ext.   

Mobile Phone:   Ext.    

1	<b>Validated phone number</b>	A validated phone number is formatted according to the rules of the dial plan for your organization or region. A validated phone number becomes the <b>display number</b> in the CIC client. A display number can become a <b>clickable link</b> that dials the number. <b>Tip:</b> To copy the phone number to the Clipboard, right-click a validated phone number. To copy the phone number and extension, right-click an extension number.
2	<b>Edit button</b>	Click the <b>Edit</b> button to change a phone number.
3	<b>Unvalidated phone number</b>	A phone number appears exactly as you enter it until you validate it.
4	<b>Validate button</b>	Click the <b>Validate</b> button to check your phone number entry against the requirements of the dial plan for your organization or region.
5	<b>Invalid phone number</b>	Several error indicators appear when a phone number entry cannot be validated. <ul style="list-style-type: none"> <li>• An invalid phone number has a <b>wavy underline</b>.</li> <li>• The Edit button for an invalid number has a <b>dotted outline</b>.</li> <li>• An error indicator <b>flashes</b>.</li> </ul>
6	<b>Error Indicator</b>	The error indicator appears next to the Validate button associated with an invalid phone number.

## Related Topics

- Follow-me Routing Options
- Insert and Delete Directory Entries
- View and Edit Directory Entries

## 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 your own status or to set another user's status.

### Related Topics

- Set Status Details
- Set Another User's Status

## Shortcut Keys

**Note:** If you have the appropriate license and user rights, the full CIC client can appear in an Oracle Service Cloud Workspace. For more information, see [CIC client workspace](#).

Many of the buttons and fields in the full CIC client have **shortcut keys** or "hot keys" assigned to them. Pressing **shortcut keys**, which usually open a window or start a function, performs the same task as pressing a button or selecting a field. For example, to place an interaction on hold, select the interaction and then simultaneously press the **Ctrl** and **H** keys.

### My Interactions and Other Queue Shortcuts

**Tip:** The CIC client workspace shortcuts work only if you click an interaction to ensure that it has focus before you use the shortcut keys.

Function	Shortcut
Call Back	Ctrl+B
Coach	Ctrl+O
Create Custom Call Rule	Ctrl+Shift+C
Always send caller directly to voice mail	Ctrl+Shift+M
Disconnect	Ctrl+D
Hold	Ctrl+H
Join	Ctrl+J
Listen to a Call	Ctrl+L
Mute Call	Ctrl+U
Park on Orbit	Ctrl+K
Pause Recording	Ctrl+E
Pickup	Ctrl+P

Private	Ctrl+I
Properties	Ctrl+Shift+P
Record	Ctrl+R
Remove from Queue	Ctrl+Shift+R
Request Assistance	Ctrl+N
Send to Voicemail	Ctrl+M
Transfer	Ctrl+T

## Directory Shortcuts

The availability of specific directory shortcuts depends on the information available in a directory entry and the functions enabled in your CIC client. For example, the shortcut for dialing an assistant is not available if the selected directory entry does not have an associated number for an assistant. In the same way, you cannot start a video call if your CIC client is not integrated with Microsoft Office Communications Server 2007.

**Warning:** The CIC client workspace directory toolbar shortcuts work only if you click a directory entry to ensure that it has focus before you use the shortcut keys.

Function	Shortcut
Camp	Ctrl+A
Change user's status	Ctrl+S
Copy	Ctrl+C
Dial Assistant	Ctrl+R
Dial Business number	Ctrl+B
Dial Business number 2	Ctrl+U
Dial Default number	Enter
Dial Extension	Ctrl+Shift+X
Dial Fax	Ctrl+F
Dial Home	Ctrl+H
Dial Home 2	Ctrl+O
Dial Mobile	Ctrl+I
Dial Pager	Ctrl+G
E-mail message to Business address	Ctrl+E
E-mail message to Home address	Ctrl+L
Initiate new Chat	Ctrl+Shift+C
Properties	Ctrl+Shift+P

## Viewing Shortcut Keys

You can view shortcut keys by right-clicking on an interaction or a directory entry.

**Note:** The currently available shortcuts appear in black type. Shortcuts which are not available in the current context are dimmed.

## Related Topics

Tips and Tricks

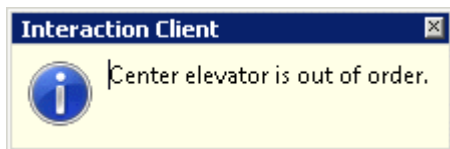
## Supervisor Client Memos

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.

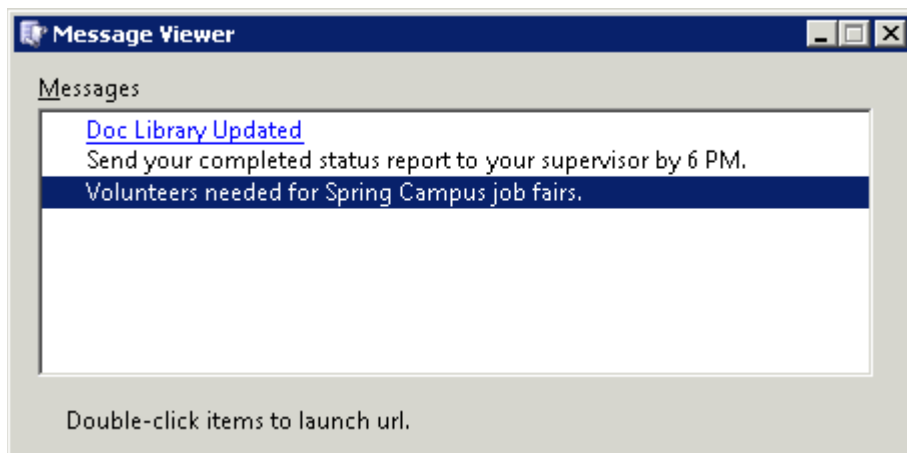


### Notification Area

Notifications appear in the **Status Bar**. The client notification area presents the text of the client memo in a stock ticker-like format. If you receive multiple client memos, then the memos scroll. Current memos move into the notification area by rotating in from the bottom while any other memo rotates out the top. There is a pause of several seconds between the time the memo is fully rotated in and the time it begins cycling to the next memo to allow you some time to read the memo.

Click the **Message Viewer** icon in the Status Bar to display all the current notifications on your system. You can click a notification that contains a URL link, launching your browser and displaying the appropriate page.

**Note:** Only notifications appear in the Message Viewer. Desktop pop-ups do not appear.



## Related Topics

Status Bar

## Tips and Tricks

Here are a number of shortcuts that enable you to perform some common tasks more efficiently.

- Transferring Calls
- Search a Directory
- Copying Information to the Clipboard

## Transferring Calls

You can easily transfer calls to a directory entry:

- Drag any call to an entry to blind transfer to default number
- Right drag any call to an entry to get an extended transfer option menu

Right-click a directory entry to display a shortcut menu that contains all the different transfer options. For more information, see Transferring Calls.

## Copying Information to the Clipboard

You can easily copy a directory entry or interaction details to an email message, document or report by using the Windows clipboard. Select a directory entry or interaction and press **Ctrl+C** or select **Edit > Copy**.

Paste the information in the destination application by pressing **Ctrl+V**. When you paste the copied information in an application, it appears in a simple, easy-to-read format similar to these examples.

- Information copied from a directory entry includes information from all displayed columns.

```
Last Name: Took
First Name: Nora
Extension: 7777
Department: Development
Business Phone: (317) 555-7777
Home Phone: (317) 555-0300
Status: Available, No ACD
Status Notes:
On Phone: False
Time In Status: 7:23:33
```

- The amount of information included for an interaction depends on where you select the interaction.

```
Call Id : 1001426260
Disposition: Called
Name: Indianapolis IN
Number: (317) 555-1234
Start : Today, 3:19 PM
End : 3:19 PM
Duration : 3:18
```

## Related Topics

Dial a Recently Dialed Number  
Shortcut Keys  
Working with Other Directories  
Working with the Company Directory

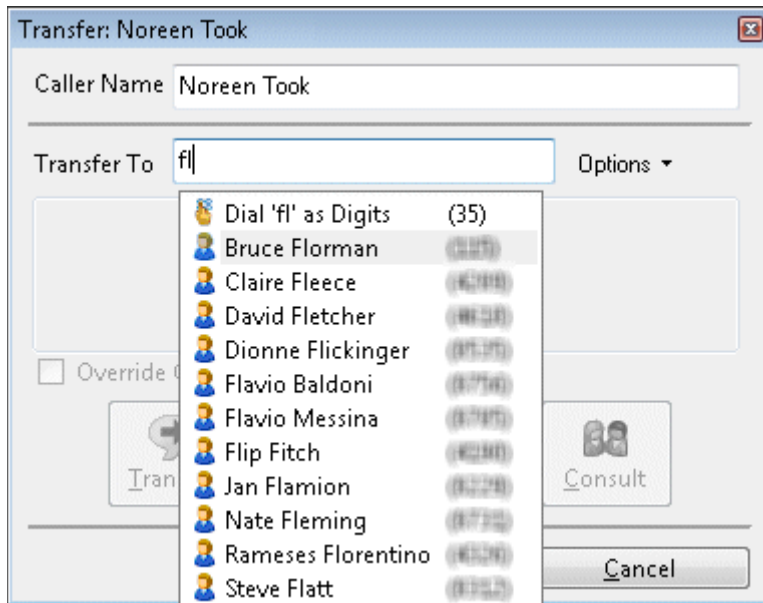
## Transfer Dialog Box

**Requirements:** Access Control Rights determine which Attendant Profiles, 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, Workgroup Queues, and Station Queues for matching names and numbers. Your system administrator can use Interaction Administrator to create or change the server parameter, TransferDialogDirectories, to include additional directories in the search.

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.



**Important:** You use a modified version of the Transfer dialog box to transfer work items.

### 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.

You can modify the information in the **Caller Name** text box to correct the name of the caller or to provide additional information such as an account number or a description of the caller's problem. If you then transfer the call to another CIC client user, the newly entered information appears in the recipient's My Interactions or other queue list view.

**Warning:** Use only alphanumeric characters (A-Z, a-z, or 0-9) in the **Caller Name** text box. Do not use special characters such as comma (,), colon (:), at sign (@), ampersand (&), etc. Special characters can cause the call transfer to fail or prevent the recipient from picking up the call. Also, do not enter more than 78 characters in this 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.

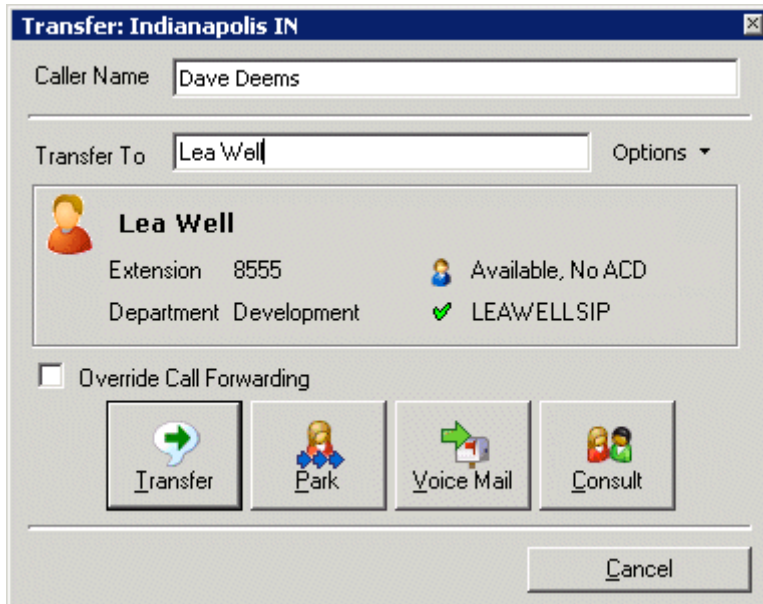
**Requirements:** Search Station Queues and Search Workgroup Queues Access Control rights determine which station and workgroup queues are available as transfer targets.

- 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.



CIC client users can set Call Coverage options that forward their calls to another CIC user. CIC client users can also set status details that forward their calls to an alternate phone number. Select the **Override Call Forwarding** check box to ignore these settings and transfer the current call directly to the selected number or voice mail box or to park the call on the selected number.

### 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
- Transfer a Work Item

### Using the Toolbars

### Using the Toolbars

The Interactive Intelligence Oracle Service Cloud Integration includes three types of toolbars:

- The Interactive Intelligence Media Bar controls CIC client functions within Oracle Service Cloud and is integrated into the Oracle Service Cloud CRM interface. It contains buttons for logging on or logging off, making calls, setting your status, as well as other basic CIC client functions.
- The Queue Control toolbar helps you manage telephone calls as well as voice mail and fax messages. It appears on each queue management view, such as My Interactions.
- 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. Custom buttons can also appear in interaction forms for calls, chats, e-mails, callbacks, or work items.

A custom button can invoke a handler or launch a local application. 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 work item) 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 move or remove a custom button from your Queue Control toolbar just like any other interaction button. Custom buttons can also be removed by the CIC administrator from your Queue Control toolbar, interaction forms, 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.

### Related Topics

Customizing Toolbars  
**Using the Queue Control Toolbar**

## Customizing Toolbars

**Requirements:** The Customize Client Security Right enables you change the buttons in a 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 the CIC client toolbars.

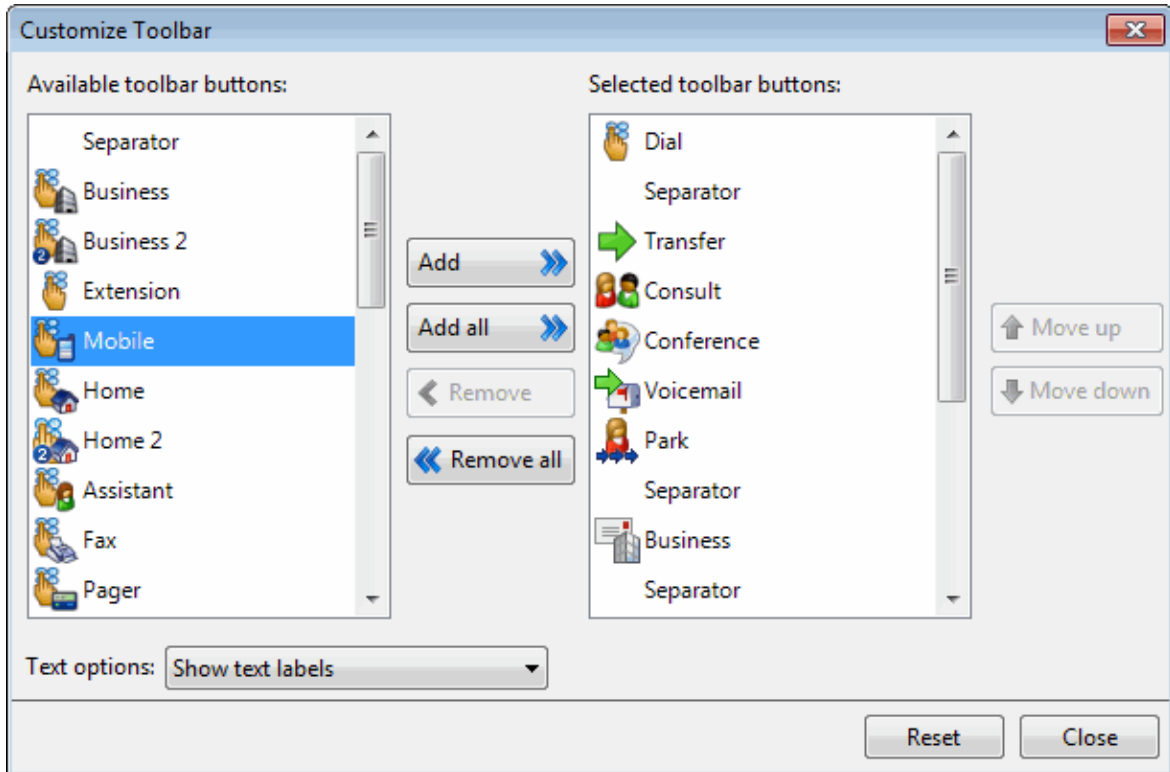
### Add, Remove, or Rearrange Buttons

The Queue Control Toolbar appears on each queue management view (such as My Interactions). The Directory Toolbar appears on each directory view (such as Company Directory). If you use Interaction Process Automation, a

toolbar appears on the My Work Items . You can change the appearance of these toolbars. Each toolbar can have its own unique set of toolbar buttons.

**To customize a Queue Control, Directory, or My Work Items toolbar:**

1. Select the view containing the toolbar you want to customize.
2. Right-click the toolbar and select **Customize**.
3. In the **Customize Toolbar** dialog box, perform any of the following actions:



**Tip:** When you customize a toolbar, pay particular attention when you point to a specific button. Some buttons may have the same label name, but have different icons. For example, the Customize Toolbar dialog box shows three separate Mobile buttons, but one button represents Transfer, one represents Consult, and another represents Dial. Also, some buttons have the same icon but different labels. For more information, see Directory Toolbar Buttons and Using the Queue Control Toolbar.

- To add a button to the toolbar, from the **Available toolbar buttons** list, select a button name and click **Add ->**.

**Result:** The selected button appears at the bottom of the **Current toolbar buttons** list.

**Tip:** Insert one or more Separator lines to divide the toolbar buttons into groups.

- To remove a button from the toolbar, from the **Current toolbar buttons** list, select a button name and click **<- Remove**.

**Result:** The selected button is removed from the **Current toolbar buttons** list and reappears in the **Available toolbar buttons** list.

- To change the order of buttons on the toolbar, from the **Current toolbar buttons** list, select the button name and use the **Move Up** and **Move Down** buttons to move the button to the desired position on the toolbar.
  - From the **Text options** drop-down list, control whether the button names are displayed by selecting **Show text labels** or **No text labels**.
4. Do one of the following:
- Click **Close** to save the new settings.
  - Click **Reset** to return the toolbar to its default configuration.

### Related Topics

Custom Buttons  
Using the Queue Control Toolbar

## Using the Queue Control Toolbar

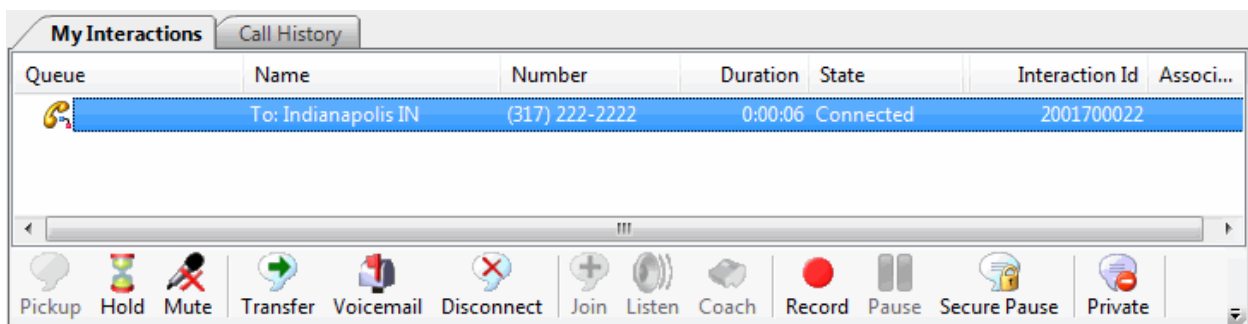
### Using the Queue Control Toolbar

**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.

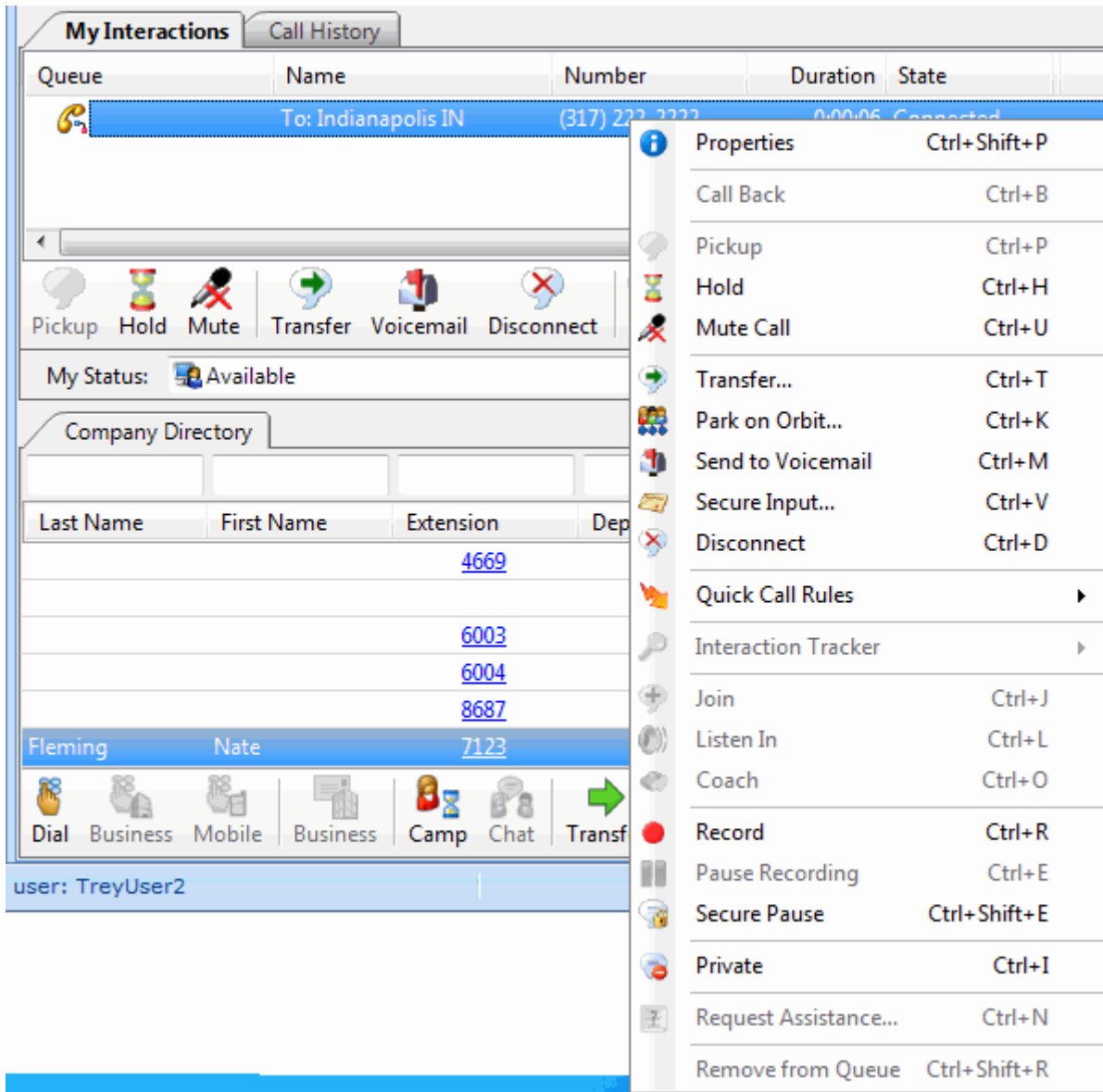
My Interaction Rights determine the actions you can perform on interactions in My Interactions. Access Control rights determine which actions you can perform on **other queues** you have the rights to display. To **Disconnect**, **Hold**, **Mute**, **Pickup** or **Transfer** interactions, you need the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

 Assistance

 Coach or Whisper (Operator Console)

 Disconnect

 Hold

 Join

 Listen

 Mute


 Park on Orbit

 Pause

 Pickup

 Properties

 Private

 Record

 Secure Input

 [Secure Pause](#)

 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 Toolbars
- Using the Queue Control Toolbar

## Assistance Button

**Requirements:** The "Assistance" Interaction Command Right determines whether the Assistance button can appear on a toolbar. It also controls whether the Request Assistance command appears on a shortcut menu or is available via a keyboard shortcut. The Request Assistance from Supervisors Security right enables you to request assistance from your supervisor.

<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar Queue Control toolbar Chat window E-mail Window for Incoming Messages E-mail Window for Outgoing Messages
<b>Keyboard keys</b>	<b>Ctrl+N</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Sometimes you encounter an interaction for which you need assistance. For example, a caller asks a question that you cannot answer. Or you are in the middle of a web chat when you need help from your supervisor.  If you need help with an interaction, click the Assistance button to request assistance from your supervisor.


**Note:** The Assistance button is enabled only for ACD-routed interactions. If the interaction is not in a state in which this action can be performed, the Assistance button appears dimmed. Although you cannot request assistance on an intercom chat, you could transfer the chat session to a supervisor or conference the chat session with a supervisor.

#### Related Topics

- Assistance Process
- Request Assistance From Your Supervisor
- 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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+O</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.



<b>Description</b>	<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><b>Tip:</b> 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><b>Note:</b> 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 or is available via a keyboard shortcut. 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.


<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+D</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click Disconnect to disconnect the current interaction. When you click Disconnect, the icon for that interaction changes to a Disconnect icon. 

**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

## Help Button



<b>Icon</b>	
<b>Location</b>	Interactive Intelligence Media Bar
<b>Description</b>	Click the Help button to display the Interactive Intelligence Oracle Service Cloud Integration help.

### Related Topics

Using the Interactive Intelligence Media Bar

## 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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+H</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click Hold to place the selected interaction on hold. To take the interaction off hold, click Hold again, or click Pickup, or double-click the interaction in your My Interactions queue. When you click this button, the icon for the selected interaction changes to a Hold icon 

**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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+J</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	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. The connected call icon is displayed. 


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

### 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 In command appears on a shortcut menu or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+L</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue view to ensure that it has focus before you press the keys.
<b>Description</b>	Click the Listen button to listen to a call. You can listen to a caller leaving a voice mail

	<p>message, to an ongoing call, a call on hold, or to a conference call.</p> <p>You can also "listen to" (monitor) email, chat, callback or conference interactions.</p> <p>The parties being listened to or monitored may not be aware that someone is listening to the interaction. For more information, see Determine if Someone is Listening to or Recording Your Interactions.</p> <p><b>Tip:</b> 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>
--	--


**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

**Related Topics**

- Determine if Someone is Listening to or Recording Your Interactions
- Listen to a Call
- Listen to Someone Leave a Voicemail Message
- Using the Queue Control Toolbar

**Mute Button**

**Requirements:** The "Mute" Interaction Command Right determines if the Mute button can appear on a toolbar. It also controls whether the Mute Call command appears on a shortcut menu or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar
<b>Keyboard shortcut</b>	<b>Ctrl+U</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	<p>Click <b>Mute</b> to disable the microphone on your telephone so that the other party or parties cannot hear what you are saying.</p> <p>Click <b>Mute</b> again to reactivate the microphone.</p> <p>If you are in a conference call hosted by a different IC 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

## Park on Orbit Button

**Requirements:** The "Park" Interaction Command Right determines if the Park on Orbit button can appear on a toolbar. It also controls whether the Park on Orbit command appears on a shortcut menu or is available via a keyboard shortcut. The Park Interactions Security right enables you to park in orbit a call appearing in My Interactions.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+K</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	You can place any connected call in a specific orbit. This places the call on hold and removes it from your station. Depending on the hold behavior your CIC administrator configures, callers "in orbit" hear a combination of music and messages. To a caller, there is no difference between being on hold or in orbit.


**Note:** The Park on Orbit button does not appear on your Queue Control toolbar by default. For more information about adding buttons to a CIC client toolbar, see Customizing Toolbars.

## Related Topics

Customizing Toolbars  
Park a Call on Orbit  
Park on Queue Button  
Park a Call on Another Person's Extension  
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 Recording command appears on a shortcut menu or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+E</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other

	queue to ensure that it has focus before you press the keys.
<b>Description</b>	Use this button to control a recording session. Click this button to pause the recording session. Click it again to resume the recording session.

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



**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

**Related Topics**

- Record a Call
- Record Button
- 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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Work Item Toolbar Callback Window Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+P</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click this button to pick up the current interaction, or to take the current interaction off hold. When you click this button, the icon for a call changes to a Connected icon. 


**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
- Pick Up a Work Item
- 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 or is available via a keyboard shortcut. The Private Interactions Security right enables you to mark an interaction appearing in My Interactions as private.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Chat Window Email Window for Outgoing Messages
<b>Keyboard shortcut</b>	<b>Ctrl+I</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click this button to prevent other Customer Interaction Center users from recording or listening to your conversation.  <b>Warning:</b> Use of the Private feature may be subject to your company's policies and should only be used in accordance with those policies. CIC handler customization can be used to track the use of the Private feature to ensure compliance with such policies.

### Related Topics

Using the Queue Control Toolbar

## Properties Button on the Queue Control Toolbar


<b>Icon</b>	
<b>Location</b>	Queue Control toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+Shift+P</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	The Properties button enables you to view and edit detailed information on the selected interaction. For more information, see View and Edit Interaction Properties.  <b>Note:</b> The Properties button does not appear on your Queue Control toolbar by default, but you can add it. For more information, see Customizing Toolbars.

### Related Topics

Customizing Toolbars  
Properties Button on the Directory Toolbar  
Using the Queue Control Toolbar  
View and Edit Interaction Properties

## Record Button

**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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+R</b> <b>Tip:</b> Toolbar shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click Record to record the currently selected call or chat. A call recording is saved as a .wav file. A chat recording is saved as a .txt file. Clicking Record the first time starts the recording session for a call. Clicking Record again stops the recording session for a call. <b>Note:</b> You can press the Record button more than once to stop or continue recording your interaction. The CIC client stores each part of the recorded conversation in separate audio files or text files, and sends them to you in email message attachments after you end the call.

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

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.


**Related Topics**

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

**Secure Input Button**

**Requirements:** Your CIC administrator must enable and configure the Secure Input feature and make it available to one of the workgroups to which you belong. To use the Secure Input feature, you need the Initiate Secure Input Security Right. The "Secure Input" Interaction Command Right determines if the Secure Input button can appear on a toolbar. It also controls whether the Secure Input command appears on a shortcut menu or is available via a keyboard shortcut. The IC administrator assigns Secure Input Forms to selected workgroups. To use a specific Secure Input form, you need the **View Workgroup** Access Control Right for the workgroup to which it belongs.

See Customizing Toolbars for instructions on displaying this toolbar button if it does not appear by default.

<b>Icon</b>	
-------------	---





<b>Location</b>	Queue Control toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+V</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click <b>Secure Input</b> to start a Secure Input session. Secure input creates a secure session that is separate from the customer-agent interaction. It collects the confidential information from the customer, validates it with the appropriate web service, ends the secure session, and returns both customer and agent to the main interaction.

**Related Topics**

Secure Input  
Start a Secure Input Session

**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 or is available via a keyboard shortcut. The Secure Recording Pause Interactions Security right enables you to secure pause a recording of an interaction appearing in My Interactions.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+Shift+E</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	<p>Click <b>Secure Pause</b> 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.</p> <p></p> <p><b>The Secure Pause does not end until the timer reaches zero.</b></p> <p>You can press <b>Secure Pause</b> again during a pause to reset the countdown timer to the maximum duration of a pause.</p> <p>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> <p><b>Tip:</b> Pressing <b>Secure Pause</b> multiple times during a pause does not increase the duration beyond the maximum time limit.</p> <p><b>Note:</b> The CIC client stores the recorded conversation in a .wav file, and sends it to you in an email message attachment after you end the call. The final recording contains a beep to indicate secure (non-recorded) segments. The recording does not play silence</p>

during the secure pause segment. These segments are omitted from the recording.


**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

**Related Topics**

- Record a Call
- Secure Pause a Recording
- 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 or is available via a keyboard shortcut. 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.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+T</b>  <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	Click this button to open the Transfer dialog box where you can enter a transfer recipient in the <b>Transfer to:</b> text box and select the type of transfer operation you want to perform.  To send the interaction directly to the recipient, enter the recipient's extension (internal number) or a phone number (external number), select the recipient from the drop-down list and click <b>Transfer</b> .


**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 Send to Voicemail command appears on a shortcut menu or is available via a keyboard shortcut. The Transfer Interactions to Voice Mail Security right enables you to transfer an interaction appearing in My Interactions to your voice mail.

<b>Icon</b>	
<b>Location</b>	Queue Control toolbar Interactive Intelligence Media Bar Chat Window
<b>Keyboard shortcut</b>	<b>Ctrl+M</b> <b>Tip:</b> Keyboard shortcuts work only if you select an interaction in My Interactions or other queue to ensure that it has focus before you press the keys.
<b>Description</b>	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

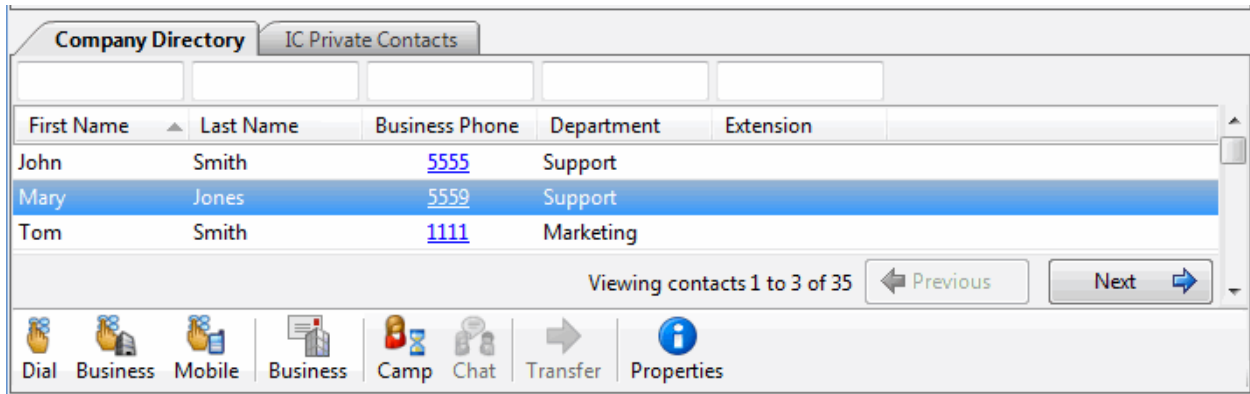
#### Using the Directory Toolbar

### Using the Directory Toolbar

Use the Directory toolbar to simplify working with the contacts listed in your directories 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 view. You can customize a Directory toolbar for each directory view.

Some buttons may not be available in all situations. If a button is unavailable, you cannot use it on the currently selected interaction or contact.

**Note:** The Directory toolbar in the Lync-enabled Company Directory view is different than the toolbar used in other Directory views. For more information, see Lync-enabled Company Directory.



### Default Directory Toolbars

The default configuration for the Directory toolbar includes the following buttons:

Toolbar Button	Function
	Camp
	Chat
	Dial Default Number
	Dial Business Phone
	Dial Mobile Phone
	Properties
	Send E-mail Message (Business)
	Transfer

### Customizing Toolbars

The default Directory toolbar does not contain all the available buttons. For more information about adding, arranging, or removing buttons, see Customizing Toolbars. For a comprehensive list of buttons you can include on your toolbar, see Directory Toolbar Buttons.







#### Related Topics

- Customizing Toolbars
- Directory Toolbar Buttons
- Directory Toolbar Shortcuts
- Using the Toolbars

### Directory Toolbar Shortcuts

Like the Queue Control toolbar, the Directory toolbar contains buttons that have shortcut keys assigned to them. Pressing shortcut keys performs the same task as pressing the button.

**Tip:** Select a directory entry before you press a Directory toolbar shortcut. When transferring or parking a call, select both the interaction and the directory entry before pressing the shortcut keys.

Toolbar Button	Shortcut Keys	Function
	Enter	Dial Default Number
	Ctrl+B	Dial Business Phone
	Ctrl+I	Dial Mobile Phone
	Ctrl+E	Send E-mail Message (Business)
	Ctrl+A	Camp
	Ctrl+Shift+C	Chat
	Ctrl+Shift+P	Properties








### Directory Shortcuts and the shortcut menu


























You can view the currently available directory shortcuts by right-clicking on a directory entry to display the shortcut menu. Actions that are not available for the current directory entry are grayed-out.







### Directory Toolbar Buttons

### Directory Toolbar Buttons

The following list contains the buttons available for the Directory toolbar. For more information about adding toolbar buttons to the Directory toolbar, see Customizing Toolbars.

Toolbar Button	Label	Function
	Assistant	Dial Assistant Phone
	Assistant	Consult transfer to Assistant Phone
	Assistant	Blind transfer to Assistant Phone
	Business	Dial Business Phone
	Business	Consult transfer to Business Phone
	Business	Blind transfer to Business Phone
	Business	Send an email message to the Business address


	Business 2	Dial Business Phone 2
	Business 2	Consult transfer to Business Phone 2
	Business 2	Blind transfer to Business Phone 2
	Camp	Camp
	Chat	Initiate new Chat
	Conference	Create or Expand a Conference Call by Adding Parties
	Consult	Consult Transfer
	Dial	Dial default phone number
	Email	Send an email message to the business address for the selected directory entry.
	Extension	Dial default phone number extension
	Fax	Dial Fax
	Fax	Consult transfer to Fax
	Fax	Blind transfer to Fax
	Home	Dial Home Phone
	Home	Consult transfer to Home Phone
	Home	Blind transfer to Home Phone
	Home	Send an email message to the Home address
	Home 2	Dial Home Phone 2
	Home 2	Consult transfer to Home Phone 2
	Home 2	Blind transfer to Home Phone 2
	Mobile	Dial Mobile Phone
	Mobile	Consult transfer to Mobile Phone
	Mobile	Blind transfer to Mobile Phone
	Pager	Dial Pager
	Pager	Consult transfer to Pager

	Pager	Blind transfer to Pager
	Park	Park on Queue
	Properties	Properties
	Status	Change user's status
	Transfer	Blind transfer to default number
	Voicemail	Send to Voicemail

### Related Topics

Using the Directory Toolbar

## Camp Button


<b>Icon</b>	
<b>Location</b>	<b>Directory Toolbar</b>
<b>Keyboard shortcut</b>	<b>Ctrl+A</b>
<b>Description</b>	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.

<b>Icon</b>	
<b>Location</b>	<b>Directory Toolbar</b> <b>Note:</b> The Change User's Status button may not appear on your Directory toolbar by default. For a list of available buttons, see <a href="#">Directory Toolbar Buttons</a> . For instructions on adding them to your Directory toolbar, see <a href="#">Customizing Toolbars</a> .
<b>Keyboard shortcut</b>	<b>Ctrl+S</b>
<b>Description</b>	You can set another user's status in the Company Directory or other directory view.

### Related Topics

Directory Toolbar Buttons  
Set Another User's Status

## Conference Button

<b>Icon</b>	
<b>Location</b>	<b>Directory Toolbar</b>
<b>Description</b>	Click this button to add a directory contact to a conference call.

### Related Topics










Create or Expand a Conference Call by Adding Parties

## Consult Transfer Buttons

**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.

A variety of different Consult Transfer buttons can appear on the Directory toolbar. Use these buttons to transfer an interaction to a specific number associated with a selected directory entry **after consulting the recipient**.

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

<b>Icons</b>	<b>Label</b>	<b>Function</b>
	Assistant	Consult transfer to Assistant Phone
	Business	Consult transfer to Business Phone
	Business 2	Consult transfer to Business Phone 2
	Consult	Consult Transfer
	Fax	Consult transfer to Fax
	Home	Consult transfer to Home Phone
	Home 2	Consult transfer to Home Phone 2
	Mobile	Consult transfer to Mobile Phone
	Pager	Consult transfer to Pager
<b>Location</b>	<b>Directory Toolbar</b>	
	<b>Note:</b> You can configure which Consult Transfer buttons appear on your Directory toolbar. For more information, see <a href="#">Customizing Toolbars</a> .	
<b>Description</b>	Click a Consult Transfer button to speak with the transfer recipient while your original caller stays on hold then transfer the selected interaction to a specific number for a selected Directory entry.	
	<b>Note:</b> The toolbar button is unavailable if this number is not recorded for the selected Directory	



entry. For example, the Consult Transfer to Assistant Phone button is disabled if the phone number does not exist for the currently selected Directory entry.











### Related Topics

Transfer a Call After Consulting the Recipient  
View and Edit Directory Entries

## Dial Buttons


A variety of different Dial buttons can appear on a standard Directory toolbar. Use these buttons to dial a specific number associated with a selected directory entry.

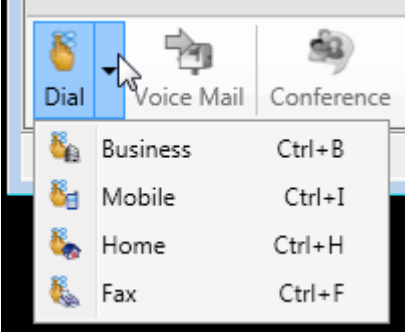
**Note:** For information about checking which numbers are associated with your directory entries, see View and Edit Directory Entries.

Icons	Label	Function
	Assistant	Dial Assistant Phone
	Business	Dial Business Phone
	Business 2	Dial Business Phone 2
	Dial	Dial default phone number
	Extension	Dial default phone number extension
	Fax	Dial Fax
	Home	Dial Home Phone
	Home 2	Dial Home Phone 2
	Mobile	Dial Mobile Phone
	Pager	Dial Pager
<b>Location</b>	<b>Directory Toolbar</b> <b>Note:</b> You can configure which Dial buttons appear on your Directory toolbar. For more information, see Customizing Toolbars.	
<b>Description</b>	Click a Dial button to dial a specific number for a selected Directory entry. <b>Note:</b> The toolbar button is unavailable if this number is not available for the selected Directory entry. For example, the Dial Assistant Phone button is disabled if the phone number does not exist for the currently selected Directory entry.	

### Lync-enabled Company Directory Dial Button

The Lync-enabled Company Directory consolidates dial buttons into a single **Dial** button with a drop-down list.


<b>Icon</b>	
-------------	---

<b>Location</b>	<b>Lync-enabled Company Directory toolbar</b>
<b>Description</b>	<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"> <li>▪ Select an entry in the Lync-enabled Company Directory and then click the Dial button to dial the default number.</li> <li>▪ Select an entry in the Lync-enabled Company Directory and then click the arrow on the Dial button. Click one of the displayed "Dial" entries to dial the associated number.</li> </ul> 

**Related Topics**

- Directory Toolbar Buttons
- Lync-enabled Company Directory
- Make a Call Using a Dial Button
- View and Edit Directory Entries


**Initiate New Chat Button**

<b>Icon</b>	
<b>Location</b>	<b>Directory Toolbar</b>
<b>Keyboard shortcut</b>	<b>Ctrl+Shift+C</b>
<b>Description</b>	<p>Click this button to start and participate in intercom chats with other CIC client users.</p> <p><b>Note:</b> 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

**Park on Queue Button**


<b>Icon</b>	
<b>Location</b>	<b>Directory Toolbar</b>

	<b>Note:</b> The Park on Queue button may not appear on your Directory toolbar by default. For a list of available buttons, see Directory Toolbar Buttons. For more information about adding buttons to your Directory toolbar, see Customizing Toolbars.
<b>Description</b>	You can place any connected call or connected ACD-routed email interaction in your queue in a selected user's queue or workgroup queue. 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.

**Related Topics**

- Customizing Toolbars
- Park a Call on Orbit
- Park on Orbit Button

**Properties Button on the Directory Toolbar**

<b>Icon</b>	
<b>Location</b>	Directory Toolbar
<b>Keyboard shortcut</b>	<b>Ctrl+Shift+P</b> <b>Tip:</b> Keyboard shortcuts work only if you select a directory entry to ensure it has focus before you press the keys.
<b>Description</b>	The Properties button on your Directory toolbar enables you to view and edit detailed information for the selected directory entry. For more information, see View and Edit Directory Entries.



**Related Topics**

- Customizing Toolbars
- Properties Button on the Queue Control Toolbar
- View and Edit Directory Entries

**Send Email Message Buttons**

Two different send email message buttons can appear on the Directory toolbar. Use these buttons to send an email message to a specific email address associated with a selected directory entry.

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


Icons	Label	Function
	Business	Send an email message to the Business email address.
	Home	Send an email message to the Home email address.
<b>Location</b>	<b>Directory Toolbar</b> <b>Note:</b> You can configure which Send Email buttons appear on your Directory toolbar. For more	

	information about adding buttons to your Directory toolbar, see Customizing Toolbars.
<b>Keyboard shortcut</b>	For a list of email keyboard shortcuts, see Directory Toolbar Shortcuts.
<b>Description</b>	Click an email button to use your email program to send an email message to a specific address for a selected Directory entry. <b>Note:</b> The toolbar button is unavailable if this address is not available for the selected Directory entry. For example, the Send Email to Home address button is disabled if that email address does not exist for the currently selected Directory entry.

**Related Topics**

Send an Email Message

**Send to Voicemail Button**

<b>Icon</b>	
<b>Location</b>	<b>Directory Toolbar</b> <b>Note:</b> The Send to Voicemail Button may not appear on your Directory toolbar by default. For a list of available buttons, see Directory Toolbar Buttons. For more information about adding buttons to a toolbar, see Customizing Toolbars.
<b>Description</b>	Use this button to transfer a call to a selected CIC user's voice mail account. Select a directory entry and click this button. The currently selected call is transferred to the designated user's voice mail.

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

**Related Topics**

- Transfer a Call to Another Person's Voicemail
- Transfer a Call to Your Voicemail
- Using the Queue Control Toolbar
- Voicemail Button










**Blind Transfer Buttons**

**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.

A variety of different Blind Transfer buttons can appear on the Directory toolbar. Use these buttons to transfer an interaction **without consulting the recipient** to a specific number associated with a selected directory entry.

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

Icons	Label	Function
-------	-------	----------

	Assistant	Blind transfer to Assistant Phone
	Business	Blind transfer to Business Phone
	Business 2	Blind transfer to Business Phone 2
	Fax	Blind transfer to Fax
	Home	Blind transfer to Home Phone
	Home 2	Blind transfer to Home Phone 2
	Mobile	Blind transfer to Mobile Phone
	Pager	Blind transfer to Pager
	Transfer	Blind transfer to default number
<b>Location</b>	<b>Directory Toolbar</b> <b>Note:</b> You can configure which Blind Transfer buttons appear on your Directory toolbar. For more information, see Customizing Toolbars.	
<b>Description</b>	Click a blind Transfer button to transfer the selected interaction to a specific number for a selected Directory entry. <b>Note:</b> The toolbar button is unavailable if this number is not available for the selected Directory entry. For example, the Blind Transfer to Assistant Phone button is disabled if an assistant’s phone number does not exist for the currently selected Directory entry.	

**Related Topics**

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

**Configuration Options**

**Configuration Options**

**Requirements:** You need the Customize Client Security right to customize your personal CIC client configuration settings. You need the Manage Client Templates Security right to create or edit templates for other CIC client users. For more information, see Client Templates.

The CIC client organizes your configuration options in a single dialog box. The Configuration dialog box contains the following properties details panes:

**Alerting**

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

**Calls**

- Follow Me Routing

- Call Coverage
- Personal Prompts

#### Email

#### IP Phone

#### Monitored Appearances

#### Views

- Call History
- Dial Pad
- Directories
- Search Processes
- Queues
  - Orbit Queue
- Tracker
  - Lync Embedded Client
- Unified Messaging
  - Fax Viewer
  - Voicemail

#### General

#### Automatic Status Changer

#### Interaction Optimizer Settings

#### Outlook Dialing

#### Related Topics

- Client Templates
- Understanding the Configuration Dialog Box

## Understanding the Configuration Dialog Box

**Requirements:** You need the Customize Client Security right to customize your personal CIC client configuration settings. Specific settings in the Configuration dialog box properties details pane can be unavailable if they do not apply in your current configuration. Client templates can contain configuration settings that you may not be able to change. A lock icon indicates the panes containing settings you cannot change.

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

You can use the Configuration dialog box to control the appearance and behavior of the CIC client.

### Accessing the Configuration Dialog Box

To access the Configuration dialog box:

- From the Interactive Intelligence Media Bar, click Configuration. In the first Configuration dialog box, click **Configure Client**.

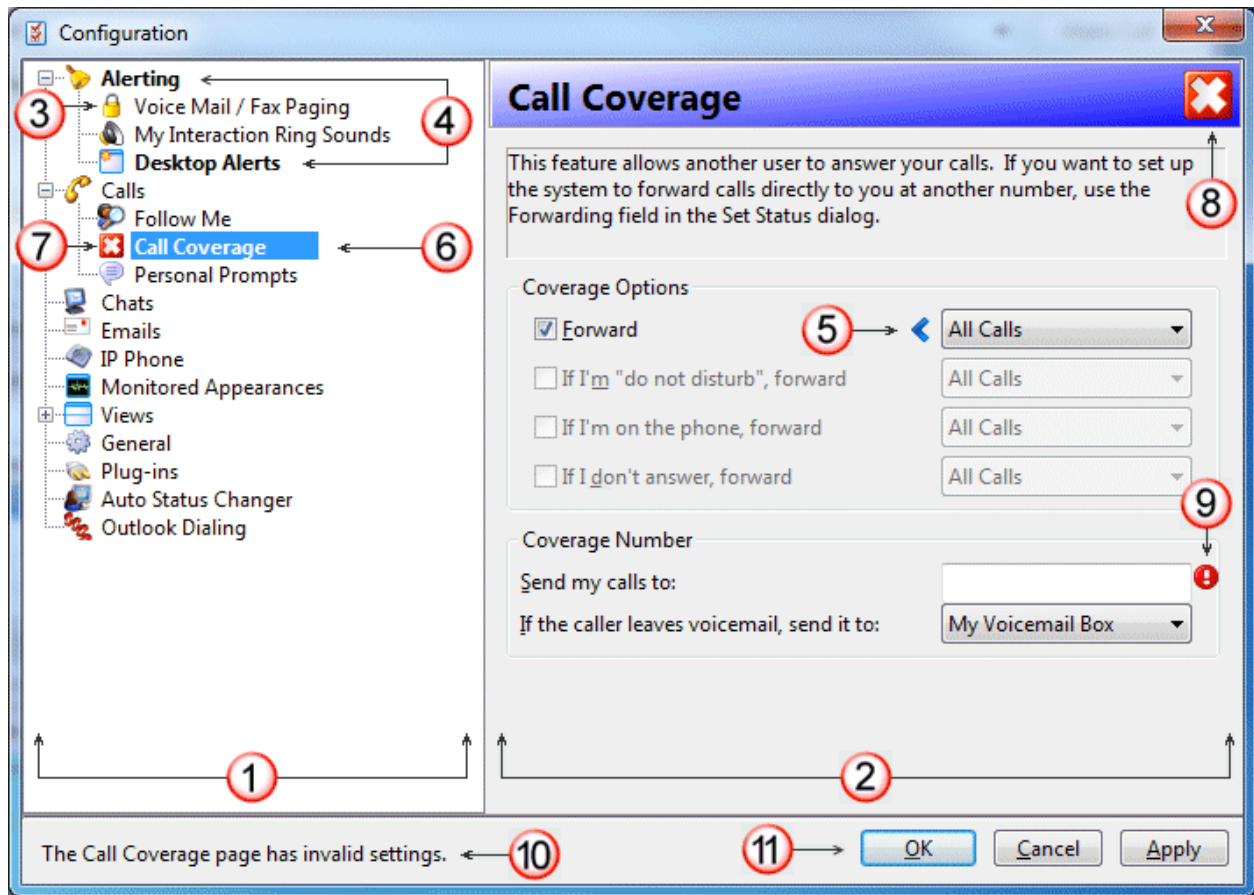
### Using the Configuration Dialog Box

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

**Note:** In the initial release, only the Follow Me node is available.

### Shortcut Keys

Shortcut keys are available for many of the options in a Properties details pane. If you do not see the underlined characters for the shortcuts, press the **Alt** button. Press **Alt** plus the appropriate letter to select or clear a check box, select a radio button, or to move your cursor to a control or text box.



1	<b>Navigation pane</b>	The Configuration dialog box shows the available types of settings in a tree view control on the left. Click any node to display the settings for that node.  <b>Note:</b> The list of nodes changes based on which plug-ins your CIC administrator enables and your feature licenses. For more information, see the help links in Configuration Options.
2	<b>Properties details pane</b>	The settings associated with each node appear in the Properties details pane.
3	<b>Lock icon</b>	Your CIC administrator can use Client Configuration Templates in Interaction Administrator to prevent users from modifying selected configuration settings. If you cannot modify the settings for a particular node, a <b>lock icon</b> appears

		next to the node name. Also, the corresponding setting controls on the associated properties details pane are unavailable.
4	<b>Modified settings</b>	Two indicators appear when you change a setting but have not yet applied (saved) this change:
5		<ul style="list-style-type: none"> <li>In the navigation pane, a <b>bold node name</b> identifies a properties details pane which contains modified settings that have not yet been applied.</li> <li>In the Properties details pane, a <b>pointer icon</b> identifies the specific setting that has been changed but not yet applied.</li> </ul>
6	<b>Selected node</b>	The name of the currently selected node is highlighted.
7	<b>Error icons</b>	Error icons appear in several places in the Configuration dialog box:
8		<ul style="list-style-type: none"> <li>Before the name of the node containing the incorrect or missing setting.</li> </ul> <p><b>Tip:</b> Click this icon to display the properties details pane containing the error.</p>
9		<ul style="list-style-type: none"> <li>In the banner for the Properties details pane.</li> </ul> <p><b>Note:</b> Usually the banner displays the same icon as the corresponding node in the Navigation pane. Some properties details panes require a valid connection to the CIC server to save their settings. If the connection drops, the banner icon changes to a <b>broken connection icon</b> and the settings controls are unavailable or the properties details pane is blank.</p>
10	<b>Error message</b>	Error messages appear in the bottom section of the Configuration dialog box.
11	<b>Command buttons</b>	<ul style="list-style-type: none"> <li>Click <b>OK</b> to save any changed settings and close the Configuration dialog box.</li> <li>Click <b>Cancel</b> to discard any changed settings and close the Configuration dialog box.</li> <li>Click <b>Apply</b> to save any changed settings and keep the Configuration dialog box open.</li> </ul>

### More Information

The list of nodes can and does change based on which plug-ins are enabled and which optional features are installed in the CIC client. For more information, see the help links in Configuration Options.

### Related Topics

- Automatic Status Changer
- Configure Your IP Phone
- Client Templates

### Miscellaneous Configuration Options

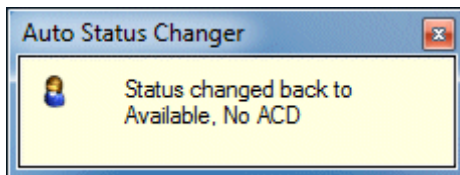


## Automatic Status Changer

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

Use the Automatic Status Changer to change your CIC status when your screen saver turns on or off or when your workstation is locked or unlocked. For example, Automatic Status Changer could set your status to "Available" when your screen saver turns off.

When Automatic Status Changer resets your status, it displays a desktop alert.



### Special Circumstances

If the Automatic Status Changer doesn't change your status or your status is not what it set it to, Automatic Status Changer doesn't reset your status when you resume work. For example, Automatic Status Changer sets your status to Away From Desk when you lock your workstation. Then you use the TUI (Telephone User Interface) to set your status to Available, Forward. Automatic Status Changer does not change your status back to Away From Desk when you unlock your workstation.

If your status is already set to what the Automatic Status Changer would change it to when you resume work, it does change your status.

Also, setting a user's status requires a **valid connection with the IC server**. If your server connection drops, the Automatic Status Changer does not change your status when the screen saver turns on or off or the workstation is locked or unlocked.

**Warning:** Do not use the Automatic Status Changer if you set up **Power Options Properties** in Control Panel to turn off your monitor after a set amount of time. When the monitor's power is turned off, the Automatic Status Changer thinks the screen saver has turned off. It changes your status back to either what it was before the screen saver started or to a pre-defined status specified in the Automatic Status Changer dialog.

In the rare case that you run more than one type of CIC client at the same time, do not enable Automatic Status Changer in both applications. For example, running Interaction Desktop and Interaction Connect at the same time is not a supported configuration. Enable Automatic Status Changer in only one CIC client.

### Configuring Automatic Status Changer

**Note:** Automatic Status Changer is a required plug-in. Required plug-ins cannot be removed from the CIC client and do not appear in the Plug-ins property details pane of the Configuration dialog box. You configure this plug-in in the Auto Status Changer property details pane of the Configuration dialog box.

**To configure the Automatic Status Changer:**

1. In the Configuration dialog box, click the **Auto Status Changer** node.
2. Use the **When to Change** tab to enable or disable the auto status changer. The two options are:

<b>Not at this time. I wish to disable the auto status changer.</b>	Disable the Automatic Status Changer.
<b>When my workstation locks or the screen saver starts.</b>	Change user's CIC status whenever the screen saver turns on or off or when the workstation locks or unlocks. If this option is selected, screen saver activation or workstation

	locking is interpreted as you going away. If screen saver activation causes your CIC status to change, then stopping the screen saver sets your status back. Similarly, if the workstation locks and causes your CIC status to change, then unlocking the workstation resets your status.
--	---

- If you enable the Automatic Status Changer, use the **What to Change** tab to determine what status is set when the screen saver turns on or off.
- In the **What to do when I go away** section:

<b>Set my status to:</b>	Choose the status you want the Automatic Status Changer to set when your screen saver activates or your workstation locks. For example, your status can be set automatically to "Away from Desk."
<b>Only change my status if my current status is in the Selected list</b>	<p>Select this check box for additional control over <b>when</b> the Automatic Status Changer changes your status if the screen saver activates or the workstation locks.</p> <p><b>If checked</b>, the Automatic Status Changer changes your status when the screen saver activates or the workstation locks <b>only if your current status is in the Selected list</b>.</p> <p>Click a status in the Available list and then click the &gt;&gt; button to move it to the Selected list. Use the &lt;&lt; button to move a status from the Selected list back to the Available list.</p> <p><b>If cleared</b>, the Automatic Status Changer always changes your status when the screen saver activates or the workstation locks. It changes your status to the status specified in the <b>Set my status to</b> drop-down list.</p>
<b>If my status is changed, set my status notes to:</b>	<p>If you want to have status notes set for the status to which you are changed, check this check box and enter the status notes in the text box provided.</p> <p><b>Note:</b> Status notes work on a per status basis. Status notes appear in the Status Notes column which can be displayed for CIC users. For example, both workgroup and the Company Directory can display Status Notes.) For more information, see <a href="#">Customize Columns</a>.</p>

- In the **What to do when I come back** section:

<b>Set my status to what it was auto-changed from</b>	<p>Select this radio button to change your status to what it was before the screen saver activated or the workstation locked.</p> <p><b>Note:</b> The Automatic Status Changer does not change your status back to one you could not have selected and which was automatically set for you. For example, CIC could automatically set your status to "Follow Up" after you disconnect an ACD interaction. After a period of inactivity, the Automatic Status Changer sets your status to "Away from Desk." When you unlock your workstation or turn off your screen saver, the Automatic Status Changer does <b>not</b> set your status back to "Follow Up." "Follow up" is not a user-selectable status. Your status remains set to "Away from Desk."</p>
---	---

**Set my status to**

Select this radio button and select a status from the list to change your status to a pre-determined status when the screen saver turns off or the workstation unlocks.

6. Click **Apply** to save your selections.
7. Click **OK** to close the Configuration dialog box.

**Related Topics**

Possible Status Values  
 Set Status Details  
 Set Your Status  
 Set Another User's Status  
 Setting Status  
 Understanding the Configuration Dialog Box  
 Unavailable Status Reminder  
 View Another User's Status

**Configure Your IP Phone**

If you have a Managed IP phone, you can configure synchronization between the Do Not Disturb (DND) setting on your phone and your CIC client user status. These configuration settings enable you to specify what CIC sets your user status to when you activate DND status or turn off DND on your phone.

**Note:** Your CIC administrator can enable the DND synchronization feature and create custom configuration settings for you in Interaction Administrator. Your CIC administrator also controls whether you can alter these configuration settings. For more information, see [Understanding the Configuration Dialog Box](#).

**To configure DND Status Synchronization:**

1. In the Configuration dialog box, click the **IP Phone** node.

**Note:** This node is available only if you have a managed IP phone.

2. From the **When I turn the DND button on, set my status to:** drop-down list, select the status you want to have when you activate the DND button on your IP phone.
3. In the **When I turn the DND button off** section, do one of the following:

- Select **Set my status to the last available status**

**Result:** When you turn DND status off using your phone, your CIC status returns to what it was before you activated the DND button.

- Select **Set my status to** and from the drop-down list, select a CIC status.

**Result:** When you turn DND status off using your phone, your CIC status is set to the status you select here.

4. Click **Apply** to save your selections.
5. Click **OK** to close the Configuration dialog box.

**Related Topics**

Managed IP Phone  
 Possible Status Values  
 Set DND Status with Your Phone

Set Your Status  
Setting Status  
Understanding the Configuration Dialog Box

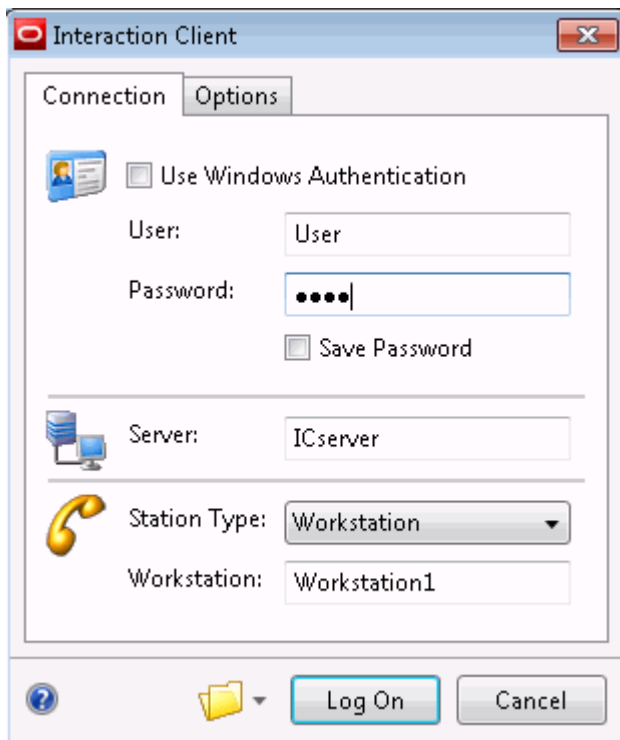
## Connection Tab of the Logon dialog box

Use the **Connection** tab of the Logon dialog box to enter authentication details and server connection information.

**Tip:** The **Save As** and **Open** buttons enable you to save multiple startup configurations (profiles) and to select a preferred configuration when starting the CIC client.

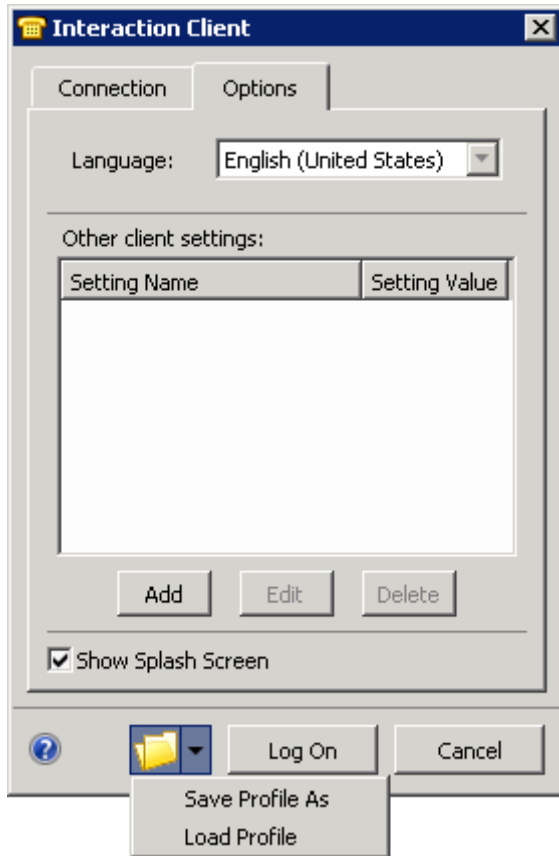
**To adjust your log on authentication details, or change your host and station information:**

1. Open the Logon dialog box.



**Note:** If your CIC administrator has enabled the Single Sign On feature, the appearance of your Logon dialog box may be slightly different.

2. Do one of the following:
  - To change your current log on settings or to create an alternate startup configuration, proceed to the next step.
  - To change an existing set of log on settings, click the drop-down arrow next to the **Profile** (folder) icon. Select **Load Profile**. Find the appropriate profile and click **Open**.
3. In the **Connection** tab, make any necessary adjustments. For more information, see Logon Settings.
4. Optionally, on the Options tab, select another language for the CIC client interface and help.
5. If you changed any settings, click the drop-down arrow next to the Profile (folder) icon. Select **Save Profile As**.



**Result:** The **Save As** dialog box appears.

5. Do one of the following:
  - If you selected an alternate profile in step 2, verify that the appropriate name appears in the **File name** drop-down list box and click **Save**.
  - To change your default settings, in the **File name** drop-down list box, select **Default.i3client** and click **Save**.
  - To create a profile, in the **File name** drop-down list box, enter a new file name in this format: *filename.i3client*. Click **Save**.
6. To test your configuration changes by logging on to the CIC client, click **Log On**.

### Related Topics

Options Tab of the Logon dialog box  
Single Sign On

## General Configuration Options

### To set general options:

1. In the Options dialog box, make these selections:

### Attempt auto-login at Oracle Service Cloud startup

- Select **Never** if you want to log on manually. For more information, see Logging On.

- Select **Always** to log on to the CIC client every time you start Oracle Service Cloud.
- Select **Only if logged on when Oracle Service Cloud was last closed** to log on when you start Oracle Service Cloud only if you ran the CIC client in your last Oracle Service Cloud session.

**Media Bar**

Click **Configure Client** to configure any of several configuration options available to you in the Interactive Intelligence Oracle Service Cloud Integration. For more information, see Configuration Options.

**Personal Call Rules**

Click **Call Rules** to set up rules for personal calls. For more information, see Setting Up Personal Rules.

**About**

Click **About** to display the CIC client current version number and other information.

3. Click **OK** to save your settings and close the Configuration dialog box.

**Related Topics**

- About dialog box**
- Configuration Options**
- Language Setting
- Logging On**
- Setting Up Personal Rules**

## General Options

**Requirements:** You need the Customize Client Security right to configure general options. Client templates can contain configuration settings that determine your general options and control whether you can alter configuration settings.

**To set general options:**

1. In the Configuration dialog box, select the **General** node.
2. In the **General** properties details pane, in the **Interactions** section, select the appropriate options:

<b>Hide disconnected interactions</b>	Select this check box to remove interactions from My Interactions or other queue immediately after you disconnect them.
<b>Confirm drag and drop operations</b>	Select this check box to display a confirmation dialog box anytime you perform a drag and drop operation such as dragging and dropping a call on another call to create a conference call. For more information, see Drag and Drop a Call on Another Call.
<b>Confirm single click dialing</b>	Select this check box to display a confirmation dialog box anytime you start a call by single-clicking on a number in your Call History, or Company directory. This gives you the opportunity to click Yes or No before the call is dialed.  <b>Note:</b> If you enable both Advanced Dialing Options and <b>Confirm single click dialing</b> , the confirmation dialog box does <b>not</b> appear. However, clicking <b>OK</b> in the Advanced Dialing Options dialog box is the same as clicking <b>Yes</b> in the confirmation dialog box.

3. In the **Notification Area** section, select the appropriate options:

<p><b>Show actual status icon in system tray</b></p>	<p>Select this check box to replace the CIC client icon with an icon associated with your status (Available, Away from Desk, etc.).</p>
<p><b>Minimize to the notification area instead of the task bar</b></p>	<p>Select this check box to remove the CIC client icon from the Windows taskbar when you close the CIC client workspace.</p> <p>This setting controls what happens on the Windows taskbar when you <b>close</b> the workspace, instead of exiting the CIC client entirely. When you close the workspace, the CIC client continues to run. To restore the CIC client workspace, single-click the taskbar icon or notification area icon. For more information, see Exiting.</p> <p><b>Note:</b> This setting has no effect if you have already pinned the CIC client application to the Windows taskbar. If the application is pinned, the taskbar icon remains when you close the CIC client.</p>

4. In the remaining, unlabeled section, select the appropriate options:

<p><b>Automatically play voice mail interactions</b></p>	<p>The option controls what happens after an agent picks up an ACD-routed voice mail interaction in the My Interactions view and an email form containing the voice mail attachment opens.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>Select this check box to open the Interaction Voicemail Player automatically and immediately play the voice mail.</li> </ul> <p><b>Tip:</b> Interaction Voicemail Player configuration options affect this selection. If Interaction Voicemail Player is not set to be your default voice mail player, then voice mail opens in your default.wav player (Windows Media Player, Real Player, etc.). Also, if <b>Play voice mail automatically on open</b> is not selected in the Interaction Voicemail Player options, the Voicemail Player opens, but you must click the Play button to hear the voice mail. For more information, see Configuring Interaction Voicemail Player.</p> <ul style="list-style-type: none"> <li>Clear this check box if you prefer to manually open the voice mail attachment in the email form.</li> </ul> <p><b>Note:</b> An ACD-routed voice mail interaction is a voice mail left by a customer who dials into a workgroup queue. This voice mail is sent to the workgroup email Inbox as an attachment to an email. The email is then sent to the first available agent in the workgroup. It appears in the agent's My Interactions view as an ACD-routed voice mail interaction.</p>
<p><b>Sort account codes by account number</b></p>	<p>Select this check box to sort account codes by account numbers within the CIC client.</p>

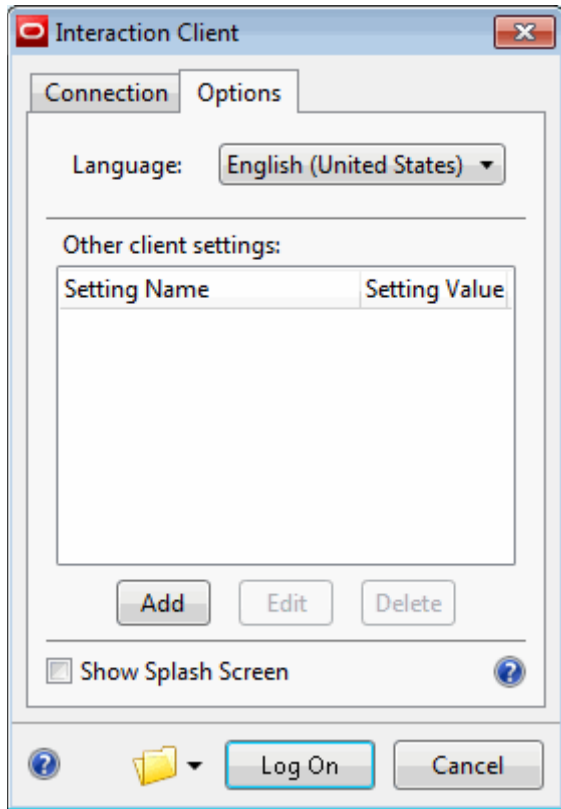
5. Click **Apply** to save your selections.

6. Click **OK** to close the dialog box.

**Related Topics**

Understanding the Configuration Dialog Box

## Options Tab of the Logon dialog box



<b>Language</b>	If your CIC administrator has installed the appropriate language pack on the IC server, you can select a language other than English for the CIC client interface and help. For more information, see Language Setting.
<b>Other client settings</b>	In some cases, and under the direction of a support representative or your CIC administrator, you can create settings that control the operation of the CIC client.
<b>Show Splash Screen</b>	Use this check box to control whether the CIC client splash screen appears when you log on to the CIC client.
<b>Profile drop-down list</b>	The drop-down list next to the Profile (folder) icon enables you to save multiple log on configuration settings (profiles) and to select a preferred profile when logging on to the CIC client. For more information, see Using Profiles to Log On.

### Related Topics

- Connection Tab of the Logon dialog box
- Language Setting
- Logon Dialog Box

## Outlook Dialing

**Requirements:** If you are running Microsoft Lync when you try to use the Call feature for a contact in Outlook 2007 or Outlook 2010, Lync attempts to dial the call instead of the CIC client. For more information about installing the appropriate hot fix and modifying the Windows registry, see the Microsoft Support site, <http://support.microsoft.com/kb/959625>.



The Outlook Dialing feature is an optional component for the CIC client. When it is installed, it enables Microsoft Outlook to dial telephone numbers, such as contacts.

In technical terms, this feature is a minimal telephony service provider (TSP) that is based on Microsoft's TAPI/TSP specification. "TAPI" stands for Telephony Application Programming Interface. The Outlook Dialing feature provides a bridge between the Customer Interaction Center and Outlook's TAPI capability.

## Installation and Configuration

Before you can configure or use the Outlook Dialing feature, you must install it as part of the Interaction Center User Applications Setup. For more information, see the *IC Installation and Configuration Guide*.

## Verify Installation

To verify installation of the Outlook Dialing addin:

1. In the Configuration dialog box, click the **Outlook Dialing** node.
2. In the Outlook Dialing property details pane, verify that Installation State is **Installed**.
3. Click **OK** to close the Configuration dialog box.

## Configure Outlook Dialing

After you have installed the Outlook Dialing feature, you can verify that the necessary TAPI provider was installed and complete the necessary configuration in Microsoft Outlook.

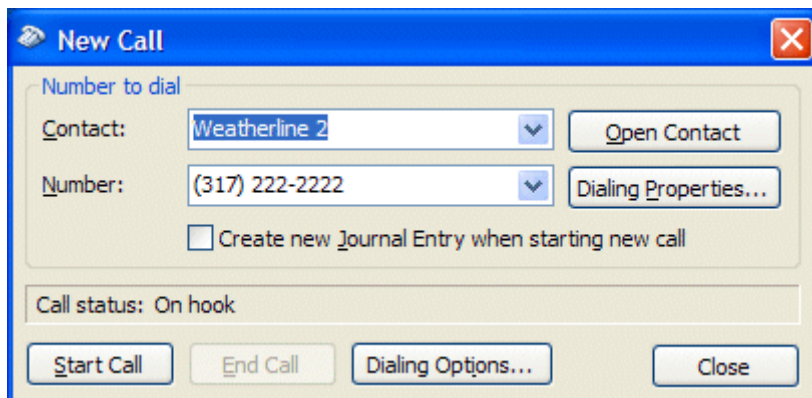
**Note:** You can complete the following steps now or the first time you dial an Outlook contact.

To configure the Outlook Dialing addin:

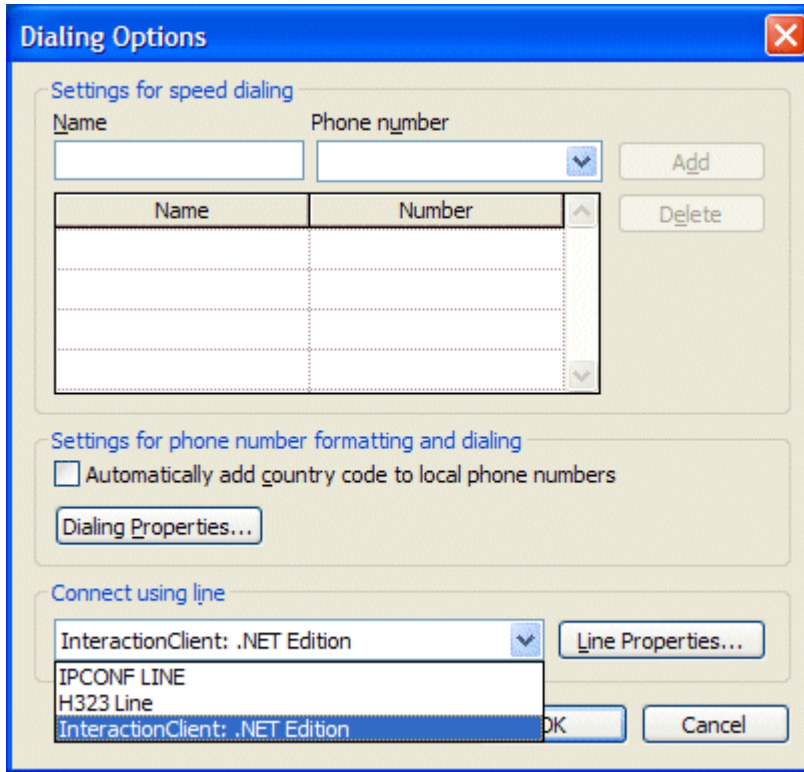
1. In Microsoft Outlook, right-click a selected Outlook contact.

**Tip:** For more information about locating and displaying an Outlook contact, see the *Microsoft Office Outlook Help*.

2. From the drop-down menu, select **Call Contact**.
3. In the New Call dialog box, select **Dialing Options**.



4. In the Dialing Options dialog box, select a CIC client from the **Connect using line** drop-down list.



5. Click **OK** to save your settings.

### Dial a Microsoft Outlook Contact

Before you can dial an Outlook contact, the CIC client must be running and you must be logged onto a station.

**Note:** Select the appropriate dialing option before trying this for the first time. For more information, see the **Configuring the Outlook Dialing Plug-in** instructions above.

1. Right-click an Outlook Contact.

**Tip:** For more information about locating and displaying an Outlook contact, see the Microsoft Office Outlook Help.

2. From the drop-down menu, select the arrow next to the contact's name.
3. Click the number to dial.

### Voicemail Message View

**Requirements:** You must install Interaction Voicemail Player on your workstation in order to display the Voicemail Message view.

The Voicemail Message view includes a playback interface that enables you to listen to your voice mail messages on a choice of devices. For more information, see Use the Voicemail Message View.

**To display the Voicemail Message view and player:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Unified Messaging**.
2. In the **Views** list, select **Voicemail**.

3. Click **OK**.

**Result:** The Voicemail Message view appears.

### Related Topics

- Add or Close Views
- Customizing the Interface
- Use the Voicemail Message View

## Alerting Options

### Alerting Options

**Requirements:** The Multiple Calls Security right controls whether you are alerted to the arrival of a new call when you are already on a call. This type of alert is in addition to the alerting options you can figure yourself.

You can choose how you want the CIC client to notify you of incoming calls. You can configure it to send a message to your pager when you have new messages. You can assign distinctive.wav files to alert you of new calls, chats, e-mails, or other interactions. The Alerting node enables you to set the following options:

- General Alerting Options
- Voice Mail / Fax Paging
- My Interactions Ring Sounds
- Desktop Alerts
- Parked Call Alerting Options

## Desktop Alerts

Use Desktop Alerts to display a desktop dialog box for alerting interactions and other events. The desktop dialog box pops up in the bottom right corner of your Windows desktop. The dialog box fades automatically depending on the type of alert. You can stop the fading by moving the mouse over the dialog box.



### Setting Up Desktop Alerts

To set up desktop alerts:

1. In the Configuration dialog box, expand the **Alerting** node and click the **Desktop Alerts** node.
2. In the Desktop Alerts properties details pane, complete the fields as described below.

<b>Display desktop alerts for alerting interactions</b>	Select this check box to turn on desktop alerts. The Interaction Alert dialog box displays information about the
---	---

	<p>interaction, i.e., name, number and an icon for the interaction type.</p> <p><b>Note:</b> You can also display a message in a desktop alert dialog box by setting up a personal rule. For more information, see <a href="#">Setting Up Personal Rules</a>.</p> <p>A personal rule that displays a desktop alert overrides the setting in this check box. For example, if you turn off desktop alerts for all alerting interactions by clearing this check box, but have a personal rule that displays desktop alerts for some alerting interactions, then the desktop alert appears for the interactions included in the personal rule.</p>
<b>Duration</b>	<p>Adjust the slider to control how long the Interaction Alert dialog box is displayed on the desktop before fading away.</p> <p>Set the alert to fade immediately (0 Seconds after alerting), never (Lifetime of Interaction), or a time between 1 and 120 seconds.</p>

3. Click **Apply** to save your selections.
4. Click **OK** to close the Configuration dialog box.

### Using Desktop Alerts

There are three types of desktop alerts.

<b>Interaction Alerts</b>	<p>An Interaction Alert appears when you receive a new alerting interaction. The interaction alert dialog box displays information about the interaction, i.e., name, number and an icon for the interaction type.</p> <p>Click <b>Pickup</b> to pick up the interaction, or click <b>Send to Voicemail</b> to send the interaction to your voice mail.</p>
<b>Camping Alerts</b>	<p>A Camping Alert appears when you camp on another person. The camping alert dialog box displays information about the person, i.e., name, status and station. If the person you camped on is not available, by default the alert dialog box fades and pops up again when the user becomes available.</p> <p>Click <b>Call Now</b> to immediately call the person, click <b>Stop Camp</b> to stop camping on the person, or click <b>Options</b> to set the behavior of the Camping Alert dialog box.</p>
<b>General Alerts</b>	<p>A CIC administrator may send a General Alert to your client. The administrator controls the content and the behavior of these general alerts.</p>

#### Related Topics

[Understanding the Configuration Dialog Box](#)

### General Alerting Options

**Requirements:** You need the [Customize Client Security](#) right to configure general alerting options. Client templates can contain configuration settings that determine your general alerting options and control whether you can alter configuration settings.

General alerting options control telephone or computer speaker alerts for incoming interactions, whether incoming interactions are automatically selected, and how long an interaction can alert before it times out.

#### To set general alerting options:

1. In the Configuration dialog box, click the **Alerting** node.
2. In the Alerting properties details pane, in the **General Alerting** section, select the appropriate options:

<b>Ring telephone for calls</b>	<p>When selected, your telephone rings when calls come into the CIC client.</p> <p><b>Note:</b> This option is disabled if this station is configured to <b>Ring Always in Interaction Administrator</b>, or if this is a remote station.</p>
<b>Ring computer</b>	<p>When selected, incoming interactions ring through your computer's speakers.</p>
<b>Ring when on phone</b>	<p>When selected, incoming interactions ring on the computer when you are already on the phone.</p>
<b>Pop client</b>	<p>When selected, the arrival of an incoming interaction causes the CIC client to appear on top of any other application you are running. The My Interactions view pops to the foreground if it was behind another view.</p>
<b>Pop for Work Items</b>	<p>When selected, the arrival of a new work item causes the CIC client to appear on top of any other application you are running. The My Work Items view pops to the foreground if it was behind another view. For more information, see Working with Interaction Process Automation for more details on work items and processes.</p> <p><b>Note:</b> Only agents with the appropriate licenses and rights can use IPA. For more information, see IPA User Licenses and IPA User Rights.</p>
<b>Auto select interactions after disconnect</b>	<p>You can have multiple interactions in the My Interactions queue. However, you can perform actions (such as mute, record, transfer, etc.) on <i>only</i> the currently selected interaction.</p> <p>When you enable this option, the CIC client automatically selects the oldest interaction that is not disconnected when the currently selected interaction leaves the queue.</p> <p><b>Tip:</b> By default, if there are no active interactions in <b>My Interactions</b>, when an alerting interaction appears, it is automatically selected.</p>
<b>Select new outgoing interactions</b>	<p>When selected, any new outgoing interactions in a queue are automatically selected.</p>
<b>Timeout for incoming calls (in seconds)</b>	<p>Typically, 6 seconds covers one ring and a pause, so 18 seconds allows approximately three full ring cycles. The duration of this timeout defaults to the value on your Client Configuration template in Interaction Administrator. If you don't have a template, the duration defaults to 30 seconds.</p> <p>The Timeout for ACD calls is controlled separately by the Workgroup configuration on the IC server, and it also defaults to 30 seconds.</p> <ul style="list-style-type: none"> <li>• You cannot control the timeout for ACD calls from here.</li> <li>• Negative numbers are not valid.</li> <li>• Minimum value is <b>7</b>.</li> </ul>

3. Click **Apply** to save your selections.
4. Click **OK** to close the Configuration dialog box.

Your CIC administrator can configure how the CIC client works. Contact your CIC administrator if you have questions on how any of these options are set on your system.

**Related Topics**

- Client Templates
- Parked Call Alerting Options
- Understanding the Configuration Dialog Box

## My Interactions Ring Sounds

**Requirements:** You need the Customize Client Security right to configure interaction ring sounds. Client templates can contain configuration settings that determine your interaction ring sounds and control whether you can alter configuration settings.

My Interaction Ring Sounds configuration settings designate the WAV files played for various types of interactions.

**To set voice mail alert options:**

1. In the Configuration dialog box, expand the **Alerting** node and click the **My Interaction Ring Sounds** node.
2. In the My Interaction Ring Sounds properties details pane, to change ring sounds, see Changing Ring Sounds. For a description of the ring sound options, see My Interaction Ring Sounds Options.
3. Click **Apply** to save your selections.
4. Click **OK** to close the Configuration dialog box.

### Changing Ring Sounds

**To change ring sounds:**

1. Click the **More** button (...) at the end of the text box for the appropriate interaction type.  
**Result:** The Open dialog box, which displays sound files in a list, appears.
2. Choose a sound file (.wav) from the list or search for a sound file in another directory.

**Tip:** To listen or review your sound file, click the **Play** button.

3. Click **OK** after making your selection.

### My Interaction Ring Sounds Options

<b>Calls</b>	This option specifies the location of the.wav file to play when calls ring on your My Interactions queue.  <b>Note:</b> If you are working with monitored appearances, calls arriving on those queues could have a different sound. For more information, see <a href="#">Customize Monitored Appearance Alerts</a> .
<b>Chats</b>	This option specifies the location of the.wav file to play when chats arrive at your CIC client station.
<b>Emails</b>	This option specifies the location of the.wav file to play when an ACD-routed email message arrives at your CIC client station.
<b>All Other Interactions</b>	This option specifies the location of the.wav file to play when all other interactions arrive at your CIC client station.

**Related Topics**

Customize Monitored Appearance Alerts  
Understanding the Configuration Dialog Box

## Parked Call Alerting Options

**Requirements:** You need the Customize Client Security right to configure parked call alerting options. Client templates can contain configuration settings that determine your parked call alerting options and control whether you can alter configuration settings.

The Parked Call Alerting options enable you to set up alerts that occur when someone parks a call on your extension.

Parked Call Alerting options are only for an alerting action for the user on whose extension the call is parked. The user who initiates a transfer and parks the call does not get reminded periodically. Also, these apply only to calls that are transferred and parked on your extension. They do not apply to **calls parked on orbit**.

### To set parked call alerting options:

1. In the Configuration dialog box, click the **Alerting** node.
2. In the Alerting property details pane, in the **Parked Call Alerting** section, select the appropriate options:

<b>Display Desktop Alert for new parked calls</b>	When selected, a desktop alert (toast) appears when any CIC user parks a call on your extension.
<b>Play audio alert for new parked calls</b>	When selected, a sound plays through your computer's speakers when any CIC user parks a call on your extension.
<b>Once</b>	When selected, the desktop alert and audio alert selected above occur only when the call is first parked.
<b>At regular intervals</b>	When selected, the desktop alert and audio alert selected above occur at selected intervals while the call is parked.
<b>Minutes between alerts</b>	If <b>At Regular Intervals</b> is selected, this number determines the time between alerts.

3. Click **Apply** to save your selections.
4. Click **OK** to close the dialog box.

### Related Topics

Client Templates  
General Alerting Options  
Understanding the Configuration Dialog Box

## Voice Mail / Fax Paging

**Requirements:** You need the Customize Client Security right to configure voicemail and fax alerts. Client templates can contain configuration settings that determine your voicemail and fax alert settings and control whether you can alter configuration settings.

Voicemail and Fax Alerts settings control the methods used to alert you when you receive a fax or voice mail. You can also control whether you receive these alerts at any time of day or only during specific hours.

### To set voice mail alert options:

1. In the Configuration dialog box, expand the **Alerting** node, and then click **Voicemail / Fax Paging**.

2. In the **Alerting Method** section, choose one of the following options:

<b>Do Not Send Me Alerts</b>	If selected, you do not receive alerts when you have messages waiting.
<b>E-Mail Address</b>	If selected, you receive alerts at the email address specified in the text field to the right. <b>Note:</b> Your CIC administrator can set a server parameter that attaches a copy of the fax to the fax notification you receive at your email address.
<b>Telephone Number</b>	If selected, you receive alerts at a telephone number specified in the text field to the right. If <b>not</b> selected, you receive alerts at a telephone number specified by the CIC administrator. You can type both commas (,) and slashes (/) with the number you type. Comma causes a 2-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 2 seconds, the digits 2222 are dialed. <b>Note:</b> Use of the comma (,) to create a 2-second delay is not supported in all platforms. This issue will be resolved in a future release.
<b>Pager Number Pager ID</b>	If selected, you receive alerts on a pager at the number specified in the <b>Pager Number</b> text box. Supply the pager PIN in the <b>Pager ID</b> text field. <b>Note:</b> If you use this alerting method, the alert includes the remote telephone number and the date and time of the call.

3. In the **Alerting Reason** section, select the type of interaction event that triggers an alert:

<b>I Receive a Voicemail</b>	If selected, you receive an alert for new voice mail messages.
<b>Any Voicemail</b>	If selected, you receive an alert every time you receive a voice mail message.
<b>Only Urgent Voicemails</b>	If selected, you receive an alert only for voice mail messages marked urgent.
<b>I Receive a New Fax</b>	If selected, you receive an alert for new fax messages.

4. In the **Alerting Time** section, select the times when you want to receive alerts.

<b>Any Time of Day</b>	If selected, you can receive alerts any time of the day.
<b>Only Between</b>	If selected, you can receive alerts only during specific hours (office hours, for example). Click the arrows at the end of the <b>Start</b> box and choose the earliest time you want to be contacted. Click the arrows at the end of the <b>End</b> box and choose the latest time you want to be contacted.

5. Click **Apply** to save your selections.  
6. Click **OK** to close the Configuration dialog box.

**Related Topics**

**Client Templates**

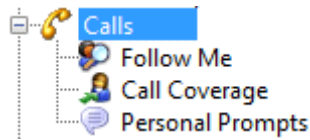
Understanding the Configuration Dialog Box



## Call Options

### Call Options

Within the Calls configuration node, you can choose how to manage incoming interactions. For example, you can set up options to have the CIC client search for you at different telephone numbers if someone calls you when you're away from your office. You can set up call forwarding, a feature to allow another user to answer your calls, and you can record and manage personal prompt messages callers hear when you are unavailable to answer your interactions.



For more information about call options, see:

- Calls
- Follow Me
- Call Coverage
- Personal Prompts

### Calls Configuration

**Requirements:** You need the Customize Client Security right to customize your personal CIC client configuration settings. Client templates can contain configuration settings that determine your calls options and control whether you can alter 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 Configuration dialog box, click the **Calls** node.
2. In the Calls property details pane, complete the fields as described in Calls Options.
3. Click **Apply** to save your selections.
4. Click **OK** to close the Configuration dialog box.

#### Calls Options

<b>Timeout for external calls (in seconds):</b>	<p>This option determines the number of seconds your outgoing calls ring before they are disconnected.</p> <div style="background-color: #009688; color: white; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> This setting is always used for calls forwarded to you when your status is <b>Available, Forward</b>. For calls you place yourself, this time out setting is ignored unless <b>Analyze outgoing external calls</b> 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> </div>
<b>Use advanced dialing options (account code, workgroup)</b>	<p>If enabled, the Advanced Dialing Options dialog box appears when you call. You can then assign an Account Code to the call and associate the call with a Workgroup. For more information, see Advanced Dialing Options.</p>

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

### Related Topics

- Client Templates
- Understanding the Configuration Dialog Box

## 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. Client templates can contain configuration settings that determine your Follow-me Routing options and control whether you can alter configuration settings.

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 *Telephone User Interface User's Guide* or **Quick Reference Card** in the CIC Documentation Library.

### To add a follow-me phone number:

1. In the Configuration dialog box, expand the **Calls node** and click **Follow Me**.
2. To prompt callers for their name, select the **Screen Calls** check box.

**Note:** When Screen Calls is selected and you 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. In the Follow Me properties details pane, click **New**.
4. In the **Details** section, complete the fields as described below.

<b>Phone Number</b>	<p>Enter a telephone number you want the CIC client to call if you are not available.</p> <p><b>Note:</b> For information about entering, editing and verifying phone numbers, see <a href="#">Phone Number Controls</a>.</p> <p><b>Dialing Pause</b></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><b>Note:</b> Use of the comma (,) to create a two-second delay is not supported in all platforms.</p>
<b>Ext.</b>	Enter an extension number. This number is dialed after a connection is made.
<b>Timeout</b>	<p>Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds.</p> <p><b>Note:</b> If the forwarding number is an internal station extension, this timeout value is ignored and the station is alerted for 45 seconds.</p>
<b>Use Pin</b>	<p>To require that you or another call recipient must enter your CIC client password to accept the call, select <b>Use Pin</b>.</p> <p><b>Note:</b> This feature can prevent someone else from answering your calls through the follow-me routing process.</p>

- Click the **Validate** control (check mark).

**Note:** A validated phone number is formatted according to the rules of the dial plan for your organization or region. A validated phone number becomes the display number in the CIC client. For more information, see [Phone Number Controls](#).

- To add another number, repeat steps 3 through 5.
- Click **Apply** to save your settings.
- Click **OK** to close the Configuration dialog box.

#### To change your follow me settings:

- 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 **Delete**.
  - To change the settings for a number, select the number and type new values in the **Phone Number** and **Timeout** text boxes and select or clear the **Use Pin** checkbox.
- Click **Apply** to save your settings.
- Click **OK** to close the Configuration dialog box.

#### To change your follow me settings:

- 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

Client Templates  
 Understanding Follow-me Routing  
 Understanding the Configuration Dialog Box  
 Start Follow-Me Routing

## Call Coverage

### Call Coverage Options

**Requirements:** You need the Customize Client Security right to customize your personal CIC client configuration settings. **Client templates** can contain configuration settings that determine your call coverage options and control whether you can alter configuration settings.

You can use Call Coverage to forward your calls if your status is Available, Forward. Use call coverage to enable another user to answer your calls.

To set call coverage options:

1. In the Configuration dialog box, expand the **Calls** node and click **Call Coverage**.
2. In the Call Coverage property details pane, make your selections as described in Coverage Options and Coverage Number.
3. Click Apply to save your selections.
4. Click OK to close the Configuration dialog box.

### Coverage Options

The Coverage Options section has the following options:

<p><b>Forward</b></p>	<p>This option sends a designated type of call to a Call Coverage number.                      The available call types are:</p> <ul style="list-style-type: none"> <li>• <b>All Calls.</b></li> <li>• <b>Internal Calls.</b> This includes calls from internal numbers or extensions on the CIC system.</li> <li>• <b>External Calls.</b> This includes calls from outside the CIC system (calls from public service telephone networks).</li> <li>• <b>Unknown Calls.</b> This includes calls from outside the CIC system that do not have caller ID.</li> </ul>
<p><b>If I'm "Do Not Disturb,"</b></p>	<p><b>Tip:</b> The number of seconds a forwarded call rings at the designated Call Coverage number is determined by the Timeout for external calls setting.</p> <p>This option sends a designated type of call to a Call Coverage number when your</p>

<b>forward</b>	status is Do Not Disturb (DND), including not being logged on. This behavior depends on the configuration of your DND statuses. The available call types are the same as the ones for <b>Forward</b> . See the descriptions above.
<b>If I'm on the phone, forward</b>	This option sends a designated type of call to a Call Coverage number, when you are on the phone. The available call types are the same as the ones for <b>Forward</b> . See the descriptions above.
<b>If I don't answer, forward</b>	This option sends a designated type of call to a Call Coverage number, when you do not answer. The available call types are the same as the ones for <b>Forward</b> . See the descriptions above.

### Coverage Number

The Coverage Number section has the following options:

<b>Send my calls to:</b>	Specify the phone number that calls are sent to when they meet any of the criteria in Coverage Options. This number must be an internal number or a CIC extension.
<b>If a caller leaves voice mail, send it to:</b>	Specify whether voice mail messages are sent to the internal telephone number or CIC extension voice mailbox, or to your voice mailbox. The internal number or extension must have a mailbox assigned. If no mailbox is assigned to this number, then the system does not allow you to apply the changes.  For example, if My Voicemail Box is selected, any message left by a caller is sent to <i>your</i> voice mail. If you select the other option (the number you entered in Send my calls to), then you give ownership of the call (or any voice mail) to that coverage number.

### Related Topics

- Client Templates
- Forward Calls When You do not Answer
- Forward Calls When You're in Do Not Disturb Status
- Forward Calls When You Are on the Phone
- Forward Calls Regardless of Status
- Understanding the Configuration Dialog Box

## Forward Calls When You Do Not Answer

If you do not answer a call, you can forward it to an internal telephone number.

You can also choose to forward:

- Only internal calls (calls made to you within your company)
- Only external calls (calls made to you from outside your company)
- Only unknown (calls that don't contain caller ID information)
- All calls

When you use the forwarding feature, the CIC client routes all calls sent to your local extension to the number you enter.

**Note:** You can also choose to forward your calls when you are away from your desk but accessible at another telephone number. When you choose to forward calls to a remote telephone number, you must set your status to Available, Forward.

**To forward your calls when you do not answer:**

1. In the Configuration dialog box, expand the **Calls** node and click **Call Coverage**.
2. In the **Coverage Options** section, select **If I don't answer, forward** and choose the type of incoming calls to forward.

<b>All Calls</b>	All calls.
<b>External Calls</b>	Calls from outside
<b>Internal Calls</b>	Calls from internal numbers or extensions on the CIC system.
<b>Unknown Calls</b>	Calls from outside the CIC system that do not have caller ID.

3. In the **Coverage Number** section, enter the forwarding number in the **Send my calls to** field.

**Note:** Your administrator may set this forwarding number for you. If the **Send my calls to** field is grayed-out or disabled, you may not have permission to set a forwarding number. If you have questions about call forwarding permissions, see your CIC administrator.

4. Click the **"If the caller leaves a voice mail, send it to:"** pull-down list and choose to send voice mail messages to a telephone number or to **My Voicemail Box**.

<b>Send my calls to:</b>	Enter the phone number that calls are sent to when you select one of the Coverage Options above in the Coverage Options section. This number must be an internal number or a CIC extension.
<b>If a caller leaves voice mail, send it to:</b>	Click this drop-down menu to choose to send voice mail messages to the internal telephone number or CIC extension you set, or to your voice mailbox.  The internal number or extension must have a mailbox assigned. If no mailbox is assigned to this number, then the system does not allow you to apply the changes. For example, when you select the My Voicemail Box option, any message left by a caller is sent to your voice mail. If you select the other option (the number you entered in Send my calls to), then you give ownership of the call (or any voice mail) to that coverage number.

**Note:** If you choose to send voice mail messages to your voice mail box, **all** voice mail messages go to **your** voice mail box, regardless of how you have configured your Coverage Options.

For example, assume you set the CIC client to forward your calls to User B, and a caller leaves a voice mail message. Let's also assume User B has set up his calls to forward to User C, and User C has set up his calls to forward to User D. In this case, if a caller leaves a voice mail, the CIC client sends it to your voice mail box, not to any other user in the forward chain mentioned in this scenario. The voice mail goes to you because you were the original recipient. You (not User B, User C, or User D) receive the voice mail message in your voice mail box.

5. Click **Apply** to save your selections.
6. Click **OK** to close the Configuration dialog box.

**Related Topics**

- Call Coverage
- Forward Calls When You Are on the Phone

Forward Calls When You're in Do Not Disturb Status  
 Forward Calls Regardless of Status  
 Forward Calls to Your Remote Telephone Number

## Forward Calls When You Are in Do Not Disturb Status

If your status is "Do Not Disturb" and you receive a call, you can forward the call to an internal telephone number.

You can also choose to forward:

- Only internal calls (calls made to you within your company)
- Only external calls (calls made to you from outside your company)
- Only unknown (calls that don't contain caller ID information)
- All calls

When you use the forwarding feature, the CIC client routes all calls sent to your local extension to the number you enter.

**Note:** You can also choose to forward your calls when you are away from your desk but accessible at another telephone number. When you choose to forward calls to a remote telephone number, you must set your status to Available, Forward.

### To forward your calls when you do not answer:

1. In the Configuration dialog box, expand the **Calls** node and click **Call Coverage**.
2. In the **Coverage Options** section, select **If I'm "do not disturb", forward** and choose the type of incoming calls to forward.

<b>All Calls</b>	All calls.
<b>External Calls</b>	Calls from outside
<b>Internal Calls</b>	Calls from internal numbers or extensions on the CIC system.
<b>Unknown Calls</b>	Calls from outside the CIC system that do not have caller ID.

3. In the **Coverage Number** section, enter the forwarding number in the **Send my calls to** field.

**Note:** Your administrator may set this forwarding number for you. If the **Send my calls to** field is grayed-out or disabled, you may not have permission to set a forwarding number. If you have questions about call forwarding permissions, see your CIC administrator.

4. Click the **"If the caller leaves a voice mail, send it to:"** pull-down list and choose to send voice mail messages to a telephone number or to **My Voicemail Box**.

<b>Send my calls to:</b>	Enter the phone number that calls are sent to when you select one of the Coverage Options above in the Coverage Options section. This number must be an internal number or a CIC extension.
<b>If a caller leaves voice mail, send it to:</b>	Click this drop-down menu to choose to send voice mail messages to the internal telephone number or CIC extension you set, or to your voice mailbox.  The internal number or extension must have a mailbox assigned. If no mailbox is assigned to this number, then the system does not allow you to apply the changes. For example, when you select the My Voicemail Box option, any message left by a caller is sent to your voice mail. If you select

	the other option (the number you entered in Send my calls to), then you give ownership of the call (or any voice mail) to that coverage number.
--	---

**Note:** If you choose to send voice mail messages to your voice mail box, **all** voice mail messages go to **your** voice mail box, regardless of how you have configured your Coverage Options.

For example, assume you set the CIC client to forward your calls to User B, and a caller leaves a voice mail message. Let's also assume User B has set up his calls to forward to User C, and User C has set up his calls to forward to User D. In this case, if a caller leaves a voice mail, the CIC client sends it to your voice mail box, not to any other user in the forward chain mentioned in this scenario. The voice mail goes to you because you were the original recipient. You (not User B, User C, or User D) receive the voice mail message in your voice mail box.

5. Click **Apply** to save your selections.
6. Click **OK** to close the Configuration dialog box.

### Related Topics

- Call Coverage
- Forward Calls When You Are On the Phone
- Forward Calls When You Do Not Answer
- Forward Calls Regardless of Status
- Forward Calls to Your Remote Telephone Number

## Forward Calls When You Are on the Phone

You can configure the CIC client so that if you receive a call and are on the phone, you can forward the call to an internal telephone number.

You can also choose to forward:

- Only internal calls (calls made to you within your company)
- Only external calls (calls made to you from outside your company)
- Only unknown (calls that don't contain caller ID information)
- All calls

When you use the forwarding feature, the CIC client routes all calls sent to your local extension to the number you enter.

**Note:** You can also choose to forward your calls when you are away from your desk but accessible at another telephone number. When you choose to forward calls to a remote telephone number, you must set your status to Available, Forward.

### To forward your calls when you are on the phone:

1. In the Configuration dialog box, expand the **Calls** node and click **Call Coverage**.
2. In the **Coverage Options** section, select **If I'm on the phone, forward** and choose the type of incoming calls to forward.

<b>All Calls</b>	All calls.
<b>External Calls</b>	Calls from outside
<b>Internal Calls</b>	Calls from internal numbers or extensions on the CIC system.



<b>Unknown Calls</b>	Calls from outside the CIC system that do not have caller ID.
----------------------	---

- In the **Coverage Number** section, enter the forwarding number in the **Send my calls to** field.

**Note:** Your administrator may set this forwarding number for you. If the **Send my calls to** field is grayed-out or disabled, you may not have permission to set a forwarding number. If you have questions about call forwarding permissions, see your CIC administrator.

- Click the **"If the caller leaves a voice mail, send it to:"** pull-down list and choose to send voice mail messages to a telephone number or to **My Voicemail Box**.

<b>Send my calls to:</b>	Enter the phone number that calls are sent to when you select one of the Coverage Options above in the Coverage Options section. This number must be an internal number or a CIC extension.
<b>If a caller leaves voice mail, send it to:</b>	Click this drop-down menu to choose to send voice mail messages to the internal telephone number or CIC extension you set, or to your voice mailbox.  The internal number or extension must have a mailbox assigned. If no mailbox is assigned to this number, then the system does not allow you to apply the changes. For example, when you select the My Voicemail Box option, any message left by a caller is sent to your voice mail. If you select the other option (the number you entered in Send my calls to), then you give ownership of the call (or any voice mail) to that coverage number.

**Note:** If you choose to send voice mail messages to your voice mail box, **all** voice mail messages go to **your** voice mail box, regardless of how you have configured your Coverage Options.

For example, assume you set the CIC client to forward your calls to User B, and a caller leaves a voice mail message. Let's also assume User B has set up his calls to forward to User C, and User C has set up his calls to forward to User D. In this case, if a caller leaves a voice mail, the CIC client sends it to your voice mail box, not to any other user in the forward chain mentioned in this scenario. The voice mail goes to you because you were the original recipient. You (not User B, User C, or User D) receive the voice mail message in your voice mail box.

- Click **Apply** to save your selections.
- Click **OK** to close the Configuration dialog box.

### Related Topics

[Call Coverage](#)  
[Forward Calls When You Do Not Answer](#)  
[Forward Calls When You're in Do Not Disturb Status](#)  
[Forward Calls Regardless of Status](#)  
[Forward Calls to Your Remote Telephone Number](#)

## Forward Calls Regardless of Status

You can forward calls, regardless of your status, to an internal telephone number.

You can also choose to forward:

- Only internal calls (calls made to you within your company)
- Only external calls (calls made to you from outside your company)
- Only unknown (calls that don't contain caller ID information)

- All calls

This forwarding feature is known as Call Coverage. Call Coverage is intended for situations where you have a colleague or assistant who is “covering the phones” for you while you attend to other matters.

When you use the forwarding feature, the CIC client redirects all calls originally targeted at your local extension to the number you enter.

**Note:** You can also choose to forward your calls when you are away from your desk but accessible at another telephone number. When you choose to forward calls to a remote telephone number, you must set your status to Available, Forward.

**To forward your calls regardless of your status:**

1. In the Configuration dialog box, expand the **Calls** node and click **Call Coverage**.
2. In the **Coverage Options** section, select **Forward** and choose the type of incoming calls to forward.

<b>All Calls</b>	All calls.
<b>External Calls</b>	Calls from outside
<b>Internal Calls</b>	Calls from internal numbers or extensions on the CIC system.
<b>Unknown Calls</b>	Calls from outside the CIC system that do not have caller ID.

3. In the **Coverage Number** section, enter the forwarding number in the **Send my calls to** field.

**Note:** Your administrator may set this forwarding number for you. If the **Send my calls to** field is grayed-out or disabled, you may not have permission to set a forwarding number. If you have questions about call forwarding permissions, see your CIC administrator.

4. Click the "**If the caller leaves a voice mail, send it to:**" pull-down list and choose to send voice mail messages to a telephone number or to **My Voicemail Box**.

<b>Send my calls to:</b>	Enter the phone number that calls are sent to when you select one of the Coverage Options above in the Coverage Options section. This number must be an internal number or a CIC extension.
<b>If a caller leaves voice mail, send it to:</b>	Click this drop-down menu to choose to send voice mail messages to the internal telephone number or CIC extension you set, or to your voice mailbox.  The internal number or extension must have a mailbox assigned. If no mailbox is assigned to this number, then the system does not allow you to apply the changes. For example, when you select the My Voicemail Box option, any message left by a caller is sent to your voice mail. If you select the other option (the number you entered in Send my calls to), then you give ownership of the call (or any voice mail) to that coverage number.

**Note:** If you choose to send voice mail messages to your voice mail box, **all** voice mail messages go to **your** voice mail box, regardless of how you have configured your Coverage Options.

For example, assume you set the CIC client to forward your calls to User B, and a caller leaves a voice mail message. Let’s also assume User B has set up his calls to forward to User C, and User C has set up his calls to forward to User D. In this case, if a caller leaves a voice mail, the CIC client sends it to your voice mail box, not to any other user in the forward chain mentioned in this scenario. The voice mail goes to you because you were the original recipient. You (not User B, User C, or User D) receive the voice mail message in your voice mail box.

5. Click **Apply** to save your selections.

6. Click **OK** to close the Configuration dialog box.

### Related Topics

- Call Coverage
- Forward Calls When You Are on the Phone
- Forward Call When You do not Answer
- Forward Calls When You're in Do Not Disturb Status
- Forward Calls to Your Remote Telephone Number
- Understanding Follow-me Routing

### 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 DND (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 you have not recorded an "Out of Office Message," then the appropriate status message plays to the caller. The status message also plays if you have recorded the "Out of Office Message" but have not activated it. If a status message is not recorded, the generic message is, "<Your name> is not available. Please leave a message after the tone."

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 CIC administrator for details.

[Click here](#) for possible status values.

For information on setting personal prompts options and recording personal prompts, see [Personal Prompt Options](#). You can also set up a personal rule to play an audio file to callers, see [Setting Up Personal Rules](#).

**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 *IC TUI User's Guide*.

### Related Topics

- Personal Prompts Options
- Set your status

## Personal Prompts Options

**Requirements:** You need the Customize Client Security right to configure personal prompts options. Client templates can contain configuration settings that determine your personal prompts options and control whether you can alter configuration settings.

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:** When recording prompts, unless you change your status to a non-ACD status you may continue to receive ACD calls. Station audio does not appear in the CIC client when you lift your receiver to record your prompt, and this can allow an ACD call to be transferred to your queue.

**To set personal prompts options:**

1. In the Configuration dialog box, expand the **Calls** node and click **Personal Prompts**.
2. In the Personal Prompts properties details pane, do one or both of the following:
  - Select **Activate out of office message** to activate your **Out of Office** message.
  - Select **Activate agent greeting** to activate your Agent Greeting message.

**Note:** These options are available only after your CIC administrator enables them for you and you have recorded the appropriate message. You can also use your Telephone User Interface to record your Out of Office and Agent Greeting messages. For more information, see the *IC TUI User's Guide*.

3. Click the button of the prompt you want to record.

**Result:** CIC initiates a telephone call to your station.

4. Pick up the call and follow the verbal instructions to record the prompt.
5. Do one of the following:
  - Press **1** on your telephone to end the recording.
  - If your workstation is configured as a soft phone and you selected SIP Soft Phone as Station Type when you logged on, select the **Press 1** button on the Personal Prompts properties pane to end the recording.
6. Optionally, do either or both of the following:
  - To review a recorded prompt, click the **Preview** button.

**Note:** If you have not previously recorded the prompt or the system cannot find the prompt file, you hear an error message. Go back to step 5 and try recording the prompt again. If the problem persists, contact your CIC administrator.

- To return a prompt to a generic recording, click the **Reset** button.
8. Click **Apply** to save your selections.
  9. Click **OK** to close the 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><b>Record Out of Office Message</b></p>	<p>Record a message that is played if:</p> <ul style="list-style-type: none"> <li>○ You are in a DND status. (Your status is Gone Home, Out of the Office, or some other "not available" status.)</li> </ul> <p>and</p> <ul style="list-style-type: none"> <li>○ You have recorded the Out of Office Message.</li> </ul> <p>and</p> <ul style="list-style-type: none"> <li>○ You selected the <b>Activate Out of Office Message</b> check box.</li> </ul> <p><b>Note:</b> If you are in a DND status, and did <b>not both</b> record <b>and</b> activate the Out of Office message, the caller hears an automated status-based message such as</p>
--	--

	"Your name is At Lunch." If no status-based message is available, the caller hears "Your name is not available."
<b>Record No Answer Message</b>	<p>Record a message that is played if:</p> <ul style="list-style-type: none"> <li>○ You are <b>not</b> in a DND status. (Your status is Available; Available, No ACD; or some other "available" status).</li> </ul> <p>and</p> <ul style="list-style-type: none"> <li>○ You do not answer your phone.</li> </ul> <p>and</p> <ul style="list-style-type: none"> <li>○ You have recorded the <b>Record No Answer</b> message.</li> </ul> <p><b>Note:</b> If you are <b>not</b> in a DND status and did <b>not</b> record the <b>Record No Answer</b> message, the caller hears a status-based message such as "Your name is working at home."</p>
<b>Record Follow Me Message</b>	<p>Record a message that is played if your status is set to <b>Available, Follow Me</b>.</p> <p>When you set your status to <b>Available, Follow Me</b>, 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>
<b>Record Name</b>	Record your name. This recording is used in status-based messages, such as "Your name is At Lunch."
<b>Record Agent Greeting</b>	<p>Use this button to record a message to play to callers before you answer an ACD call.</p> <p>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. You must also select the <b>Activate Agent Greeting</b> box.</p> <p>This feature is best used with the <b>Auto Answer Calls</b> (user/agent attribute set in Interaction Administrator). When used with <b>Auto Answer Calls</b> enabled, your <b>Agent Greeting</b> plays to the caller as you are being alerted. The length of your <b>Agent Greeting</b> is limited to 10 seconds, and therefore, is considered an introduction or "smile".</p> <p><b>Note:</b> 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>
<b>Record Available, Forward Message</b>	<p>Use this button to record a message to play to callers when your status is set to <b>Available, Forward</b>. 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: "&lt;User name&gt; is at a remote location. Please hold while we transfer you to that location."</p>

**Related Topics**

- Client Templates
- Understanding the Configuration Dialog Box

**Monitored Appearances****Working with Monitored Appearances**

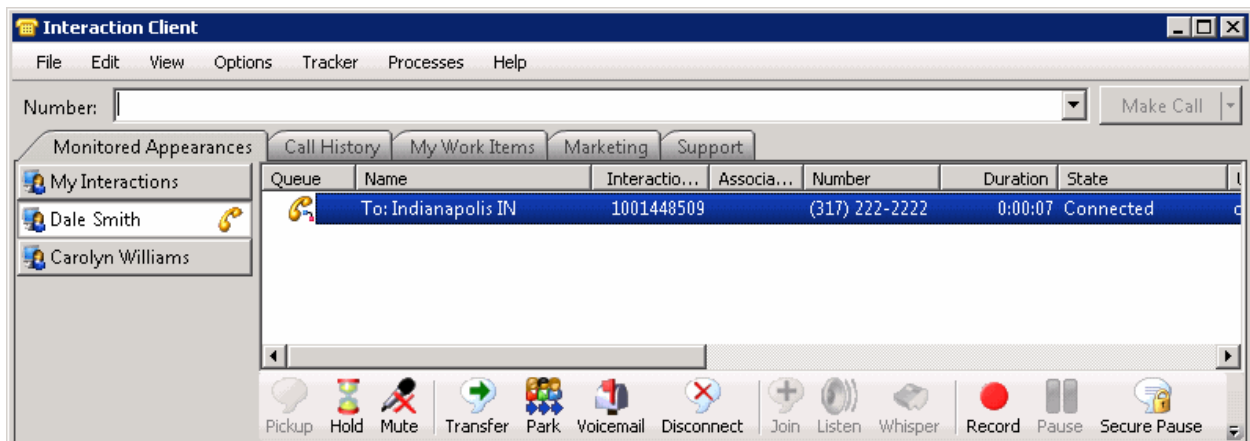
**Requirements:** Access Control rights determine which queues you can view and what actions you can perform on the interactions in these queues. For more information about the required rights, see the description of the Access Control Rights for User Queues. In addition, Client templates can contain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

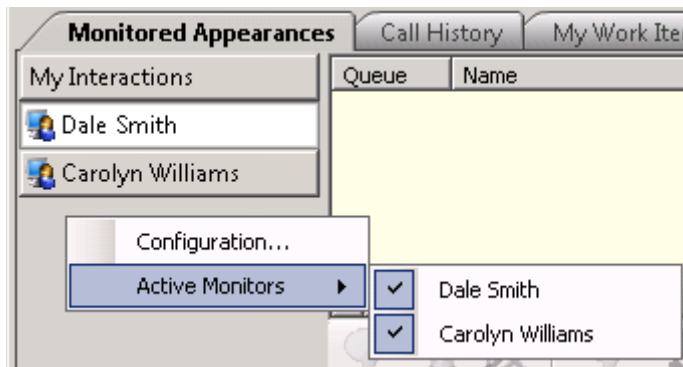
**Requirements:** For more information about required rights, see [Working with Monitored Appearances](#). Note also that a Monitored Appearance is automatically removed if you lose the rights to view the associated user queue.

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.

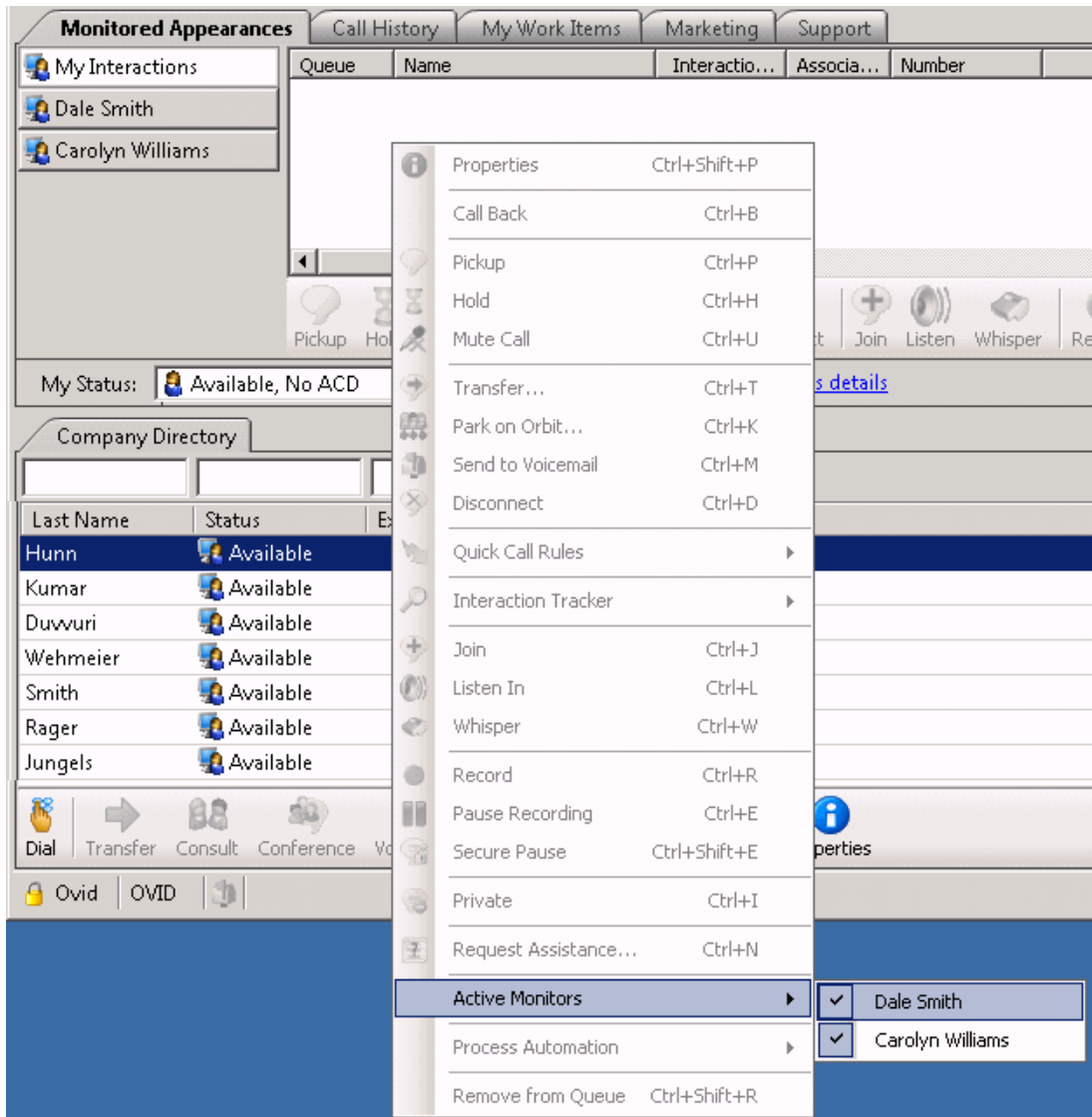
**To activate or deactivate a monitored appearance:**

1. Do one of the following:

- If you have at least one monitored appearance displayed, in the Monitored Appearances tab, right-click below the last name listed. From the shortcut menu, select **Active Monitors**.



- If you have configured some monitored appearances, right-click in the Monitored Appearances view. Select **Active Monitors** from the shortcut menu.



2. Do one of the following:

- To activate a monitored appearance, place a check mark next to a previously configured name.

**Result:** Monitoring is started for the selected person's activities.

- To deactivate a monitored appearance, clear the check mark next to the name.

**Result:** Monitoring is stopped for the selected person's activities.

**Related Topics**

- Configure Monitored Appearances
- Customize Monitored Appearance Alerts
- Delete a Monitored Appearance
- Working with Monitored Appearances



## Configure Monitored Appearances

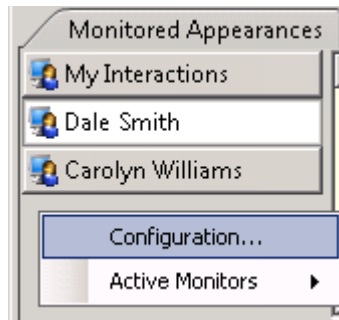
**Requirements:** For information about required rights, see Working with Monitored Appearances. Also, you should set up monitored appearances only for users at **your site**. You should not configure a monitored appearance for a user configured on a separate site (on another IC server) or for multi-site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

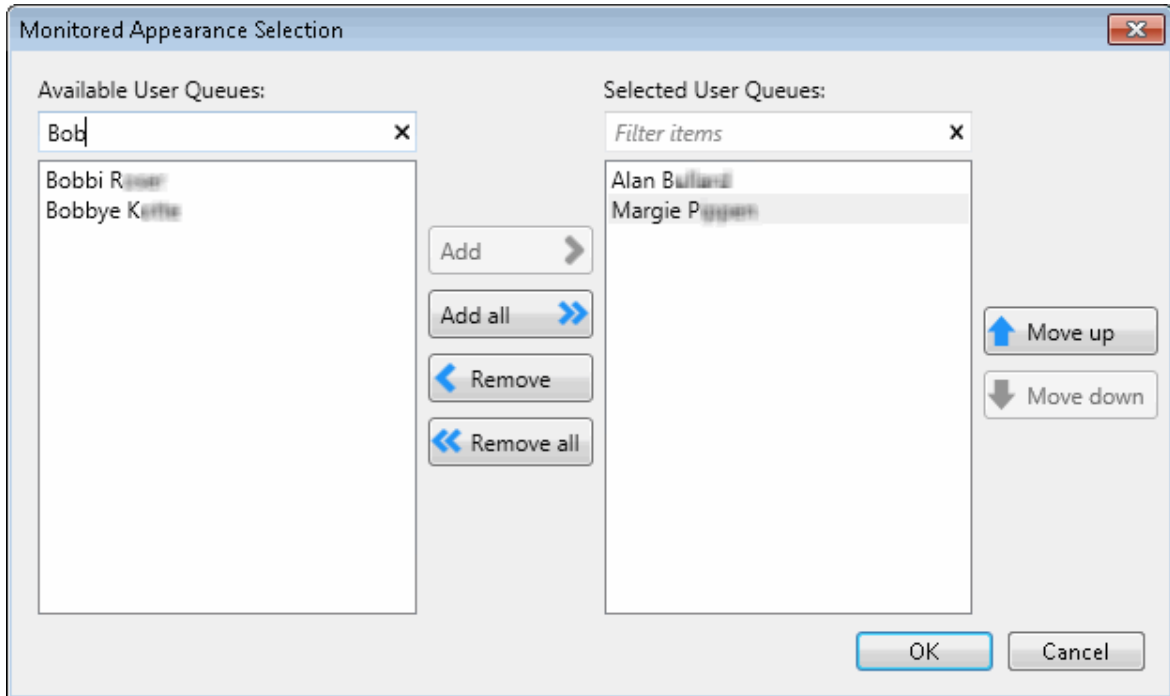
### To add a monitored appearance:

1. Do one of the following:
  - If you have not yet configured a monitored appearance, open the Configuration dialog box.
  - If you already have one monitored appearance, on the Monitored Appearances pane, right-click below the last name and select **Configuration**.



2. If not already selected, in the Configuration dialog box, click the **Monitored Appearances** node.
3. In the Monitored Appearances property details pane, click **Manage Users**.

**Result:** The Monitored Appearance Selection dialog box opens.



4. Create a list of Selected User Queues by doing any of the following:
  - From the **Available User Queues** list, select a user queue. Click **Add** to add the user queue name to the **Selected User Queues** list.
  - Click **Add all** to add all the Available User Queues to the Selected User Queues list.
  - From the Selected User Queues list, select a user queue name and click **Remove**.
  - Click **Remove all** to remove all selected user queue names from the Selected User Queues list.
5. When the **Selected User Queues** list contains the names of the user queues you want to monitor, click **OK**.

**Result:** The Configuration dialog box reappears.

6. In the Monitored Appearances property details pane, select a Monitored Appearance from the list and, in the **Settings** section, configure its label and the behavior of alerts for this queue by doing any of the following:

<b>Label</b>	Type a unique name for the monitored user. This is the name that appears on the Monitored Appearances view.
<b>Active</b>	Select the <b>Active</b> check box to display this user queue on the Monitored Appearances tab.
<b>Ring telephone for calls</b>	Select this to ring your telephone when a new interaction arrives on the monitored queue.  <b>Note:</b> The Modify User Queues Access Control Right is required to enable the <b>Ring telephone for calls</b> or the <b>Ring computer</b> alerting options for a monitored appearance.
<b>Ring computer</b> <b>Ring when on phone</b>	Select <b>Ring computer</b> to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.

	<p><b>Tip:</b> If you also check the <b>Ring when on phone</b> 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>
<b>Pop client</b>	When selected, the arrival of an interaction on the monitored queue causes the CIC client to appear on top of any other application you are running. The <b>Monitored Appearances</b> view pops to the foreground if it was behind another view in the CIC client.
<b>Display desktop alerts</b>	Display a desktop alert for alerting interactions on this monitored appearance.
<b>Call Ring Sound</b>	<p>Next to the <b>Call Ring Sound</b> 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><b>Note:</b> This setting enables you to select a different sound for each of your monitored queues. For more information, see My Interactions Ring Sounds.</p>

**Related Topics**

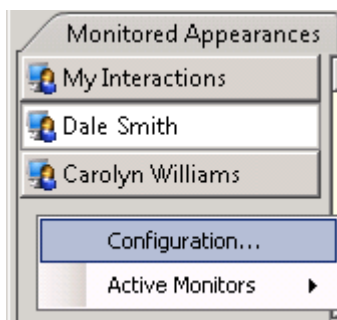
- Activate and Deactivate Monitored Appearances
- Configure Monitored Appearances
- Customize Monitored Appearance Alerts
- Working with Monitored Appearances

## 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 Configuration dialog box.
  - If you already have one monitored appearance, on the Monitored Appearances view, right-click below the last name and select **Configuration**.



2. In the Configuration dialog box, click the **Monitored Appearances** node.
3. In the Monitored Appearances property details pane, select a Monitored Appearance from the list and, in the **Settings** section, configure its label and the behavior of alerts for this queue by doing any of the following:

<b>Label</b>	Type a unique name for the monitored user. This is the name that appears on the Monitored Appearances view.
<b>Active</b>	Select the <b>Active</b> check box to display this user queue on the Monitored Appearances tab.
<b>Ring telephone for calls</b>	Select this to ring your telephone when a new interaction arrives on the monitored queue.  <b>Note:</b> The Modify User Queues Access Control Right is required to enable the <b>Ring telephone for calls</b> or the <b>Ring computer</b> alerting options for a monitored appearance.
<b>Ring computer Ring when on phone</b>	Select <b>Ring computer</b> to hear a ringing sound on your computer when a new interaction arrives on the monitored queue.  <b>Tip:</b> If you also check the <b>Ring when on phone</b> 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.
<b>Pop client</b>	When selected, the arrival of an interaction on the monitored queue causes the CIC client to appear on top of any other application you are running. The <b>Monitored Appearances</b> view pops to the foreground if it was behind another view in the CIC client.
<b>Display desktop alerts</b>	Display a desktop alert for alerting interactions on this monitored appearance.
<b>Call Ring Sound</b>	Next to the <b>Call Ring Sound</b> text box, click the controls to select and then preview the distinctive sound played when new calls arrive on this monitored user queue.  <b>Note:</b> This setting enables you to select a different sound for each of your monitored queues. For more information, see My Interactions Ring Sounds.

4. After you finish configuring monitored appearances, click **Apply**.
5. To close the Configuration dialog box, click **OK**.

### Related Topics

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

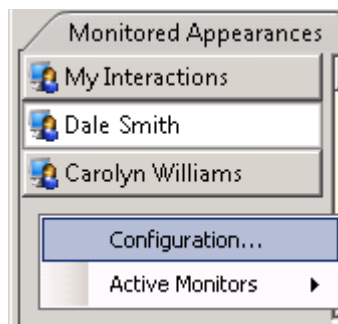
## Delete a Monitored Appearance

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:

- Do one of the following:
  - Access the Configuration dialog box in the usual way.
  - If you already have one monitored appearance, on the Monitored Appearances view right-click below the last name and select **Configuration**.



- In the Configuration dialog box, click the **Monitored Appearances** node.
- In the Monitored Appearances property details pane, select **Manage Users**.
- In the Monitored Appearance Selection dialog box, in the **Selected User Queues** list, select the user you no longer want to monitor.
- Click **Remove**.
- Click **Apply**.

**Result:** The Monitored appearance for the selected user is deleted.

- Click **OK**.

### Related Topics

[Activate and Deactivate Monitored Appearances](#)  
[Configure Monitored Appearances](#)  
[Customize Monitored Appearance Alerts](#)  
[Working with Monitored Appearances](#)

### Views

## Customizing the Interface

You can customize views and toolbars. Client templates can display a standard set of views, determine which columns and toolbar buttons appear in these views, and set the order in which the columns and buttons appear on these views.

- Add or Remove View Columns

- Add or Close Views
- Change View Layout
- Change View Order
- Create New View Dialog Box
- Customize Columns
- Customize the Toolbar
- Display the Chat View
- Display the e-FAQ View
- Display the Interaction Information View
- Display the Response Management View
- Display the Workgroup and Profile View
- Move Views
- Reset View Layout
- Resize a Docking Zone

## 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**.

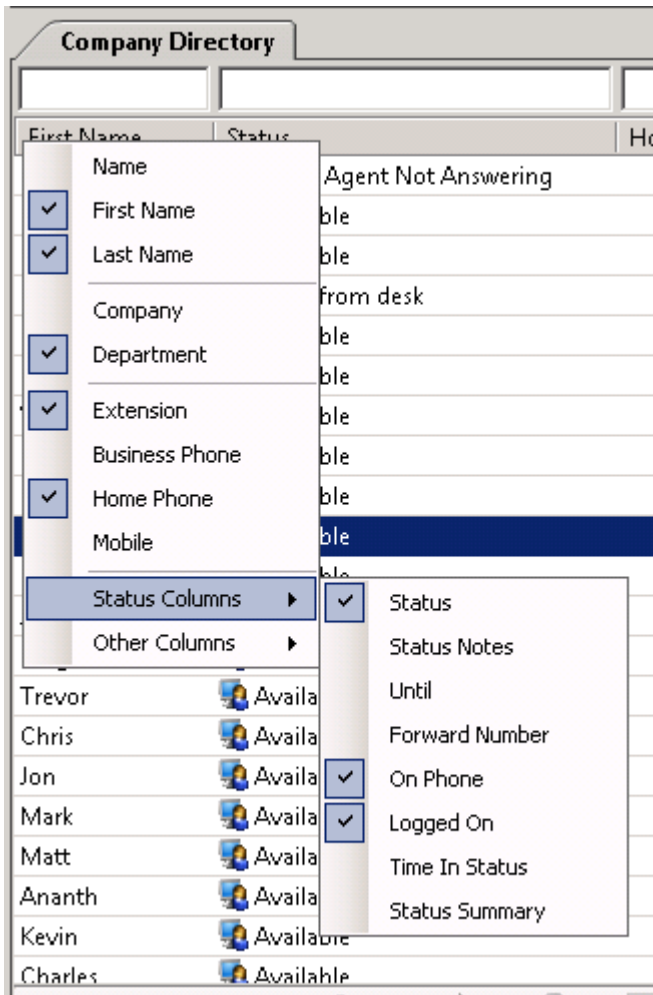
You can add or remove columns from any queue or directory view.

Right-click a column label in a queue, directory, or My Work Items view to display a menu of the columns that can be added or removed.

### To add or remove a column:

1. Right-click on the column headings for the view.

**Result:** A drop-down list of available column names appears.



2. Do one of the following:
  - To add a column, click the name of a column.
  - To remove a column, click the name of a column with a check mark.

### Related Topics

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

## 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.

You can even 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).

You control where the views appear. You can drag and drop views from zone to zone. For more information, see Docking Architecture.

You can also 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.

**Note:** Client templates can make certain views appear automatically.

## Adding a View

You add or close views directly from the CIC client interface. Each view appears as a tab with the name of the view.

**Tip:** Views with contents that are unique to your interface have the text "**Private**" in their name (for example, IC Private Contacts.)

### To add views:

1. Right-click a tab in the area where you want to add a view and click **New View**.

**Result:** The Create New View dialog box appears.

2. Do one of the following:

- Use the **Search** text box to locate the appropriate view.

**Tip:** In the **Categories** list, select **All views** to search for every matching view. Enter all or part of a view name in the **Search** text box and press **Enter** to display a list of views with matching names. Click the X in the Search text box to clear your search term.

- From the **Categories** list, select the category that contains the view you want.

3. In the **Views** list, click the appropriate view or type of view.

**Result:** If a selection dialog box appears, continue to the next step. If it does not, skip to last step.

4. Optional. From the **Available Items** list, select the appropriate view and click **Add >**.

5. Optional. Select and add additional views to the **Selected items** list.

6. When you complete your selection or selections, click **OK**.

**Result:** The selected view or views appear in the same docking zone as your currently selected view.

## Closing a View

You can remove any view that is not required. The My Interactions view is always required and cannot be removed. If you are licensed for Interaction Process Automation, the My Work Items view is required. Your CIC administrator determines whether views supplied by a client template are required.

### To close a displayed view:

1. Right-click the tab for a view you no longer want to display.
2. In the shortcut menu, click **Close view name**.

**Result:** The view is removed.



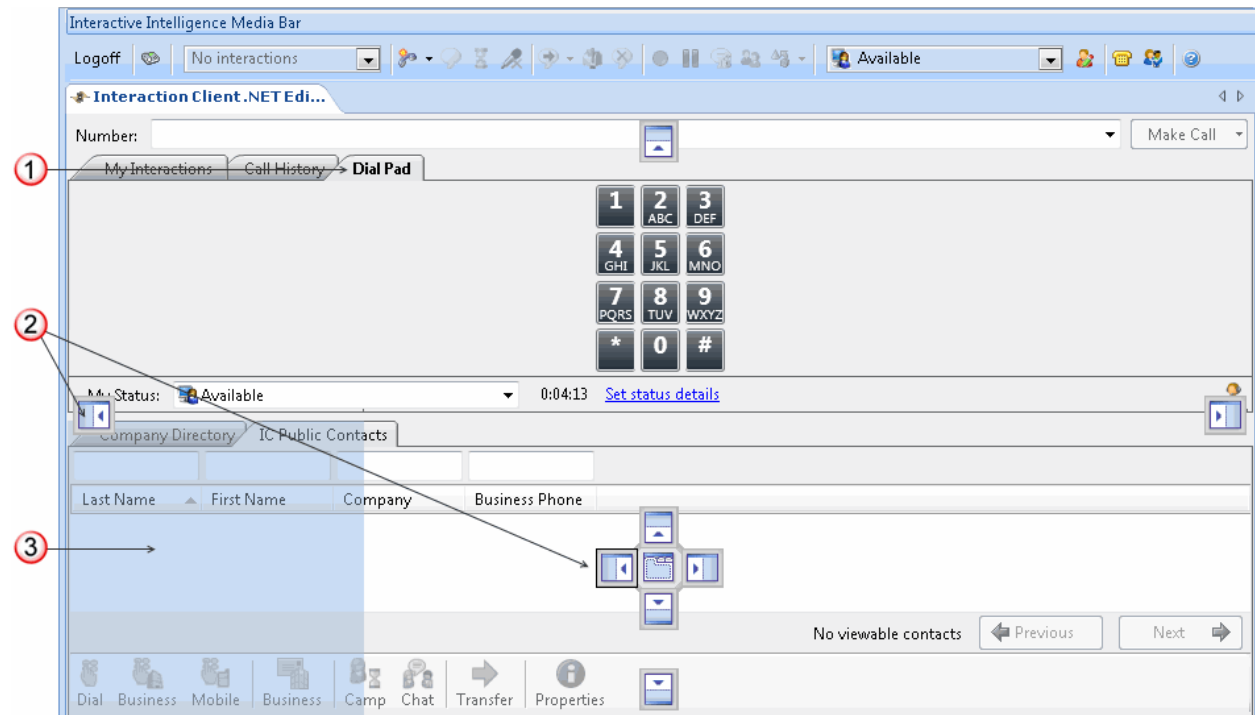
**Note:** Closing a view doesn't permanently remove the view from the CIC client. You can choose to display this view again at a future date. Also, not all views can be closed. If you right-click a tab and the **Close** option is not available, then that view cannot be closed.

## Related Topics

Customizing the Interface  
 Reset View Layout  
 Understanding the Configuration Dialog Box  
 Working with the Company Directory  
 Working with Other Directories

## Change View Layout






Using a flexible **docking architecture**, you can rearrange views within the CIC client interface, placing them in more convenient locations to suit your needs. This capability is helpful if you manage many interactions and users, for example in different states or multiple inter-office divisions, because more views can be visible at a time.



1	<b>Selected view</b>	To move a view, click and hold on its tab and start dragging it. <b>Note:</b> When you click a tab to select a view, the tab is highlighted and its name appears in bold type which helps you see which view is being moved.
2	<b>Docking icons</b>	Docking icons appear on the client window, showing you the available locations to which you can move the view.
3	<b>Selected docking zone</b>	When you point to a docking icon, the client highlights the area to which the view will move if you release the mouse button and "drop" the tab on that particular docking arrow.

**Tip:** You can also drag a view within its current set of tabs to reorder it.

## Docking Icons

Icon	Description
	Create a new left dock zone.
	Create a new top dock zone.
	Create a new right dock zone.
	Create a new bottom dock zone.
	Add the view currently being dragged to the currently highlighted dock zone.

### 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.

### To reorder columns:

1. Click and hold on a column heading.
2. Drag it over the desired location.
3. Release the column heading.

### 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 Toolbars

**Requirements:** The Customize Client Security Right enables you change the buttons in a 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.

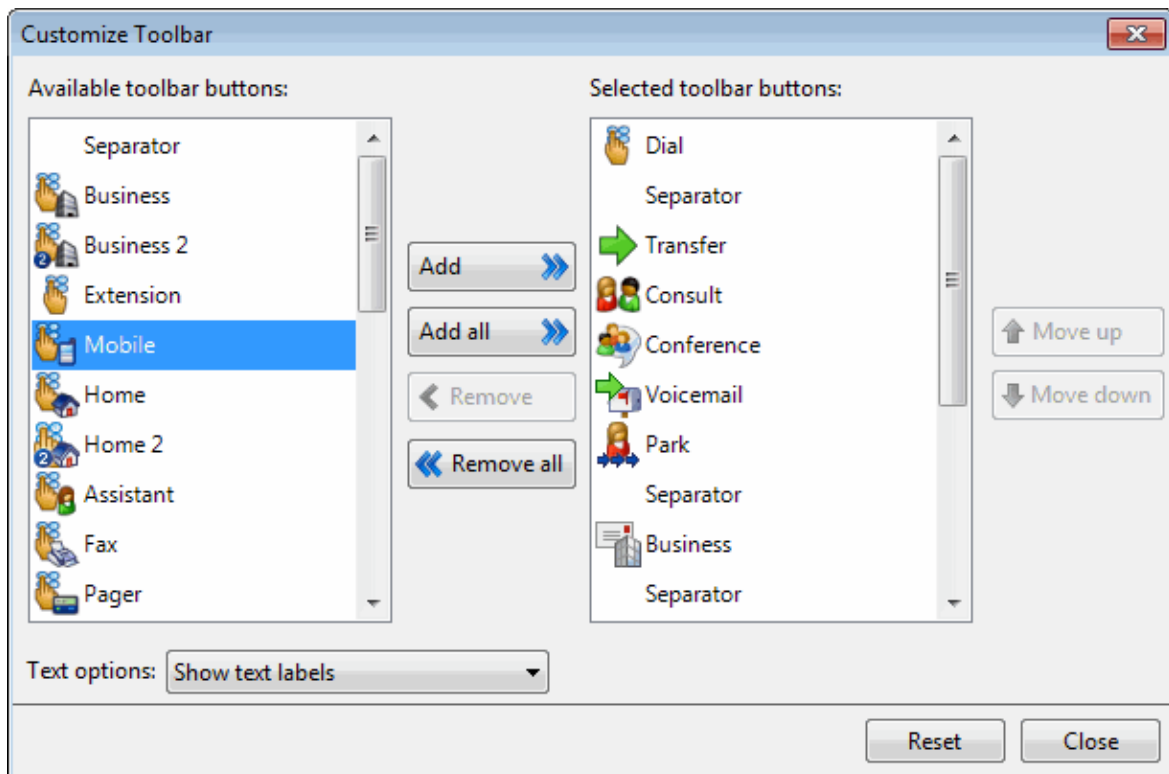
You can add, remove, or rearrange buttons on the CIC client toolbars.

### Add, Remove, or Rearrange Buttons

The Queue Control Toolbar appears on each queue management view (such as My Interactions). The Directory Toolbar appears on each directory view (such as Company Directory). If you use Interaction Process Automation, a toolbar appears on the My Work Items . You can change the appearance of these toolbars. Each toolbar can have its own unique set of toolbar buttons.

#### To customize a Queue Control, Directory, or My Work Items toolbar:

1. Select the view containing the toolbar you want to customize.
2. Right-click the toolbar and select **Customize**.
3. In the **Customize Toolbar** dialog box, perform any of the following actions:



**Tip:** When you customize a toolbar, pay particular attention when you point to a specific button. Some buttons may have the same label name, but have different icons. For example, the Customize Toolbar dialog box shows three separate Mobile buttons, but one button represents Transfer, one represents Consult, and another represents Dial. Also, some buttons have the same icon but different labels. For more information, see [Directory Toolbar Buttons and Using the Queue Control Toolbar](#).

- To add a button to the toolbar, from the **Available toolbar buttons** list, select a button name and click **Add ->**.

**Result:** The selected button appears at the bottom of the **Current toolbar buttons** list.

**Tip:** Insert one or more Separator lines to divide the toolbar buttons into groups.

- To remove a button from the toolbar, from the **Current toolbar buttons** list, select a button name and click **<- Remove**.

**Result:** The selected button is removed from the **Current toolbar buttons** list and reappears in the **Available toolbar buttons** list.

- To change the order of buttons on the toolbar, from the **Current toolbar buttons** list, select the button name and use the **Move Up** and **Move Down** buttons to move the button to the desired position on the toolbar.
- From the **Text options** drop-down list, control whether the button names are displayed by selecting **Show text labels** or **No text labels**.

4. Do one of the following:

- Click **Close** to save the new settings.
- Click **Reset** to return the toolbar to its default configuration.

### Related Topics

Custom Buttons  
Using the Queue Control Toolbar

## Move Views

You can simply drag and drop a view to a new location.

**Note:** You cannot move the My Interactions view.

### To move a view to a new location:

- Click and hold the tab for the view you want to move.
 

**Result:** The docking icons appear.
- Without letting go of the mouse button, point to the icon that represents where you want to move the view.
 

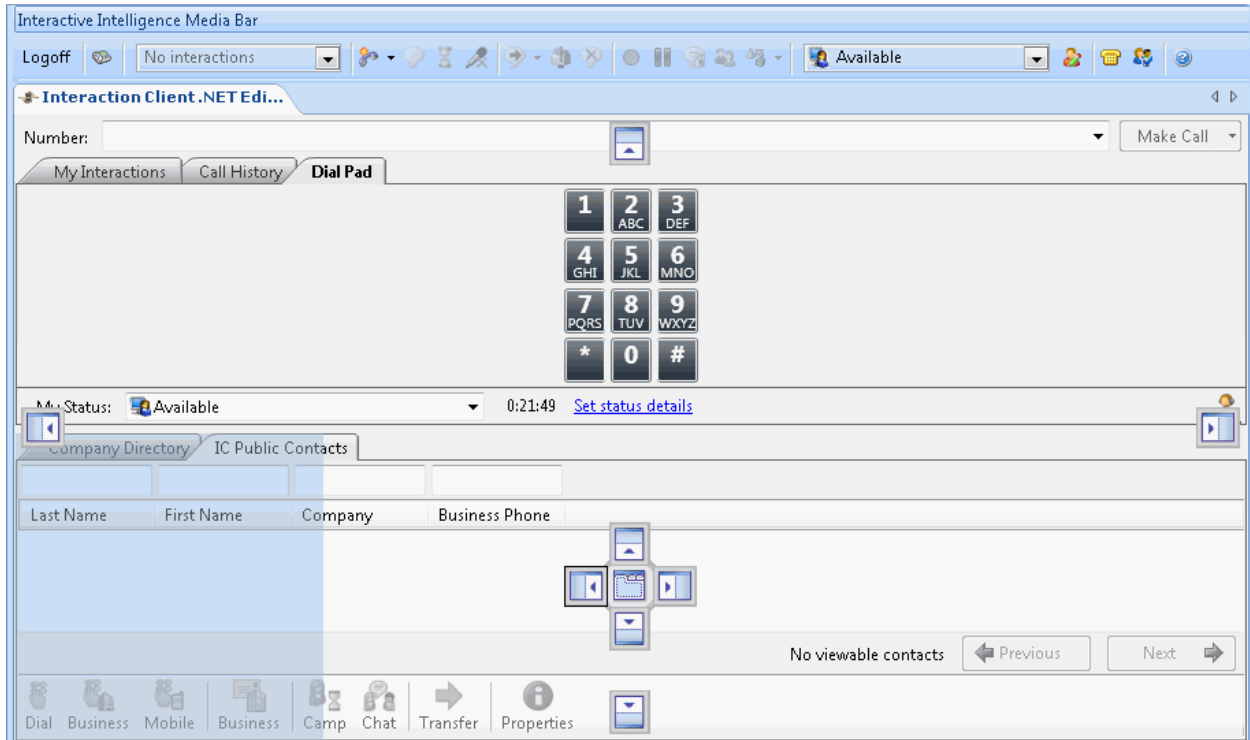
**Note:** The CIC client highlights the area to which the view will move.
- Release the button to drop the view in its new location.
 

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

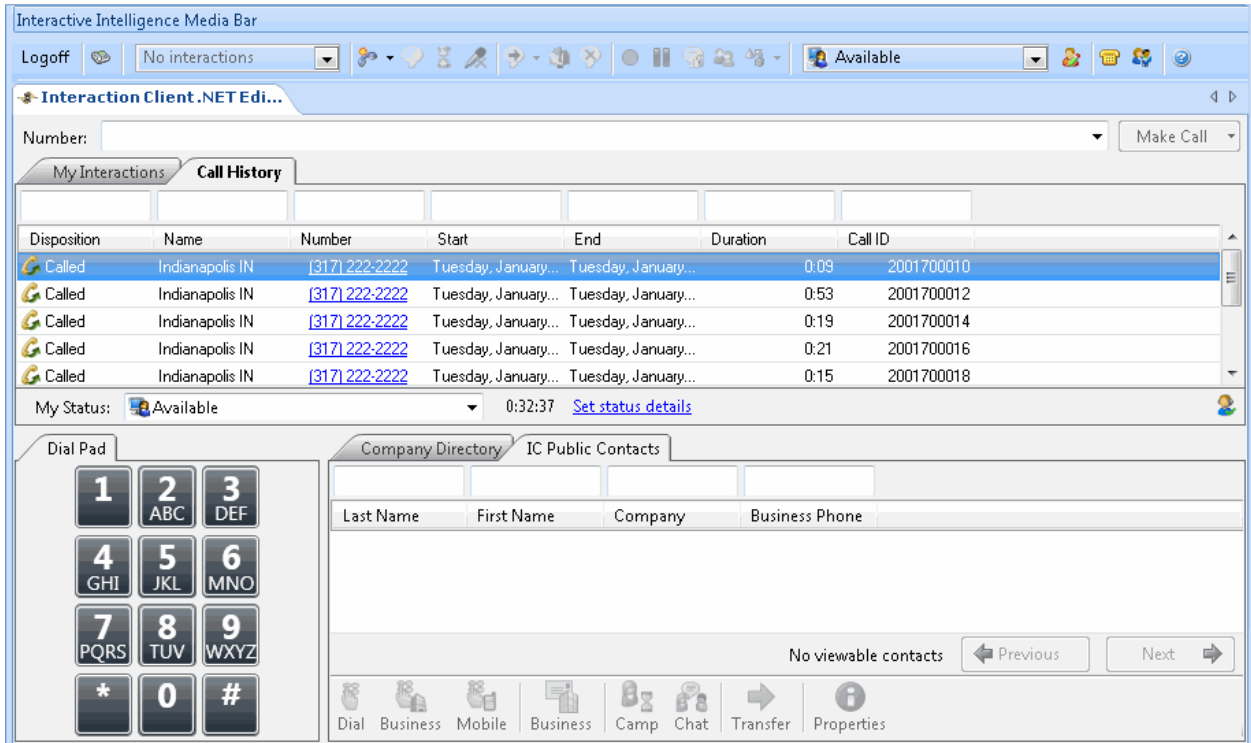
### Example

In this example, you want to move the Dial Pad view to a new location (the lower left side of the CIC client interface.) You click the tab for the Dial Pad view and begin to drag it. This displays the docking icons. The selected target zone is also indicated by a shaded area.

**Note:** The Dial Pad view tab is highlighted and the name appears in bold type. This indicates the tab is selected and is the one being moved.



When you release the mouse button the Dial Pad view moves to its new location.



### Related Topics

- Add or Close Views
- Change View Layout

## Reset Queue Column Display

**Requirements:** The View Queue Columns Access Control right determines which columns you can add to a **queue view**.

The columns you can display in a queue view such as My Interactions are controlled by user rights. If you have the appropriate rights, you can add these columns to a queue display with a single command instead of selecting them one by one.

### To reset a queue column display:

1. Right-click in the column heading row in a queue view.
2. From the shortcut menu, select **Reset column headers**.

**Result:** All the columns you are entitled to view appear in the queue view.

### Related Topics

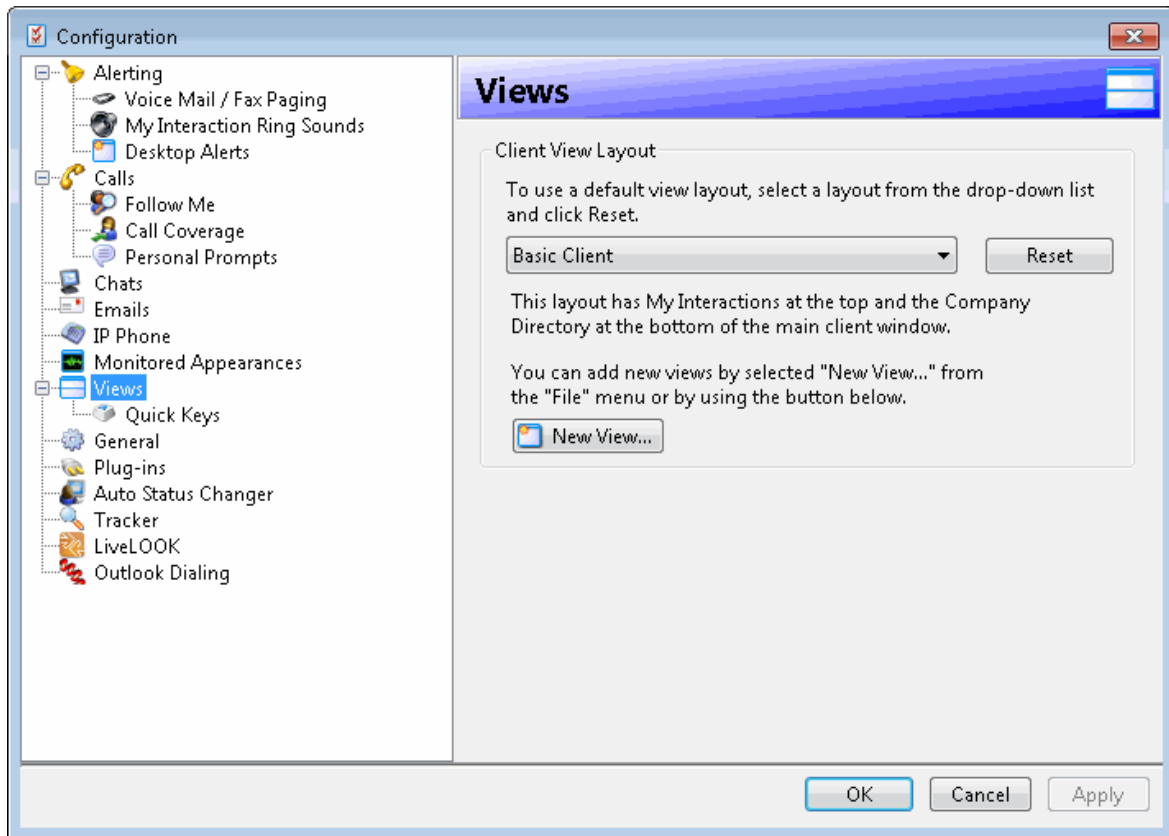
- Add or Remove View Columns
- My Interactions
- View Queue Columns

## Reset View Layout

Resetting the view layout restores the CIC client to its default set of views and the default layout for those views.

**To return to a default view layout:**

1. In the Configuration dialog box, select the **Views** node.



2. In the Views properties details pane, click **Reset**.

**Note:** A description of the selected layout appears below the view layout drop-down list. Your CIC administrator can also assign a client template to you in Interaction Administrator. Client templates also affect which views appear in your interface. Therefore, this layout description may not match exactly what you see after you reset your view layout.

**Result:** A Configuration dialog box appears, asking you to confirm that you want to return the layout to its default settings.

3. Do one of the following:

- To continue, click **Yes**.

**Result:** Your CIC client views are automatically restored to their original configuration or the configuration defined in your assigned client template.

- To cancel, click **No**.

4. In the Configuration dialog box, click **OK**.

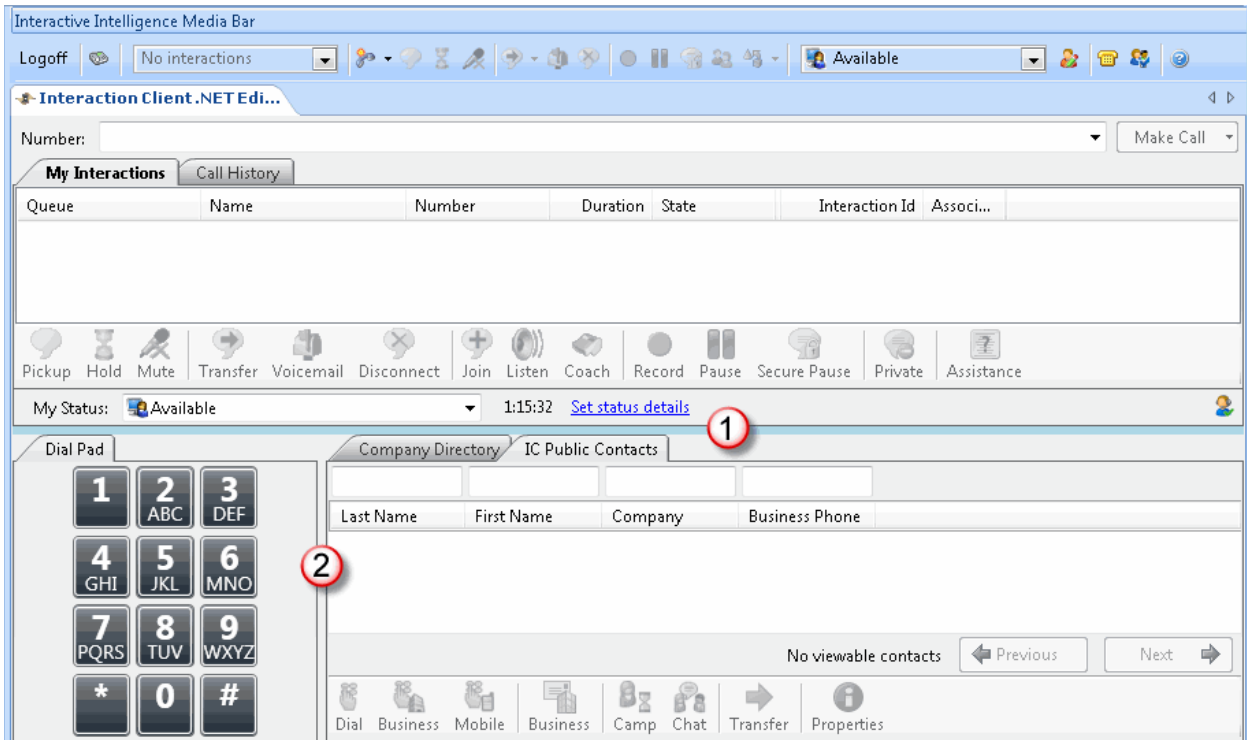
**Related Topics**

Add or Close Views  
 Change View Layout  
 Move Views

## Resize a Docking Zone

Use the splitter area to resize docking zones.

1	<b>Horizontal splitter area</b>	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	<b>Vertical splitter area</b>	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

### Plug-ins

## Plug-ins

**Requirements:** You need the appropriate View Plug-ins Access Control right to add a plug-in to the CIC client.

Plug-ins are components that can be dynamically added to the CIC client to provide extended functionality. Plug-ins are first made available on the IC server by an administrator and then the CIC administrator determines which plug-ins are visible to you as an available option in the CIC client. For a list of plug-ins available in your installation, see the **Plug-ins** node in the Configuration dialog box. For more information, see Enabling a Plug-in.



The CIC administrator can also designate a plug-in as required. Required plug-ins are included in the CIC client by default and do not appear on the Plug-ins property details pane. Required plug-ins include Call History and Auto Status Changer.

### Related Topics

Understanding the Configuration Dialog Box

## Enabling a Plug-in

**Requirements:** You need the appropriate View Plug-ins Access Control right to add a plug-in to the CIC client. The CIC administrator can also designate a plug-in as required. Required plug-ins are included in the CIC client by default and do not appear on the Plug-ins property details pane. Required plug-ins include Call History and Auto Status Changer.

Plug-ins are components that can be added to the CIC client to provide extended functionality.

### In general, the process of enabling a plug-in includes these steps:

1. The CIC administrator makes the plug-in available on the IC server.
2. In Interaction Administrator, the CIC administrator determines which plug-ins are visible to end users in User Configuration - Access Control.
3. You select the check box associated with the plug-in on the Plug-ins properties details pane of the Configuration dialog box and then enable it by selecting **Apply** or **OK**. For more information, see Plug-ins Properties Details Pane.

**Note:** When you enable a plug-in, some necessary files are downloaded from the IC server to the CIC client. Subsequently, plug-in availability is determined by comparing information on the IC server with corresponding information in the CIC client. Therefore, if you run disconnected, or the server connection fails, or you change to another IC server, previously enabled plug-ins may not be available or only the plug-ins that were loaded when you last closed the CIC client may be available.

4. Some plug-ins require configuration. If this is the case, the newly enabled plug-in appears as a node on the left side of the Configuration dialog box. Select the appropriate node and complete the necessary configuration settings.

### Plug-ins Properties Details Pane

Use the Plug-ins properties details pane to enable the **plug-ins** you want to use in your CIC client.

To enable a plug-in:

1. In the Configuration dialog box, select the **Plug-ins** node.
2. Available plug-ins are listed in the Plug-ins properties details pane. Select the check box for the plug-in you want to enable.

**Tip:** A description of the currently selected plug-in appears at the bottom of the Plug-ins properties details pane.

3. Click **Apply** to save your selections.
4. Click **OK** to close the Configuration dialog box.

### Related Topics

Automatic Status Changer

## Understanding the Configuration Dialog Box

### SIP Soft Phone

## SIP Soft Phone

SIP Soft Phone is a powerful application for desktop or laptop PCs that communicates via SIP for call control. It delivers the audio to the user through a supported USB audio device connected to your workstation or laptop.

It can be used with the CIC client or a basic call control interface. The SIP Soft Phone is like any other CIC station, so it is defined in Interaction Administrator.

The SIP Soft Phone is a system tray-based application (it is accessible from the lower right-hand side of the Windows desktop). This is the primary user interface including balloon-style notifications. It includes wizards for provisioning SIP soft phones and audio tuning.

**Note:** For Windows 7, you can install the SIP Soft Phone application during the Interaction Center User Applications Setup. For more information, see the *IC Installation and Configuration Guide*.

### Starting the SIP Soft Phone

There are different ways to start the SIP Soft Phone:

- If you previously selected the **Use Windows Authentication** check box in the Logon dialog box **startup** is set to **Always** in General Configuration Options, starting Oracle Service Cloud automatically logs you on to the Interactive Intelligence Oracle Service Cloud Integration and starts the SIP Soft Phone application.
- If you normally start Oracle Service Cloud and then click the Logon button in the Interactive Intelligence Media Bar, click the SIP Soft Phone icon on your Windows desktop to start the SIP Soft Phone before you log on to the CIC client.

**Result:** The SIP Soft Phone icon appears in the system tray and indicates the current status. When SIP Soft Phone starts, it uses the devices that were configured on the Setting Devices page of the Audio Tuning Wizard, unless those devices are no longer available. If the configured devices are not available, SIP Soft Phone uses the default Windows audio devices.

### Security

SIP Soft Phone delivers audio by means of Interactive Intelligence's HPAA (High-Performance Audio Architecture) libraries that use the RTP/SRTP protocol. SRTP enables security conscious organizations to encrypt the audio stream.

### Requirements

To use the SIP Soft Phone, you must:

- Be configured as a user on an IC server with the appropriate SIP hardware and software prerequisites.
- Install the SIP Soft Phone application on your workstation.

**Note:** This is available as part of the Interaction Center User Applications Setup. For more information, see the *IC Installation and Configuration Guide*.

- Configure the SIP Soft Phone to use a supported USB audio device.
- Log on to a station that is appropriately configured with a SIP soft phone station in Interaction Administrator.

**Note:** Your CIC administrator can configure (provision) your station with a soft phone in Interaction Administrator. You can also use the SIP Soft Phone Provisioning Wizard to provision your SIP soft phone and set it up for use. For more information, see the *SIP Soft Phone Help*.

- Select **SIP Soft Phone** as the Station Type when logging on to the CIC client.

**Note:** For more information, see [Logon Dialog Box](#).

For more information about SIP requirements, see your CIC administrator, or see the *IC Installation and Configuration Guide* or the *SIP Application Note for IC 4.0* available in the CIC Documentation Library on the IC server.

### Related Topics

Audio Tuning Wizard  
 Logging On  
 Provisioning Wizard  
 SIP Hard Phone  
 SIP PC Audio  
 USB Audio Device

## Audio Tuning Wizard

By default, audio comes from the computer's microphone and speakers. Interactive Intelligence does not recommend using the PC's speakers and microphones because the audio quality suffers. Use the Audio Tuning Wizard to select and tune the USB audio device (USB headset) used with the SIP Soft Phone application.

**Note:** The USB audio device is necessary to hear the audio prompts during auto-provisioning and when making calls. The Audio Tuning Wizard is available only if you installed the SIP Soft Phone application.

You can use the Audio Tuning Wizard to:

- Select a different microphone and speakers for calls.

**Note:** Your possible selections are limited to the audio devices installed under Windows on your system.

- Adjust microphone volume.
- Adjust speaker volume and balance.
- Test speaker settings.

### To use the Audio Tuning Wizard:

1. Do one of the following:
  - In the Windows notification area, right-click the SIP Soft Phone icon and select **Audio Tuning Wizard**.
  - From the Provisioning Wizard, click **Audio Tuning Wizard** on the Audio Setup page.

2. At the Audio Tuning Wizard Welcome screen, click **Next**.

**Result:** The wizard guides you through the following tasks:

- Setting Devices
- Configuring Speakers
- Configuring a Microphone.

**Note:** Click the **Help** button in the Audio Tuning Wizard for instructions on selecting and adjusting audio devices.

### Related Topics

Provisioning Wizard

SIP Hard Phone  
SIP PC Audio  
SIP Soft Phone  
USB Audio Device

## SIP Soft Phone Provisioning Wizard

If your network can be automatically discovered using DHCP option 160, your computer has only one network interface card, and your Full Computer Name matches the one used for an IP Phone in Interaction Administrator, then your SIP Soft Phone is automatically provisioned the first time you start it.

Otherwise, you must complete the provisioning process before you can make calls and use a SIP soft phone as a SIP endpoint. The SIP Soft Phone Provisioning Wizard simplifies this set-up process for a SIP Soft Phone.

**Note:** As a user, you can provision a SIP Soft Phone on any workstation to which you can log on. Customer Interaction Center then uses the correct configuration for the workstation you are currently using. A system administrator can provision any station using their CIC administrator credentials. The SIP Soft Phone Provisioning Wizard is available only if you installed the SIP Soft Phone application.

The SIP Soft Phone Provisioning Wizard guides you through the following tasks:

- Setting up Audio Devices
- Obtaining the Configuration File for your SIP Soft Phone
- Setting the Network Adapter Options
- Using Auto Provisioning to Configure your SIP Soft Phone

### To start the SIP Soft Phone Provisioning Wizard:

- Right-click the SIP Soft Phone icon in the system tray, and then click **Provision**.

## SIP Hard Phone

A SIP hard phone is a standalone device that is both a SIP device and an audio device. It can be used with or without the CIC client. Like a standalone analog phone, no additional configuration or added support is needed to work with the CIC client.

A list of supported SIP IP Phones is available at <http://testlab.inin.com>.

### Related Topics

Audio Tuning Wizard  
Provisioning Wizard  
SIP PC Audio  
SIP Soft Phone  
USB Audio Device

## SIP PC Audio

The CIC client has the ability to accept SIP (Session Initiation Protocol) audio sessions in conjunction with SIP-enabled telephones or the SIP Soft Phone application. It can transmit and receive audio using any supported device.

Optionally, you can use SIP/VoIP telephones on the LAN or WAN as long as they are SIP-compliant and the network was designed for VoIP. If you are setting up a new office, this means only one type of network – the LAN – needs to

be deployed. This can also be a way to migrate into Voice over IP without changing your entire infrastructure at one time. SIP processing enables you to connect small remote offices or groups of users via the WAN via SIP-enabled telephones.

### Related Topics

- Audio Tuning Wizard
- Provisioning Wizard
- SIP Hard Phone
- SIP Soft Phone
- USB Audio Device

## USB Audio Device

A USB audio device delivers audio from the PC to the user and is connected to the PC's USB port. The SIP Soft Phone application requires that you use a supported USB audio device.

### Audio Device Requirement

When it comes to audio devices, audio quality and personal preference are subjective. When you select a USB headset, choose a quality headset with noise and echo cancellation. You can discuss personal experience with headsets and recommendations from other partners and customers on the Interactive Intelligence Community Forum at <http://community.inin.com/>.

### Related Topics

- Audio Tuning Wizard
- Provisioning Wizard
- SIP Hard Phone
- SIP PC Audio
- SIP Soft Phone

## Working with Account and Wrap-Up Codes

### Working with Account and Wrap-Up Codes

**Requirements:** To display Account Code fields, you need the View Account Codes Access Control. To assign an Account Code to an interaction, you also need the Account Code Verification Security right . To see the **Advanced Dialing Options** dialog box, the **Use advanced dialing** option client configuration option in the Calls Configuration properties details pane must be enabled. The View Queue Columns Access Control right determines whether you can display the Account code column in My Interactions or other queue view. To assign a wrap-up code, you must be a member of a workgroup for which wrap-up codes are configured and activated.

This section provides background information on account codes and wrap-up codes and how they are used in the CIC client.

### Related Topics

- Advanced Dialing Options
- Assign Codes to an Interaction
- Assign Codes to an Incoming Interaction
- Assign Codes to an Outgoing Interaction
- Numerically Sort Account Codes
- Understanding Account Codes
- Understanding Wrap-Up 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:** This configuration is not required if your CIC administrator wants you to designate only a workgroup name on outgoing interactions and not assign an account code.

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

**Note:** Advanced Dialing Options can be enabled on a per user basis. This setting becomes the default value which you can override if you have access to the Calls properties details pane of the Configuration dialog box.

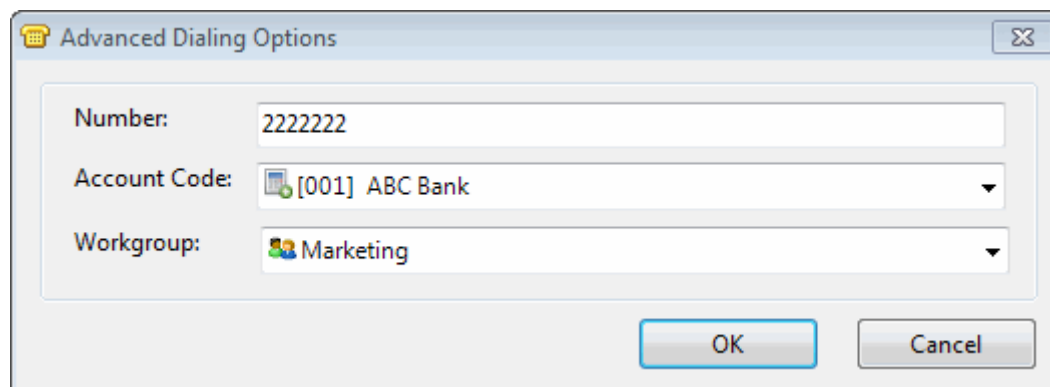
- Assigns you to at least one ACD workgroup.

In the CIC client, you:

- Enable the **Use advanced dialing options (account code, workgroup)** option in the Calls Configuration properties details pane 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.



Here are some things to note about the Advanced Options dialog box:

- The Account Code and Workgroup drop-down lists default to the last values used in this 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.

- The Sort account codes by account number configuration option controls account code order in the Advanced Dialing Options dialog box. The CIC client can sort account codes either by code (number) or description.
- 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 set the workgroup code to <None> for calls not made on behalf of a workgroup.
- You can only associate a call with a workgroup at the time the call is started.
- 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.
- Enable both **Advanced Dialing Options** and Confirm single click dialing to eliminate confirming that you want to dial a selected number. The Advanced Dialing Options dialog box takes the place of the Confirm Dial dialog box. Clicking **OK** in the Advanced Dialing Options dialog box is the same as clicking **Yes** in the confirmation dialog box.

### Related Topics

Assign Codes to an Outgoing Interaction  
Calls Configuration  
General options

## Assign Codes to an Incoming Interaction

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

You can assign Account codes and Wrap-up codes in the Interaction Properties dialog box. You can also assign these codes in some interaction windows and in the Interaction Information view.

### 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. Do one of the following:
  - Right-click the interaction and choose **Properties** from the menu that appears.
  - Click the Properties button.

**Result:** The Interaction Properties dialog box appears.

3. In the Interaction Properties dialog box, click the arrow at the end of the **Account Code** field and select the account code you want to assign to this interaction.

- Optionally, if your CIC administrator configured wrap-up codes, you can assign a **Wrap-up Code** in a similar fashion.

**Note:** If you don't assign a code during an interaction on a queue configured for wrap-up codes, you can be prompted to assign one when your part of the interaction ends. For more information, see [Understanding Wrap-Up Codes](#).

- Click the **Close** button in the upper right corner of the Interaction Properties dialog box.

**Result:** The account code you assigned to the interaction appears in the Account Code column 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](#).

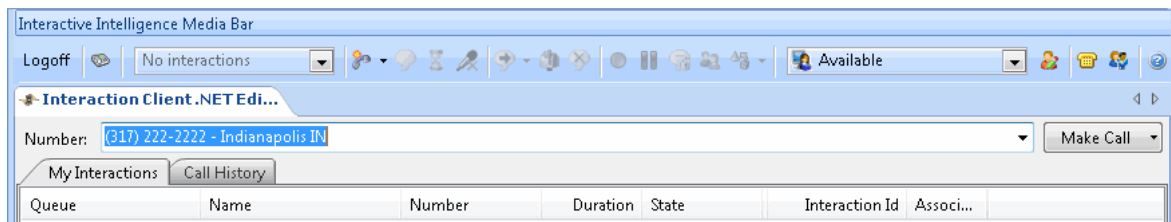
If your company uses account codes or tracks calls by workgroup, then you can be prompted to assign an account code or ACD workgroup every time you make a call. Your system must be appropriately configured in order for you to be prompted. For more information, see [Advanced Dialing Options](#).

**Note:** You can also assign an account code in the Interaction Information View.

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

- Do one of the following:
  - In the Interactive Intelligence Media Bar, click the Make Call button. In the New Call dialog box, in the Number field, type the phone number you want to call.
  - In the CIC client workspace, in the **Number** field, type the phone number you want to call.

**Note:** You can also drag and drop a directory entry into the **Number** field. The system copies the contact's default number into the Number field. For more information about other methods of starting a call, see [Making Calls](#).

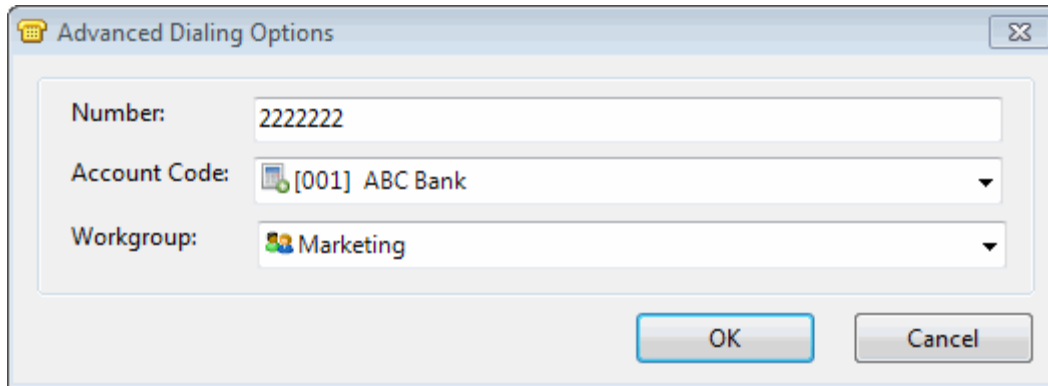


**Note:** Optionally, you can use the arrow on the Make Call button to assign a workgroup. For more information, see [Make a Call Using the Number Field](#).

- Click the **Make Call** button or press **Enter**.

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





- Click the arrows at the end of the **Account Code** or **Workgroup Code** drop-down lists and select the codes you want to assign to this interaction and click **OK**.

**Result:** The call is started.

**Note:** If your CIC administrator has configured and enabled account codes, an account code is required. A workgroup code signifies that the call was made on behalf of a workgroup. You can select <None> for calls not made for a workgroup.

**Tip:** For more information, see [Advanced Dialing Options](#).

You can use the Properties window to set an account code for any incoming or outgoing interaction. A workgroup code can only be assigned when you start the interaction, not after it has started.

#### To assign an account code to an outgoing interaction using the Interaction Properties dialog box:

- During an outgoing interaction, right-click the interaction and choose **Properties** from the menu that appears.
- Result:** The Interaction Properties dialog box appears.
- In the Interaction Properties dialog box, click the arrow at the end of the **Account Code** field and select the account code you want to assign to this interaction.
  - Optionally, if your CIC administrator configured wrap-up codes, you can assign a **Wrap-up Code** in a similar fashion.
  - Click the **Close** button in the upper right corner of the Interaction Properties dialog box.

**Result:** The account code you assigned to the interaction appears in the Account Code column of your queue.

#### Related Topics

[Advanced Dialing Options](#)  
[Understanding Account Codes](#)  
[Understanding Wrap-Up Codes](#)

## Numerically Sort Account Codes

You can sort your list of available account codes numerically. This makes it easier for you to search for the appropriate account code to assign to your current interaction.

**Note:** There are several places in the CIC client where you can assign an account code to an interaction. For more information, see [Working with Account and Wrap-Up Codes](#).

#### To numerically sort your account code list:

1. In the Configuration dialog box, select the **General** node.
2. In the General properties details pane on the right, select the **Sort account codes by account number** check box.
3. Click **OK** to save your changes.

### Related Topics

Understanding Account Codes

## Understanding Account Codes

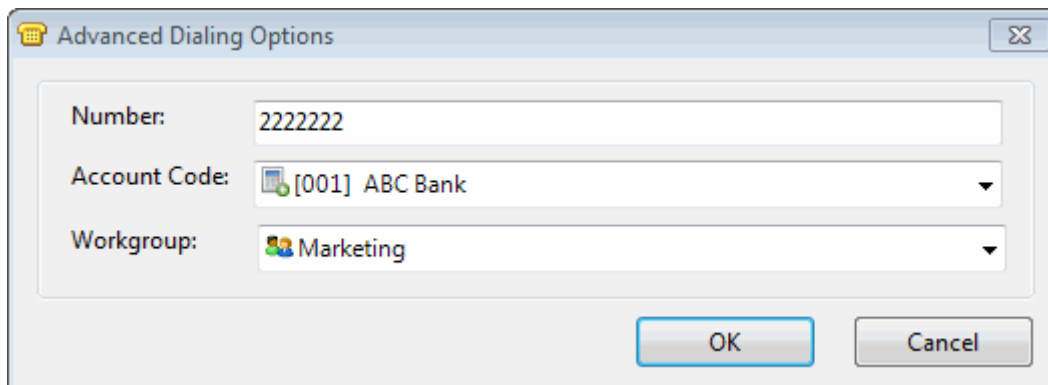
**Requirements:** See Working with Account and Wrap-up Codes.

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.

### 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.
- Account codes can be sorted numerically. When you type the first few numbers of the account code, the CIC client jumps ahead to the first match, speeding up the process of selecting the appropriate code for your interaction.
- You can use the Interaction Properties Dialog Box to set an account code for any incoming or outgoing interaction.
- You are prompted to assign account codes to outgoing interactions in the Advanced Dialing Options dialog box only if your company uses account codes and your system is appropriately configured. For more information, see Advanced Dialing Options.



### Related Topics

Working with Account and Wrap-Up Codes  
Assign Codes to an Incoming Interaction  
Assign Codes to Outgoing Interaction

## Understanding Wrap-Up Codes

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

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

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

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

### Assigning a Wrap-Up Code

The following rules apply to wrap-up codes:

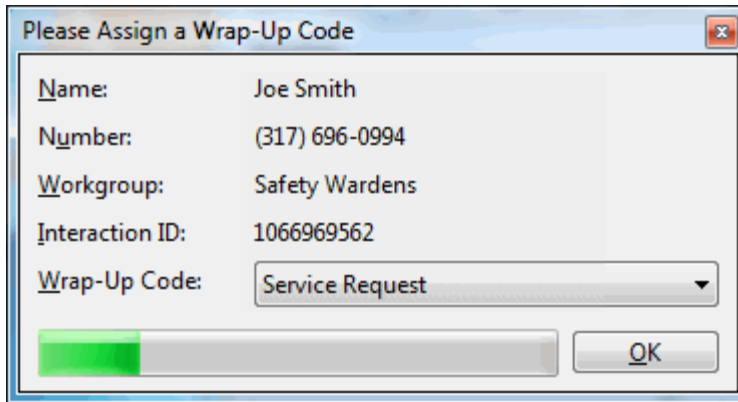
- You can assign wrap-up codes to **incoming** and **outgoing** interactions.
- You can assign or change a wrap-up code any time **during** an interaction.
- If a wrap-up code is required and you have not already assigned one, you are prompted to assign a wrap-up code **after your part in the interaction 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 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 remind 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. 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. You can then close the Please Assign a Wrap-Up Code dialog box or wait for dialog box to close automatically when the wrap-up time limit is reached.

- When you type the first few characters of the wrap-up code or name, the CIC client jumps ahead to the first match, allowing you to select the appropriate wrap-up code quickly.
- You cannot sort wrap-up codes by code or name; they are automatically sorted alphabetically by description.



**Related Topics**

Working with Account and Wrap-Up Codes

**Working with 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.

**Note:** The View Queue Columns Access Control right determines whether you can display the Details column in My Interactions.

My Interactions						
Queue	Name	Duration	State	Details	Interactio	
Marketing	Conference	0:02:53	Connected	Need help tracking order AX104598.	1001216	
Marketing	Indianapolis IN	0:00:22	Connected	2222222	1001215	

- When you pick up a callback request interaction, it appears in the **Callback** window.
- When you pick up a callback request, its state changes to ACD Assigned: (Agent name), and other agents are not able to respond to this request. However, if the callback request is transferred to you, or if you pick it up even though you are a not a member of the workgroup to which it was routed, its state changes to Connected.
- When you make a call in response to a callback request, the new call is associated with the Callback request as a child item. It is indented under the original callback request.

- As with all interactions, a callback request remains in the workgroup queue unless a non-member of the workgroup picks it up. If a non-member of the workgroup picks it up, it disappears from the workgroup queue.

**Related Topics**

- Callback Window
- Respond to a Callback Request

**Callback Window**

The Callback window appears when you pick up a callback request.

**Tip:** If you prefer not to see the sidebar view, click the splitter bar to collapse that portion of the Callback window.

1	<b>Menus</b>	Use these menus to perform various actions during a callback.
2	<b>Toolbar</b>	The toolbar contains buttons for most of the functions for managing a callback request.  <b>Tip:</b> Keyboard shortcuts are also available for these functions and are listed on the View menu.
3	<b>From</b>	The name of the person who requested that someone call them back.
4	<b>Number</b> <b>Make Call</b>	The telephone number supplied by the person who requested the callback. Clicking the <b>Make Call</b> button dials the telephone number.
5	<b>Attempt</b>	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.
6	<b>Subject</b>	This area displays the reason the callback was requested. This information is usually required as a part of the process for requesting a callback.
7	<b>Callback Complete</b> <b>Retry Later</b>  <b>Attempt Failed</b>	After you make the requested call, use these buttons to indicate whether you reached the requester or not. For more information, see Respond to a Callback Request.  Click the <b>Callback Complete</b> button to indicate you reached the requester and completed the callback interaction.  The <b>Retry Later</b> 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.  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 transfer the callback request back to the workgroup queue. After this transfer, server parameters and handler customization can affect how the snoozed callback request is reprocessed. For more information, contact your CIC Administrator.  Click the <b>Attempt Failed</b> 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.

		<b>Tip:</b> If your CIC system is appropriately configured, you may be able to select a wrap-up code that explains the reason for this failure.
8	<b>Status bar</b>	The Status bar displays the ID number, duration and state of the interaction. For more information, see Queue Contents.
9	<b>Sidebar area</b>	The appearance of the sidebar area can vary based on your user rights. It contains controls and information that are related to the callback request.
10	<b>Account Code</b>	Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to the callback interaction. For more information, see Understanding Account Codes and Assign Codes to an Interaction.
11	<b>Wrap-up Code</b>	If you are a member of a workgroup for which Wrap-up codes are configured, you can use this drop-down list to assign a wrap-up code to the callback interaction. For more information, see Understanding Wrap-Up Codes and Assign Codes to an Interaction.
12	<b>Notes</b>	Use the Notes section to add notes or comments about the callback request. For more information, see Add Notes to an Interaction.  <b>Note:</b> These notes are visible to other CIC client users who are "Listening to" (monitoring) this callback request. After the callback request is disconnected, these notes can be available in the Notes section of the Related Items view if the callback requester is identified and the Customer Interaction Center system collects this information. For more information, see your CIC administrator.
13	<b>Splitter Bar</b>	If you prefer not to see the sidebar area, click the splitter to hide that part of the Chat window. Click the splitter again to restore the sidebar area.
14	<b>Add a Note icon</b>	To add a note about the callback request, click this icon to open the Notes text box. For more information, see Add Notes to an Interaction.
15	<b>Responses</b>	Select a pre-defined response. For more information, see Use Response Management for an Incoming Interaction.  <b>Note:</b> Response Management is not available in the Interactive Intelligence Oracle Service Cloud Integration.

## 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 window opens.

**Tip:** If you prefer not to see the sidebar view, click the splitter (to the left of the Notes tab) to collapse that portion of the Callback window.

2. Click the **Make Call** button to return the call.

**Result:** This creates a call that is associated with the callback request. For more information, see [Callback Interaction](#).

- If prompted, in the Advanced Dialing Options dialog box, assign an **Account Code** to the **call** and click **OK**.

**Note:** The Account Code in the Advanced Dialing Options dialog box applies to the **call**. The Account Code and Wrap Up Code drop-down lists in the Callback window apply to the **callback request**.

- When the call is ended, in the Callback window, do any of the following:
  - Click **Properties** and assign an Account Code and Wrap Up code for the callback request.
  - Click **Add Note** and add a note to the callback request.
- In the Callback window, click one of the following buttons, depending on the result of your callback session:

<b>Callback Complete</b>	Click this button to indicate you reached the requester and completed the callback interaction.
<b>Retry Later</b>	<p>The <b>Retry Later</b> 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, contact your CIC Administrator.</p>
<b>Attempt Failed</b>	<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><b>Tip:</b> 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>

- Close the Callback window.
- If your outgoing call is still connected, select the call interaction and click **Disconnect**.

### Related Topics

[Assign Codes to an Interaction](#)  
[Callbacks and the Current Interaction View](#)

## Monitor a Callback Request

**Requirements:** See [Listen](#).

If you have the appropriate rights, you can monitor a callback request handled by another CIC client user.

Some things to note about the process of monitoring a callback request:

- If you monitor a callback request, a **Lsns icon** appears on the line containing the interaction in both the agent's and your own queue views.

**Tip:** For more information, see [Determine if Someone is Listening to or Recording Your Interactions](#).

- The **Lsns icon** is not removed until you cease to monitor the interaction by closing the callback window on your workstation or clicking the **Listen** button a second time.
- You can stop monitoring a callback request at any time.
- Any notes the agent makes on the original callback request are visible to anyone monitoring the interaction.
- If the agent selects an account code, this is also visible in the monitored callback window.
- If the agent makes a call as a result of this callback request, you must start a separate **Listen In** action to monitor the conversation.

In a typical example, another CIC client user (agent) picks up a callback request from a workgroup queue. If you have the necessary rights to listen to (monitor) interactions and to monitor the queue on which the callback request is appearing, you can view the callback request.

#### To monitor a callback request:

1. The agent picks up a callback request.

**Result:** The Callback window appears on the agent's workstation and displays the callback request.

2. You select the same callback request interaction from the appropriate queue view and do one of the following:
  - Right-click the callback request and choose **Listen In** from the menu that appears.
  - Select the callback request and then click the **Listen** button.

**Result:** A callback request window opens on your workstation and displays the callback request. The **Lsns** icon appears in the row containing the callback request in both the agent's and your queue view.

3. If the agent responds to the callback request, an outgoing call appears in the appropriate queue views on the agent's and your systems.
4. To monitor the agent's call, select the call interaction in your queue view and click the **Listen button**.

**Result:** The **Lsns** icon appears in the row containing the call. You hear the conversation.

**Note:** You can stop listening at any point in this process. You do not need to wait until the agent completes the call.

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

#### Related Topics

Determine if Someone is Listening to or Recording Your Interactions  
Listen to a Call in a Queue  
Working with E-mail Messages

## 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. Do one of the following:
  - In the Response Management view, search for and then select an appropriate response.
  - In the Callback window or E-mail Window for Incoming Messages, expand the **Responses** section and search for an appropriate system-wide response.

**Tip:** For more information, see [Search for a 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 the **Notes** section of the Callback window or E-mail window for Incoming Messages.

**Related Topics**

[Search for a Response](#)  
[Use Response Management in an Email Message](#)  
[Working with Callback Requests](#)

**Working with Calls****Working with Calls**

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

- Call Security
- Making Calls
- Picking Up Calls
- Transferring Calls
- Forwarding Calls
- Making Conference Calls
- Using Speed Dial
- Using Other Call Features

**Call Security**

Customer Interaction Center provides call security that prevents others from listening in on a call or even determining which internal parties are involved in a conversation.

CIC administrators can configure the use of two encryption protocols to support encryption of call audio (SRTP) and call control information (TLS). This provides confidentiality and flexibility for security-sensitive organizations. Your CIC administrator can use Interaction Administrator to configure your station to use SRTP for all your calls. When SRTP is not configured for a station, the calls are “non-encrypted” or not secure from network interception.

## Call Security Icons and Alerts

When the CIC administrator configures your station to request that all calls are secure or if you are involved in a call where one of the parties has requested a secure call, the CIC client monitors a call's security level to determine if it is secure and remains secure. A call can begin as a secure (SRTP) call and later be downgraded to a non-secure state. This can occur if the secure call is transferred to, or made part of a conference with, a non-secure party.

**Note:** If your station is not configured to have secure calls, you do not see a lock icon at all.

- Secure calls



A closed lock icon indicates that a call is secure within the environment controlled by CIC. It appears only if your station is configured to have secure calls and *end-to-edge* security.

A call can be comprised of multiple audio legs. When your station is configured to have secure calls (SRTP is configured in Interaction Administrator), the call is encrypted/secured as far as possible (e.g., within the environment controlled by CIC). If all the audio legs of the call are secure to the edge of network (to another SRTP phone or to an SRTP gateway) then the closed lock icon appears, indicating a secure call. The lock does not display on an RTP station since the RTP station always has at least one non-secure audio leg (the RTP leg to the phone itself).

**Note:** The Secure Call icon indicates only *end-to-edge* security; i.e. security from a device configured to use TLS/SRTP and controlled by CIC (such as your phone) to the point where CIC passes the call to an outside agency or a device that is not configured for TLS/SRTP.

Outside agencies can include a PSTN (Public Switched Telephone Network) or other service provider outside the control of CIC. Devices that might not be configured for TLS/SRTP can include other telephones or a gateway between CIC and a PSTN.

- Non-secure calls



An open lock icon indicates that at least one leg of a call is not secure. It appears only if your station is configured to have secure calls and *end-to-edge* security.

If your station is configured to have secure calls (SRTP is configured in Interaction Administrator), but the call cannot be made completely secure from the station to the destination (e.g., only one leg of the call is secure), and the station security level is configured for *end-to-edge* security, then the open lock icon appears. This means that security has been downgraded because some portion of the call cannot be encrypted, or secured. The open lock does not imply someone is listening to a call, but only that part of the call cannot be secured to prevent it from being intercepted. The open lock does not display on an RTP station, or on an SRTP station that has its security level configured as *minimal*. The open lock displays only on an SRTP station that has its security level configured as *end-to-edge*.

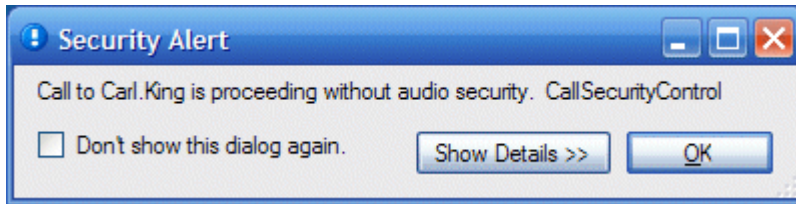
**Note:** If you point to the non-secure call icon, it displays a tooltip that explains the cause of the security alert.

- A Security Alert dialog box can also appear to alert you that the previously secure call is no longer secure.

**Tip:** For more information about why the call is no longer secure, click **Show Details >>**.

**Note:** If your CIC administrator grants you the right to configure your CIC client alerts, you can control whether this Security Alert dialog box appears. For more information, see [Calls Configuration](#). When a call

goes from a non-secure state to a secure state, the icon in the user's queue changes to indicate that the previously non-secure call is now secure. You do not see a Security Alert.



## Related Topics

### Calls Configuration

## Emergency Call Alerts

**Requirements:** No additional licensing is required for Emergency Call Alerts. However, before Emergency Call Alerts can be issued, your CIC administrator must first create an Emergency call classification, select the individuals or workgroups who should receive Emergency Call Alerts for calls with that classification, classify certain phone numbers as "Emergency" phone numbers, and provide emergency information for each station and Managed IP Phone.

CIC administrators can set up alerts to notify specific individuals or workgroups when an emergency call is made from a CIC station or Managed IP Phone. Emergency calls can include 911 calls and calls to other emergency numbers (e.g., police, fire department, or internal emergency numbers).

If you are designated by the CIC administrator to receive Emergency Call Alerts, when an emergency call alert is issued you:

- Receive an email message that notifies you about the Emergency Call.
- See an emergency call hyperlink.
- See a pop-up alert.

### E-mail Message Alert

If you are designated to receive emergency call alerts, an email message is sent to you when an emergency call alert is issued. These e-mails are sent regardless of your CIC status and are sent even if you are not logged onto the CIC client at the time.

An email message alert looks like the following example:

```
Subject: Classification Alert: Emergency
Importance: High

Classification Alert: Emergency

Local Name: Interactive Intelligence
Local Number: 3459
Remote Name: Power and Light
Remote Number: 555-9999

User Id: Joe.Smith
Station: JSMITHSIP
Line: SIP Line 2
```

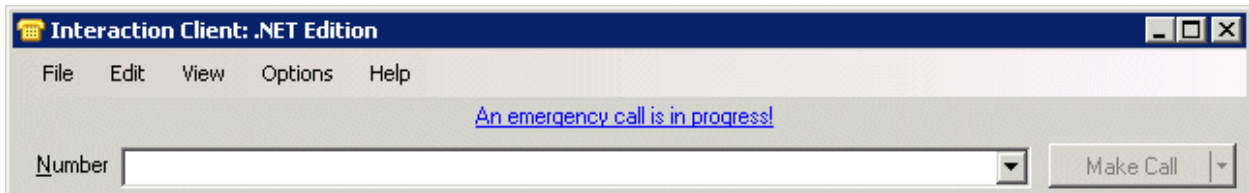
The information in the email message alert corresponds to the way Emergency Call Alerts are configured in Interaction Administrator.

<b>Local Name</b>	The Emergency Information "Customer Name" for the station or managed IP phone where the call was made.
<b>Local Number</b>	The Emergency Information "Calling Party Number" for the station or managed IP phone where the call was made.
<b>Remote Name</b>	The description of the emergency number that was dialed.
<b>Remote Number</b>	The emergency number dialed.
<b>User Id</b>	The user account name of the logged-in user who made the call.
<b>Station</b>	The standard CIC name for the station where the call was made.
<b>Line</b>	The name of the outgoing telephone line used for the emergency call.

**Note:** The CIC administrator configures Emergency Information for stations and Managed IP Phones in Interaction Administrator. If this information is not provided, then Local Name and Local Number are blank in the email message alert.

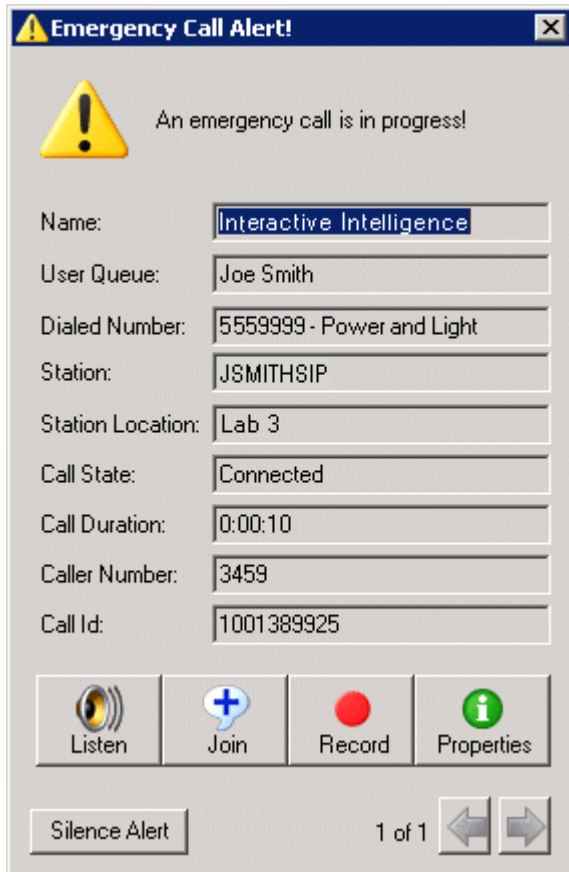
### Alert Message Hyperlink

When an emergency call alert is issued, you see a warning that an emergency call is in progress. This warning is a hyperlink that appears above the **Number** field. Click this link to display the Emergency Call Alert dialog box.



### Pop-up alert

If you are designated to receive emergency call alerts, you see a pop-alert when an emergency call alert is issued. This is a real-time alert that occurs when CIC classifies a call as an emergency.



<b>Name</b>	The Emergency Information "Customer Name" for the station or managed IP phone where the call was made.
<b>User Queue</b>	The display name of the logged-in user who made the call. If the call is made from a phone or station without an associated user (e.g. lobby phone), then this is blank.
<b>Dialed Number</b>	The emergency number dialed and the emergency phone number description.
<b>Station</b>	The standard CIC name for the station where the call was made.
<b>Station Location</b>	The Emergency Information "Description" of the station or managed IP phone from which the call was made.
<b>Call State</b>	The current state of the emergency call (e.g. Dialing, Connected, Held, or Disconnected). For more information, see Understanding an Interaction's State.
<b>Call Duration</b>	The amount of time since the emergency number was dialed.
<b>Caller Number</b>	The Emergency Information "Calling Party Number" for the station or managed IP phone where the call was made.
<b>Call Id</b>	The CIC interaction identification number for the emergency call.

**Note:** The CIC administrator configures Emergency Information for stations and Managed IP Phones in Interaction Administrator. If this information is not provided, then Name, Station Location, and Caller Number are blank in the Emergency Call Alert.

### Working with Emergency Call Alerts

You can do any of the following in the Emergency Call Alert dialog box:

- You can close the Emergency Call Alert dialog box. Later you can return to it while the call is in progress by clicking the Alert Message Hyperlink.
- An audible alert tone is played through the PC speakers for 10 seconds when you receive an emergency call alert. Click the **Silence Alert** button to turn it off.
- If you receive multiple, simultaneous emergency call alerts, click the right and left arrow buttons to view each alert.
- Click the Properties button to view and edit detailed information on the emergency call. You can take notes on the call. For more information, see View and Edit Interaction Properties.
- Click the Listen button to listen to the emergency call. You hear both sides of the call, but the initial participants are not able to hear you. For more information, see Listen to a Call.
- Click the Join button to participate in the emergency call. This creates a three-way conference call and the initial participants are able to hear you. For more information, see Join an Interaction.
- Click the Record button to record the emergency call. This recording is delivered to you after the call is completed. For more information, see Record a Call for details.

**Note:** The **Listen**, **Record** or **Join** buttons can be disabled if you do not have the rights to perform the action associated with the button or if the call is not in a state in which this action can be performed. Contact your CIC administrator if you need security rights to perform one or more of these actions.

#### Related Topics

Managed IP Phone  
**Working with Calls**

#### Making Calls

### Making Calls

There are a number of ways to make a call in the CIC client. Enter a number in the **Number** field, use your telephone, or use the dial pad in the Client. Double-click any phone number hyperlinks, double-click a directory entry, or select a directory entry and click any available dial button on the directory toolbar.

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
- Click to Dial an Oracle Service Cloud Contact
- Call Back a Disconnected Call
- 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 a Dial Button
- Make a Call Using the Make Call Button
- Make a Call Using the Number Field
- Using Call History to Make Calls
- Using the Dial Pad

## 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:

- In the Interactive Intelligence Media Bar, click the Make Call button. Type **0** in the **Number** field in the New Call dialog box and then click **Make Call**.
- In the CIC client workspace, type **0** or the internal operator number in the **Number** field and click **Make Call**.

### To call an external (phone company) operator:

- In the Interactive Intelligence Media Bar, click the Make Call button and then type **00** in the **Number** field in the New Call dialog box.
- In the CIC client workspace, type **00** or the internal operator number in the **Number** field and click **Make Call**.

**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

Making Calls

## Call Back a Disconnected Call

The **Call Back** option enables you to call back to the phone number for a disconnected call in My Interactions, or a user or station queue.

### Do one of the following:

- Right-click the disconnected call and select **Call Back** from the pop-up menu.
- Double-click the disconnected call.
- Select the call and press the shortcut keys **Ctrl+B**.

**Result:** The **Call Back** option dials the number of the selected call if the number is valid.

### Related Topics

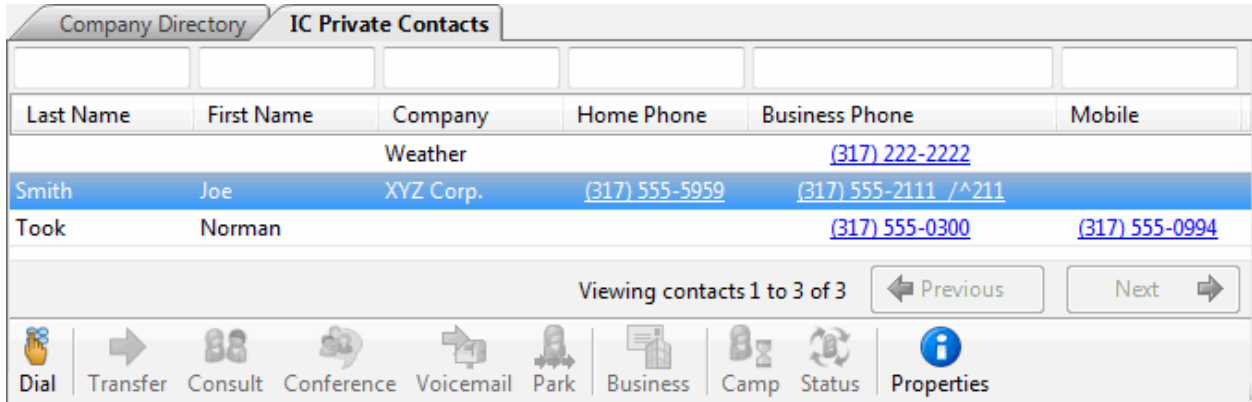
## Dial a Recently Dialed Number

Making Calls

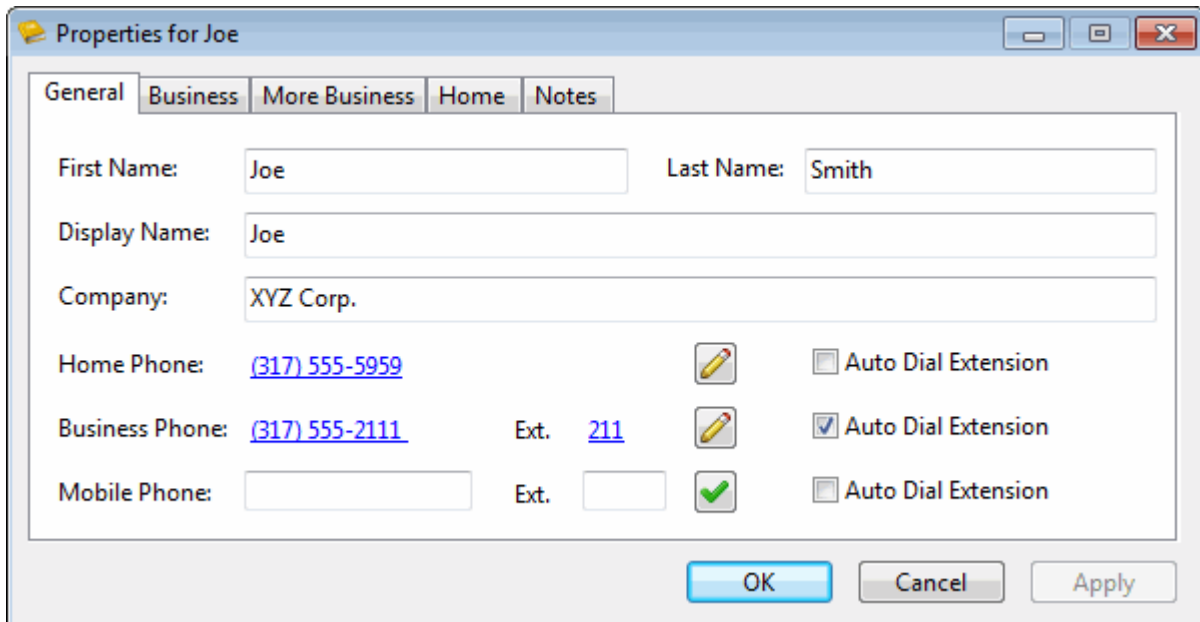
## Click to Dial a Directory Contact

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 an extension number hyperlink in the **Properties** dialog box.



### Related Topics

- Making Calls
- View and Edit Directory Entries

## Click to Dial an Oracle Service Cloud Contact



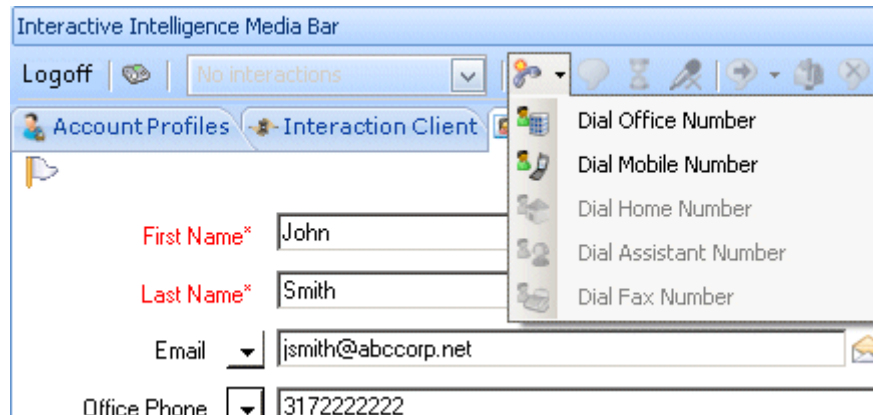
You can click to dial any of the phone numbers associated with an Oracle Service Cloud contact.

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

**To click to dial an Oracle Service Cloud contact:**

1. In the Oracle Service Cloud interface, display a Contact workspace or any other workspace associated with an Oracle Service Cloud contact, for example an Incident.
2. Click the Click to Dial down arrow in the Interactive Intelligence Media Bar.

**Result:** A list of phone numbers belonging to the contact associated with the currently selected workspace record appears.



3. Click one of the available numbers.

**Result:** The CIC client automatically dials the selected phone number.

**Related Topics**

- Make Call / Click to Dial Button
- Make a Call Using the Make Call Button
- Making Calls**

## 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
- Make a Call Using the Number Field
- Make a Call Using the Make Call Button

## Dial a Number Inside the Organization

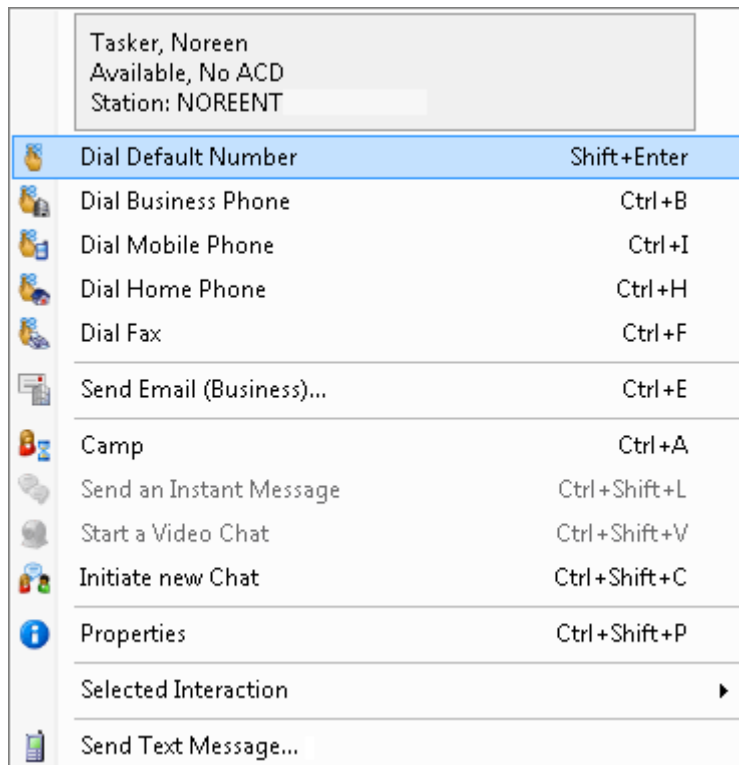
You can use the CIC client to dial the extension of someone within your organization. The extension for a user is listed in the Company Directory or other directories. You can watch the status of the call in My Interactions.

### 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 filter boxes. 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 appropriate Dial button.
  - Right-click a person's name to display this drop-down menu. Click one of the displayed "Dial" entries.



### Related Topics

- [Click to Dial an Oracle Service Cloud Contact](#)
- [Dial a Long-Distance Number](#)
- [Dial a Number Outside the Organization](#)
- [Dial Buttons](#)
- [Make a Call Using the Make Call Button](#)

## Make a Call Using the Number Field

### 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:

Do one of the following:

- Click any directory entry that represents the number you want to dial.
- In the Interactive Intelligence Media Bar, click the **icon** on the Make Call button. Type the phone number in the **Number** field in the New Call dialog box and then click **Make Call**.
- In the Interactive Intelligence Media Bar, click the **down arrow** on the Make Call button. Click one of the phone numbers in the drop-down list to dial an Oracle Service Cloud contact.
- In the CIC client workspace, type the phone number in the **Number** field and click **Make Call**.
- Right-click an Outlook Contact. From the drop-down menu, select the arrow next to the contact's name. Click the number to dial.

**Note:** This feature is available only if you have installed the Outlook Dialing feature. For more information, see Outlook Dialing.

#### Related Topics

Click to Dial an Oracle Service Cloud Contact  
 Dial a Long-Distance Number  
 Dial a Number Inside the Organization  
 Dial a Number Using Speed Dial  
 Make a Call Using the Make Call Button  
 Make a Call Using the Number Field

### 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:
  - To call the default number associated with the speed dial entry, double-click the speed dial entry for the person you want to call.
  - To dial a number other than the default number for a speed dial entry, right-click the speed dial entry and choose another number from the shortcut menu.
  - In the CIC client workspace, drag and drop the speed dial entry on the **Number** field and click **Make Call**. For more information, see Make a Call Using the Number Field.

**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
- Create a New Directory Entry in Speed Dials
- Display a Speed Dial View
- Understanding Speed Dial Hyperlinks

## Dial a Recently Dialed Number

A list of names and numbers you have recently called is available in the **New Call** dialog box or the **Call History** view.

### To dial a recently dialed number from the Number list:

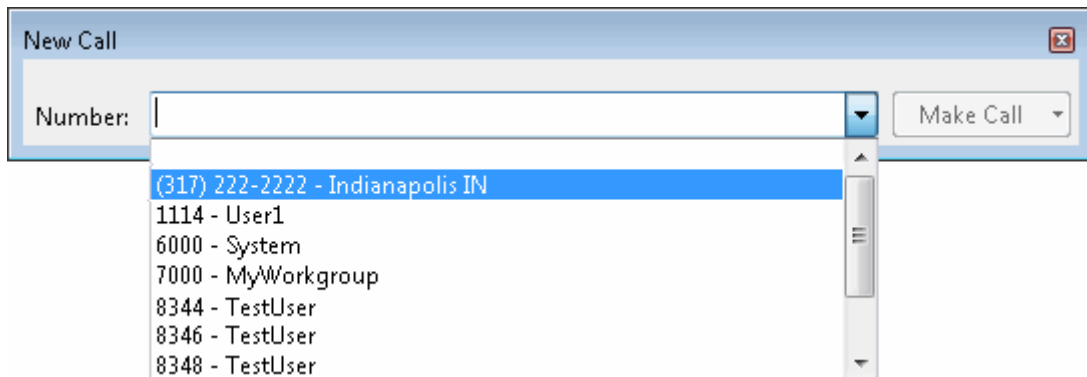
1. Click the arrow at the end of the **Number** drop-down list.
2. Click a number in the list of numbers you have recently dialed.
3. Click the **Make Call** button or press **Enter**.

### To dial a recently dialed number in the New Call dialog box:

1. Click the **Make Call** button in the Interactive Intelligence Media Bar.

**Result:** The New Call dialog box appears.

2. Click the down arrow to the right of the **Number** field and select one of the recent calls in the drop-down list.



3. Click the **Make Call** button.

### To dial a recently dialed number from the Call History view, do one of the following:

- Double-click the Call History row containing the number you want to dial.
- Click the number hyperlink and click **Yes** to dial.
- Right-click the number hyperlink and click **Dial** on the menu that appears.

**Note:** The CIC client uses the originally dialed number to place the call. If, for example, you prefixed the number with "9" to place an outside call, the "9" is used when you call the number from the Call History view, even if this does not appear in the number hyperlink.

## Related Topics

- Call History
- Making Calls

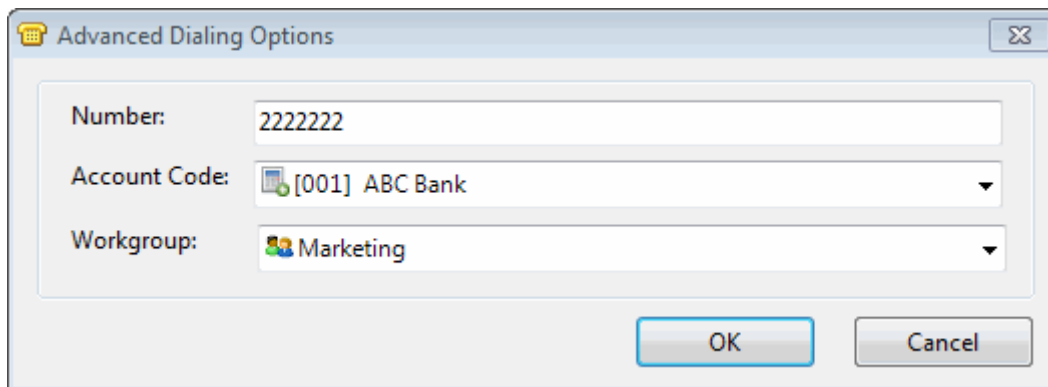
## Dial on Behalf of a Workgroup

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.

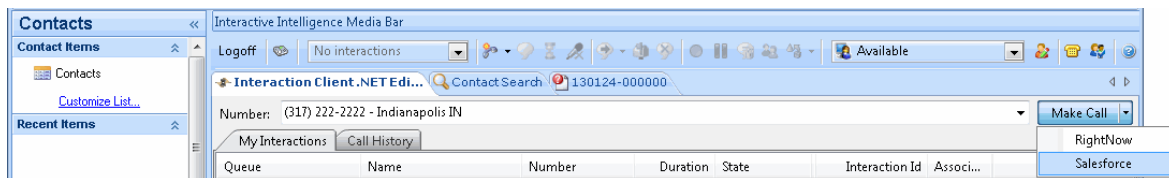
**Note:** You can only dial on behalf of a workgroup in which your status is Active. For more information, see [Change Your Workgroup Activation Status](#).

There are three ways you can assign a workgroup code to an outbound call:

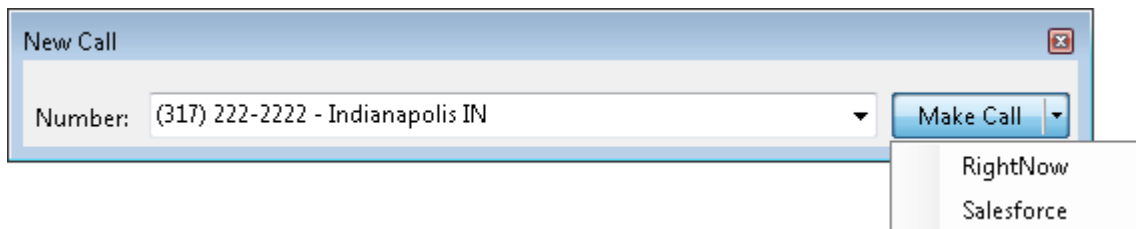
- Use the Advanced Dialing Options dialog box.



- Use the Workgroup drop-down list available on the Make Call button. For more information, see [Make a Call Using the Number Field](#).



- Use the Workgroup drop-down list available on the Make Call button on the New Call dialog box. For more information, see [Make a Call Using the Make Call Button](#).



### 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.

### Related Topics

Dial a Number Outside the Organization  
Make a Call Using the Make Call Button

## Make a Call Using a Dial Button

You can make a call by selecting a directory entry and clicking the appropriate Dial button. A variety of different Dial buttons can appear on the Directory toolbar. Use these buttons to dial a specific number associated with a selected directory entry.

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 a directory entry and click the appropriate Dial button on the Directory toolbar.

**Note:** You can configure which Dial buttons appear on your Directory toolbar. For more information, see Customizing Toolbars and Dial buttons.

### Related Topics

Customizing Toolbars  
Dial Buttons

## Make a Call Using the Make Call Button

You can make a call from Oracle Service Cloud by typing the phone number on your computer keyboard instead of dialing it on your telephone.

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.

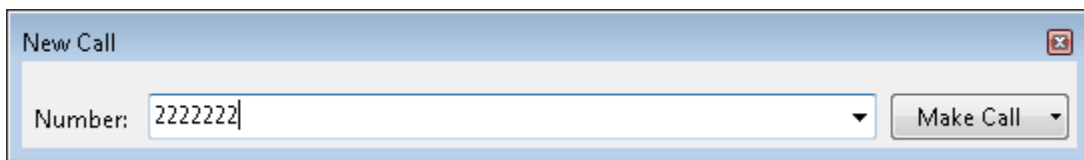
**Note:** To find out if you have toll call privileges, contact your CIC administrator.

**To make a call:**

1. Click the **Make Call** button in the Interactive Intelligence Media Bar.

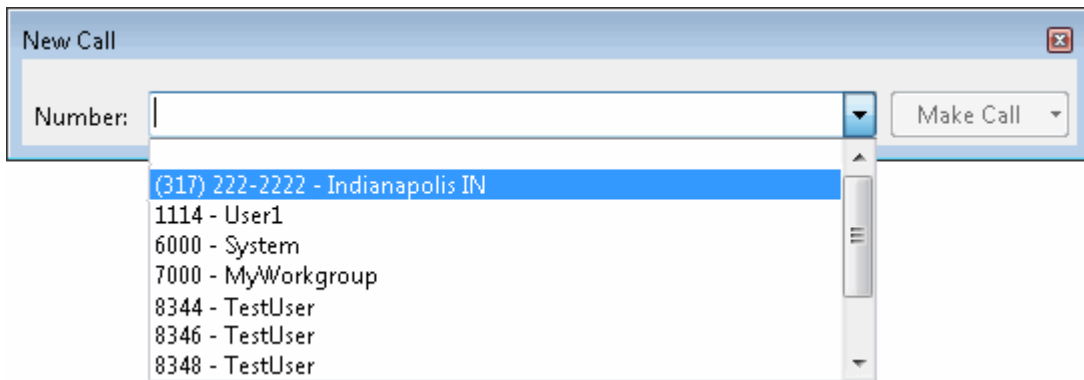
**Result:** The **New Call** dialog box appears.

2. Do one of the following:
  - Enter a telephone number in the **Number** field in the New Call dialog box.

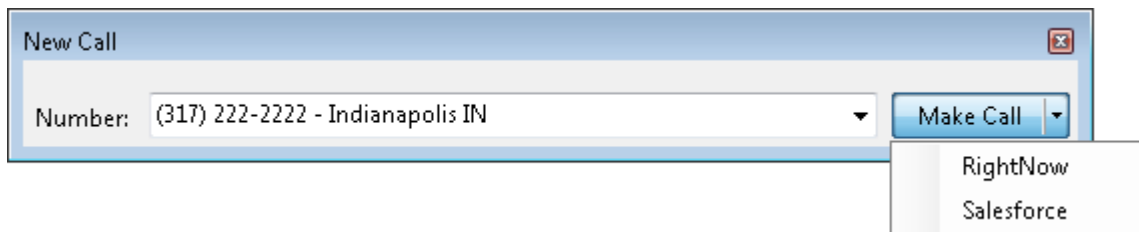


**Tip:** For more information, see [Entering Telephone Numbers](#).

- Click the down arrow to the right of the Number field and select one of the recent calls in the drop-down list.

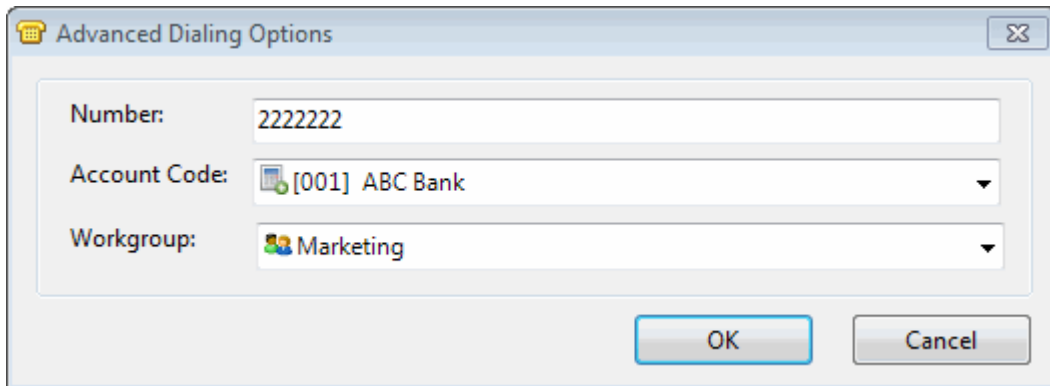


3. If you are dialing on behalf of a workgroup, click the down arrow on the Make Call button and select a workgroup.



4. Do one of the following:
  - If you do not need to assign an Account Code, click **Make Call**.

- If you are using Advanced Dialing Options and you need to assign an Account Code, the Advanced Dialing Options dialog box appears. Click the down arrow to the right of the Account Code field and select an Account code. Click **OK** to place the call.



### Related Topics

- Click to Dial an Oracle Service Cloud 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
- Entering Telephone Numbers
- Make Call / Click to Dial Button

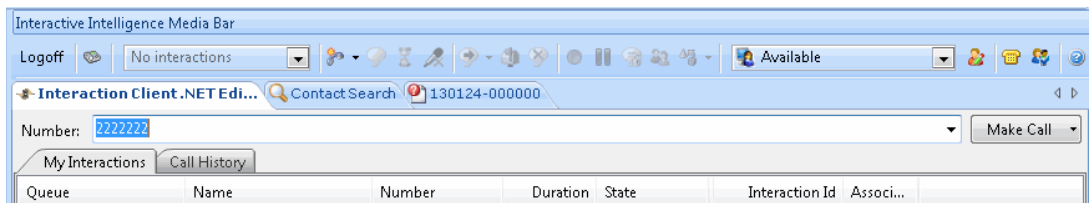
## Make a Call Using the Number Field

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:

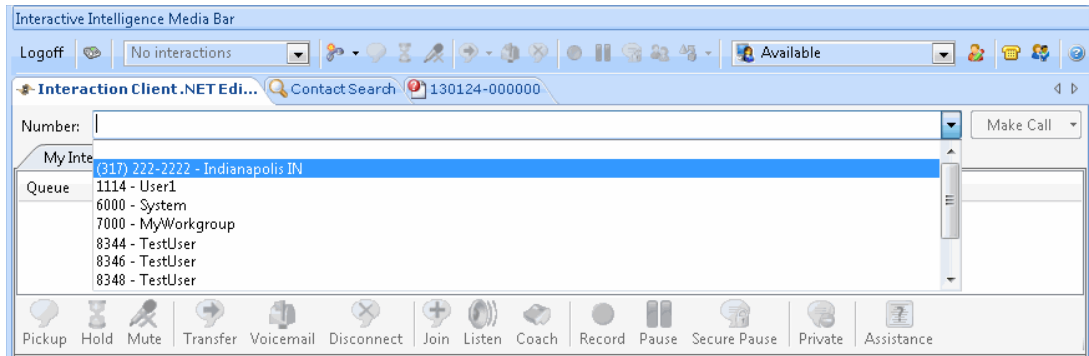
1. In the CIC client workspace, do one of the following:
  - Enter a telephone number in the **Number** field.



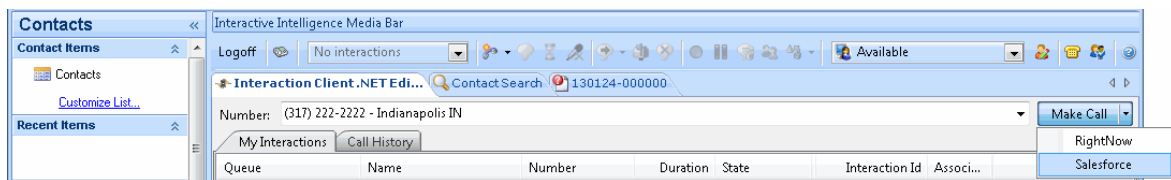
**Note:** For more information about entering letters, parentheses or other special characters, see Entering Telephone Numbers.

- Click the down arrow to the right of the **Number** field and select one of the recently dialed numbers in the drop-down list.

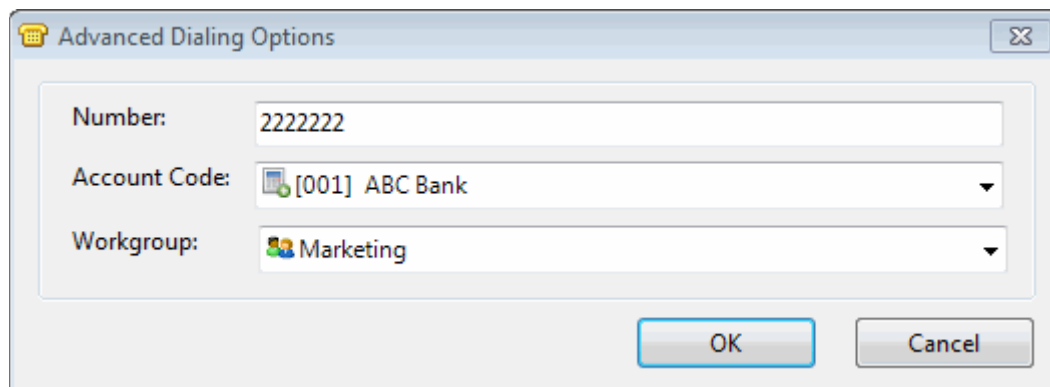




- If you are dialing on behalf of a workgroup, click the down arrow on the **Make Call** button and select a workgroup.



- Do one of the following:
  - If you do not need to assign an Account Code, click **Make Call** or press the **Enter** button on your keyboard.
  - If you are using Advanced Dialing Options and you need to assign an Account Code, the Advanced Dialing Options dialog box appears. Click the down arrow to the right of the Account Code field and select an Account code. Click **OK** to place the call.



### 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 IC server and wish to put the call on hold without disrupting the call with hold music. By default, Conference calls hosted on your **local** IC 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 appears pressed 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
- Park a Call on Orbit
- Pick Up a Call From a Queue
- Pick Up a Call from an Orbit
- 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 a Work Item  
Pick Up or Reopen an E-mail Message

### Answer an Incoming Interaction

These instructions assume that you are answering an interaction in your queue, but you can answer an interaction from any user or station queue you monitor.

#### 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 speakers. For more information, see General Alerting Options.
- Appearing on top of any applications you are working on. For more information, see **Pop client** in General Alerting Options,
- 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. For more information, contact your CIC administrator.

#### To pick up your call:

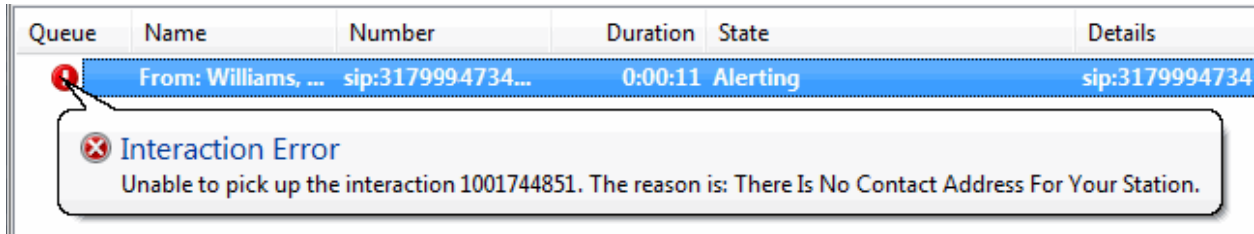
- If you are not connected to another call, do one of the following:
  - Pick up your telephone handset and the call automatically connects, and you can begin speaking.
  - Click the **Pickup** button on the Queue Control toolbar.

- Double-click the interaction in the My Interactions view.
- 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.

### Unable to Pick Up Interaction

An **Interaction Error** icon appears if you are unable to pick up an interaction. A tooltip for the icon explains the reason for the problem.



### 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 (Chat, Web Call Backs, etc.).
  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

## Park a Call on Orbit

**Requirements:** You need the Orbit Queue Security right to display the Orbit Queue view. For more information, see Park on Orbit.

You can place any connected call in a specific orbit. This places the call on hold and removes it from your station. Depending on the hold behavior your CIC administrator configures, callers "in orbit" hear a combination of music and messages. To a caller, there is no difference between being on hold or in orbit.

Calls in orbit can be picked up at another station. This enables you to move to another station and resume the call without having to transfer the call to a specific extension. You can view and pick up calls in orbit by displaying the Orbit Queue view in the CIC client. For more information, see **Orbit Queues**.

**Note:** Your CIC administrator can configure a **maximum hold time** for calls. By default, calls on hold for longer than fifteen minutes are disconnected. Your administrator can also configure the behavior that occurs once the hold time is exceeded. For example, your administrator may choose to transfer calls on hold longer than twenty minutes to another queue. For more information, see your administrator.

**Tip:** You can also use a Polycom phone configured as SIP station to park a call on orbit. For more information, see the *Polycom® SoundPoint® Quick Reference Cards* available in the CIC Documentation Library.

### To park a call on orbit:

1. In My Interactions, if the call is not already selected, click the call to select it.
2. Do one of the following:
  - Right-click the call and choose **Park on Orbit** from the menu that appears.
  - Press **Ctrl+K**.
  - Click the Park on Orbit button in the Queue Control toolbar.

**Note:** This is an optional button. For more information about adding this button to the Queue Control toolbar, see Customizing Toolbars.


3. In the Orbit Park dialog box, assign a number to this orbit by typing a number in the **Park call on Orbit** text box.

**Note:** You can use any single digit number (starting with 1) up to the 10-digit number 4294967294. Avoid orbit numbers starting with 0 (zero). The number defaults to the last orbit number used.

4. Click **Park**.

**Note:** If the orbit number is currently in use, you are prompted to choose another orbit number.

**Result:** The call is removed from My Interactions or other queue and the call's state changes to **Parked**. You can view the call in the Orbit Queue view.

Queue	Orbit	Name	Interaction...	Associated Process	Number	Duration	State
	10	From: Joe Smith	1066717307	3176960994	3176960994	0:01:08	Parked

5. To suppress on-hold music for the other party, click the Mute button before or after placing the call in orbit.
6. To pick up a call from an orbit, see Pick up a Call from an Orbit.

**Related Topics**

Introduction to Queues  
 Orbit Queues  
 Pick up a Call from an Orbit

**Pick Up a Call From a Queue**

**Requirements:** See Pickup.

You can pick up a call in any displayed queue if you have security 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.

**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

**Pick Up a Call from an Orbit**

**Requirements:** See Pickup.

You can pick up a call from an orbit from any station.

**To pick up a call from an orbit:**

1. Click the Orbit Queue view.
2. Do one of the following:
  - Right-click a call in the orbit queue and choose **Pickup** from the menu that appears.
  - Select the call then click the Pickup button.

**Result:** You are now connected to the call.

**Tip:** You can also use a Polycom phone configured as SIP station to park a call on orbit. For more information, see the *Polycom® SoundPoint® Quick Reference Cards* available in the CIC Documentation Library.

**Related Topics**

Introduction to Queues

Orbit Queues  
Park a Call on Orbit

## 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 IC server and wish to put the call on hold without disrupting the call with hold music. By default, Conference calls hosted on your **local** IC 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 appears pressed 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 in the CIC client workspace, 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.

This procedure assumes you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring.

### 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.
- You can set up Parked Call Alerting options that notify you when someone parks a call on your extension.
- 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.

**Note:** If the Park on Queue button does not appear on your Directory toolbar, see Directory Toolbar Buttons for a list of available buttons and see Customizing Toolbars for instructions on adding it to your Directory toolbar.

#### To park a call using the Transfer dialog box:

1. Inform the caller that he or she is going to be transferred and put on hold.
2. Do one of the following:
  - In the Interactive Intelligence Media Bar, click the Transfer button.
  - In the CIC client workspace, 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 transfer to use.

5. Optionally, if you selected a CIC user as a recipient, do one of the following:
  - Select the **Override Call Forwarding** check box to transfer the call to the CIC user's extension.

**Result:** CIC disregards any forwarding phone number set for this CIC user in Call Coverage options or Set Status Details.

- Clear the **Override Call Forwarding** check box to transfer the call to the extension or phone number currently preferred by the CIC user.

6. Click the **Park** button.

**Result:** The call disappears from **My Interactions** and is placed on hold in the recipient's **My Interactions** queue so the recipient can select it later. Until the recipient picks up the call, callers hear the company's hold message.

## Related Topics

[Call Coverage Options](#)  
[Monitor Two or More Queues at the Same Time](#)  
[Parked Call Alerting Options](#)  
[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**. 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](#).

**Tip:** This procedure assumes you are transferring interactions from My Interactions, but you can transfer them from any queue you are monitoring. All users can place Consult Transfer Buttons on their Directory toolbars. For more information, see Customizing Toolbars.

**To perform a consult transfer:**

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:
  - In the Interactive Intelligence Media Bar, click the Transfer button.
  - In the CIC client workspace, on the Queue Control Toolbar, click the Transfer button.
  - Right-click the call and choose **Transfer** from the menu that appears.
  - Right-click a directory entry or right-drag a call to a directory entry to display the **Transfer** menu.
  - Click a directory entry and in the Directory toolbar, click a **Consult Transfer** button.

**Tip:** All the types of Consult Transfer buttons have a pair of figures in their icon. For a list of available buttons, see Directory Toolbar Buttons. For more information about adding buttons to a toolbar, see Customizing Toolbars.

**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. Optionally, if you selected a CIC user as a recipient, do one of the following:
  - Select the **Override Call Forwarding** check box to transfer the call to the CIC user's extension.

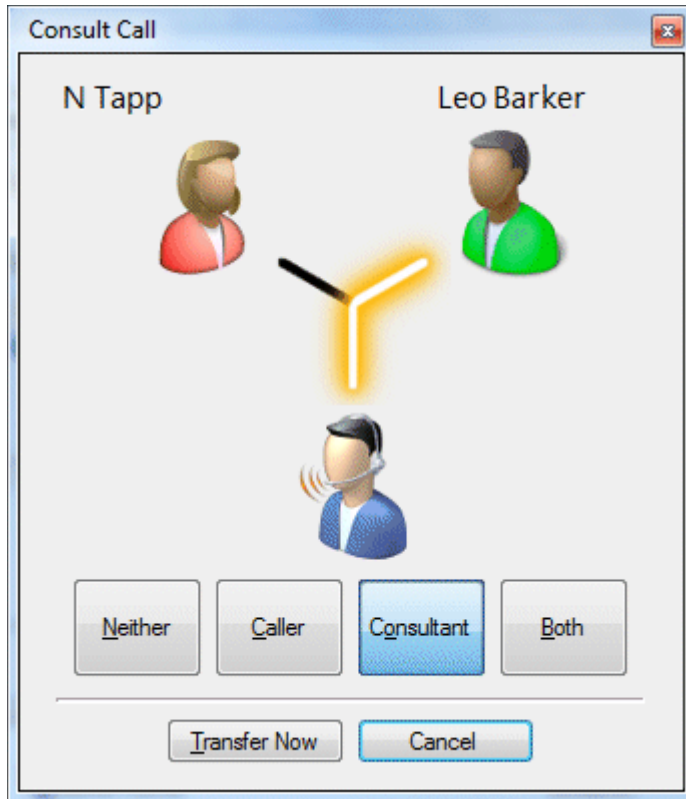
**Result:** CIC disregards any forwarding phone number set for this CIC user in Call Coverage options or Set Status Details.

- Clear the **Override Call Forwarding** check box to transfer the call to the extension or phone number currently preferred by the CIC user.

6. Click the **Consult** button.

**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.



7. Do one of the following:

- If the intended recipient (Consultant) answers his or her phone, and agrees to the transfer, click **Transfer Now**.

**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.

**Note:** 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. If you want to return to speaking to the transfer recipient, click the name of that party.

## Related Topics

- Call Coverage Options
- Drag and Drop a Call on a Name in a Directory
- Park a Call on Another Person's Extension
- 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 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

In the CIC client, you can transfer a call to a directory entry in several ways. You can right-click on a directory entry and transfer the call, you can right-drag a call to a directory entry allowing extended transfer options, or you can Drag and Drop a Call on a Name in a Directory.

### Right-click a directory entry to transfer a call:

1. Click on a directory tab and right-click the directory entry to which you want to transfer the call.
2. From the shortcut menu, select **Selected Interaction**.
3. From the submenu that appears, select the desired transfer option.

**Note:** You can transfer only the **currently connected call** in My Interactions or other queue (there can only be one in that state). You cannot transfer a call in any other state.

### Drag a call to a directory entry to transfer a call:

1. Right-click and while holding down the mouse button drag the call to a directory entry and release.
2. From the shortcut menu, select **Selected Interaction**.
3. From the submenu that appears, select the desired transfer option.

### Use a Transfer button to transfer a call:

1. Click a directory tab and click the directory entry to which you want to transfer the call.
2. In the Directory toolbar, click a Blind Transfer button or Consult Transfer button.

**Note:** For a list of available buttons, see Directory Toolbar Buttons. For more information about adding buttons to a toolbar, see Customizing Toolbars.

### To blind transfer using a Directory:

1. Inform the caller that he or she is going to be transferred.

2. Select a directory entry.
3. Do one of the following:
  - Select an entry in the Company Directory and then click a Blind Transfer button in the Directory toolbar to transfer the call to the default number.
  - Right-click the directory entry to which you want to transfer the call. From the shortcut menu, select **Selected Interaction**. From the submenu that appears, select **Transfer** to transfer the call to the default number or select **Transfer to other number** then select the appropriate number from the next submenu.

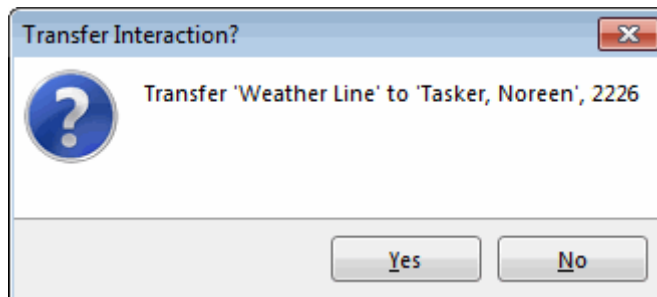
**Result:** The call disappears from My Interactions and is transferred to the selected number.

#### To drag and drop blind transfer:

1. Inform the caller that he or she is going to be transferred.
2. Do one of the following:
  - Right-drag and drop the interaction on a Directory entry. From the shortcut menu, select **Selected Interaction**. From the submenu that appears, select **Transfer** to transfer the call to the default number or select **Transfer to other number** then select the appropriate number from the next submenu.

**Result:** The interaction is transferred to the selected number.

- Click the interaction and drag and drop it on a directory entry. In the **Transfer Interaction?** dialog box, click **Yes**.



**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:
  - In the Interactive Intelligence Media Bar, click the Transfer button.
  - In the CIC client workspace, on the Queue Control Toolbar, click the Transfer button.
  - Right-click the call and choose **Transfer** from the menu that appears.

**Result:** The **Transfer dialog box** appears.

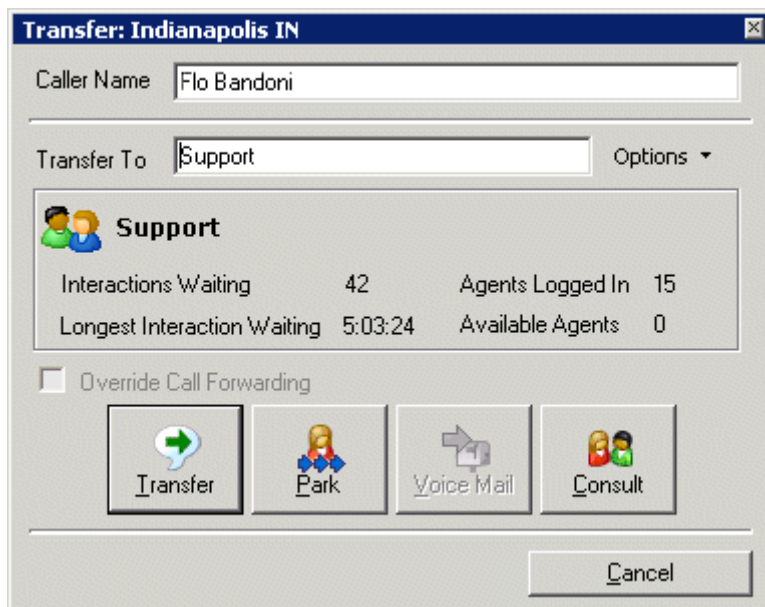
3. In the **Transfer To:** text box, type all or part of the Workgroup's name or number.

**Result:** A drop-down list of choices appears.

**Tip:** If the drop-down list does not contain the workgroup you expected, check the search criteria selected in the **Options** drop-down list and make sure **Workgroups** is selected.

4. From the **Transfer To** drop-down list, do one of the following:
  - Select the appropriate workgroup name and associated extension number.
  - Select "Dial [your entry] as Digits" to convert a text entry into numbers.

**Result:** Status information for the selected CIC Workgroup appears. This enables you to check the workgroup's current statistics before transferring the call. Use this information to estimate the probable wait time for a transferred call.





5. Click the **Transfer** button.

**Result:** The transferred call disappears from My Interactions or other queue and is routed to the selected CIC Workgroup.

### Using the Workgroups and Profiles Directory to Transfer a Call

**Note:** Before you can transfer a call to a workgroup using this method, you must Display the Workgroup and Profile View. You also need the appropriate user rights to view the name of the workgroup in the Workgroup and Profiles directory.

#### To transfer a call to a Workgroup in the Workgroups and Profiles directory:

1. Tell the caller that he or she is going to be transferred.
2. Do one of the following:
  - Drag the call to a workgroup in the Workgroups and Profiles directory view. In the **Transfer Interaction** dialog box, click **Yes**.
  - Select a workgroup name in the Workgroups and Profiles directory view and press **Enter**.
  - Right-click a workgroup name in the Workgroups and Profiles directory view. From the shortcut menu, select **Selected Interaction**, then select the desired transfer option.
  - Click on a workgroup name in the Workgroups and Profiles directory view. In the Directory toolbar, click a Blind Transfer button.

**Note:** For a list of available buttons, see Directory Toolbar Buttons. For more information about adding buttons to a toolbar, see Customizing Toolbars.

**Result:** The call disappears from **My Interactions** and is transferred to the appropriate Workgroup queue.

#### Related Topics

Introduction to Queues  
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:

- In the Interactive Intelligence Media Bar, click the Transfer button.
- In the CIC client workspace, 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.

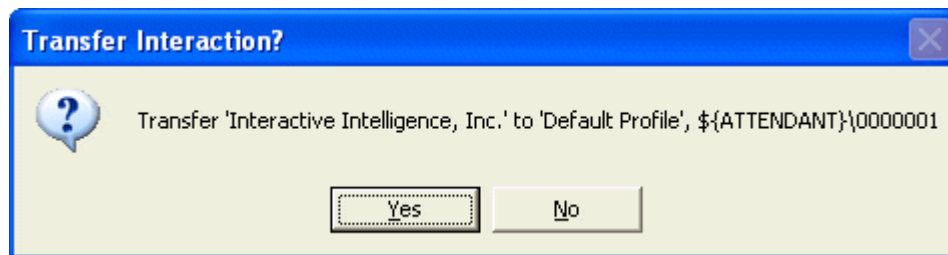
### Using the Workgroups and Profiles Directory to Transfer a Call

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**.
- Right-click an Attendant Profile name in the Workgroups and Profiles directory view. From the shortcut menu, select **Selected Interaction**, then select the desired transfer option.

**Result:** The call disappears from **My Interactions** and is processed according to the settings on the Attendant profile.

**Related Topics**

Introduction to Queues  
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 **Voice Mail** button may be disabled 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

These procedures assume you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring. There are several ways to transfer a call to another person's voice mail.

**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:
  - In the Interactive Intelligence Media Bar, click the Transfer button.
  - In the CIC client workspace, 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 **Voice Mail** button.

**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 an asterisk (\*):**

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 the transfer recipient's number followed by an asterisk (\*).

**Example:** 1234\*

**Result:** A drop-down list of choices appears.

4. From the drop-down list, select "Dial [your entry] as Digits."
5. Click the **Transfer** button.

**Result:** The call is transferred to the recipient's voice mail and disappears from **My Interactions**.

#### **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:**

- In the Interactive Intelligence Media Bar, click the Voicemail button.

- In the CIC client workspace, on the Queue Control Toolbar, click the Voicemail button or press **Ctrl+M**.
- If the call is connected, right-click the call and select **Send to 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 one of many Transfer buttons you can place on a Directory toolbar.

For more information, see:

- Transfer a Call Using the Queue Control toolbar
- Transfer a Call Using the Directory Toolbar

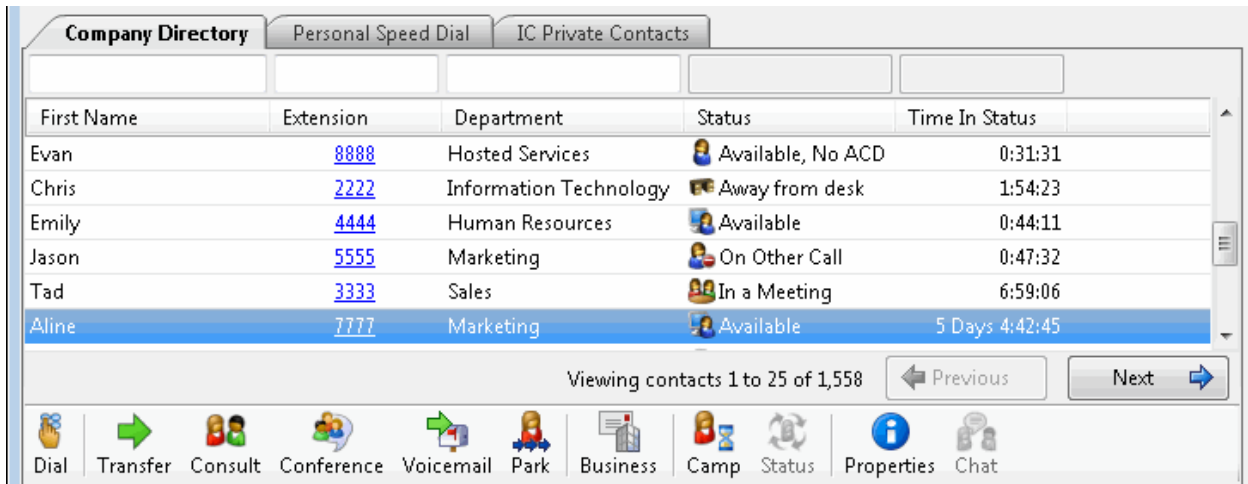
#### Related Topics

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 Directory Toolbar

You can transfer the currently selected interaction, using any of the Transfer buttons on the Directory toolbar.

**Note:** For a list of available buttons, see [Directory Toolbar Buttons](#). For more information about adding buttons to a toolbar, see [Customizing Toolbars](#).



#### To transfer a call using a Transfer button:

1. Select an interaction.
2. Select a directory tab and click the directory entry to which you want to transfer the call.
3. In the Directory toolbar, click a Blind Transfer button or Consult Transfer button.

**Note:** For more information, see [Transfer a Call Without Consulting the Recipient](#) or [Transfer a Call After Consulting the Recipient](#).

#### Related Topics

[Customizing Toolbars](#)  
[Directory Toolbar Buttons](#)  
[Transfer a Call Using the Queue Control Toolbar](#)  
[Using the Directory Toolbar](#)

## 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:** 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. Optionally, if you selected a CIC user as a recipient, do one of the following:
  - Select the **Override Call Forwarding** check box to transfer the call to the CIC user's extension.
 

**Result:** CIC disregards any forwarding phone number set for this CIC user in Call Coverage options or Set Status Details.
  - Clear the **Override Call Forwarding** check box to transfer the call to the extension or phone number currently preferred by the CIC user.
6. 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 the **Consult** button. For more information, see Transfer a Call After Consulting the Recipient.
  - To send the call to the intended recipient's voice mail, click the **Voice Mail** button. 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 the **Park** button. 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 call is transferred to the intended recipient and disappears from **My Interactions**.

### Related Topics

Call Coverage Options  
 Set Status Details  
 Transfer a Call Using the Directory Toolbar  
 Transfer a Call to a Directory Entry

## 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.

This procedure assumes you are transferring interactions from My Interactions, but you can transfer interactions from any queue you are monitoring.

**Tip:** All users can place Blind Transfer Buttons on their Directory toolbars. For more information about adding buttons to a toolbar, see Customizing Toolbars.

### 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. Optionally, if you selected a CIC user as a recipient, do one of the following:
  - Select the **Override Call Forwarding** check box to transfer the call to the CIC user's extension.

**Result:** CIC disregards any forwarding phone number set for this CIC user in Call Coverage options or Set Status Details.

- Clear the **Override Call Forwarding** check box to transfer the call to the extension or phone number currently preferred by the CIC user.

6. Click the **Transfer** button.

**Result:** The transferred call disappears from My Interactions or other queue and is routed to the selected recipient.

**Tip:** Transferring a call directly to a contact's phone number is another method of making a blind transfer. For more information, see [Transfer a Call to a Directory Entry](#).

## Related Topics

Call Coverage Options  
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

In the CIC client, you can use Call Coverage to forward your calls if your status is **Available**, **Forward**, or forward your calls regardless of your status, or forward your calls to a remote number. You can also set up the CIC client to use follow-me routing to search for you at different telephone numbers.

**Note:** Your administrator may set forwarding numbers for you. If your **Forwarding** configuration options are disabled, you may not have permission to set forwarding numbers. If you have questions about call forwarding permissions, see your CIC administrator.



**Related Topics**

- Call Coverage
- Forward Calls When You Are on the Phone
- Forward Calls When You're in Do Not Disturb Status
- Forward Calls Regardless of Status
- Forward Calls to Your Remote Telephone Number
- Forward Calls When You Do Not Answer
- Understanding Follow-me Routing

**Call Coverage Options**

**Requirements:** You need the Customize Client Security right to customize your personal CIC client configuration settings. **Client templates** can contain configuration settings that determine your call coverage options and control whether you can alter configuration settings.

You can use Call Coverage to forward your calls if your status is Available, Forward. Use call coverage to enable another user to answer your calls.

To set call coverage options:

1. In the Configuration dialog box, expand the **Calls** node and click **Call Coverage**.
2. In the Call Coverage property details pane, make your selections as described in Coverage Options and Coverage Number.
3. Click Apply to save your selections.
4. Click OK to close the Configuration dialog box.

**Coverage Options**

The Coverage Options section has the following options:

<b>Forward</b>	<p>This option sends a designated type of call to a Call Coverage number. The available call types are:</p> <ul style="list-style-type: none"> <li>• <b>All Calls.</b></li> <li>• <b>Internal Calls.</b> This includes calls from internal numbers or extensions on the CIC system.</li> <li>• <b>External Calls.</b> This includes calls from outside the CIC system (calls from public service telephone networks).</li> <li>• <b>Unknown Calls.</b> This includes calls from outside the CIC system that do not have caller ID.</li> </ul> <p style="background-color: #fff9c4; padding: 2px;"><b>Tip:</b> The number of seconds a forwarded call rings at the designated Call Coverage number is determined by the Timeout for external calls setting.</p>
<b>If I'm "Do Not Disturb," forward</b>	<p>This option sends a designated type of call to a Call Coverage number when your status is Do Not Disturb (DND), including not being logged on. This behavior depends on the configuration of your DND statuses.</p> <p>The available call types are the same as the ones for <b>Forward</b>. See the descriptions above.</p>
<b>If I'm on the phone, forward</b>	<p>This option sends a designated type of call to a Call Coverage number, when you are on the phone.</p>

<p><b>If I don't answer, forward</b></p>	<p>The available call types are the same as the ones for <b>Forward</b>. See the descriptions above.</p> <p>This option sends a designated type of call to a Call Coverage number, when you do not answer.</p> <p>The available call types are the same as the ones for <b>Forward</b>. See the descriptions above.</p>
--	---

### Coverage Number

The Coverage Number section has the following options:

<p><b>Send my calls to:</b></p> <p><b>If a caller leaves voice mail, send it to:</b></p>	<p>Specify the phone number that calls are sent to when they meet any of the criteria in Coverage Options. This number must be an internal number or a CIC extension.</p> <p>Specify whether voice mail messages are sent to the internal telephone number or CIC extension voice mailbox, or to your voice mailbox. The internal number or extension must have a mailbox assigned. If no mailbox is assigned to this number, then the system does not allow you to apply the changes.</p> <p>For example, if My Voicemail Box is selected, any message left by a caller is sent to <i>your</i> voice mail. If you select the other option (the number you entered in Send my calls to), then you give ownership of the call (or any voice mail) to that coverage number.</p>
--	---

### Related Topics

- Client Templates
- Forward Calls When You do not Answer
- Forward Calls When You're in Do Not Disturb Status
- Forward Calls When You Are on the Phone
- Forward Calls Regardless of Status
- Understanding the Configuration Dialog Box

## 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.

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 IC 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.
- You can also choose to forward your calls when you're on the phone, when you set your status to **Do Not Disturb**, or when you are otherwise unable to answer the call. For more information, see the Related Topics.

### To forward your calls to your remote location:

1. Do one of the following:

- In the Interactive Intelligence Media Bar, from the Status Drop-Down List, select **Available, Forward**.
  - In the CIC client workspace, from the **My Status** drop-down list, select **Available, Forward**.
2. Do one of the following:
- If you have **previously** set your status to Available, Forward and entered the correct forwarding telephone number, you are finished. All calls are now forwarded to the remote number.
  - If you have **never** before set your status to Available, Forward, the Set Status dialog box appears. You are prompted to enter a Forward Number. Go to the next step.

- If you have previously set your status to Available, Forward but want to **change the forwarding telephone number**, click the **Set status details** link to the right of the **My Status** list. Go to the next step.
3. In the Set Status dialog box, in **Forward Number**, enter the remote telephone number for forwarded calls.
4. Click **OK**.

**Result:** Your status is set to Available. Forward and all calls are forwarded to the remote number.

### Related Topics

[Forward Calls When You Are on the Phone](#)  
[Forward Calls When You do not Answer](#)  
[Forward Calls When You're in Do Not Disturb Status](#)  
[Forward Calls Regardless of Status](#)  
[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

**Note:** The CIC client can send a message to your pager or an email address when someone leaves a message for you. For more information, see [Voice Mail / Fax Paging](#). In addition, your administrator can configure Interaction Center to send you an email notification when internal and/or external calls are routed to you when you are in a forwarding status.

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. Client templates can contain configuration settings that determine your Follow-me Routing options and control whether you can alter configuration settings.

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 *Telephone User Interface User's Guide* or **Quick Reference Card** in the CIC Documentation Library.

### To add a follow-me phone number:

1. In the Configuration dialog box, expand the **Calls node** and click **Follow Me**.
2. To prompt callers for their name, select the **Screen Calls** check box.

**Note:** When Screen Calls is selected and you 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.

- In the Follow Me properties details pane, click **New**.
- In the **Details** section, complete the fields as described below.

<b>Phone Number</b>	<p>Enter a telephone number you want the CIC client to call if you are not available.</p> <p><b>Note:</b> For information about entering, editing and verifying phone numbers, see <a href="#">Phone Number Controls</a>.</p> <p><b>Dialing Pause</b></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><b>Note:</b> Use of the comma (,) to create a two-second delay is not supported in all platforms.</p>
<b>Ext.</b>	Enter an extension number. This number is dialed after a connection is made.
<b>Timeout</b>	<p>Specify the number of seconds the CIC client rings an external number. It defaults to 15 seconds.</p> <p><b>Note:</b> If the forwarding number is an internal station extension, this timeout value is ignored and the station is alerted for 45 seconds.</p>
<b>Use Pin</b>	<p>To require that you or another call recipient must enter your CIC client password to accept the call, select <b>Use Pin</b>.</p> <p><b>Note:</b> This feature can prevent someone else from answering your calls through the follow-me routing process.</p>

- Click the **Validate** control (check mark).

**Note:** A validated phone number is formatted according to the rules of the dial plan for your organization or region. A validated phone number becomes the display number in the CIC client. For more information, see [Phone Number Controls](#).

- To add another number, repeat steps 3 through 5.
- Click **Apply** to save your settings.
- Click **OK** to close the Configuration dialog box.

#### To change your follow me settings:

- 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 **Delete**.
  - To change the settings for a number, select the number and type new values in the **Phone Number** and **Timeout** text boxes and select or clear the **Use Pin** checkbox.
- Click **Apply** to save your settings.

3. Click **OK** to close the Configuration 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

Client Templates  
Understanding Follow-me Routing  
Understanding the Configuration 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, clicking the Conference Manager button, and 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 conference call to transfer an ACD-routed incoming call to a **workgroup queue**. If you call into a workgroup queue and are put on hold and then conference the ACD-routed call with your workgroup call and

then disconnect from the resulting conference, the ACD-routed call is removed from the workgroup queue. It is put on hold and remains on hold. Use a **blind transfer** to transfer the incoming call to a workgroup queue. 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.

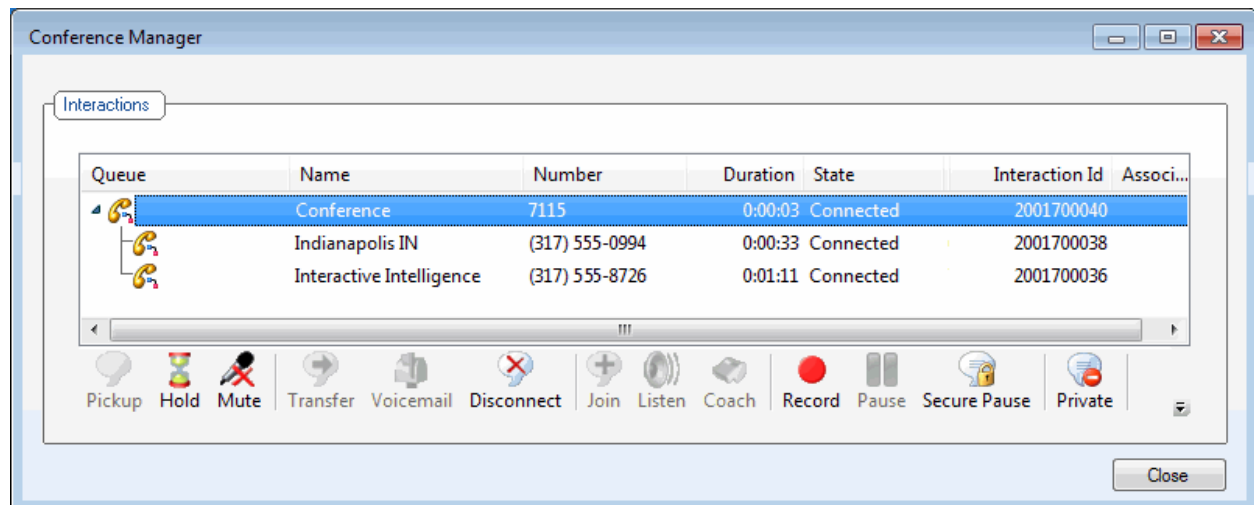
**Tip:** You can put a conference on Hold by selecting the conference and clicking the **Hold** button. You can click the **Pickup** or **Hold** buttons to reconnect to a held conference. For more information, see Place a Call on Hold.

**Related Topics**

- Conferencing Features
- Create a Conference Call Using Join
- Create a Conference Call Using Drag and Drop
- Create or Expand a Conference Call by Adding Parties
- Disconnect Someone From a Conference Call

## Conferencing Features

Conference calls appear in the **Conference Manager dialog box** in a tree fashion. The conference call is the root interaction. Click the arrow next to the root interactions to show or hide the conference participants.



- To create a conference, in the Interactive Intelligence Media Bar, click the Conference Manager button. Then in the Conference Manager dialog box, just drag and drop a call on another call .

**Result:** You see a new interaction named "Conference."

- To add parties to a conference, in the Conference Manager dialog box, drag any connected or held call and drop it on the Conference interaction.

**Related Topics**

- Create or Join a Conference Using Join
- Create or Expand a Conference Call by Adding Parties
- Disconnect Someone from a Conference Call
- Drag and Drop a Call on Another Call
- Making Conference Calls

## Create or Join a Conference Call Using Join

**Requirements:** See Join.

You can create or join a conference call in My Interactions or a station or user queue that you are monitoring.

**Tip:** For more information about displaying a queue other than your own (My Interactions), see [Monitor Two or More Queues at the Same Time](#).

### To create or join a conference call using Join:

1. Do one of the following:
2. Open the user or station queue you are monitoring.
3. Select the call or conference call you want to join.
4. In the CIC client workspace, on the Queue Control Toolbar, click the Join button.

**Result:** You are now connected to the call (or conference call already in progress).

### Related Topics

- Conferencing Features
- Create a Conference Call Using Drag and Drop
- Create or Expand a Conference Call by Adding Parties
- Join Button
- Join an Interaction

## Create or Expand a Conference Call by Adding Parties

You can add any directory contact to an existing call and create a conference call. You can then add additional parties by selecting other contacts and adding them to the conference call. The CIC client automatically dials the selected parties and adds them to the conference call as soon as they answer the telephone.

Conference participants can be **internal**, for example other CIC client users listed in the Company Directory. Or they can be **external**, for example personal contacts listed in your Outlook Private Contacts directory.

Your CIC administrator controls whether conference participants hear ringing, a voice mail greeting, or other sounds while new parties are being contacted. Or new conference call parties can be added to the existing conference call as soon as they answer the telephone.

### To create or expand a Conference Call by adding parties:

1. Dial the number of a participant in the conference call.

**Result:** The interaction appears in My Interactions.

2. After the call connects, select the next party for the conference call from a directory view.

**Note:** You do not need to put the call on hold before adding new parties to the conference.

3. In the Directory toolbar, click **Conference**.

**Result:** The calls are now connected to each other and a conference call is created. The parties can talk to each other. The resulting conference call remains on hold.



4. Repeat steps 2 and 3 to add additional parties.
5. Select the conference call to join the conference.

#### Related Topics

[Conferencing Features](#)  
[Create a Conference Call Using Join](#)  
[Create a Conference Call Using Drag and Drop](#)

## 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.

You can create a conference call in the Conference Manager dialog box by dragging and dropping a call on another call.

#### To create a conference call:

1. Dial the number of a participant in the conference call.  
**Result:** The interaction appears in My Interactions.
2. Click the Hold button to put the call on hold.
3. Repeat steps 1 and 2 for each participant.
4. In the Interactive Intelligence Media Bar, click the Conference Manager button.
5. In the Conference Manager dialog box, select one of the calls you want to conference, and while holding down the mouse button, drag that call to another call and release.

**Result:** The calls are now connected to each other and a conference call is created. For more information, see Conferencing Features.

**Tip:** 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 join. 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 Configuration dialog box.

#### To transfer a call:

1. **Right-click** the call you want to transfer and drag it to the other connected call.
2. Release the mouse button.
3. From the pop-up menu that appears, select **Transfer** '*call name*' to '*call name*' where both of the call names refer to currently connected calls.

**Result:** The two calls are now joined together. You are not included in the conversation.

#### Related Topics

[Conferencing Features](#)  
[Create a Conference Call Using Join](#)  
[Create or Expand a Conference Call by Adding Parties](#)

## 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 the Conference Manager dialog box.

**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
- Change the Sound of Your Incoming Calls
- Coach an Interaction
- Determine if Someone is Listening to or Recording Your Interactions
- Join an Interaction
- Listen to a Call
- Record a Call
- Remove Disconnected Calls from Queue
- Request Assistance from Your Supervisor
- View and Edit Interaction Properties

## Associate an Interaction with a Workspace

**Requirements:** Only agents with the appropriate licenses and rights can use the Interactive Intelligence Oracle Service Cloud Integration. For more information, see Interactive Intelligence Oracle Service Cloud Integration.

You can associate a selected interaction with an Oracle Service Cloud Incident workspace record. This association is written to the Oracle Service Cloud database and is available for reporting purposes. Examples of the types of

interactions that can be associated with workspace records include an email request for support and follow-up calls made to resolve the problem.

A single interaction can be associated with multiple Oracle Service Cloud workspace records and a single workspace record can be associated with multiple interactions.

**Note:** If the Interactive Intelligence Oracle Service Cloud Integration screen pops the appropriate Oracle Service Cloud workspace record when you receive an interaction, the currently selected interaction is automatically associated with that Oracle Service Cloud workspace record.

#### To associate an Interaction with a Workspace record:

1. Pick up an alerting interaction or put an interaction on hold.

**Note:** Connect to an interaction before making an association. You cannot associate a disconnected interaction with a workspace record.

**Result:** The Associate Interaction with Workspace button becomes available.



2. Locate and open the appropriate Oracle Service Cloud workspace record and select the tab for this record.

**Result:** If you have not previously associated this interaction with this workspace record, the Associate Interaction with Workspace button remains available.



3. With the tab for the workspace record selected, click the Associate Interaction with Workspace button.

**Result:** The Associate Interaction with Workspace button remains selected and indicates that the association has been made and recorded.



**Note:** This visual indication that an interaction is associated with a workspace record remains only until the interaction is disconnected. It does not appear the next time you view the workspace record.

4. As long as the interaction remains active and selected, you can repeat steps 2 and 3 to associate the interaction with additional workspace records.

#### Related Topics

Associate Interaction with Workspace Button

## Camp on an Internal Extension

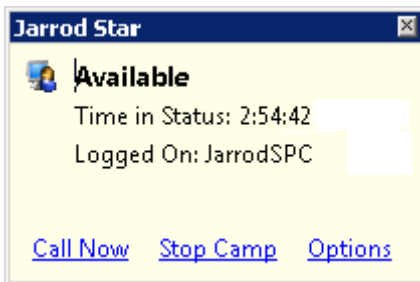
Camp is a function that can watch another user's status and alert you when that status changes. When another CIC client user in your organization is currently unable to take your call, you can camp on that person's extension until that person becomes available.

**Note:** This feature is available only to Interactive Intelligence Oracle Service Cloud Integration users who have the appropriate license and user rights to display the CIC client workspace.

**To camp on an internal extension:**

1. Do one of the following:
  - Open the directory and right-click the name of the person you want to call. Select **Camp** from the pop-up menu.
  - 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.



**Note:** You can click **Stop Camp** on any Camp desktop alert to cancel camping on that user.

2. To set options for the Camp desktop alert, click **Options**. A pop-up menu appears.
  - To make the Camp desktop alert **fade away** if the selected person's status changes to an unavailable status, place a check mark next to **Auto hide when unavailable**.

**Note:** If selected person's status changes to an available status type, the Camping dialog box does not fade away even when this option is selected.

- To **display** the Camp desktop alert anytime the selected person's status changes, place a check mark next to **Pop for all Status changes**.

**Note:** This setting causes the Camp desktop alert to reappear for all status changes even if the selected person's status changes to unavailable and **Auto hide when unavailable** is selected.

3. When the person becomes available, the Camp desktop alert reappears. The Call Now button is enabled. Click it to call the user.

**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.

**Stopping Camping**

You can terminate camping alerts in several ways.

**To stop camping, do one of the following:**

- Exit the CIC client.
- Select a name and click **Stop Camp** in the Active Camps dialog box.
- Click **Stop Camp** in a Camp desktop alert.

**Related Topics**

Camp Button  
 Camp Desktop Alert  
 Desktop Alerts

**Change the Sound of Your Incoming Calls**

If you are using the "Ring Computer" option for your incoming calls, you can change the ring sound to any sound you like. For more information, see General Alerting Options.

**Note:** Your CIC administrator can lock configuration options so that they cannot be changed by individual users. If the configuration options are grayed-out, you do not have permission to modify them. If you have questions about configuration options and permissions, see your CIC administrator.

**To change the sound of your PC's ring:**

1. In the Configuration dialog box, expand the **Alerting** node and click the **My Interaction Ring Sounds** node.
2. In the **My Interactions Ring Sounds** properties details pane, click the button with the **ellipsis** (three dots) for **Calls**.

**Result:** The **Open** dialog box, which displays sound files in a list, appears.

4. Choose a sound from the list or search for a sound in another directory. Click **OK** after making your selection.
5. To listen or review your sound file, click the **Play** button for **Calls**.

**Related Topics**

My Interactions Ring Sounds

**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 click the **Coach** button or press **Ctrl+O**.

**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.

**Note:** When you respond to an email interaction, you create an email reply interaction. You need to expand the original email interaction to see the email reply interaction to determine if someone is listening to or recording your reply.

### 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



- When you record 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. In this case, it is you.

- 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 call:
  - 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.
- If a number appears next to the Record icon, it indicates the number of CIC users who are recording the interaction.
- A record icon appears at the bottom of the Chat Window if you start a recording during a chat session. Recording a chat session creates a transcript of the chat that is e-mailed to you after the chat session ends.
- A record icon appears at the bottom of the Email Window for Outgoing Messages if you start a recording of an email reply. If you record an email reply, a copy of that email reply is sent to you in the mailbox configured for you in Interaction Administrator.

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

### Related Topics

[Listen Button](#)  
[Listen to a Call](#)  
[Manage a Chat Session](#)  
[Record a Call](#)  
[Record Button](#)  
[Settings affecting Record and Listen indicators](#)  
[Working with Calls](#)  
[Working with Chat Sessions](#)

## Join an Interaction

**Requirements:** See [Join](#).

The Join feature enables you to add yourself to an interaction. Both the agent and the outside party can hear your side of the conversation. When you use the Join feature, the CIC client creates a conference call between the agent, the customer, and you.

### To join an agent's interaction:

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

**Result:** You are now connected via conference call to the agent's interaction. You can begin interacting with the agent and the customer.

### Related Topics

[Join Button](#)  
[Create or Join a Conference Call Using Join](#)

## Listen to a Call

**Requirements:** See Listen.

Choose this option to start continuous monitoring of a call in a queue. This feature enables a monitoring party to listen to both sides of a call. It is available on user or station queues and **My Interactions**, if you have the appropriate rights.

All calls in monitored queues alert you (ring, pop and Desktop Alerts) in a similar fashion to calls in **My Interactions**. These calls also appear in the Call History view.

### To listen to a call in a queue:

1. Select the **My Interactions** or other queue tab.
2. Do one of the following:
  - Right-click a call in the queue and choose **Listen In** from the menu that appears.
  - Select a call and then click the Listen button.

**Note:** When you listen to a call, a line below the call displays the Listen icon.

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record 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

Auto Select Interactions After Disconnect  
Determine if Someone is Listening to or Recording Your Interactions  
Listen Button  
Listen to Someone Leave a Voicemail Message

## Record a Call

**Requirements:** See Record.

If you have the appropriate security rights, you can use the CIC client to record a call. This recording appears in your email inbox as a WAV file attachment to an email message. This procedure assumes that you are currently connected to a call.

**Note:** You cannot record an interaction that another CIC client user has marked as Private.

### To record a call:

1. Select an interaction and click Record.  
**Result:** The **Record** button appears pressed, and the call is recorded as a .wav file.
2. To pause the recording, click **Pause**.

**Result:** The **Pause** button appears pressed, and recording is suspended.

**Note:** This pause affects only your recording of the interaction. Recordings made by other monitors of this interaction are not affected. If available, use the **Secure Pause** button to pause **all** recordings. For more information, see Secure Pause a Recording.



- To stop recording, click **Record** again.

**Result:** The **Record** button becomes un-pressed, and the recording stops.

**Note:** You can press the **Record** button more than once to stop or continue recording your call. The CIC client stores each part of the recorded conversation in separate .wav files, and sends them to you in email message attachments after you end the call.

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

### Related Topics

Record Button  
Secure Record Pause Button

## Remove Disconnected Interactions from a Queue

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, if the interaction is not already selected, click the interaction to select it.
- Right-click the interaction and choose **Remove from Queue** from the menu that appears or press **Ctrl+Shift+R**.

**Result:** The disconnected interaction is removed from your queue.

**Tip:** You can also use the **Hide disconnected interactions** configuration option to remove interactions from the My Interactions view or other queue view immediately after you disconnect them. For more information, see [General Options](#).

### Related Topics

Introduction to Queues

## Request Assistance from Your Supervisor

**Requirements:** For more information about the rights required to use the Assistance button, see [Assistance](#). The Assistance button is enabled only for **ACD-routed interactions**. Also, if the interaction is not in a state in which this action can be performed, the Assistance button is dimmed.

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.

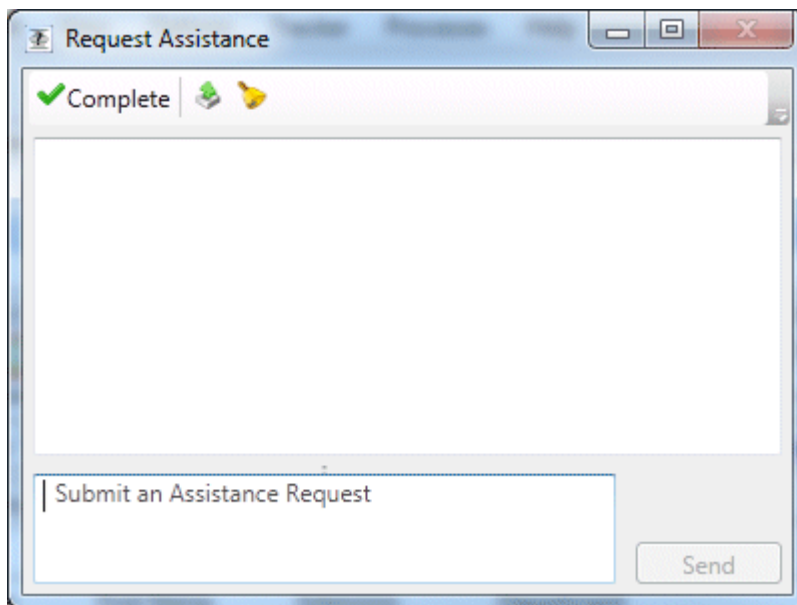
**Note:** At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

## Requesting Assistance

### To request assistance:

1. Do one of the following:
  - In My Interactions, select the call or web chat for which you need help. On the tool button bar, click the Assistance button or right-click the call and choose **Request Assistance** from the menu that appears.
  - In the Callback window, click the **Assistance** button.
  - In the Chat Window, click the **Assistance** button.
  - In the E-mail Window for Incoming Messages or E-mail Window for Outgoing Messages, click the Assistance button.

**Result:** The **Request Assistance** dialog box appears.

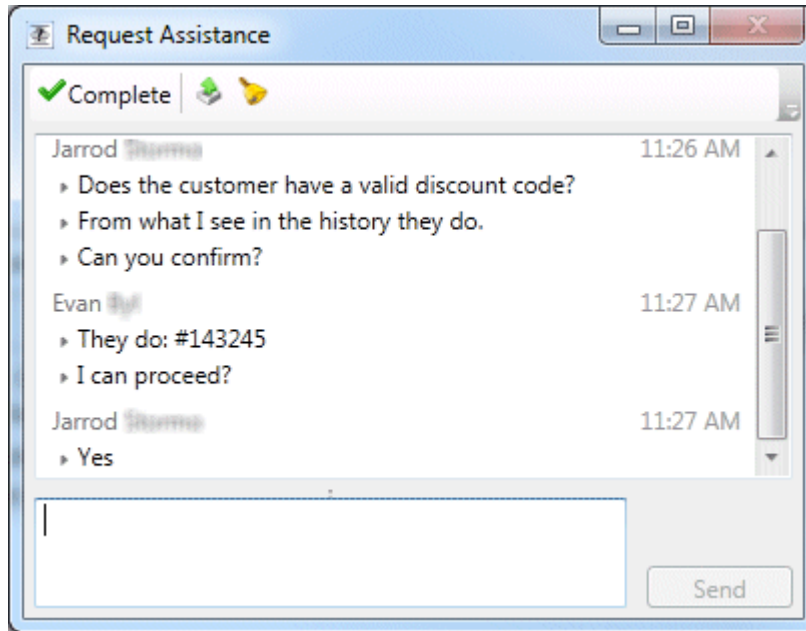


2. In the **Submit an Assistance Request** text box, type a brief explanation of why you need assistance from your supervisor.

**Note:** Use the **Pop on new message** and the **Play on new sound** controls to alert you to a response from your supervisor.

3. Do one of the following:
  - To cancel the request, close the Request Assistance dialog box.
  - To send the help request to your supervisor, click the **Send** button.

**Result:** The workgroup supervisor receives an assistance request in Interaction Supervisor. Also, all supervisors on the same IC server see a pop-up toast assistance request. You can chat with your supervisor in the Request Assistance dialog box.

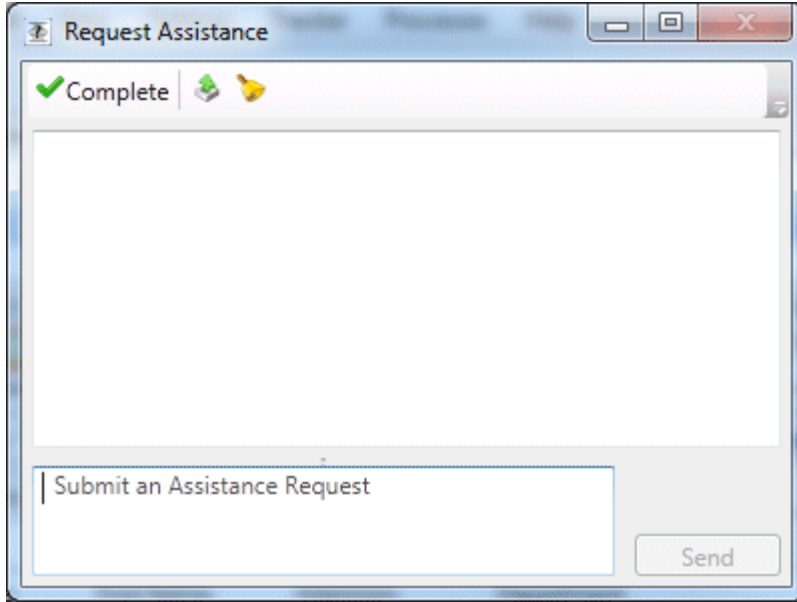


#### Related Topics

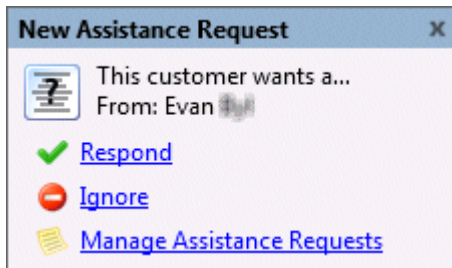
- Assistance Button
- Assistance Process
- Manage a Chat Session
- Working with Chat Sessions

## Assistance Process

When you click the Assistance button in My Interactions or the Chat Window, the Request Assistance dialog box appears. You enter a problem description and click **Send**.



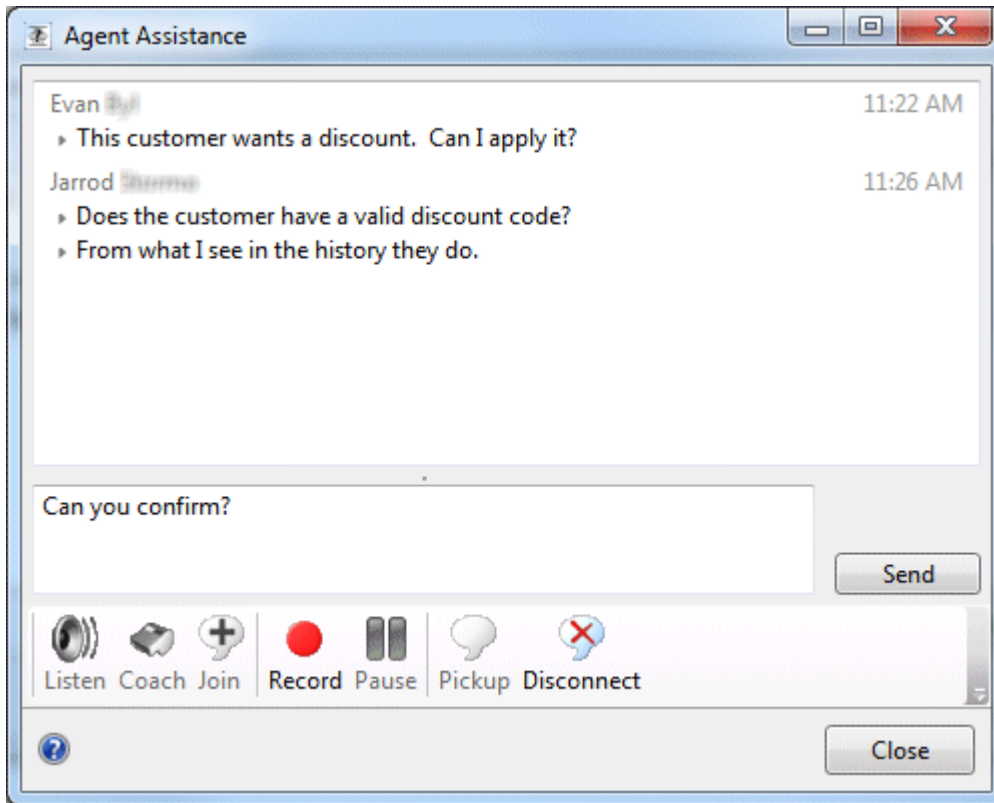
All of the workgroup supervisors on the same IC server see this assistance request. If a supervisor responds to the request, the toast notification closes automatically for all supervisors.



**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.

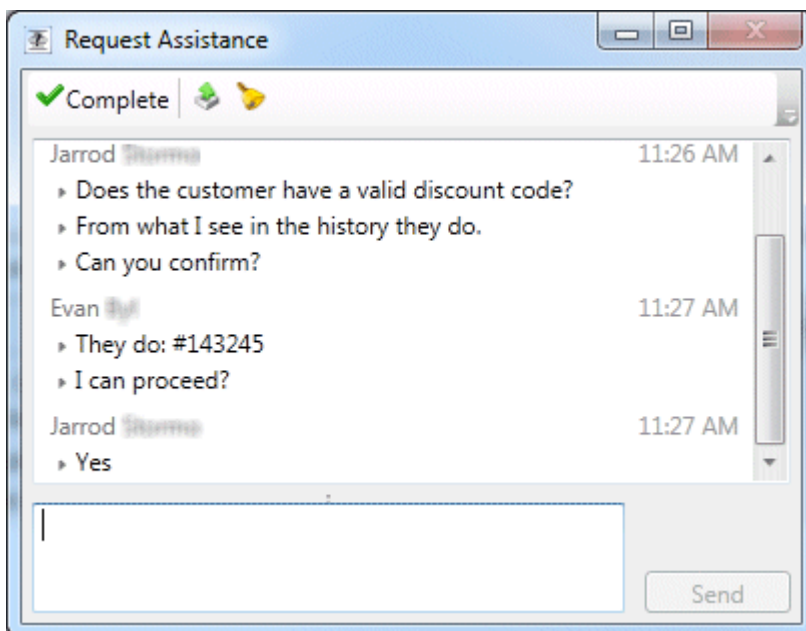
The supervisor responds to the notification by clicking a link:

- **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 dialog box.



**Related Topics**

Assistance Button  
Request Assistance From Your Supervisor

## Secure Input

**Requirements:** Your CIC administrator must enable and configure the Secure Input feature and make it available to one of the workgroups to which you belong. To use the Secure Input feature, you need the Initiate Secure Input Security Right. The "Secure Input" Interaction Command Right determines if the Secure Input button can appear on a toolbar. It also controls whether the Secure Input command appears on a shortcut menu or is available via a keyboard shortcut. The IC administrator assigns Secure Input Forms to selected workgroups. To use a specific Secure Input form, you need the View Workgroup Access Control Right for the workgroup to which it belongs.

Secure input separates and encrypts data to protect it from theft or misuse. It protects the customer's audio and prevents accidental recording of confidential information. It also protects this secure data from access. Secure input creates a secure session that is separate from the customer-agent interaction. It collects the confidential information from the customer, validates it with the appropriate web service, ends the secure session, and returns both customer and agent to the main interaction.

For example, an external customer makes an inbound call. At some point in the interaction, the customer is ready to provide credit card information. You click the Secure Input button to start a secure session. At that point, audio between agent and customer separates:

- You hear "hold music" to indicate that the call is still connected. When the call reconnects agent with customer, the CIC client alerts you.
- The customer navigates an Interactive Voice Response (IVR) system and provides credit card information. Customer Interaction Center sends the information to the credit card issuer for validation. At the end of the IVR, Customer Interaction Center re-establishes the audio between the customer and you. It informs both customer and you of the outcome (success or failure, with a tracking number and reason for any failure).

### Related Topics

[Start a Secure Input Session](#)

## 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, when you are connected to a call interaction. This procedure assumes you are currently connected to a call. You do not have to be currently recording the call interaction.

### To secure pause a recording:

- During a call interaction, 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 CIC client stores the recorded conversation in a .wav file, and sends it to you in an email message attachment after you end the call. 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.

### Related Topics

Secure Pause Button

## Start a Secure Input Session

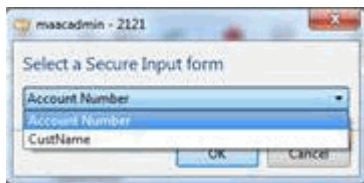
**Requirements:** Your CIC administrator must enable and configure the Secure Input feature and make it available to one of the workgroups to which you belong. To use the Secure Input feature, you need the Initiate Secure Input Security Right. The "Secure Input" Interaction Command Right determines if the Secure Input button can appear on a toolbar. It also controls whether the Secure Input command appears on a shortcut menu or is available via a keyboard shortcut. The IC administrator assigns Secure Input Forms to selected workgroups. To use a specific Secure Input form, you need the **View Workgroup** Access Control Right for the workgroup to which it belongs.

Secure input separates and encrypts data to protect it from theft or misuse. It protects the customer's audio and prevents accidental recording of confidential information. You start a Secure Input session when a customer is ready to provide confidential information such as a credit card number.

### To start a secure input session:

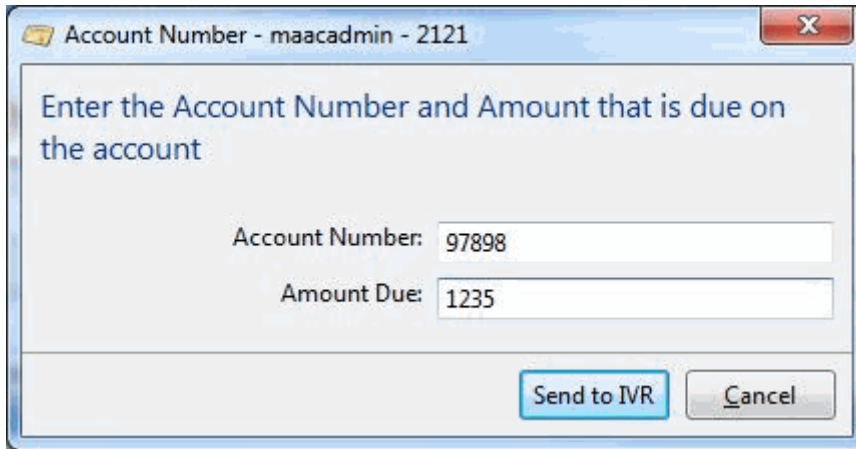
- During an active and selected interaction, click the Secure Input button.

**Result:** The Select a Secure Input form dialog box appears. Your CIC administrator configures the forms that appear in this list.



- Select the appropriate form.

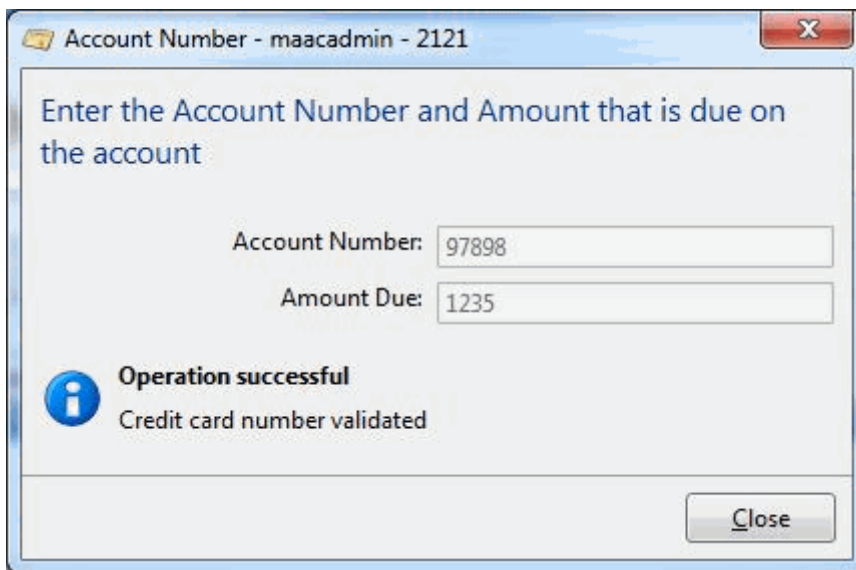
**Result:** A dialog box appears to collect non-confidential information.



3. Enter the required non-confidential information and then click **Send to IVR**.

**Result:** The CIC client starts the secure session with the customer. You see a "Waiting for caller to complete input..." message.

After the customer enters the information, the CIC client returns control to the you and displays a success message if the customer's information was valid.



4. If the customer information was valid, click **Close**. Otherwise, click **Retry** or **Cancel**.

#### Related Topics

Secure Input 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:**

- Right-click an interaction in Call History, My Interactions, or any queue you have permission to monitor. Click **Properties**.

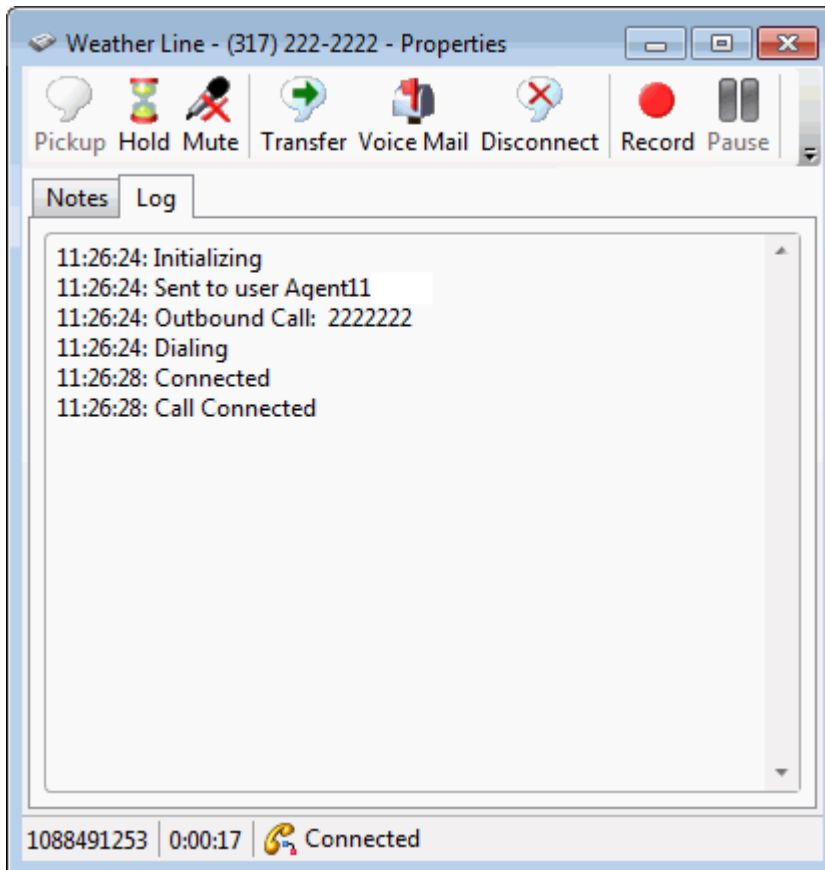


- Select an interaction and click the Properties button.

**Result:** The Interaction Properties dialog box appears.

## Log

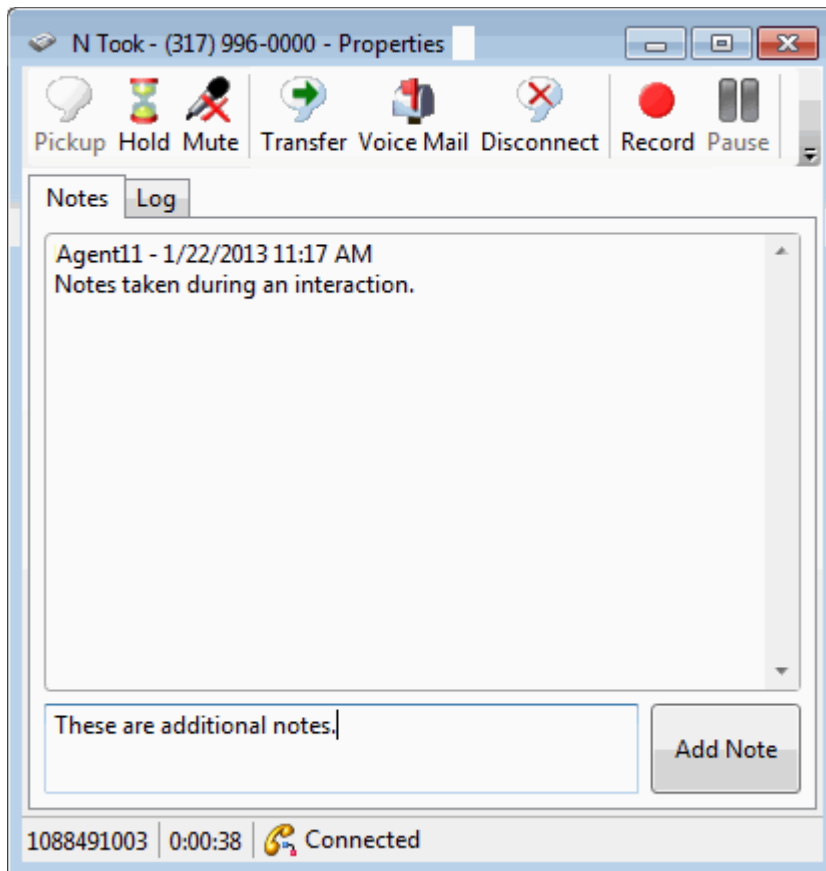
The **Log** describes changes in the interaction's state. This information goes into a log file and is used for reporting purposes.



## Notes

**Notes** record information typed by an agent about an interaction.

**Note:** You can only take notes on an interaction only while the interaction is selected and active, during a call, for example. You can also use the Notes section in the appropriate interaction window to add notes or comments about an Interaction. For more information, see [Add Notes to an Interaction](#). You can also use the Interaction Information view to add notes to an interaction.



#### To take notes on an interaction:

1. Do one of the following:
  - Right-click an interaction in My Interactions or any queue you have permission to monitor. From the drop-down menu, click **Properties**.
  - Select an interaction and click the Properties button.
2. Click the **Notes** tab.
3. In the text box to the left of the **Add Note** button, type the notes.
4. Click the **Add Note** button.

**Result:** The text appears in the Notes tab.

#### Related Topics

[Add Notes to an Interaction](#)  
[Assign Codes to an Incoming Interaction](#)  
[Assign Codes to Outgoing Interaction](#)  
[Properties Button on the Queue Control Toolbar](#)  
[View and Edit Directory Entries](#)

#### Working with 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 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**.

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 IC 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 IC 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.

**Note:** In the Interactive Intelligence Oracle Service Cloud Integration, both intercom and web chat interactions appear in the My Interactions queue. When you pick up an **intercom** chat, it appears in the CIC client Chat window or the Chat view. However when you pick up a **web** chat, it is handled by Oracle Service Cloud and appears in the appropriate Oracle Service Cloud workspace.

## Chat Interactions

A connected computer icon identifies a chat interaction in My Interactions. The chat interaction displays the name of the last participant to type during this chat and part of the text typed.

Queue	Name	Duration	State	Number	Chat Resp...	Details	Interaction Id
	From: Betty Jones	0:05:52	Connected	BLASIUS.DEV2000.com	0:01:53	<b>Betty Jones:</b> I need information a...	1001498248
	From: Ted Miller	0:04:08	Connected	BLASIUS.DEV2000.com	0:03:49	<b>Evan B:</b> How may I help you today?	1001498251

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.

**Note:** The IC administrator can set an agent **Chat Response Time** limit for ACD-routed interactions. This time limit can be different for each workgroup. A red outline appears around the chat interaction as a warning when this limit is reached. The warning disappears when you type and send a response as part of an ongoing chat.

- 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 **Chat view**. The currently selected chat interaction is highlighted.
- Borders around chat interactions alert you to one of these conditions:

- A **yellow border** indicates you have missed part of the conversation. This occurs when a chat participant enters some new text, but you do not have the appropriate Chat window or the Chat view selected (in focus).
- A **red border** appears around an ACD-routed chat interaction if you do not respond before a time limit is reached. Your CIC administrator can configure a different Chat Response Time Limit for each workgroup to which you belong.

### Related Topics

- Add Notes to an Interaction
- Assign Codes to an Interaction
- Chat Window
- Conference Two or More Chat Sessions
- Configure Chat Options
- Configure Chat Window
- Copy and Paste Text during a Chat Session
- Determine if Someone is Listening to or Recording Your Interactions
- Disconnect a Chat Session
- Initiate a Chat Session
- Manage a Chat Session
- Mark a Chat Session as Private
- Pick Up a Chat Request
- Place a Chat Session on Hold
- Print a Chat Session
- Record a Chat Session
- Request Assistance from Your Supervisor
- Send a Chat Session Request to Voicemail
- Transfer a Chat Session
- Use e-FAQ in a Chat or E-mail Reply Interaction

### Chat Configuration, Window and View

## Configure Chat Options

Chat options make it easier for you to manage multiple interactions at the same time and remain aware of what is happening in a Chat interaction. You can work on another interaction or task and are alerted by a sound or see a visual clue when you need to focus on the Chat again. Chat Options control the behavior of both the Chat window and the Chat View.

**Note:** In the Interactive Intelligence Oracle Service Cloud Integration, Chat Options apply only to **intercom** chats. For more information, see [Working with Chat Sessions](#).

#### To configure chat options:

1. In the Configuration dialog box, click the **Chats** node.
2. In the Chat properties details pane, select from the following options:

<p><b>Focus when new text is added</b></p>	<p>To be alerted visually when a chat participant starts to type or sends new text, select this option.</p> <p><b>Result:</b> One of the following happens:</p> <ul style="list-style-type: none"> <li>• If you use the Chat window to manage chats and have minimized or hidden it, the Chat window is restored (popped) and appears on top of any other open windows.</li> </ul>
--	--

	<p><b>Note:</b> If this option is not selected and the Chat window is minimized or is not the active window, the Windows taskbar CIC client button flashes when new text is added.</p> <ul style="list-style-type: none"> <li>This setting is <b>ignored</b> if you use the Chat View. However a <b>yellow border</b> appears around the chat interaction in My Interactions when a chat participant enters some new text and you do not have the appropriate Chat window or the Chat View selected (in focus). For more information, see Working with Chat Sessions.</li> </ul>
<b>Play sound when new text is added.</b>	<p>To hear a sound when any of the other chat participants sends new text as part of the Chat conversation, select this option.</p> <p><b>Note:</b> This setting works for all chats, regardless of whether you use the Chat window or the Chat View to manage chats.</p>
<b>Display timestamps</b>	<p>To display the time new text was added to the chat, select this option.</p> <p><b>Result:</b> Each new chat entry includes a timestamp. This timestamp appears next to the text in the ongoing conversation in the Chat window and the Chat View.</p> <p><b>Note:</b> This is the time the CIC client received notification that someone added new text to the chat. Timestamps reflect <b>your</b> local time (the time on your workstation). They are not based on the time zones of other chat participants. The time appears in the Short time format which you can configure in the Windows Region and Language settings.</p>

- Click **Apply** to save your selections.
- Click **OK** to close the Configuration dialog box.

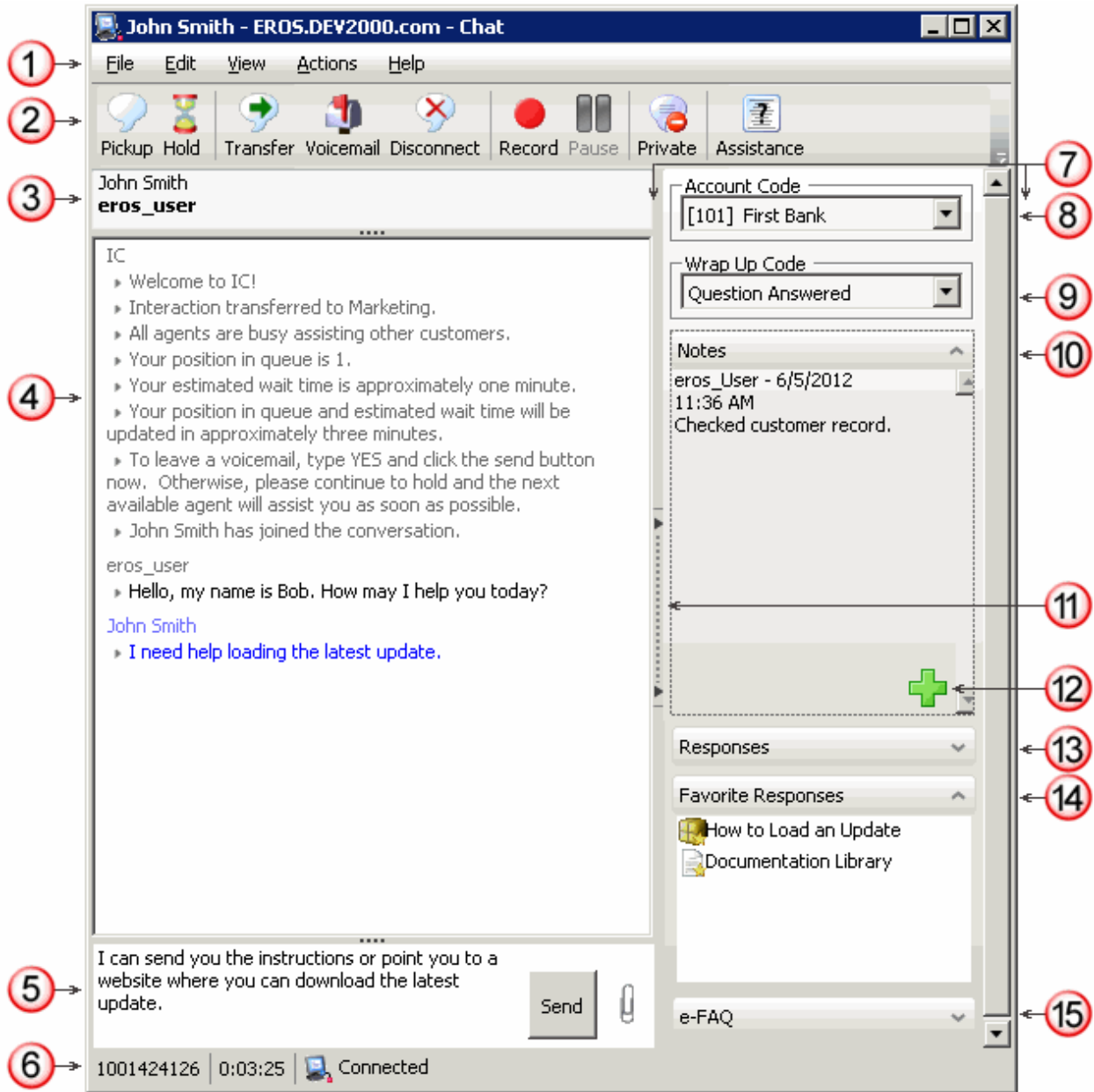
### Related Topics

Manage a Chat Session  
Working with Chat Sessions

## Chat Window

The Chat window provides the necessary tools for participating in a chat interaction.

**Note:** In the Interactive Intelligence Oracle Service Cloud Integration, the Chat window is used only for **intercom** chats. For more information, see Working with Chat Sessions.



1	<b>Menus</b>	Use these menus to perform various actions during a chat. For more information, see Chat Window Menus.
2	<b>Toolbar</b>	The toolbar contains buttons for most of the functions for managing a chat session. For more information, see Manage a Chat Session.  <b>Tip:</b> Keyboard shortcuts are also available for these functions and are listed on the View menu. Also, you control whether the toolbar is displayed. For more information, see Configure Chat Window.
3	<b>Chat Members</b>	This section displays the names of the chat participants. The word <b>(Typing)</b> appears after the name of a chat member who is typing a response that hasn't yet appeared in the Chat Window.
4	<b>Conversation</b>	The Conversation area displays the pre-configured automatic messages that

		<p>CIC sends when the chat begins, plus all chat text from all participants.</p> <p><b>Note:</b> If your CIC administrator enables text filtering, certain sensitive information such as credit card numbers or Social Security numbers is blocked from view. You see only some replacement text such as ##### instead of the numbers.</p>
5	<b>Composition area</b>	<p>Compose your reply to an ongoing chat, then click <b>Send</b> or press <b>Enter</b>.</p> <p><b>Tip:</b> Press <b>Ctrl+Enter</b> to insert a line break. Use <b>Ctrl+Backspace</b> to delete the previous word. You can also use <b>Ctrl+arrow keys</b> to navigate within the composition area.</p> <p>You can:</p> <ul style="list-style-type: none"> <li>• Type a response.</li> <li>• Click the <b>Attach a file</b> icon (paperclip) to locate a file on your workstation and send it to other chat participants.</li> </ul> <p><b>Note:</b> You can send a file to a visitor who starts a 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.</p> <ul style="list-style-type: none"> <li>• Locate and insert a Favorite Response or a system-wide response in the composition area. For more information, see Use Response Management During a Chat Session.</li> <li>• Copy and paste text to or from a Windows application.</li> <li>• Copy and paste information from your company's e-FAQ knowledge base.</li> </ul>
6	<b>Status bar</b>	<p>The Status bar displays the ID number, duration and state of the interaction. For more information, see Queue Contents.</p> <p><b>Note:</b> You control whether the Status bar is displayed. For more information, see Configure Chat Window.</p>
7	<b>Sidebar area</b>	<p>The appearance of the sidebar area can vary based on your user rights. It contains controls and information that are related to the chat.</p> <p><b>Note:</b> You control whether the sidebar is displayed. For more information, see Configure Chat Window.</p>
8	<b>Account Code</b>	<p>Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to a chat interaction.</p>
9	<b>Wrap-up Code</b>	<p>If you are a member of a workgroup for which Wrap-up codes are configured, you can use this drop-down list to assign the code.</p>
10	<b>Notes</b>	<p>Use the Notes section to add notes or comments about the ongoing chat. Other chat participants do not see these notes.</p> <p><b>Note:</b> These notes are visible to other CIC client users who are "Listening to" (monitoring) this chat. For more information, see Monitor a Chat. After a web chat is disconnected, these notes can be available in the Notes section of the Related Items view if the remote party is identified and the CIC system collects this information. For more information, see your CIC administrator.</p>
11	<b>Splitter Bar</b>	<p>If you prefer not to see the sidebar area, click the splitter to hide that part of</p>

		the Chat window. Click the splitter again to restore the sidebar area. <b>Note:</b> You can also use the View menu to control whether the toolbar is displayed. For more information, see <a href="#">Configure Chat Window</a> .
12	<b>Add a Note icon</b>	Click this icon to open the <b>Notes</b> text box and add a note to the chat.
13	<b>Responses</b>	Select a pre-defined response. For more information, see <a href="#">Use Response Management During a Chat Session</a> . <b>Note:</b> Response Management is not available in the Interactive Intelligence Oracle Service Cloud Integration.
15	<b>e-FAQ</b>	Use e-FAQ to find answer to customer questions by searching your company's e-FAQ knowledge base. For more information, see <a href="#">Use e-FAQ in a Chat or E-mail Reply Interaction</a> .

**Related Topics**

[Add Notes to an Interaction](#)  
[Assign Codes to an Interaction](#)  
[Chat View](#)  
[Manage a Chat Session](#)  
[Understanding Account Codes](#)  
[Understanding Wrap-Up Codes](#)  
[Working with Chat Sessions](#)

**Configure Chat Window**

Use the Chat window **View** menu to control the appearance of the Chat window. From the **View** menu, add or clear check marks to control whether the Chat window toolbar, status bar or sidebar area are visible.

**To configure the Chat window:**

- To display the toolbar, from the Chat Window **View** menu, select **Toolbar**.
- To display the status bar, from the Chat Window **View** menu, select **Status Bar**.
- To display the side bar, from the Chat Window **View** menu, select **Side Bar**.

**Related Topics**

[Chat Window](#)  
[Configure Chat Options](#)  
[Manage a Chat Session](#)  
[Working with Chat Sessions](#)

**Chat View**

The Chat View enables you to handle multiple chat interactions in a single view. The Chat View displays the currently selected chat. The Chat View is an alternative to using multiple Chat Windows to manage multiple ongoing chats. You control whether your current chat interactions appear in individual Chat Windows or the Chat View. If you add the Chat View to the CIC client, all of your subsequent chat interactions appear in the Chat View.

You can replace the Sidebar area of the standard Chat Window by adding the Response Management view, Interaction Information View, and e-FAQ View to the CIC client. Use these views to make notes, assign Account codes and Wrap-up codes, or use Response Management and e-FAQ to answer customer questions.

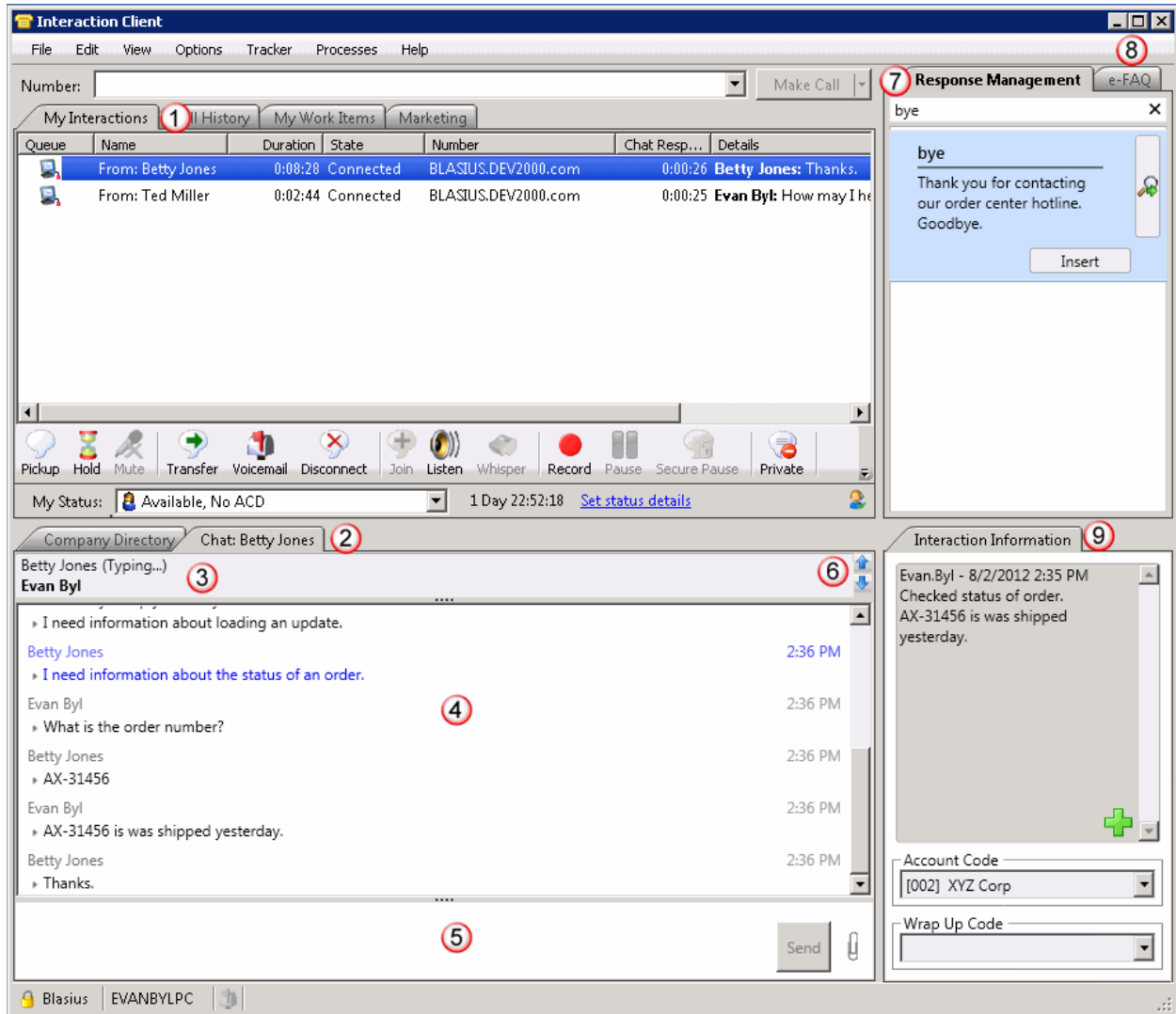


**Note:** In the Interactive Intelligence Oracle Service Cloud Integration, you manage can **intercom** chats in the Chat Display view. **Web** chats appear in the appropriate Oracle Service Cloud workspace. For more information, see *Working with Chat Sessions*.

**To display the Chat View:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Interactions**.
2. In the **Views** list, select **Chat**.
3. Click **OK**.

**Result:** The Chat View appears.



1	<p><b>My Interactions</b></p>	<p>The chat selected in My Interactions determines which chat interaction appears in the Chat View.</p> <p><b>Tip:</b> To switch quickly from one chat to another in My Interactions, press <b>Ctrl+Up arrow</b> or <b>Ctrl+Down arrow</b>. This makes it easier to participate in more than one chat session at the same time.</p>
---	-------------------------------	---

2	<b>Chat View</b>	The Chat View is a streamlined interface that focuses your attention on the current conversation. The tab label for this view shows the name of the other chat participant. You can view another chat in progress by selecting another chat in My Interactions.
3	<b>Chat Members</b>	This section displays the names of the chat participants. The word <b>(Typing)</b> appears after the name of another chat participant who is typing a response that hasn't yet appeared in the Chat View.
4	<b>Conversation</b>	The Conversation area displays the pre-configured automatic messages that CIC sends when the chat begins, plus all chat text from all participants.
5	<b>Composition area</b>	<p>Compose your reply to an ongoing chat, then click <b>Send</b> or press <b>Enter</b>.</p> <p><b>Tip:</b> Press <b>Ctrl+Enter</b> to insert a line break. Use <b>Ctrl+Backspace</b> to delete the previous word. You can also use <b>Ctrl+arrow keys</b> to navigate within the composition area.</p> <p>You can:</p> <ul style="list-style-type: none"> <li>• Type a response.</li> <li>• Click the <b>Attach a file</b> icon (paperclip) to locate a file on your workstation and send it to other chat participants.</li> <li>• Locate and insert a Favorite Response or a system-wide response in the composition area. For more information, see Use Response Management During a Chat Session.</li> <li>• Copy and paste text to or from a Windows application.</li> <li>• Copy and paste information from your company's e-FAQ knowledge base.</li> </ul>
6	<b>Display arrows</b>	If you have multiple ongoing chat interactions, use the display arrows to select which chat appears in the Chat View.

You can replace the Sidebar area of the standard Chat Window by adding additional views to the CIC client. Use these views to make notes, assign Account codes and Wrap-up codes, or use Response Management and e-FAQ to answer customer questions.

**Note:** You control whether these additional views appear in the CIC client. For more information, see Response Management view, Interaction Information View, and e-FAQ View.

7	<b>Response Management view</b>	<p>You can add the Response Management view to the CIC client. You can use the view anytime you have an active and selected interaction.</p> <p>You can search for stored responses and insert them in the chat. For more information, see Use Response Management During a Chat Session.</p>
8	<b>e-FAQ view</b>	<p>You can add the dockable e-FAQ view to the CIC client. You can use this view anytime you have an active and selected interaction.</p> <p>Use e-FAQ to find answer to customer questions by searching your company's e-FAQ knowledge base.</p>
9	<b>Interaction Information view</b>	<p>You can add the dockable Interaction Information view to the CIC client.</p> <ul style="list-style-type: none"> <li>• Use the Notes section to add notes or comments about the ongoing chat. Other chat participants do not see these notes.</li> </ul> <p><b>Note:</b> These notes are visible to other CIC client users who are "Listening to" (monitoring) this chat. For more information, see Monitor a Chat. After a web chat is disconnected, these notes can be available in the Notes section of the Related Items view if the remote</p>

		<p>party is identified and the CIC system collects this information. For more information, see your CIC administrator.</p> <ul style="list-style-type: none"> <li>Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an <b>Account code</b> to a chat interaction.</li> <li>If you are a member of a workgroup for which Wrap-up codes are configured, you can use this drop-down list to assign the code.</li> </ul> <p>You can use this view to</p>
--	--	---

**Related Topics**

- Add Notes to an Interaction
- Add or Close Views
- Assign Codes to an Interaction
- Understanding Account Codes
- Understanding Wrap-Up Codes
- Use e-FAQ in a Chat or E-mail Reply Interaction

**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 toolbar or menus in the Chat Window to manage a chat. You can also use the Chat View to manage a chat.

**Note:** In the Interactive Intelligence Oracle Service Cloud Integration, you manage **intercom** chats in the Chat window or the Chat View. **Web** chats appear in the appropriate Oracle Service Cloud workspace. For more information, see Working with Chat Sessions.

**Chat Window Toolbar**

The Chat Window toolbar contains buttons for most of the functions for managing a chat session.

Button	Description
	Click <b>Pickup</b> to connect to the current chat session. For more information, see Pickup a Chat Request.
	Click <b>Hold</b> to place the chat session on hold and free you to work with other interactions. When you place a chat session on hold, the CIC client can send you another phone call, email message, or chat session. For more information, see Place a Chat Session On Hold.
	Click <b>Transfer</b> to transfer the chat session to another CIC client user or workgroup. For more information, see Transfer a Chat Session.  When you transfer a chat session to another user, CIC includes the existing chat conversation with the transfer, which enables the transfer recipient to review the transcript after joining the chat.
	Click <b>Voice Mail</b> to Send a Chat Session Request to Voice Mail.
	Click <b>Disconnect</b> to disconnect the current chat session. For more information, see Disconnect a Chat Session.
	Click <b>Record</b> to record the current chat session. This recording is saved and sent to you as an email message attachment after you end the chat session. Clicking <b>Record</b> the first time starts the recording session for an interaction. Clicking <b>Record</b> again stops the recording session for an interaction. For more information, see Record a Chat Session.

	Click <b>Pause</b> to pause the recording session. Click it again to resume the recording session. This button is unavailable if the interaction is not in a state in which this action can be performed. For more information, see Record a Chat Session.
	Click <b>Private</b> to prevent other CIC client users from recording this chat session. This button is unavailable if the interaction is not in a state in which this action can be performed. For more information, see Mark a Chat Session as Private.  <b>Warning:</b> 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.
	If you're in a workgroup and you need help with a chat session from your workgroup queue, click <b>Assistance</b> to request assistance from your supervisor. For more information, see Request Assistance from Your Supervisor.

### Chat Window Menus

The Chat window menus contain options for managing a chat session.

Menu	Options
<b>File</b>	Use File menu options to end your participation in the chat session or print the text of a chat session. For more information, see Print a Chat Session.
<b>Edit</b>	Copy and paste text from a chat session to the Clipboard or from the Clipboard to the Chat window. For more information, see Copy and Paste Text During a Chat.
<b>View</b>	Control the appearance of the Chat Window. For more information, see Configure Chat Window.
<b>Actions</b>	Use the options on the Actions menu or the corresponding menu shortcuts to perform the actions available on the Chat Window toolbar.
<b>Help</b>	Display help.

### Related Topics

- Add Notes to an Interaction
- Assign Codes to an Interaction
- Conference Two or More Chat Sessions
- Configure Chat Options
- Configure Chat Window
- 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
- Invite Other Users to Chat
- Mark a Chat Session as Private
- Pick Up a Chat Request
- Place a Chat Session on Hold
- Print a Chat Session
- Record a Chat Session
- Request Assistance from Your Supervisor
- Send a Chat Session Request to Voice Mail
- Transfer a Chat Session
- Working with Chat Sessions

## Add Notes to an Interaction

Use the **Notes** section in the appropriate interaction window or in the **Interaction Information** view to add notes or comments about the 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. For more information, see [Monitor a Chat](#).

**Tip:** For information about adding notes to a Call, see [View and Edit Interaction Properties](#).

### To add notes to an interaction:

- Do one of the following:
  - In My Interactions, select an interaction. In the Interaction Information view, click the **Add a Note** icon (plus sign).
  - In the Callback window, Chat window, Email window for Incoming Messages, or E-mail Window for Outgoing Messages, click the **Add a Note** icon (plus sign).
- In the Notes text box, type your observations or comments and click **Add**.

**Result:** One of the following happens:

- Your notes appear in the Notes section of the Callback window, Chat window, or Email windows.
- Your notes appear in the top part of the Interaction Information view.

### Related Topics

[Respond to a Callback Request](#)  
[Manage a Chat Session](#)  
[Working with Chat Sessions](#)

## Assign Codes to an Interaction

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

**Note:** Oracle Service Cloud and CIC can monitor different mailboxes for incoming email messages. Messages that arrive in an Oracle Service Cloud mailbox do not appear in the CIC client. These email messages appear as new Incidents in the Oracle Service Cloud interface. E-mail messages **originally sent to a CIC mailbox** appear in the CIC client as interactions. You view these messages in the E-mail Window for Incoming Messages.

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 Information view.

**Note:** Wrap-up codes are not used for email message replies or forwarded email messages.

- For an incoming email message, select the appropriate codes in the **Email Window for Incoming Messages**.
- For an outgoing email message, select the appropriate Account code in the **E-mail Window for Outgoing Messages**.

- When responding to a callback request, select the appropriate codes in the Callback Window.
- During a chat session, select the appropriate codes in the Chat window.

**Note:** If Wrap-Up codes are available and you don't assign one during a chat or to an incoming email message, you are prompted to assign the appropriate code when you end your part of the interaction. Wrap-up codes are not used for email message replies or forwarded email messages.

### Related Topics

Assign Codes to an Incoming Interaction  
Assign Codes to an Outgoing Interaction  
Email Editor  
Email Preview  
Email Window for Incoming Messages  
Email Window for Outgoing Messages  
Manage a Chat Session  
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 "Conference" in the Name column.

4. Repeat steps 2 and 3 for any additional participants you want to add to the chat conference or you can [Invite Other Users to Chat](#).

**Note:** The name of each chat participant appears in the Chat Members section of the Chat Window.

5. When the session is complete, click the **Disconnect** button in the Chat window, or on the My Interactions view of the CIC client to end the chat conference.

### Related Topics

Invite Other Users to Chat  
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 the **Edit** menu in the Chat window to copy all or part of a chat session to the Windows clipboard. For example, you could copy the chat session text to Word or Notepad by clicking **Select All** and then clicking **Copy**.

The Chat window **Edit** menu contains the standard cut and paste commands:

- Undo
  - Cut
  - Copy
  - Paste
  - Delete
  - Select All
- The Chat view does not have menus, but you can use standard Windows Copy and Paste operations to copy all or part of chat session to the Windows clipboard and from there to a Windows application.
  - Use Windows **Copy** and **Paste** operations to copy the text from an open file to the composition area of the Chat window or to the composition area of the Chat view. Then click **Send**, just as if you'd typed the response.

#### Related Topics

Manage a Chat Session  
Working with Chat Sessions

## Disconnect a Chat Session

**Requirements:** See Disconnect.

**To disconnect a chat session, do one of the following:**

- In the Chat Window, click the **Disconnect** button.
- In the Chat Window or with the chat session selected in My Interactions, press **Ctrl+D**.
- In **My Interactions**, select the chat interaction and click the **Disconnect** button.

**Tip:** This is the only way to disconnect a chat appearing in the **Chat View**.

#### Related Topics

Chat View  
Chat Window  
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 invite additional users to a current chat session or you can conference two or more chat Sessions

**Note:** Intercom chats can take place only between users on the same IC 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. Do one of the following:
  - Click the Initiate New Chat button in the Company Directory toolbar.
  - Press **Ctrl+Shift+C**.
  - Right-click the directory entry and choose **Initiate new Chat** from the menu that appears.

**Result:** The chat appears in either the Chat view or the Chat window, depending on your CIC client configuration.

**Note:** If the chat recipient does not answer, you are prompted to leave a message. Press **Disconnect** in the Queue Control toolbar or in the Chat window after typing the message.

#### Related Topics

Conference Two or More Chat Sessions  
Invite Other Users to Chat  
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, do one of the following:

- Select a chat and then in the queue control toolbar, click the **Private** button.
- In the **Chat** window, click the **Private** button.

**Note:** This button is unavailable if the chat is not in a state in which this action can be performed.

#### Related Topics

Chat Window  
Manage a Chat Session  
Private Button  
Working with Chat Sessions

## Monitor a Chat

**Requirements:** See Listen.



If you have the appropriate rights, you can monitor a chat without being a participant.

Some things to note about the process of monitoring a chat:

- If you monitor a chat, a **Lsns icon** appears on the line containing the interaction in the queue views for the participating CIC client users and your own queue views.

**Tip:** For more information, see [Determine if Someone is Listening to or Recording Your Interactions](#).

- The **Lsns icon** is not removed until you cease to monitor the interaction by closing the chat window on your workstation or clicking the **Listen** button a second time.
- You can stop monitoring a chat at any time.
- If you monitor a chat, you see the complete chat conversation as it occurs. The conversation includes text typed by participants, text or URLs incorporated from e-FAQ, and the selected Account Code or Wrap-up Code.

**Note:** Files sent to chat participants are not visible to a user who monitors the chat.

- You also see any notes the agent makes on the chat. These notes are not visible to the other chat participants. For more information, see [Add Notes to an Interaction](#).

In a typical example, another CIC client user (agent) picks up a chat from a workgroup queue. If you have the necessary rights to listen to (monitor) interactions and to monitor the queue on which the chat is appearing, you can view the chat.

#### To monitor a chat:

1. The agent picks up a chat.

**Result:** Depending on the configuration of the agent's CIC client, the chat conversation appears in either the Chat window or in the Chat View.

2. You select the same chat interaction from the appropriate queue view and do one of the following:

- Right-click the chat and choose **Listen In** from the menu that appears.
- Select the chat and then click the **Listen** button.

**Result:** Depending on how you configure the CIC client, the chat conversation appears in either the Chat window or in the Chat view. The **Lsns icon** appears in the row that contains the chat in both the agent's and your queue view.

**Note:** You can stop listening at any point in this process. You do not need to wait until the agent completes the chat or withdraws from participation by disconnecting.

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

#### Related Topics

[Determine if Someone is Listening to or Recording Your Interactions](#)  
[Manage a Chat Session](#)

## Pick Up a Chat Request

**Requirements:** See [Pickup](#).

When someone sends a chat request to you, the CIC client sends a message to your email account and the chat request appears in your My Interactions queue.

**Note:** The chat may open automatically, if the CIC administrator enables your CIC client to **Auto-Answer non-ACD Interactions**. For more information, contact your CIC administrator.

#### To pick up a chat session request:

- Do one of the following:
  - In My Interactions select the chat request and click the **Pickup** button.
  - In the desktop alert (toast popup), click **Pickup**.

**Note:** A chat request also appears as an alerting interaction in a desktop popup (toast). Desktop alerts appear in the lower right-hand corner of your Windows desktop.

**Result:** Depending on how you configure the CIC client, the chat appears in either the Chat window or the Chat View.

#### 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.

- In the Chat Window, click the Hold button.
- If you are viewing the chat in the Chat View, in the Queue Control toolbar where you selected the chat, click the **Hold** button.
- In My Interactions, select the chat and click the **Hold** button.

**Result:** In the queue view, the chat's state changes to "On Hold." To return to the chat session, click the **Pickup** button.

**Tip:** The Hold and Pickup actions are also available from the **Actions** menu in the Chat Window.

**Note:** The **Hold** button is depressed while the chat session is on hold. Also, "Held" appears in the Status bar at the bottom of your Chat Window.

#### Related Topics

Manage a Chat Session  
Working with Chat Sessions

## Print a Chat Session

You can print the text of a chat session from the Chat window.

#### Do one of the following from the Chat Window File menu:

- Select **Print Preview** to preview a chat session printout.

- Select **Print** to print the text of a chat session.

### Related Topics

Manage a Chat Session  
Working with Chat Sessions

## Record a Chat Session

**Requirements:** See Record.

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 that is e-mailed to you after the chat session ends.

**Note:** This feature may or may not be available to you, depending on the rights assigned to you in Interaction Administrator.

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record 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, do one of the following:**

- In the Chat Window, click the Record button.
- If you are viewing the chat in the Chat View, in the Queue Control toolbar where you selected the chat, click the **Record** button.
- In My Interactions, select the chat and click the **Record** button.

**Result:** The recording starts. A recording interaction appears in the queue view.

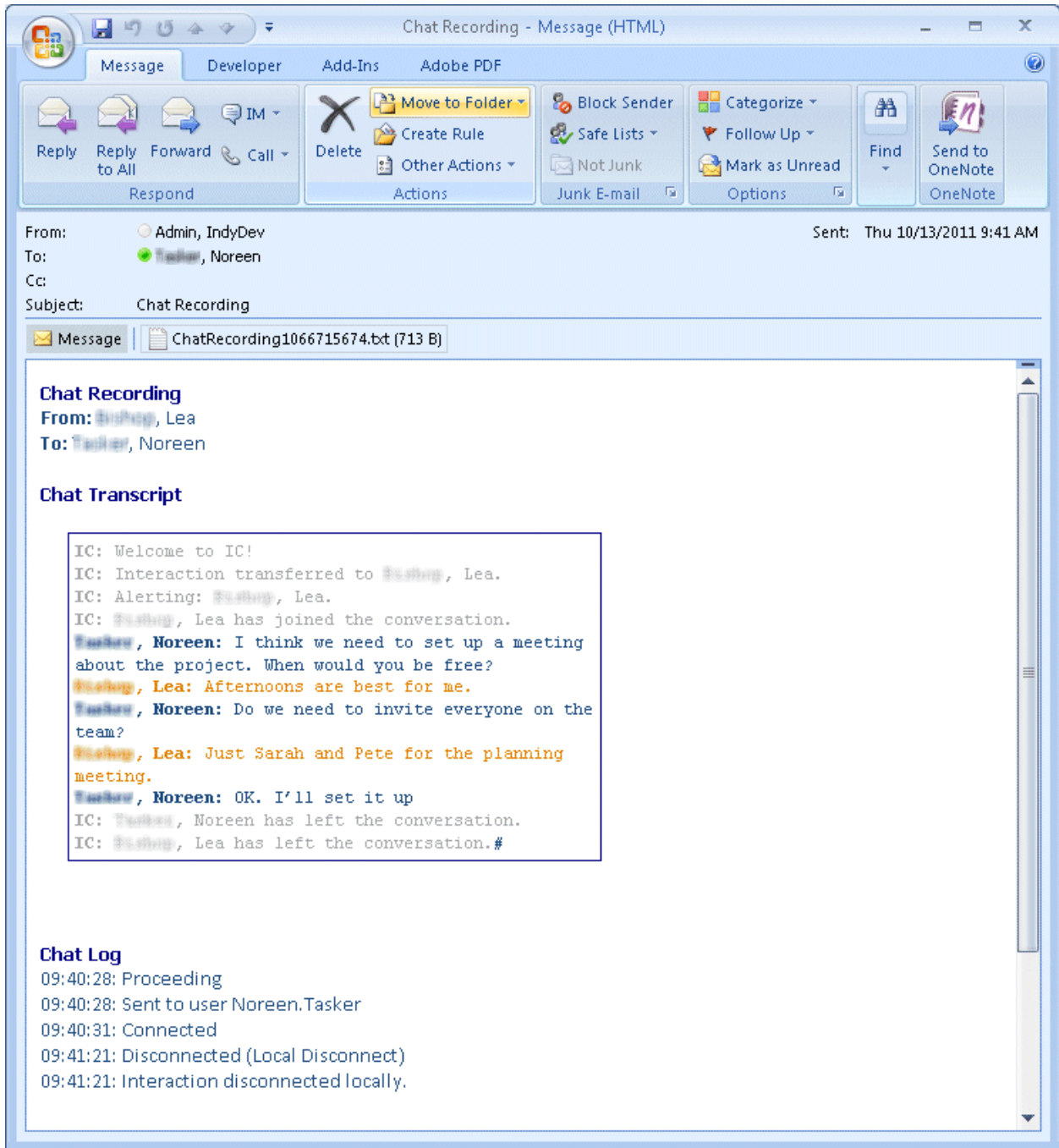
**Note:** The **Record** button is unavailable if the chat is not in a state in which this action can be performed, or if you do not have rights to record interactions.

**After you start a recording:**

- Click the **Record** button again to stop the recording session for a chat.
- You can press the **Record** button more than once to stop or continue recording your chat.

**After the chat session ends:**

The Record feature saves only the text entered in a chat session while you have the Record button pressed. After the chat session ends, the CIC client stores all parts of the recorded chat, and sends the conversation to you in an email message attachment.



### Pausing a Chat Session Recording

When you record a chat session, you can use the **Pause** button to temporarily stop the recording session.

#### To pause a chat session recording:

- 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.
- The **Pause** button is unavailable if the interaction is not in a state in which this action can be performed.

#### 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:** For more information about the rights required to use the Assistance button, see Assistance. The Assistance button is enabled only for **ACD-routed interactions**. Also, if the interaction is not in a state in which this action can be performed, the Assistance button is dimmed.

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.

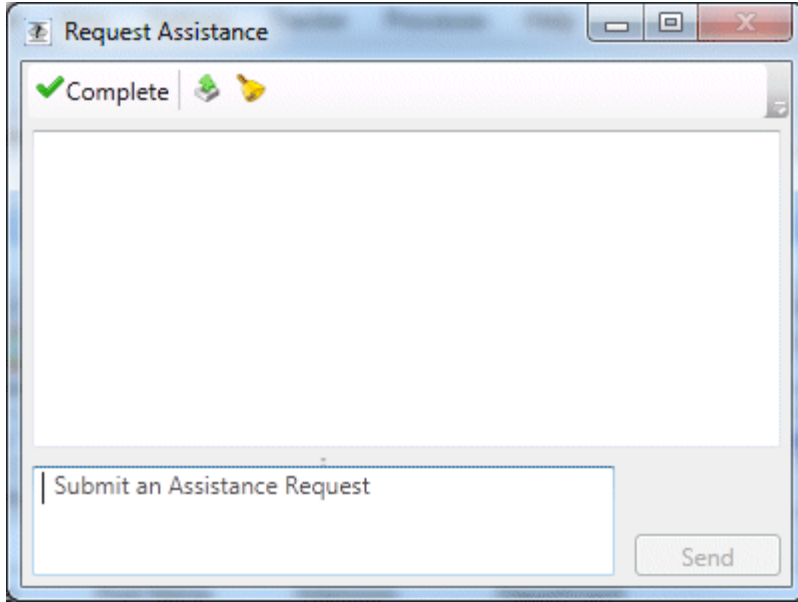
**Note:** At least one supervisor must be configured for your workgroup in Interaction Administrator and that supervisor must be logged on in order for the request assistance process to work properly.

### Requesting Assistance

#### To request assistance:

1. Do one of the following:
  - In My Interactions, select the call or web chat for which you need help. On the tool button bar, click the Assistance button or right-click the call and choose **Request Assistance** from the menu that appears.
  - In the Callback window, click the **Assistance** button.
  - In the Chat Window, click the **Assistance** button.
  - In the E-mail Window for Incoming Messages or E-mail Window for Outgoing Messages, click the Assistance button.

**Result:** The **Request Assistance** dialog box appears.

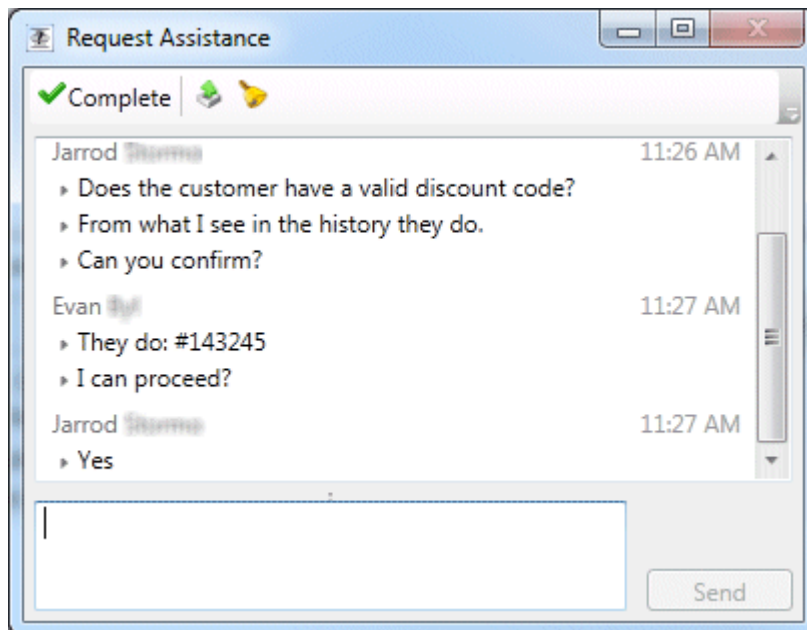


2. In the **Submit an Assistance Request** text box, type a brief explanation of why you need assistance from your supervisor.

**Note:** Use the **Pop on new message** and the **Play on new sound** controls to alert you to a response from your supervisor.

3. Do one of the following:
  - To cancel the request, close the Request Assistance dialog box.
  - To send the help request to your supervisor, click the **Send** button.

**Result:** The workgroup supervisor receives an assistance request in Interaction Supervisor. Also, all supervisors on the same IC server see a pop-up toast assistance request. You can chat with your supervisor in the Request Assistance dialog box.



## Related Topics

Assistance Button  
 Assistance Process  
 Manage a Chat Session  
 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, do one of the following:

- 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.
- In the Chat window, 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:
  - Right-click a name in a directory. From the shortcut menu, select **Selected Interaction** and then click **Transfer**.
  - 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. Do one of the following:
  - In the Chat Window, click the **Transfer** button.
  - In the Chat Window, from the Actions menu, select **Transfer**.
  - In the Chat Window, press **Ctrl+T**.

**Result:** The **Transfer dialog box** appears.

2. In the **Transfer To:** text box, type all of part of the recipient's name or number.

**Result:** A drop-down list of choices appears.

**Tip:** If the drop-down list does not contain the recipient you expected, check the search criteria selected in the Options drop-down list and adjust them if necessary.

3. 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 for the selected CIC user or current statistics for the selected workgroup appears. This information helps you determine if the user or workgroup is able to join the chat.

4. Click the **Transfer** button.

**Result:** When you transfer a chat session to another user, the CIC client includes the existing chat conversation with the transfer, which enables the transfer recipient to review the transcript when they join the chat.

### Related Topics

Manage a Chat Session  
Transfer Button  
Transfer Dialog Box  
Using the Queue Control Toolbar  
Working with Chat Sessions

## Use e-FAQ in a Chat or E-mail Reply Interaction

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction.

If your company has purchased the e-FAQ knowledge management program and you have been assigned the appropriate user rights in Interaction Administrator, you can use e-FAQ to find answer to customer questions by searching your company's e-FAQ knowledge base. You can then simply copy and paste the information during a Callback.

### To use e-FAQ during a chat session or in an e-mail reply:

1. Do one of the following:
  - In the Chat window or E-mail Window for Outgoing Messages, expand the e-FAQ section.
  - Select an interaction and then select the e-FAQ view.
2. Search for the appropriate e-FAQ question and answer.

**Tip:** For more information, see Using e-FAQ.

3. Insert a selected e-FAQ question and answer in your chat response or email reply.

### Related Topics

e-FAQ Searches  
e-FAQ View  
Manage a Chat Session  
Reply to an E-mail Message  
Reply to an HTML E-Mail Message



Using e-FAQ  
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 cannot transfer a file during an internal chat with other CIC client users.

### To use a stored response when participating in a chat:

1. Do one of the following:
  - In the Response Management view, search for and then select an appropriate response. Click **Insert**.
  - In the Chat window, expand the **Favorite Responses** section and double-click a favorite response.
  - In the Chat window, expand the **Responses** section, search for and then select an appropriate response. Click **Insert**.

**Tip:** You can use full-text searching by entering terms in the Search text box in the Responses section. A context-based search occurs automatically, based on the last five words you typed in the chat. For more information, see [Search for a Response](#).

- In the Composition area of the Chat window, type the response Shortcut and press **Ctrl+Space**.

**Tip:** You can also drag and drop responses to the Composition area.

**Result:** The response appears in the Composition area of the selected Chat. You can edit the response before it is included in the Chat.

2. Make any necessary changes to the response and then click **Send**.

**Result:** The response appears in the Conversation area of the Chat window or the Chat 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. If the response is a file, external Chat participants see a link to the file which has been copied to a temporary directory on the IC server.

### Related Topics

Manage a Chat Session  
Manage Favorite Responses  
Working with Chat Sessions

### Working with 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. 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. The View Directory Status Columns Access Control right also determines whether you can view a user's status in the directory shortcut menu.

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](#).

**Note:** Directory views are available in the full CIC client. If you have the appropriate license and user rights, the CIC client can appear in an Oracle Service Cloud CRM workspace. For more information, see [CIC client workspace](#).

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.
- Send an email message.
- Initiate a Chat Session.
- 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.
- 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:

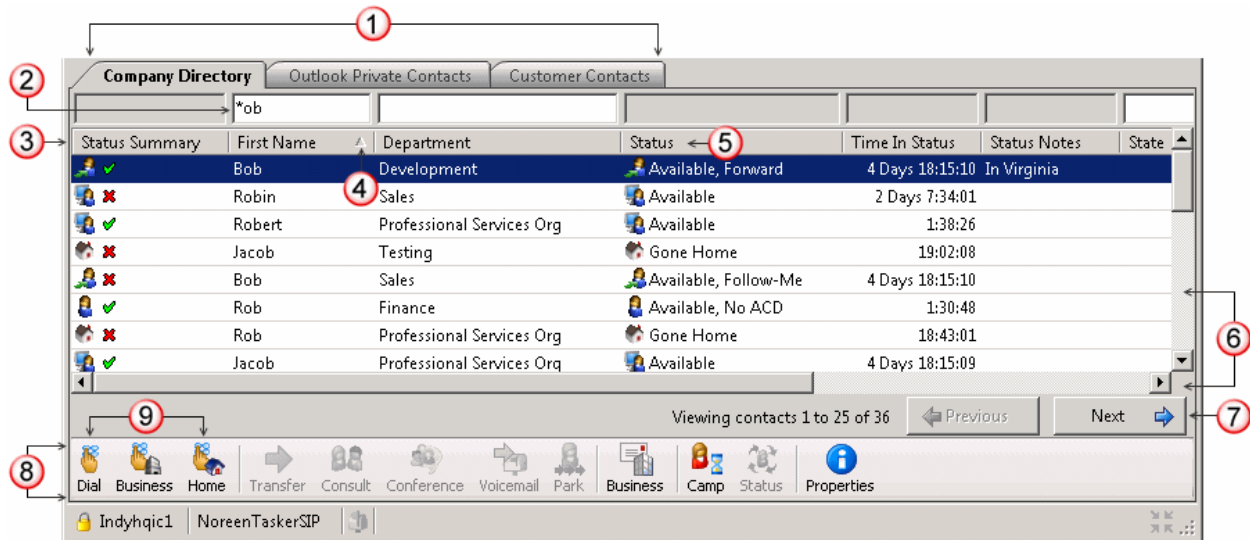
- Add or remove directory views
- Add or remove columns from a directory view.

**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.

This diagram shows multiple directory views. Each directory view appears on a separate tab.

**Note:** Some columns enable you to display a content tooltip for more information than can appear in a narrow column.



1	<b>Directory tabs</b>	<p>The three tabs represent three different directories. Each is labeled with the name of the directory. The tab for the currently selected directory view is selected and the name of the directory appears in bold type.</p> <p><b>Tip:</b> Right-click a directory tab and select <b>New View</b> or <b>Close</b> to manage your directory views. For more information, see <a href="#">Add or Close Views</a>.</p>
2	<b>Search fields</b>	<p>Use the search fields to locate a specific directory entry or group of entries. Fields you can use for searches are not dimmed. For more information, see <a href="#">Search a Directory</a>.</p>
3	<b>Column heading</b>	<p>You can drag and drop a column heading to move a column to a different position. For more information, see <a href="#">Customize Columns</a>.</p> <p>Right-click on a column heading to add or remove columns. For more information, see <a href="#">Add or Remove View Columns</a>.</p>
4	<b>Sort Direction indicator</b>	<p>Triangles indicate whether the contents of a column are sorted in ascending or descending order. If the contents of a directory are sorted by more than one column, a number indicates the sort order. For more information, see <a href="#">Sort a Directory</a>.</p>
5	<b>Status</b>	<p>Use the default <b>Status</b> column or the <b>Status Summary</b> column to determine if a contact is available to take a call. Several other status columns are available, including <b>Status Notes</b> and <b>Time in Status</b>. For more information about adding a column to a directory view, see <a href="#">Customize Columns</a>.</p>
6	<b>Horizontal and Vertical scroll bars</b>	<p>A horizontal scroll bar appears if the total width of the columns exceeds the space available in the CIC client window.</p> <p>A vertical scroll bar appears if all the entries in a single view cannot be displayed in the space available.</p>
7	<b>Paging controls</b>	<p>A large directory or set of entries can be displayed in a paged format. The <b>Previous</b> and <b>Next</b> controls enable you to navigate from one page to another in the directory.</p> <p>Next to the paging controls, you can see the number of contacts in the current directory page and the total number of contacts in the directory view.</p> <p>If a new contact is added while you are viewing a directory, it does not immediately appear in the directory view. The total number of contacts is</p>

		<p>updated, however. To display any new contacts, refresh the directory view by changing the page or adjusting the filter or sort options.</p> <p><b>Note:</b> 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.</p>
8	<b>Directory toolbar</b>	Use the Directory toolbar to manage your contacts and interactions with those contacts. For more information, see Using the Directory Toolbar.
9	<b>Dial buttons</b>	<p>You can customize the buttons appearing in the Directory Toolbar. Dial buttons enable you to dial a selected number for a contact with a single click. In this example, the Home dial button is not enabled because a home telephone number does not exist for the selected contact.</p> <p>For more information, see Make a Call Using a Dial Button.</p>

### Directory shortcut menu

Right-click a contact's name to display this shortcut menu. It enables you to view a CIC client user's status, select an appropriate action, or see the available keyboard shortcuts for each action.

**Requirements:** The View Directory Status Columns Access Control right determines whether you can view a user's status in the directory shortcut menu.

The screenshot shows a right-click context menu for a contact named 'Took, Nora'. The menu is divided into several sections:

- Contact Information:** Took, Nora, Available, No ACD, Station: NORATSIP.
- Dial Actions:** Dial Default Number (Shift+Enter), Dial Business Phone (Ctrl+B), Dial Mobile Phone (Ctrl+I), Dial Home Phone (Ctrl+H), Dial Assistant Phone (Ctrl+R), Dial Fax (Ctrl+F).
- Communication Actions:** Send Email (Business)... (Ctrl+E), Camp (Ctrl+A), Send an Instant Message (Ctrl+Shift+L), Start a Video Chat (Ctrl+Shift+V), Initiate new Chat (Ctrl+Shift+C).
- Properties:** Properties (Ctrl+Shift+P).
- Selected Interaction:** A sub-menu containing:
  - Transfer (Enter)
  - Send to Voicemail (Ctrl+M)
  - Park on Queue (Ctrl+K)
  - Consult transfer (Ctrl+T)
  - Conference
  - Transfer to other number (highlighted)
  - Consult transfer to other number
- Speed Dial Buttons:** Business (Ctrl+Alt+B), Business 2 (Ctrl+Alt+U), Mobile (Ctrl+Alt+I), Home (Ctrl+Alt+H), Home 2 (Ctrl+Alt+O), Fax (Ctrl+Alt+F), Pager (Ctrl+Alt+G), Assistant (Ctrl+Alt+R, highlighted).

In the background, a status table is visible with columns for Status, Time In Status, and Department. The selected contact is highlighted in blue in the table.

Status	Time In Status	Department
Available	7:16:10	Support Services
Available	6:46:37	Development
Available, No ACD	7:15:47	Sales
Gone Home	7:33:55	Professional Services Org

### 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

## Change a Directory Contact's Default Number

If you have the appropriate rights, you can change a directory contact's default number. The default number is the phone number dialed when you double-click a directory contact.

**Note:** To edit a directory contact's phone number or make changes to other directory contact information, see [View and Edit Directory Entries](#).

### To change a directory contact's default number:

1. Right click the directory contact and choose **Set Default Number**.
2. From the menu that appears, choose the new default telephone number; for example, Mobile, Extension, Business, or Home.

**Note:** If a menu item is disabled, such as Business 2, then no Business 2 phone number is defined for the directory contact.

**Result:** The number dialed when you double-click the contact changes to the number selected. This number is indicated by a check mark.

### Related Topics

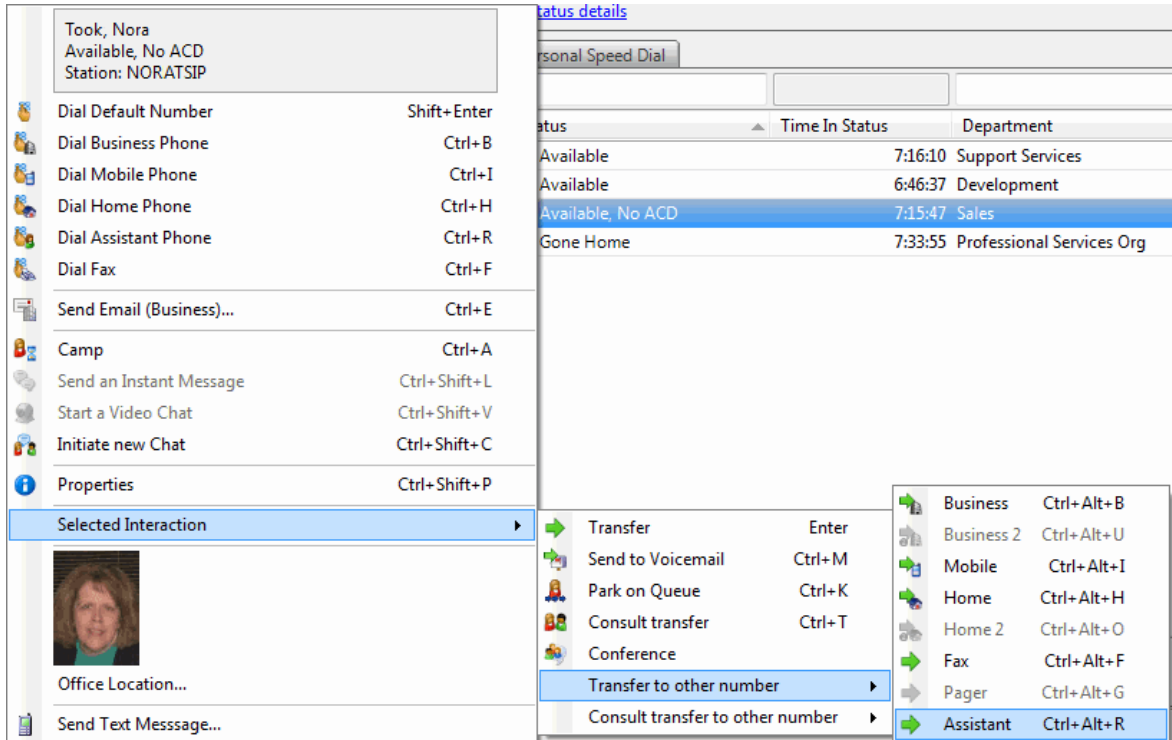
[Working with Directories](#)

## Employee Photo and Office Location

Your CIC administrator can enable the Company Directory shortcut menu to display an employee photo and a link to an office location map for each person in your company. If your CIC administrator makes this feature available, you do not need any additional licensing or user rights to use it.

### To view a Company Directory contact's photo and office location:

- Right-click a selected Company Directory contact.
- If available, click **Office Location** to view an image that shows a map or diagram indicating the employee's office location.



### Related Topics

- Shortcut Keys
- Working with Directories

## Insert and Delete Directory Entries

**Requirements:** The Directory Administrator Security right enables you to edit public directories belonging to other users.

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. Right-click a directory entry.
2. From drop-down menu, click **Insert new entry**.

**Result:** The New Directory Entry dialog box appears.

The screenshot shows a dialog box titled "New directory entry in IC Public Contacts". It has five tabs: "General", "Business", "More Business", "Home", and "Notes". The "General" tab is selected. The dialog contains the following fields and controls:

- First Name: [Text Box]
- Last Name: [Text Box]
- Display Name: [Text Box]
- Company: [Text Box]
- Home Phone: [Text Box] Ext. [Text Box]   Auto Dial Extension
- Business Phone: [Text Box] Ext. [Text Box]   Auto Dial Extension
- Mobile Phone: [Text Box] Ext. [Text Box]   Auto Dial Extension
- Allow:  Change  Delete
- Buttons: OK, Cancel, Apply

3. Make any necessary entries on any or all tabs.

#### Phone Numbers

- 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.

**Note:** For information about entering, editing and verifying phone numbers, see [Phone Number Controls](#).

4. If you want other users to be able to edit this directory entry, select the **Allow: Change** check box.
5. If you want other users to be able to delete this directory entry, select the **Allow: Delete** check box.

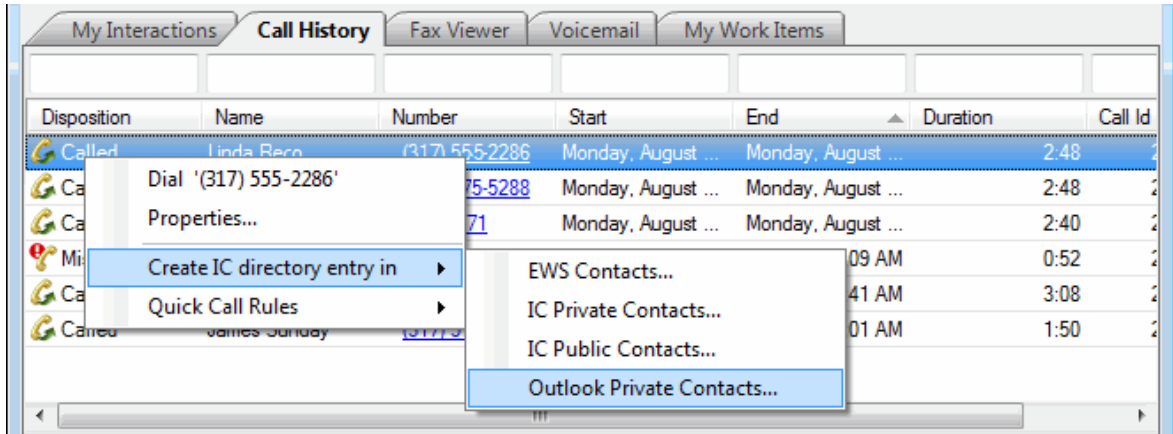
**Note:** An administrator with Directory Admin user rights assigned in Interaction Administrator can edit or delete any directory entry, regardless of the permissions assigned when the entry is created.

6. Click **OK** to save the new entry.

**Note:** The **Apply** button is dimmed on the New Directory Entry dialog box. Click **OK** to save new information.

#### To create a directory entry from Call History:

1. Right-click on a call history entry.



- From the drop-down menu, click **Create IC directory entry in**.
- From drop-down list of directory names, select a directory.

**Result:** The New Directory Entry dialog box appears.

- Make any necessary entries on any or all tabs.
- Click **OK** to save the new entry.

**Note:** The **Apply** button is dimmed on the New Directory Entry dialog box. Click **OK** to save new information.

#### To delete a directory entry:

- Right-click a directory entry.
- From drop-down menu, click **Delete entry**.

**Result:** The directory entry is immediately deleted.

#### Related Topics

View and Edit Directory Entries  
Working with Other Directories

## Search a Directory

The CIC client uses a paged format to display large directories. This makes it easier and faster to locate a specific entry because only a subset of entries is displayed at one time. A "paged directory" features Previous and Next buttons. You can use these buttons and the vertical scroll bar to locate a specific 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, do any of the following:

- Enter the first few letters of the column entry (if it's alphabetical), or enter the first few numbers (if it's numerical) in a search field. Columns that you cannot use for searches are indicated by dimmed search fields.
- 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.

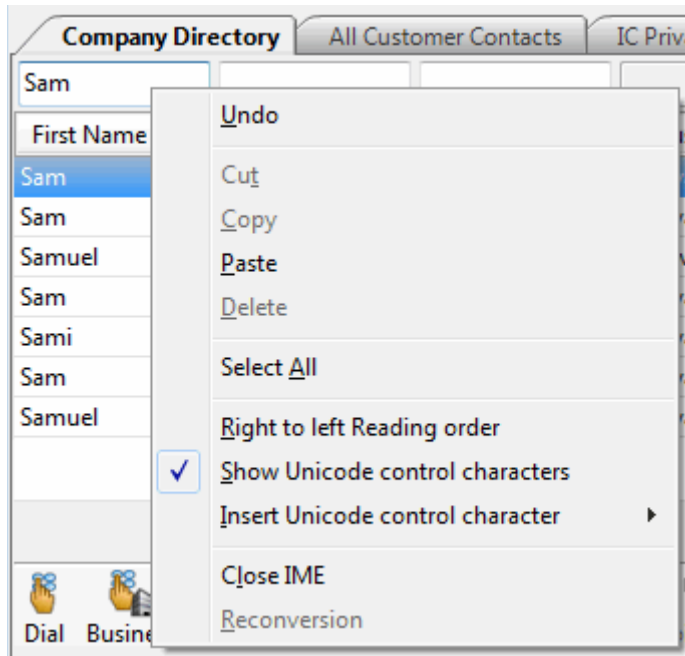


**Note:** Searches in Directory columns that contain comma-separated values, like Workgroups, automatically use a "contains" filter. The asterisk is not necessary.

- Press **Esc** to clear all entries from the search fields.

### Search Fields Context Menu

The context menu enables you to use the Windows clipboard to copy and paste text in the search fields. **Right to left Reading order** is available for RLT languages, such as Hebrew and Arabic. The **Show Unicode control characters**, **Insert Unicode control character**, **Open IME**, and **Reconversion** options are available for Asian languages. Windows provides these options. See <http://technet.microsoft.com/library/Dd361903> for more details.



### 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.

- Click a column heading once to sort the directory in ascending order.
- Click again to sort the directory in descending order.

### Related Topics

- Add or Remove View Columns
- Search a Directory
- Working with Directories

## View and Edit Directory Entries

**Requirements:** The Directory Administrator Security right enables you to edit public directories belonging to other users.

The several tabs of the Properties dialog box can contain:

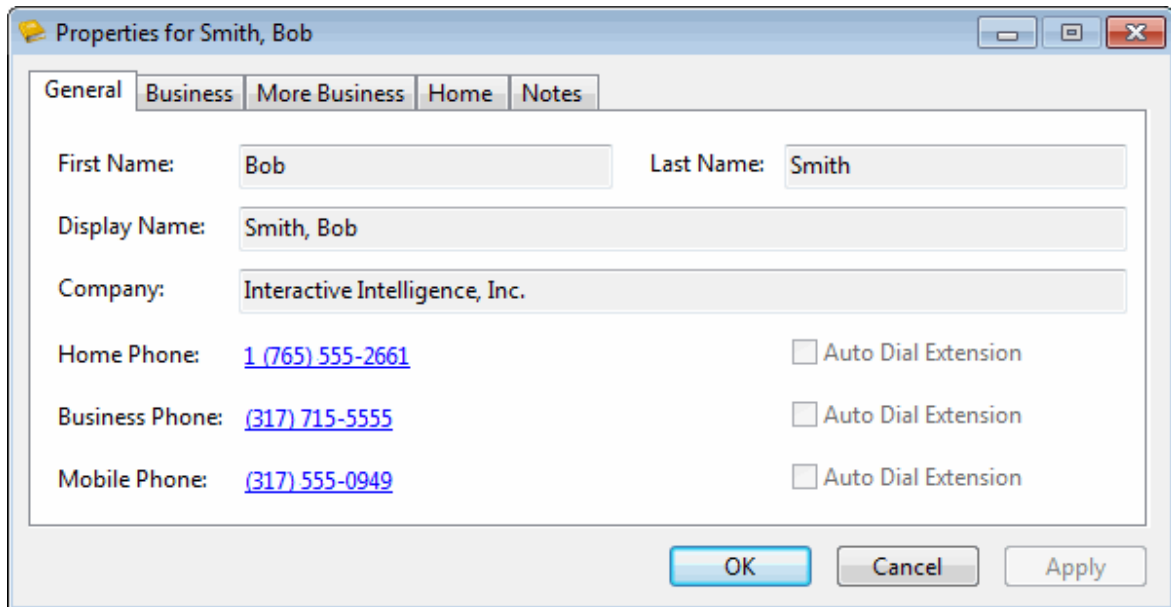
- Name, title, department and company
- Home, business, cell phone, pager and fax numbers
- Home and business street addresses
- Home and business email addresses
- Business website address
- Assistant's name and phone number
- Notes

You can view extended information for directory entries.

**To view directory entries:**

1. Right-click a directory entry.
2. From the drop-down menu, click **Properties**.

**Result:** The Properties dialog box appears.



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

**Note:** Any changes you make to entries in the Outlook Private Contacts directory in the CIC client are reflected in the Contact records in Microsoft Outlook.

**To edit directory entries:**

1. Right-click a directory entry.
2. From the drop-down menu, click **Properties**.

**Result:** The Properties dialog box appears. Notice that the data fields are enabled.

The screenshot shows a dialog box titled "Properties for Joe" with a "Business" tab selected. The "General" tab is also visible. The fields are as follows:

- First Name: Joe
- Last Name: Smith
- Display Name: Joe
- Company: XYZ Corp.
- Home Phone: (317) 555-5959 (with edit icon and unchecked "Auto Dial Extension" checkbox)
- Business Phone: (317) 555-2111, Ext. 211 (with edit icon and checked "Auto Dial Extension" checkbox)
- Mobile Phone: (empty), Ext. (empty) (with checkmark icon and unchecked "Auto Dial Extension" checkbox)

Buttons at the bottom: OK, Cancel, Apply.

3. Make any necessary changes and click **Apply**.

#### Phone Numbers

- 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.

**Note:** For information about entering, editing and verifying phone numbers, see Phone Number Controls.

4. Click **OK** to close the Properties dialog box.

- 1.

#### Related Topics

Insert and Delete Directory Entries  
 Properties Button on the Directory Toolbar  
 View and Edit Interaction Properties

## 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.

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

## 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
- Employee Photo and Office Location
- Set Another User's Status
- Transfer a Call to a Directory Entry
- View and Edit Directory Entries
- Working with Directories

## Working with e-FAQ

### Working with e-FAQ

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction.

e-FAQ is a centrally-managed database of Frequently Asked Questions and responses. If your company has purchased the e-FAQ knowledge management program and you have been assigned the appropriate user rights in Interaction Administrator, you can use e-FAQ to respond to your customers' requests for information.

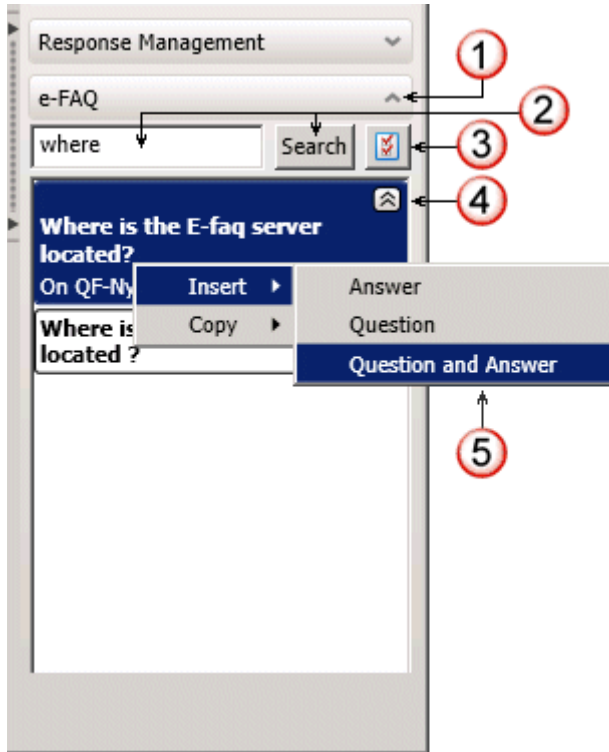
You can view, select, and use a pre-defined response to a FAQ during a chat session or while replying to an ACD-routed email message. For more information, see Using e-FAQ.

#### e-FAQ Section and e-FAQ View

You can use the e-FAQ section or the e-FAQ view to search the e-FAQ database and configure e-FAQ options. The e-FAQ section and the e-FAQ view are identical in appearance and features.

The e-FAQ section appears in the sidebar area of the Chat window and the E-mail window for Outgoing Messages. You can choose to display the dockable e-FAQ view. For more information, see e-FAQ View.

### e-FAQ section



1	<b>e-FAQ section control</b>	Click the arrow on the section control to expand or collapse the e-FAQ section.
2	<b>Search text box and button</b>	Enter search criteria in the text box and click <b>Search</b> to start searching the selected e-FAQ databases. For more information, see Using e-FAQ.
3	<b>Configuration button</b>	Click the Configuration button to select the e-FAQ databases you want to search. <b>Tip:</b> Click the <b>Advanced</b> button to configure the level of restriction you want to place on your e-FAQ search results. For more information, see Configure e-FAQ.
4	<b>Search results</b>	Click the arrow on a selected search result to display or hide the answer to a FAQ.
5	<b>shortcut menu</b>	Right-click on a selected FAQ, then do one of the following: <ul style="list-style-type: none"> <li>Click <b>Insert</b> and then select <b>Question</b> or <b>Question and Answer</b> to insert the content in the selected location in the current interaction.</li> <li>Click <b>Copy</b> and then select <b>Question</b> or <b>Question and Answer</b> to copy the content to the Windows clipboard. You can then paste this information in a Windows application such as Notepad or Microsoft Word.</li> </ul>

### Related Topics

Configure e-FAQ  
e-FAQ Searches  
e-FAQ View  
Use e-FAQ in a Chat or E-mail Reply Interaction  
Using e-FAQ

## e-FAQ view

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction.

e-FAQ is a centrally-managed database of Frequently Asked Questions and responses. If your company has purchased the e-FAQ knowledge management program and you have been assigned the appropriate user rights in Interaction Administrator, you can use e-FAQ to respond to your customers' requests for information.

You can add the e-FAQ view to the CIC client. You can use the e-FAQ view to search the e-FAQ database and configure e-FAQ options.

The features of the e-FAQ view are the same as the e-FAQ section of the E-mail Window for Outgoing Messages or Chat window. For more information, see *Working with e-FAQ*.

### To display the e-FAQ view:

1. In the **Create New View dialog box**, from the **Categories** list, select **Interactions**.
2. In the **Views** list, select **e-FAQ**.
3. Click **OK**.

**Result:** The e-FAQ view appears.



### Related Topics

Configure e-FAQ  
Using e-FAQ  
Working with e-FAQ

## Using e-FAQ

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction.

Get the right answers for your customers by searching your company's e-FAQ knowledge base, then simply copy and paste the information into an E-mail window or Chat window.

### To use e-FAQ:

1. Do one of the following:
  - In the Chat window or E-mail Window for Outgoing Messages, expand the e-FAQ section.
  - Select an interaction and then select the e-FAQ view.
2. In the e-FAQ **Search** text box, type your search terms or a question and click **Search**.

**Result:** Matching results appear in the lower part of the e-FAQ section or e-FAQ view.

**Tip:** You can also cut and paste or use your mouse to drag and drop text from the original email message to the Search text box, or you can use your mouse to drag and drop text from another application to the Search text box. For more information, see e-FAQ Searches.

**Note:** These results are sorted by relevance to your search terms or question with the highest value FAQs and answers appearing first in the list. For more information, see Configure e-FAQ.

3. If you want to check the details of the responses listed in the search results, click the down arrow next to a search result.
 

**Result:** Response details appear in the search results list.
4. If the search results do not contain the answer you are looking for or if you want to fine-tune your search, do one of the following:
  - Click the e-FAQ configuration button and adjust your e-FAQ settings. For more information, see Configure e-FAQ.
  - Type another question or search terms in the Search text box and click **Search**.
5. After you locate the correct response in the search results list, do one of the following:
  - Right click anywhere in the appropriate result, then do one of the following:
    - Click **Insert** and then select **Answer**, **Question**, or **Question and Answer** to insert the content in the selected location in the current interaction.
    - Click Copy and then select Answer, Question, or Question and Answer to copy the content to the Windows clipboard. You can then paste this information in a Windows application such as Notepad or Microsoft Word.
    - Or use your mouse to highlight either the Question or Answer, press **Ctrl+C** to copy the information to the Windows clipboard. Click at the appropriate place in the interaction, and press **Ctrl+V** to insert the copied information in the selected location in the email reply or chat.
6. Continue with the normal activities of an email response, chat session or other interaction.

**Note:** For more information, see Working with E-mail Messages or Working with Chat Sessions.

### Related Topics

Configure e-FAQ  
e-FAQ Searches

e-FAQ View

Use e-FAQ in a Chat or E-mail Reply Interaction

Working with e-FAQ

## Configure e-FAQ

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction. You need the Customize Client Security right to configure e-FAQ settings. Client templates can contain configuration settings that determine your e-FAQ options and control whether you can alter configuration settings.

You can limit or expand the number of results returned by your search by selecting a more or less restrictive Search Results configuration. Search Results configuration can be adjusted on-the-fly from the e-FAQ tab in the E-mail Window for Outgoing Messages and Chat window or in the e-FAQ view.

Selecting **All** is the least restrictive search configuration where all results found based on the search terms will be returned. **Strict** is the most restrictive search configuration where the search results will only contain the most closely matched entries, similar to keyword matches. Note that relevant entries that contain misspelled words or less common terms may not be included in the Search Results for "Strict" searches.

### To modify e-FAQ search results options:

1. To configure e-FAQ Search Results, do one of the following:
  - In the Configuration dialog box, click the **e-FAQ** node.
  - In the e-FAQ section of the E-mail Window for Outgoing Messages or Chat window, click the e-FAQ configuration button and then click the **Advanced** button.
  - Select an interaction. In the e-FAQ view, click the e-FAQ configuration button and then click the **Advanced** button.

**Result:** The e-FAQ pane of the Configuration dialog box appears.

2. Select the level of restriction you want placed on your e-FAQ search results:
  - **All:** Include all results based on the search terms.
  - **Generous:** Results may contain a wide range of entries based on the search terms.
  - **Best:** Results will contain entries closed related to the search terms.
  - **Strict:** Results will contain closed matched entries, similar to straight keyword matches.

**Note:** Relevant entries due to misspelled or alternative words may not be included in the results.

3. Click **Apply** to save your selections.
4. Click **OK** to close the Configuration dialog box.

**Result:** One of two things happens:

- If you accessed the e-FAQ pane of the Configuration dialog box from the E-mail Window for Outgoing Messages or Chat window, you are returned to the appropriate window.
- If you accessed the e-FAQ pane of the Configuration dialog box From the Interactive Intelligence Media Bar, you are returned to the CIC client workspace.

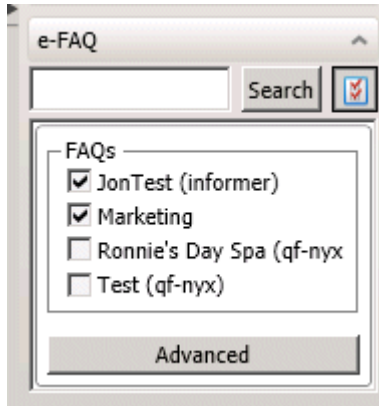
### To select which e-FAQ database to search:

1. Do one of the following:



- In the e-FAQ section of the E-mail Window for Outgoing Messages or Chat window, click the e-FAQ configuration button.
- Select an interaction. In the e-FAQ view, click the e-FAQ configuration button.

**Result:** If your CIC system has multiple e-FAQ databases, the FAQs selection section appears.



2. Click to the select the appropriate databases.

### Related Topics

[e-FAQ Searches](#)  
[e-FAQ View](#)  
[Use e-FAQ in a Chat or E-mail Reply Interaction](#)  
[Using e-FAQ](#)  
[Working with e-FAQ](#)

## e-FAQ Searches

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction.

You can use two methods, natural language or Boolean, to search within e-FAQ. Basically, you can type anything you want to search for whether it is a natural language question ("How do I send an email?") or Boolean search keywords ("e-mail requirements") in the e-FAQ tab **Search for** text box. e-FAQ automatically detects whether a Natural Language or a Boolean search would be more effective in finding accurate matches, and returns the results accordingly.

### Natural Language Query

Formulating a natural language query means typing your question in naturally spoken English. For example, you could type "How can I learn more about e-FAQ?"

Natural Language relies on context in order to better understand what you are searching for. If you enter a phrase or a full sentence, the natural language processor parses the query and takes into account which word acts as the verb, the noun, the subject, etc. It is more precise than a Boolean match. The goal of a natural language query is to return the closest possible match (or matches) to your query. It returns fewer e-FAQ entries, but the entries found are a closer match to the actual query entered. However, if you enter only one or two words, there is not enough of a context for Natural Language query to work correctly, so a Boolean search is used instead.

### Boolean Search

In a Boolean search, you type keywords. Boolean searches tend to be more generic, meaning that not all of the e-FAQ entries found are relevant. For example, you could use a Boolean query to find all of the entries that contain the word "requirements" at least once, just by querying with this word alone. Boolean results are less precise than Natural

Language results, but with certain types of content, such as technical, medical, or legal entries, Boolean searches may provide better matches.

You can separate these specific keywords with Boolean expressions, such as **or**, **and**, and **not**.

- Use **and** to find answers that contain multiple words in your query. If you separate keywords by **and**, e-FAQ returns answers that contain **all** words in the query.
- Use **or** to find answers that contain any of the words in your query. If you separate keywords by **or**, e-FAQ returns answers that contain **any** of the words in the query.
- Use **not** before any words you do not want to appear in your answers. e-FAQ does not return answers that contain the word following **not**.
- Use parentheses to group words for complex searches, for example, Interactions **and (incoming or outgoing) and not (voice mail or email)**. If your search query contains parentheses, e-FAQ looks at expressions contained in the parentheses first.

### Boolean Wildcards

Substitute the wildcard character \* (asterisk) for some portion of the word. The wildcard character can substitute for a single letter or multiple letters at any position in the word.

Expression	Matches
<b>sys*</b>	Any entry containing a word starting with the prefix " sys", such as "system", "systematic", "systemic", etc.
<b>*ware</b>	Any entry ending with "ware", such as "hardware", "software", "vaporware", etc.
<b>req*s</b>	Any entry containing a word that starts out with " req" and ends with an "s", such as "requirements", "requests", "requisitions", etc.
<b>*ware AND req*</b>	Entries that both contain a word that ends in "ware" and also one that begins with " req", such as "required hardware", or "software requirements", etc.

### Boolean Proximity Matching

You can search for a set of a set of entries where two or more words are all present and also meet a further constraint related to their positions in the entry. e-FAQ supports the NEAR and SEQUENCE functions, as shown in the following table:

Expression	Matches
<b>system NEAR requirements</b>	Entries that contain both "system" and "requirements" and have these words close together (within 10 words of each other). <b>Note:</b> The parameter for NEAR defaults to a value of 10, if not specified.
<b>system NEAR/5 requirements</b>	Entries that contain both "system" and "requirements" and have these words close together (within ~5 words of each other).
<b>system NEAR/2 requirements</b>	Entries that have "system" and "requirements" immediately adjacent to one another, in either order. <b>Note:</b> The minimum value for the NEAR parameter is 2.
<b>NEAR(hardware, system,</b>	Entries that contain all the words listed in parentheses, here

<b>requirements)</b>	"hardware", "system" and "requirements", and also have all of these words close together (within 10 words of each other) in any order.
<b>NEAR(hardware, system, requirements)/25</b>	Entries that contain all the words listed in parentheses, here "hardware", "system" and "requirements", and also have all of these words close together (within ~25 words of each other) in any order.
<b>SEQUENCE(hardware, system, requirements)</b>	Entries that contain all the words listed in parentheses, here "hardware", "system" and "requirements", and also meet the constraint that the first word precedes the second by at most 10 words, the second precedes the third by at most 10 words, etc. <b>Note:</b> The parameter for SEQUENCE defaults to a value of 10, if not specified.
<b>SEQUENCE(hardware, system, requirements)/3</b>	Entries that contain all the words listed in parentheses, here "hardware", "system" and "requirements" and also meet the constraint that the first word precedes the second by at most 3 words, the second precedes the third by at most 3 words, etc.
<b>SEQUENCE(hardware, system, requirements)/1</b>	Entries that contain the phrase "hardware system requirements".

For convenience, e-FAQ also supports the following simplifications, all of which reduce to some form of either a "NEAR" or "SEQUENCE" query:

<b>Expression</b>	<b>Same as</b>
<b>system NOTNEAR requirements</b>	system AND requirements AND NOT (system NEAR requirements)
<b>system BEFORE requirements</b>	system SEQUENCE/1 requirements
<b>system AFTER requirements</b>	requirements SEQUENCE/1 system
<b>system requirements</b>	Returns the same set of entries as the query "system AND requirements", but the entries are sorted to give priority to those that best satisfy "system BEFORE requirements".
<b>"hardware system requirements"</b>	BEFORE(hardware, system, requirements)/1
<b>NOTNEAR(hardware, system, requirements)</b>	hardware AND system AND requirements AND NOT NEAR(hardware, system, requirements)
<b>NOTSEQ(hardware, system, requirements)</b>	hardware AND system AND requirements AND NOT SEQUENCE(hardware, system, requirements)

**Note:** These simplifications can all take the optional parameters BEFORE and AFTER. So "system BEFORE/1 requirements" means to search for the exact phrase "system requirements".

### Boolean Frequency Matching

e-FAQ also supports the notions of "at least" and "at most" for Boolean queries. This is denoted as follows:

<b>Expression</b>	<b>Matches</b>
system > 5	Entries that contain the word "system" more than 5 times.
requirements < 10	Entries that contain the word "requirements" less than 10 times.

**Note:** This syntax work only for individual words (not expressions).

### Related Topics

- Configure e-FAQ
- Use e-FAQ in a Chat or E-mail Reply Interaction
- Using e-FAQ

## Use e-FAQ in a Chat or E-mail Reply Interaction

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction.

If your company has purchased the e-FAQ knowledge management program and you have been assigned the appropriate user rights in Interaction Administrator, you can use e-FAQ to find answer to customer questions by searching your company's e-FAQ knowledge base. You can then simply copy and paste the information during a Callback.

### To use e-FAQ during a chat session or in an e-mail reply:

1. Do one of the following:
  - In the Chat window or E-mail Window for Outgoing Messages, expand the e-FAQ section.
  - Select an interaction and then select the e-FAQ view.
2. Search for the appropriate e-FAQ question and answer.

**Tip:** For more information, see Using e-FAQ.

3. Insert a selected e-FAQ question and answer in your chat response or email reply.

### Related Topics

- e-FAQ Searches
- e-FAQ View
- Manage a Chat Session
- Reply to an E-mail Message
- Reply to an HTML E-Mail Message
- Using e-FAQ
- Working with Chat Sessions

## Working with 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 or to send email messages on behalf of a workgroup. You can also use a directory entry to address an email message and then send it using your own email program. There are several different types of **email messages** associated with the CIC client:

- **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 or any workgroup queue you are monitoring.

**Note:** An email message sent to your work email address appears in your email program Inbox as usual.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox that Oracle Service Cloud monitors does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox that Interaction Center monitors** appears in the CIC client Email Window for Incoming Messages. This help topic applies only to this second type of email message.

- 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 addressed by using a CIC directory entry

You can use a directory entry to address an email message, but send the message **using your default email program**. This feature makes it convenient to send email messages to people and businesses represented by directory entries. It requires that you have a correctly configured email program installed on your system. This email message is **not an interaction** and is not counted or tracked in Customer Interaction Center reports and statistics.

## 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 or other queue views 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** or other queue views.

- 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.

My Interactions							
Queue	Name	State	Subject	Details	Importance	Attachments	
M...	From: Took, Ned	ACD - Assigned...	Memo	! Memo	!	!	!
	Took, Ned	Disconnected (...)		RE: Memo			

- 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**

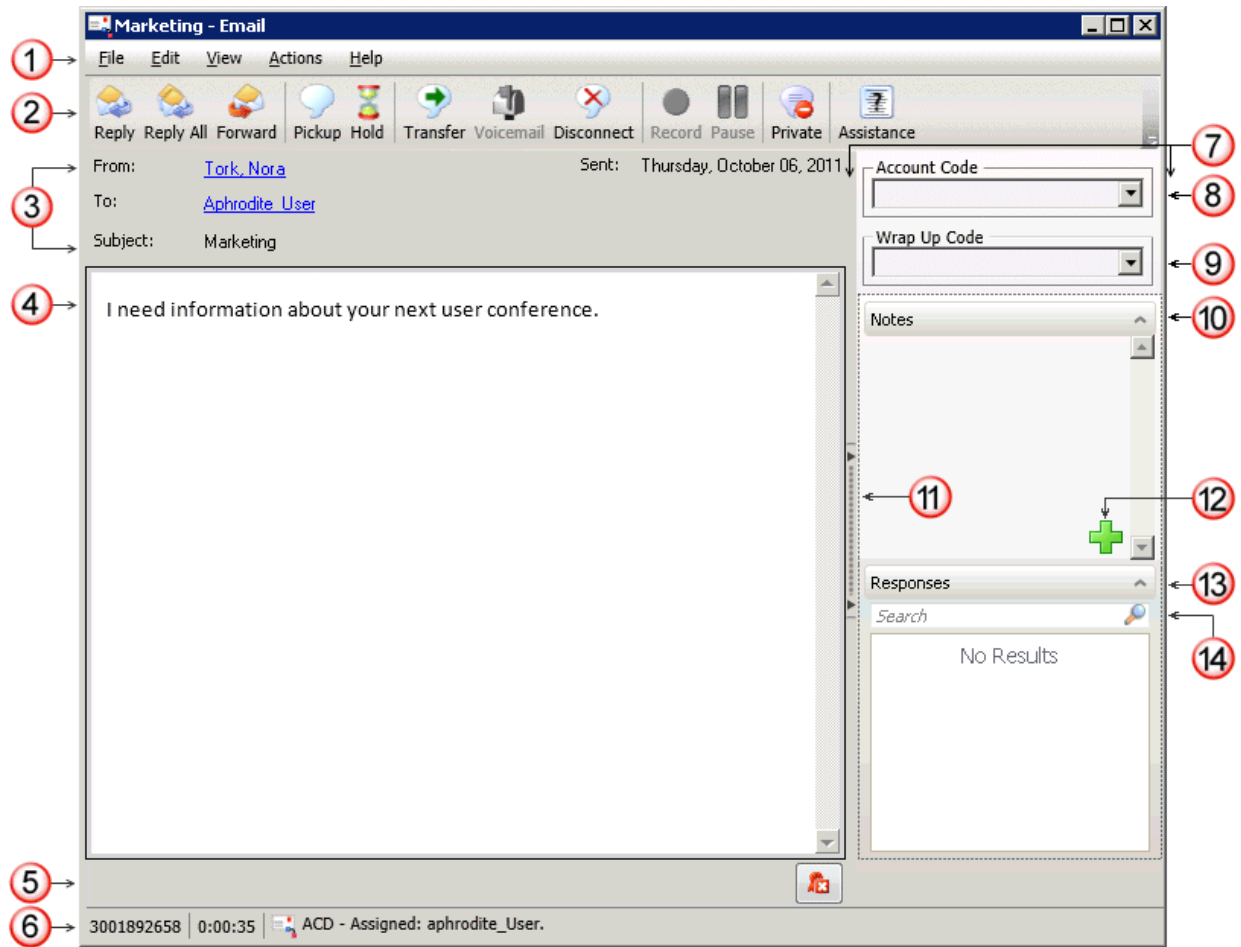
Working with Email Messages

**Email Window for Incoming Messages**

When you view an ACD-routed email interaction, this Email window provides the necessary tools for managing the interaction.

**Note:** If your CIC administrator enables text filtering, certain sensitive information such as credit card numbers or Social Security numbers is blocked from view. You see only some replacement text such as ##### instead of the numbers.

**Note:** Oracle Service Cloud and Interaction Center can monitor different mailboxes for incoming email messages. Messages that arrive in an Oracle Service Cloud mailbox do not appear in the CIC client. These email messages appear as new Incidents in the Oracle Service Cloud interface. E-mail messages **originally sent to a Customer Interaction Center mailbox** appear in the CIC client as interactions. You view these messages in the E-mail Window for Incoming Messages.



1	<b>Menus</b>	Use these menus to manage an ACD-routed email message.
2	<b>Toolbar</b>	The toolbar contains buttons for most of the functions for managing an incoming email message.  <b>Tip:</b> Keyboard shortcuts are also available for these functions and are listed on the View menu. Keyboard shortcuts are available many of the actions on the other menus.
3	<b>From To Subject Attached</b>	This area contains information from the incoming email message address fields. An <b>Attached list</b> appears here if any files are attached to the original ACD-routed email message. Click the attachment file name to open the attachment in the associated Windows application.  If you open an attached email message, it appears in an email window. If the attached email message has its own attached files, you can click the file name of any attached file and view it.  <b>Note:</b> A .msg attachment cannot be downloaded to your hard drive. It can only be viewed within the CIC client.
4	<b>Email Text</b>	The text of the incoming email message.
5	<b>Secure Email Icons</b>	This section appears only if the incoming email message is encrypted or signed. It displays icons that identify whether the message was successfully decrypted and if the digital signature was verified. For more information, see Secure Email

		Messages.
6	<b>Status bar</b>	The Status bar displays the ID number, duration and state of the incoming email interaction. For more information, see Queue Contents.
7	<b>Sidebar area</b>	The appearance of the sidebar area can vary based on your user rights. It contains controls and information that are related to managing the incoming email message.
8	<b>Account Code</b>	Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to an incoming email message.
9	<b>Wrap Up Code</b>	If you are a member of a workgroup for which Wrap Up codes are configured, you can use this drop-down list to assign the code.
10	<b>Notes</b>	Use the Notes section to add notes or comments about the incoming email message. <b>Note:</b> These notes are visible to other CIC client users who are "Listening to" (monitoring) this email message. For more information, see Monitor an Email Message and Reply. After the incoming email message is disconnected, these notes can be available in Interaction Notes if the sender is identified and Customer Interaction Center collects this information. For more information, see your CIC administrator.
11	<b>Splitter Bar</b>	If you prefer not to see the sidebar area, click the splitter to hide that part of the Email window. Click the splitter again to restore the sidebar area.
12	<b>Add a Note icon</b>	Click this icon to open the Notes text box and add a note to the email interaction.
13	<b>Responses</b>	Use the Responses section to search for and view both system-wide responses and personal responses. <b>Note:</b> None of the responses you find can be used in an incoming email message, but they can be used in a reply. Here the Responses section is for information only. Response Management is not available in the Interactive Intelligence Oracle Service Cloud Integration.
14	<b>Search</b>	Type search terms in the Search text box. For more information, see Search for a Response. <b>Note:</b> Response Management is not available in the Interactive Intelligence Oracle Service Cloud Integration.

**Related Topics**

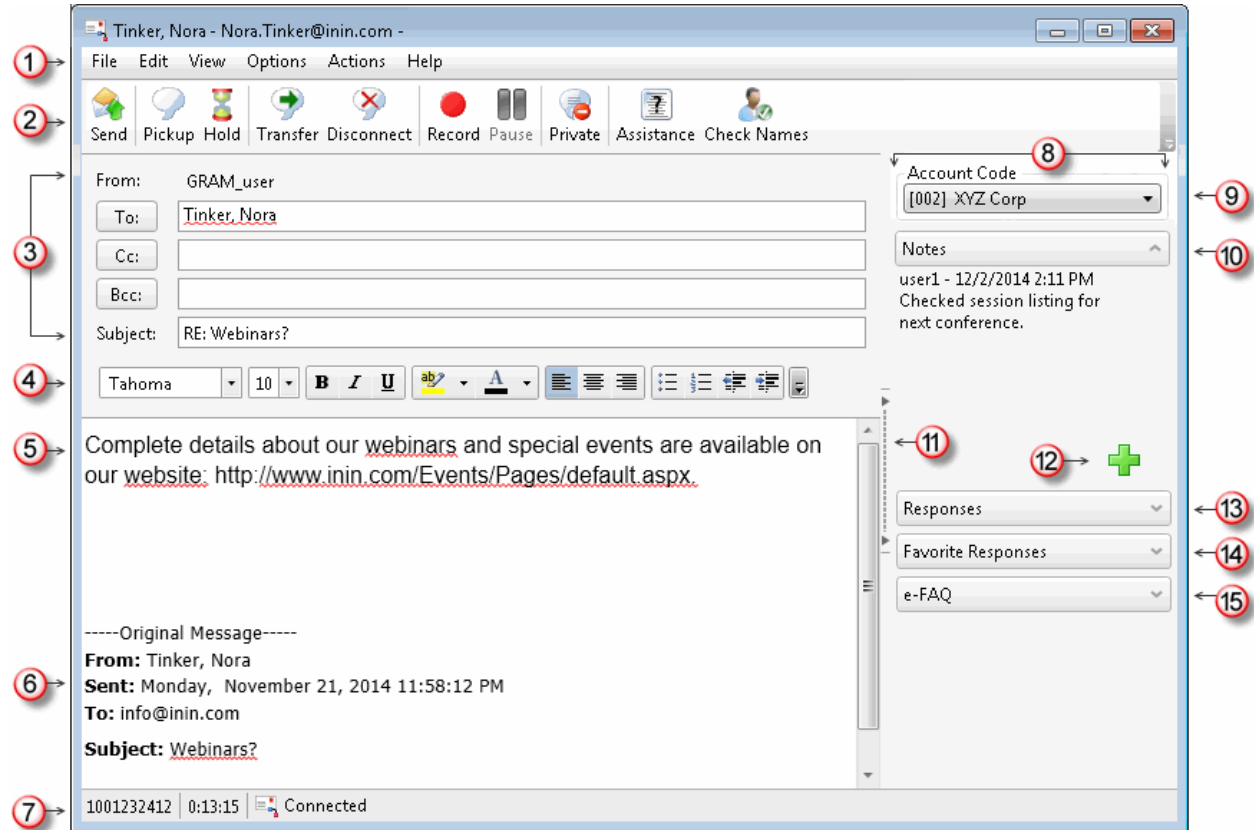
- Add Notes to an Interaction
- Assign Codes to an Interaction
- Email Configuration
- Email Window for Outgoing Messages
- Understanding Account Codes
- Understanding Wrap-Up Codes
- Working with Email Messages

**Email Window for Outgoing Messages**

You use this Email window to respond to an ACD-routed email message.



**Note:** Oracle Service Cloud and Interaction Center can monitor different mailboxes for incoming email messages. Messages that arrive in an Oracle Service Cloud mailbox do not appear in the CIC client. These email messages appear as new Incidents in the Oracle Service Cloud interface. E-mail messages **originally sent to a Customer Interaction Center mailbox** appear in the CIC client as interactions. You respond to these messages in the E-mail Window for Outgoing Messages.



1	<b>Menus</b>	Use these menus to perform various actions during or after composing an email reply.
2	<b>Toolbar</b>	<p>The toolbar contains buttons for most of the functions for managing an email reply.</p> <p><b>Note:</b> There are two versions of the editing toolbar: the MSHTML and Telerik toolbars. Your CIC administrator determines which version is available to you. For a description of these toolbars, see Reply to an HTML Email Message.</p> <p><b>Tip:</b> Keyboard shortcuts are also available for these functions and are listed on the <b>View</b> menu. Keyboard shortcuts are available many of the actions on the other menus.</p>
3	<b>From To, Cc, Bcc Subject Attached</b>	<p>This area contains the standard email message address fields.</p> <ul style="list-style-type: none"> <li>The <b>To</b> field defaults to the sender of the original email message. Click the <b>To</b> button to add additional addresses.</li> </ul> <p><b>Note:</b> Responses to messages sent with an alternate "Reply-To" address are delivered to that address. If you selected <b>Reply All</b>, 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"> <li>• <b>Subject</b> defaults to the subject of the original email message.</li> </ul> <p><b>Note:</b> <b>Subject</b> 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"> <li>• The <b>Attached</b> box displays the names of attached files. The <b>Attached</b> button enables you to attach additional files.</li> </ul> <p><b>Note:</b> The <b>Attached</b> box and <b>Attached</b> button appear in the Email window only after you use <b>File &gt; Insert Attachment</b> to attach at least one file.</p>
4	<b>Formatting toolbar</b>	<p>The text formatting toolbar appears in the E-mail Reply window under certain conditions:</p> <ul style="list-style-type: none"> <li>• If the original ACD-routed email message is formatted using <b>HTML</b>, you have the option of using text formatting tools in your email reply. For a description of the available tools, see Reply to an HTML Email Message.</li> <li>• If the original email message was sent in <b>plain text</b> (no formatting), the Email Reply window does not include a text formatting bar. Your email reply is sent in plain text.</li> </ul>
5	<b>Reply</b>	<p>Compose your reply to the email message here.</p> <p>You can:</p> <ul style="list-style-type: none"> <li>• Type a response.</li> <li>• Copy and paste text to or from a Windows application.</li> <li>• Locate and insert a Favorite Response or a system-wide response in your reply. For more information, see Use Response Management in an Email Message.</li> </ul> <p><b>Tip:</b> Different email clients at your customer sites can interpret line endings differently. To avoid this problem, press <b>Shift+Enter</b> to create a new line. Press <b>Shift+Enter twice</b> to create a blank line between two lines of text. This creates line endings that all email applications can reliably interpret.</p>
6	<b>Original Email</b>	The original ACD-routed email message appears here.
7	<b>Status bar</b>	The Status bar displays the ID number, duration and state of the interaction. For more information, see Queue Contents.
8	<b>Sidebar area</b>	The appearance of the sidebar area can vary based on your user rights. It contains controls and information that are related to the email reply.
9	<b>Account Code</b>	Some companies categorize interactions by customer. If you have the appropriate rights, you can assign an Account code to an email reply.
10	<b>Notes</b>	<p>Use the Notes section to add notes or comments about your email reply. The recipients of the email reply message do not see these notes.</p> <p><b>Note:</b> These notes are visible to other CIC client users who are "Listening to" (monitoring) this email reply. For more information, see Monitor an Email Message and Reply.</p>
11	<b>Splitter Bar</b>	If you prefer not to see the sidebar area, click the splitter to hide that part of the email reply window. Click the splitter again to restore the sidebar area.
12	<b>Add a Note</b>	Click this icon to open the Notes text box and add a note to the chat.

	icon	
13	<b>Responses</b>	Locate and use a pre-defined system-wide or personal response. For more information, see Use Response Management in an Email Message. <b>Note:</b> Response Management is not available in the Interactive Intelligence Oracle Service Cloud Integration.
14	<b>Favorite Responses</b>	A list of your favorite personal responses appears here. Double-click a favorite response to use it in your reply. For more information about designating some of your personal responses as favorites, see Manage Favorite Responses. <b>Note:</b> Response Management is not available in the Interactive Intelligence Oracle Service Cloud Integration.
15	<b>e-FAQ</b>	If your company purchased the e-FAQ knowledge management program and you have the appropriate user rights, you can search your company's e-FAQ knowledge base. You can then copy and paste the information to your email reply. For more information, see Use e-FAQ in a Chat or Email Reply Interaction.

### Related Topics

[Add Notes to an Interaction](#)  
[Assign Codes to an Interaction](#)  
[Email Configuration](#)  
[Email Window for Incoming Messages](#)  
[Understanding Account Codes](#)  
[Understanding Wrap-Up Codes](#)  
[Working with Email Messages](#)

## Secure Email Messages

The Secure E-mail Messages feature supports encryption and 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.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox monitored by Oracle Service Cloud Technologies does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox monitored by Interaction Center** appears in the CIC client E-mail Window for Incoming Messages. This help topic applies only to this second type of email message.

E-mail messages can be made secure by these methods:

- **Encryption:** This provides confidentiality by preventing anyone from reading the email message while it is in transit.
- **Cryptographic Signature:** This prevents anyone from modifying the contents of the 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.

**Note:** These methods can be used independently. You could receive a signed, but not encrypted email message. Or you could receive an encrypted but not signed email message. Or you could have a signed email message that provides for the integrity of the message by preventing anyone from altering it in transit, but does not authenticate the sender.

The Secure E-mail Message feature **does not**:

- Enable you to send an encrypted or 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:** 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 decrypt encrypted messages, verify digital signatures, and establish secure email provider connections.



Support for S/MIME by Interaction Center enables an encrypted and/or signed email message to be sent to the email address associated with a workgroup’s email queue or an Attendant mailbox. The message is retrieved from the email server by the IC server, and is decrypted by the IC server only if the workgroup is allowed to receive encrypted messages and has the certificate with the private key required for decrypting the message. After the email message is decrypted, it is routed to your My Interactions queue, or any other queue you are monitoring, where you can open and read the message, just like any other email message. For more information, see Working with E-mail.

In a typical scenario, one of your customers obtains a digital certificate for your workgroup’s email address. The customer uses that digital certificate to send an email containing confidential information such as an account number to the workgroup’s email address. The customer may or may not use a digital certificate to sign the email message. The email message is decrypted by Interaction Center and, if present, any digital signature is validated. The email message is routed to an available agent in your workgroup. Interaction icons indicate whether the message was successfully decrypted and if it was signed. Other information about the digital signature may appear in the email message.

### Secure E-mail Interaction Icons

The icons for secure email interactions identify whether the interaction was generated by a message that was encrypted or signed and whether it was successfully decrypted.

Icon	Description
	Content of the email message was successfully decrypted.
	<p>Content of the email message was encrypted but decryption failed. This could be due to one of these reasons:</p> <ul style="list-style-type: none"> <li>• Decryption was contrary to a Customer Interaction Center policy. For example, the workgroup to which this email message was sent is not configured to receive encrypted email message.</li> <li>• The private key is not installed.</li> <li>• The encryption algorithm used in this email message is not supported by</li> </ul>

	Customer Interaction Center.
	Digital signature was verified.
	A digital signature is present, but Customer Interaction Center experienced one of the following problems: <ul style="list-style-type: none"> <li>• The signer's certificate is not trusted.</li> <li>• The email message was modified in transit.</li> <li>• The "From" address in the email header does not match the digital signature.</li> </ul>

These icons appear as buttons on the E-mail Window for Incoming Messages. After you open a secure email message in the CIC client, you can:

- Check the icons to determine the status of the message; i.e. whether the signature could be verified or if the message could be decrypted.
- Point to a button to display a tooltip that explains the icon.
- Click the button to display details about the associated signature or encryption.

#### Related Topics

Email Window for Incoming Messages  
Working with E-mail Messages

#### Manage Email Messages

### Add Notes to an Interaction

Use the **Notes** section in the appropriate interaction window or in the **Interaction Information** view to add notes or comments about the 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. For more information, see Monitor a Chat.

**Tip:** For information about adding notes to a Call, see View and Edit Interaction Properties.

#### To add notes to an interaction:

1. Do one of the following:
  - In My Interactions, select an interaction. In the Interaction Information view, click the **Add a Note** icon (plus sign).
  - In the Callback window, Chat window, Email window for Incoming Messages, or E-mail Window for Outgoing Messages, click the **Add a Note** icon (plus sign).
2. In the Notes text box, type your observations or comments and click **Add**.

**Result:** One of the following happens:

- Your notes appear in the Notes section of the Callback window, Chat window, or Email windows.
- Your notes appear in the top part of the Interaction Information view.

## Related Topics

Respond to a Callback Request  
Manage a Chat Session  
Working with Chat Sessions

## Assign Codes to an Interaction

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

**Note:** Oracle Service Cloud and CIC can monitor different mailboxes for incoming email messages. Messages that arrive in an Oracle Service Cloud mailbox do not appear in the CIC client. These email messages appear as new Incidents in the Oracle Service Cloud interface. E-mail messages **originally sent to a CIC mailbox** appear in the CIC client as interactions. You view these messages in the E-mail Window for Incoming Messages.

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 Information view.

**Note:** Wrap-up codes are not used for email message replies or forwarded email messages.

- For an incoming email message, select the appropriate codes in the **Email Window for Incoming Messages**.
- For an outgoing email message, select the appropriate Account code in the **E-mail Window for Outgoing Messages**.
- When responding to a callback request, select the appropriate codes in the Callback Window.
- During a chat session, select the appropriate codes in the Chat window.

**Note:** If Wrap-Up codes are available and you don't assign one during a chat or to an incoming email message, you are prompted to assign the appropriate code when you end your part of the interaction. Wrap-up codes are not used for email message replies or forwarded email messages.

## Related Topics

Assign Codes to an Incoming Interaction  
Assign Codes to an Outgoing Interaction  
Email Editor  
Email Preview  
Email Window for Incoming Messages  
Email Window for Outgoing Messages  
Manage a Chat Session  
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.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox monitored by Oracle Service Cloud does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox monitored by Customer Interaction Center** appears in the CIC client E-mail Window for Incoming Messages. This help topic applies only to this second type of email message.

#### To forward an email message:

1. Pick up or reopen an email message.
2. Do one of the following:
  - Click the **Forward** button.
  - From the **Actions** menu, select **Forward**.
  - Press **Ctrl+F**.

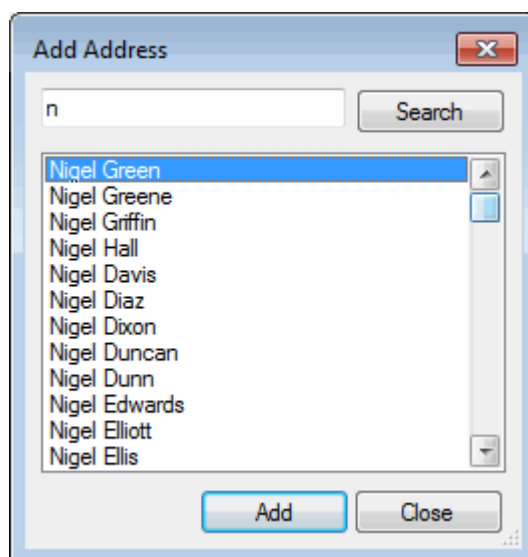
**Result:** The Email Window for Outgoing Messages appears.

3. Address the email interaction by doing one of the following:

**Tip:** From the **View** menu, select **Cc** or **Bcc** to display text boxes and buttons for Cc and Bcc addresses.

- In the **To** text box, type the addresses of the email message recipients, separating each address with a semi-colon (;).
- Click the **To** button. In the Add Address dialog box, type all or part of the address in the text box and click **Search**. From the results list, select the appropriate address and click **Add**.

**Note:** The Add Address dialog box enables you to search for an email address that is configured on your Exchange server — typically, your company's employee email addresses.



4. Optionally, [verify the email addresses](#) used in this email message by placing your cursor on one of the addresses in the **To** or **CC** text box and doing one of the following:
  - Click the **Check Names** button in the window toolbar.
  - From the **Actions** menu, choose **Check Names**.
  - Press **Ctrl+Shift+N**.

**Note:** All email addresses are automatically verified before the email message is forwarded. A verified address is underlined.

5. Optionally, type a message in the reply area.
6. Click the **Send** button.
7. If necessary, close the Email windows for the forwarded email message and the original email message and then disconnect the original email message.

**Note:** You can set your Email Configuration to perform these actions automatically.

## Related Topics

Working with E-mail Messages

## Monitor an Email Message and Reply

**Requirements:** See Listen.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox that Oracle Service Cloud monitors does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox that Interaction Center monitors** appears in a CIC client queue. This help topic applies only to this second type of email message.

If you have the appropriate rights, you can monitor an email interaction that another CIC client user is handling. You can also view the email reply.

Some things to note about the process of monitoring an email message or reply:

- If you monitor an email interaction or an email reply, a **Lsns icon** appears on the line containing the interaction in both the agent's and your own queue views.

**Tip:** For more information, see [Determine if Someone is Listening to or Recording Your Interactions](#).

- The **Lsns icon** is not removed until you cease to monitor the interaction by closing the email window on your workstation or clicking the **Listen** button a second time.
- You can stop monitoring an email message or email reply at any time.
- You do not need to monitor the original email interaction in order to monitor the email reply.
- Any notes the agent makes on the original email interaction or the email reply are visible to anyone monitoring the interaction.
- If you monitor an email reply, you see the complete reply as it is composed. The reply can include text, material incorporated from e-FAQ, attached files, and the selected Account Code. This information is visible even before the reply is sent.



In a typical example, another CIC client user (agent) picks up an email interaction from a workgroup queue. If you have the necessary rights to listen to (monitor) interactions and to monitor the queue on which the email interaction is appearing, you can view both the original email message and the email reply.

#### To monitor an email message and reply:

1. The agent picks up an ACD-routed email interaction.

**Result:** The E-mail Window for Incoming Messages appears on the agent's workstation and displays the email message.

2. You select the same email interaction from the appropriate queue view and do one of the following:
  - Right-click the email interaction and choose **Listen In** from the menu that appears.
  - Select the email interaction and then click the **Listen** button.

**Result:** The E-mail Window for Incoming Messages opens on your workstation and displays the **original ACD-routed email message**. The **Lsns** icon appears in the row containing the email interaction in both the agent's and your queue view.

3. If the agent decides to reply to the email message, two things happen:

- The E-mail Window for Outgoing Messages appears on the agent's system.
- An email reply interaction appears in both the agent's and your queue view.

**Note:** An email reply is associated with the original email interaction. In the CIC client, you can expand the original interaction and see the email reply interaction.

4. To monitor the agent's reply, select the email reply interaction in your queue view and click the **Listen button**.

**Result:** The E-mail Window for Outgoing Messages opens on your workstation.

**Note:** The **Lsns icon** appears in the row containing the email reply interaction in both the agent's and your queue view.

5. The agent composes the email message reply.

**Result:** The agent's email reply message appears in the E-mail Window for Outgoing Messages on your workstation.

6. The agent sends the email message reply.

**Result:** The E-mail Window for Outgoing Messages remains open on your workstation.

7. To stop listening, close both of the email windows or select the appropriate interactions in the queue view and click the **Listen** button again.

**Note:** You can stop listening at any point in this process. You do not need to wait until the agent sends the email reply message.

**Warning:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of CIC software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

#### Related Topics

Determine if Someone is Listening to or Recording Your Interactions  
 Listen to a Call in a Queue  
 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.

This procedure assumes you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring.

### 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 or any other queue you are monitoring and appears in the selected user's queue.

**Note:** If the Park on Queue button does not appear on your Directory toolbar, see [Directory Toolbar Buttons](#) for a list of available buttons and see [Customizing Toolbars](#) for instructions on adding it to your Directory toolbar.

### To park an email message using the Transfer dialog box:

1. Select the email message and do one of the following:
  - In the Interactive Intelligence Media Bar, click the Transfer button.
  - In the CIC client workspace, on the Queue Control Toolbar, click the Transfer button.
  - Right-click the email message 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 email message. This can help you decide what kind of transfer to use.

6. Click the **Park** button.

**Result:** The email message disappears from **My Interactions** and is placed on hold in the recipient's **My Interactions** queue so the recipient can select it later.

### Related Topics

[Monitor Two or More Queues at the Same Time](#)  
[Park a Call on Another Person's Extension](#)  
[Park on Queue Button](#)

## Pick Up or Reopen an Email Message

**Requirements:** See Pickup.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox monitored by Oracle Service Cloud Technologies does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox monitored by Customer Interaction Center** appears in the CIC client E-mail Window for Incoming Messages. This help topic applies only to this second type of email message.

You can pick up or reopen an email message from My Interactions because it was assigned to you or you can browse a workgroup queue and pick up an email message. You may also pick up an email message assigned to someone else, if you determine that a particular circumstance requires you to do so. 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:

1. In your My Interactions queue or any other queue in which the email interaction is alerting, select the inbound email interaction.
2. To pick up or reopen the email message, do one of the following:
  - Double-click the email message.
  - Click the Pickup button in the Queue Control toolbar.
  - Press **Ctrl+P**.

**Result:** The CIC client Email Window for Incoming Messages opens.

### 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

## Print an Email Message

You can print a copy of any email message.

1. In either the Email Window for Incoming Messages or the Email Window for Outgoing Messages, from the **File** menu, choose **Print**.
2. In the Print dialog box, select a printer and specify print options.
3. Click **Print**.

### Related Topics

Working with Email Messages

## Reply to an Email Message

**Warning:** In the current CIC client release, you cannot send an encrypted reply to a secure 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.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox that Oracle Service Cloud monitors does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox that Customer Interaction Center monitors** appears in the CIC client E-mail Window for Incoming Messages. This help topic applies only to this second type of email message.

## E-mail Conversation

An email reply interaction can be associated with the original incoming email interaction in an Email Conversation.

**Note:** If you have the appropriate rights and your CIC administrator enabled the **Threaded Email** feature, you can see a list of all email messages that are related to one another. Related email messages have the same Conversation ID. For more information, see Use the Conversation History Tab.

Some important things about this relationship include:

- More than one email reply can be associated with the original incoming email interaction.
- You can expand the original incoming email interaction to view the associated outgoing email interactions.

### Email conversation in a queue view

Queue	Name	Interaction Id	Number	Duration	State	User	Station
Marketing	Email Conversation	1001625116	SMTP:Noreen.T...	0:03:36	Connected	apollo_User	
Marketing	Tasker, Noreen	1001625117	SMTP:Noreen.T...	0:02:51	Connected	apollo_User	

- An email reply interaction **disconnects automatically** when you click **Send**.
- You must disconnect the original incoming email interaction manually.

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

### To reply to an email message:

1. Pick up or reopen an ACD-routed email message.

**Result:** The E-mail Window for Incoming Messages appears.

2. Do one of the following:
  - In the E-mail window toolbar, click **Reply**, **Reply All**, or Forward.
  - Press **Ctrl+R** to Reply.
  - Press **Ctrl+Shift+R** to Reply All.

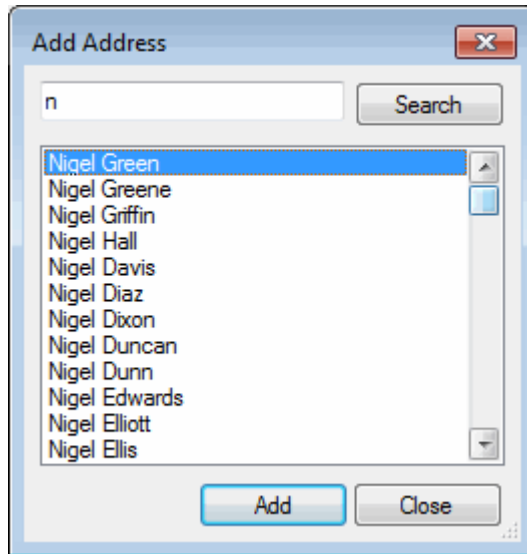
**Note:** Responses to messages sent with an alternate "Reply-To" address are delivered to that address. If you selected **Reply All**, replies are delivered to the "Reply-To" address and all of the original recipients, but not to the sender's original address.

**Result:** The E-mail Window for Outgoing Messages appears. A new outbound interaction appears in the appropriate queue view and is associated with the incoming interaction as part of an Email Conversation.

3. Optionally, add addresses to the email reply by doing one of the following:

- In the **To** text box, type the addresses of the email message recipients, separating each address with a semi-colon (;).
- Click the **To** button. In the Add Address dialog box, type all or part of the address in the text box and click **Search**. From the results list, select the appropriate address and click **Add**.

**Note:** The Add Address dialog box enables you to search for an email address that is configured on your Exchange server — typically, your company's employee email addresses.



**Tip:** You can copy and paste addresses from the email reply address fields to a third-party CRM system, if you need to look up customer records by email address.

4. Optionally, verify the email addresses used in this email message. Place your cursor on one of the addresses in the **To** or **CC** text box and do one of the following:
  - Click the **Check Names** button in the E-mail window toolbar.
  - From the **Actions** menu, choose **Check Names**.
  - Press **Ctrl+Shift+N**.

**Note:** All email addresses are automatically verified before the reply is sent. A verified address is underlined.

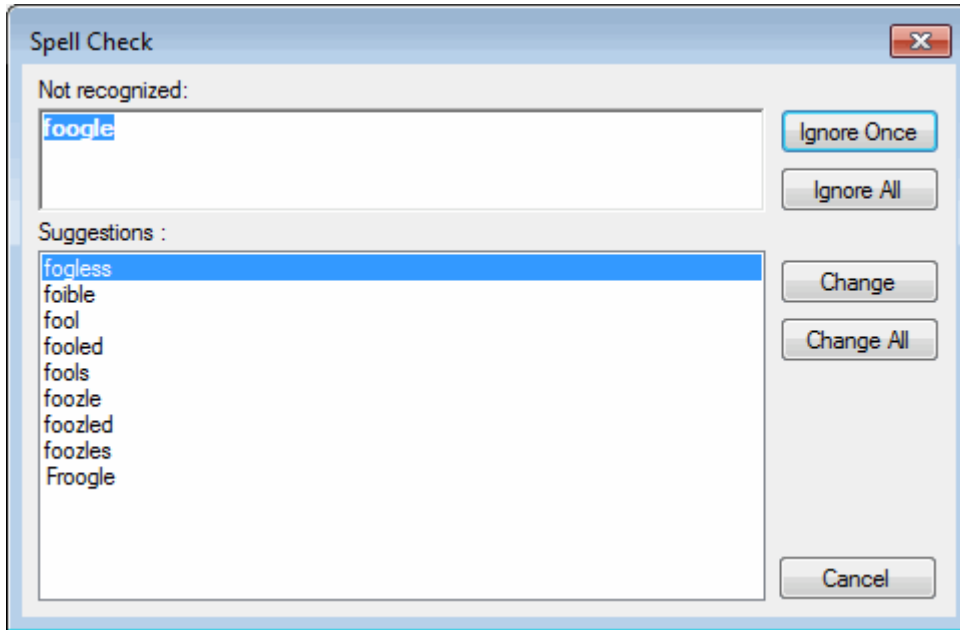
5. Type a message in the reply area.

**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.

**Note:** If you are appropriately licensed, you can use e-FAQ and Account Codes. For more information, see [Use e-FAQ in a Chat or E-mail Reply Interaction](#), and [Assign Codes to an Interaction](#).

6. Optionally, spell check your reply by clicking the **Spell Check** button in the E-mail window toolbar.

**Result:** If any misspelled words are detected, the Spell Check dialog box appears. Select the appropriate button and continue the spell check until all of the reply is checked.



7. Optionally, attach a file to the email message by doing one of the following:
  - From the Email window **File** menu, choose **Insert Attachment**.
  - If available, click the **Attached** button.

**Note:** The **Attached** button appears only after you use **File > Insert Attachment** to attach at least one file. Your system administrator configures the size limit for files you attach to an outgoing email message.

8. Optionally, to save the sender's original attachments to a directory you choose, from the **File** menu, select **Save Attachments**.
9. Optionally, to add notes to the email message, expand the **Notes** section on the right side of the window. Click the **Add a Note** icon and type your information.

**Tip:** For more information, see [Add Notes to an Interaction](#).

10. Optionally, to save the email response, do one of the following:
  - From the **File** menu, select **Save response**.
  - Press **Ctrl+S**.
11. To send the email response, do one of the following:
  - In the email window, press the **Send** button.
  - Press **Alt+S**.
  - From the **Actions** menu, select **Send Email**.

**Result:** The email reply message is sent to the addressees. In the queue view, the interaction representing the reply disconnects.

**Tip:** The email reply window also closes automatically, if you select the **No longer show email after sending** option in Email Configuration.

**Note:** The original ACD-routed email interaction does not disconnect automatically.

12. Select the original ACD-routed email interaction and click **Disconnect**.

**Tip:** The window for the original ACD-routed email interaction closes automatically when you click **Disconnect**, if you select the **No longer show email after disconnecting** option in Email Configuration.

**Related Topics**

- Reply to an HTML E-Mail Message
- Working with E-mail Messages

**Reply to an HTML Email Message**

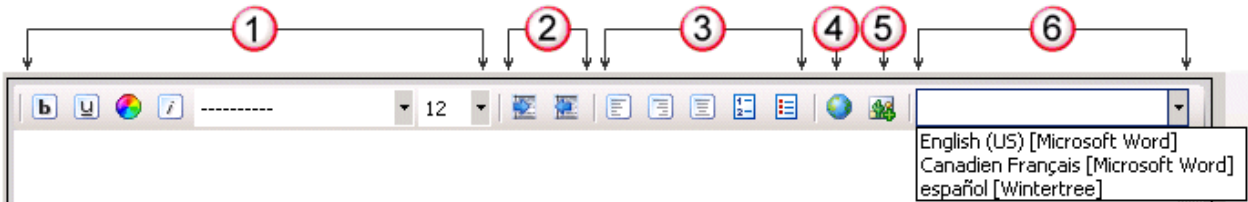
If the ACD-routed email message you received was formatted using **HTML**, you have the option of using text formatting tools in your email reply. You can also embed an image or include a hyperlink in your reply. In every other way, replying to an HTML email message is the same as replying to a plain text email message.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox that Oracle Service Cloud monitors does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox that Customer Interaction Center monitors** appears in the CIC client E-mail Window for Incoming Messages. This help topic applies only to this second type of email message.

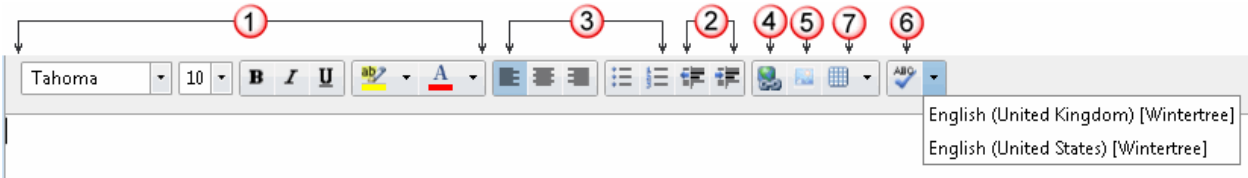
**Format Text**

The HTML version of the Email Window for Outgoing Messages includes a text formatting toolbar. There are two versions of the editing toolbar: the MSHTML and Telerik toolbars. Your CIC administrator determines which version is available to you.

**MSHTML Toolbar**



**Telerik Toolbar**



**Tip:** Point to any button to display a tooltip containing the name of the button.

1	<b>Font</b>	Use the font controls to bold, underline or italicize selected text. You can also select text color, font and size. <b>Note:</b> You can define a custom text color. This custom color is saved for future HTML email replies.
2	<b>Text Indent</b>	Use text indent controls to increase or decrease the space between the selected text and the left margin.

3	<b>Paragraph</b>	Use the paragraph controls to set left, right and center text alignment. You can also create bulleted or numbered lists.
4	<b>Hyperlink</b>	Use the hyperlink control to create a working hyperlink in your email reply.
5	<b>Image</b>	Use the Image control to insert a picture in your email reply.
6	<b>Spell Checking</b>	Spell check your email response. Use the Spell Checking Language drop-down list to select the appropriate language.  <b>Tip:</b> The drop-down list contains the languages you select as <b>Favorites</b> in Emails Configuration. For more information about the languages available here, see Email Configuration.
7	<b>Insert Table</b>	Insert an empty table with a selected number of columns and rows.

**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.

### Create a Hyperlink

You can include a working hyperlink to a webpage in your email reply.

#### To create a hyperlink with the Telerik toolbar:

1. Click the **Hyperlink** toolbar button.  
**Result:** The Insert Hyperlink dialog box appears.
2. In the **Text** box, type the word or words you want to use as the hyperlink.
3. In the **Address** text box, type the URL for a webpage.
4. Click **OK**.

#### To create a hyperlink with the MSHTML toolbar:

1. Do one of the following:
  - Select the text or picture you want to display as the hyperlink and click the **Hyperlink** toolbar button.
  - Click the **Hyperlink** toolbar button.**Result:** The Hyperlink dialog box appears.
2. Do one of the following:
  - If you are using text for the hyperlink, in the **Text** box, type the word or words you want to use as the hyperlink.

**Tip:** If you selected any text in the email message, it appears here.

- If you are using an image for the hyperlink, in the **Screen Tip** text box, type a description of the image or other additional information.
3. In the **Address** text box, do one of the following:
    - Type the URL for a webpage or the complete path to a file (including file name).



- Click the Address down arrow and select a previously used URL or document path from the Address drop-down list.

**Tip:** To populate the list initially, type part of the URL or document path before clicking the down arrow.

4. Optionally, to specify the target window or frame in which to display linked webpage content, select the **Target Frame** check box. Then select the appropriate frame description from the drop-down list.

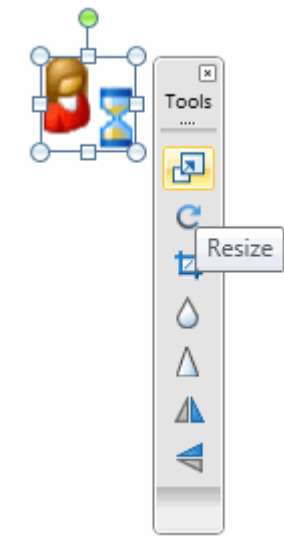
This selection	renders the content in:
_self	The frame with focus (the active window).
_blank	A new window without frames.
_parent	The immediate frameset parent.
_top	The full window without frames.
_media	The HTML content area of the Media Bar. (Available in Internet Explorer 6 or later.)
_search	The browser search pane. (Available in Internet Explorer 5 or later.)
name	A named target window or frame.

5. Click **OK**.

### Insert an Image

#### To insert an image with the Telerik toolbar:

1. Place your cursor in the e-mail reply at the point where you want the image to appear.
2. Click the **Insert Picture** button.
3. In the **Open** dialog box, locate the image file and click **Open**.
4. Optionally, to adjust the image, right-click the image and use any of the image tools.

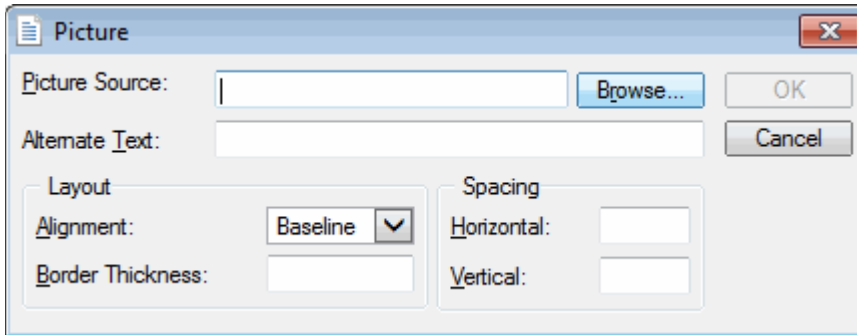


5. Optionally, to edit the image or add a caption, right-click the image and select a command from the shortcut menu.

**To insert an image with the MSHTML toolbar:**

1. Place your cursor in the e-mail reply at the point where you want the image to appear.
2. Click the **Add Image** toolbar button.

**Result:** The Picture dialog box appears.



3. Click **Browse**, locate the image file and click **Open**.
4. In the **Alternate Text** box, type a description of the image or other additional information that you want to appear if the image is not visible in the received e-mail message.
5. In the **Layout** section, select adjust the alignment of the image, relative to the e-mail reply text. Optionally, in **Border Thickness**, enter a number (in points) to specify the width of an image border.
6. In **Spacing**, enter vertical and horizontal spacing (in points) for message text wrapping around this image.
7. Click **OK**.

**Related Topics**

[Assign Codes to an Interaction](#)  
[Email Window for Outgoing Messages](#)  
[Pick Up or Reopen an Email Message](#)  
[Reply to an Email Message](#)  
[Secure Email Messages](#)  
[Use e-FAQ in a Chat or Email Reply Interaction](#)  
[Working with Email Messages](#)

**Send an Email Message**

There are several ways you can send email messages to addresses associated with your directory entries.

**Note:** This feature makes it convenient to send email messages to people and businesses represented by directory entries. It requires that you have a correctly-configured email program installed on your system. This feature is completely separate from the management of ACD-routed mail. E-mail messages sent using your default email program are not considered interactions and are not counted in Customer Interaction Center reports and statistics.

**To send an email message:**

- Select a directory entry and click the appropriate Send email button on the Directory toolbar.
- Click any available email address hyperlink in a directory entry.
- Right-click a directory entry and select **Send Email (Home)** or **Send Email (Business)**, if available.

**Result:** An email address for the selected directory entry appears in the "To" line of a new email window in your default email program.

**Note:** You can configure which Send email buttons appear on your Directory toolbar. For information about adding buttons to a toolbar, see [Customizing Toolbars](#). The toolbar button is unavailable if this email address is not available for the selected Directory entry.

### Related Topics

Directory Toolbar Buttons  
Using the Directory Toolbar  
View and Edit Directory Entries

## Transfer an Email Message

ACD-routed email messages appear in My Interactions or a workgroup queue. 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.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox that Oracle Service Cloud monitors does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox monitored by Customer Interaction Center** appears in the CIC client E-mail Window for Incoming Messages. This help topic applies only to this second type of email message.

### To transfer an email message using a directory:

1. In My Interactions or other queue, select the email message.
2. Do one of the following:
  - Right-click a name in a directory. From the shortcut menu, select **Selected Interaction** and then click **Transfer**.
  - Drag and drop the email message onto a name in a directory.

### To transfer an email message using the Transfer dialog box:

1. Pick up or reopen an email message.
2. Do one of the following in the E-mail Window for Incoming Messages or E-mail Window for Outgoing Messages.
  - Click the **Transfer** button.
  - From the **Actions** menu, select **Transfer**.
  - Press **Ctrl+T**.

**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 appropriate recipient, 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 for the selected CIC user or current statistics for the selected workgroup appear.

5. Click the **Transfer** button.
6. If necessary, close the Email window for this interaction.

### Related Topics

Working with E-mail Messages

## Use e-FAQ in a Chat or E-mail Reply Interaction

**Requirements:** You need the View e-FAQ Access Control right to use e-FAQ in an interaction.

If your company has purchased the e-FAQ knowledge management program and you have been assigned the appropriate user rights in Interaction Administrator, you can use e-FAQ to find answer to customer questions by searching your company's e-FAQ knowledge base. You can then simply copy and paste the information during a Callback.

### To use e-FAQ during a chat session or in an e-mail reply:

1. Do one of the following:
  - In the Chat window or E-mail Window for Outgoing Messages, expand the e-FAQ section.
  - Select an interaction and then select the e-FAQ view.
2. Search for the appropriate e-FAQ question and answer.

**Tip:** For more information, see Using e-FAQ.

3. Insert a selected e-FAQ question and answer in your chat response or email reply.

### Related Topics

e-FAQ Searches  
e-FAQ View  
Manage a Chat Session  
Reply to an E-mail Message  
Reply to an HTML E-Mail Message  
Using e-FAQ  
Working with Chat Sessions

## 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. Do one of the following:
  - In the Response Management view, search for and then select an appropriate response.
  - In the Callback window or E-mail Window for Incoming Messages, expand the **Responses** section and search for an appropriate system-wide response.

**Tip:** For more information, see [Search for a 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 the **Notes** section of the Callback window or E-mail window for Incoming Messages.

**Related Topics**

[Search for a Response](#)  
[Use Response Management in an Email Message](#)  
[Working with Callback Requests](#)

## 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.

**Interactive Intelligence Oracle Service Cloud Integration:** An email message sent to a mailbox that Oracle Service Cloud monitors does not appear in the CIC client. By default, this type of email message appears as a new Incident in the Oracle Service Cloud interface. However, an email message **originally sent to a mailbox monitored by Customer Interaction Center** appears in the CIC client E-mail Window for Incoming Messages. This help topic applies only to this second type of 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**.
  - In the E-mail Window for Outgoing Messages, in the reply area, type the response shortcut and press **Ctrl+Space**.
  - In the E-mail Window for Outgoing Messages, expand the **Favorite Responses** section and double-click a favorite response.

**Tip:** You can use full-text searching by entering terms in the **Search** text box in the Response Management view or the Responses section. For more information, see Search for a Response.

**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, click the **Preview** button for a selected Response.

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 and Send an E-mail Message.

#### Related Topics

Search for a Response  
Use Response Management for an Incoming Interaction  
Working with E-mail Messages

### Working with Faxes

## Working with Faxes

**Requirements:** You need the TIFF Faxes Security right to receive faxes as TIF files attached to email messages.

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 files and use the default application set up in Windows for **TIF files** to view and print faxes.

**Note:** Contact your CIC administrator if you do not have Interaction Fax installed and your faxes are not being attached to email messages as TIF files

#### Related Topics

Fax Viewer List View  
Open a Fax From Your Inbox  
Send a fax  
Use the Fax Viewer List View

### 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 application set up in Windows for TIF files displays the fax.

**Note:** The CIC administrator must configure your User rights in Interaction Administrator to enable you to receive faxes as TIF files. Contact your CIC administrator if you do not have Interaction Fax installed and your faxes are not being attached to your email messages as TIF files.

#### 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 Viewer List View

**Requirements:** You must install Interaction Fax on your workstation in order to display the Fax Viewer List view.

The Fax Viewer List view provides a convenient place for you to see all the faxes that have been delivered to you by Customer Interaction Center. You can use this view to review, delete, save, or remove copies of your faxes. The Interaction Fax Viewer opens and displays the faxes selected from this view. For more information, see Use the Fax Viewer.

**Note:** If your faxes are stored on the server in FBMC mode (File Based Mail Connector) instead of being delivered as email message attachments, you must create a Fax Viewer List view in order to view faxes. Otherwise, the Fax Viewer List view is optional.

### To display the Fax Viewer List view:

1. In the **Create New View dialog box**, from the **Categories** list, select **Unified Messaging**.
2. In the **Views** list, select **Fax Viewer**.
3. Click **OK**.

**Result:** The Fax Viewer List view appears.

### Related Topics

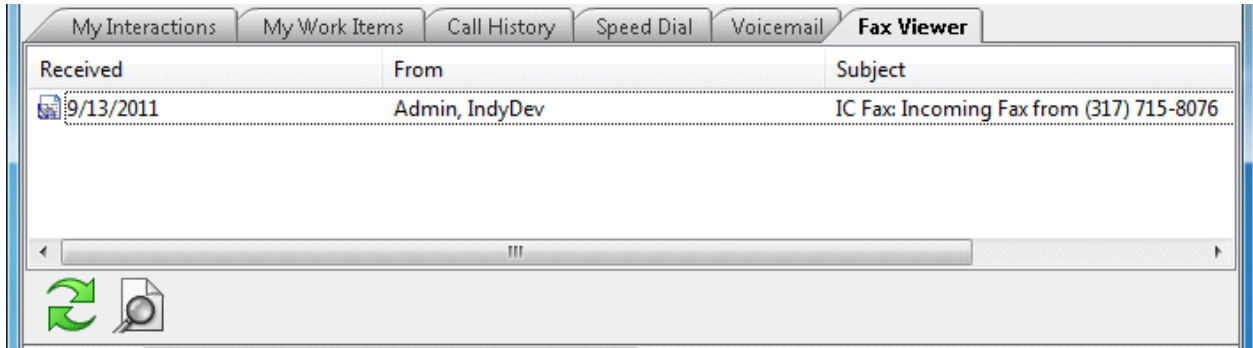
Add or Close Views  
Customizing the interface  
Use the Fax Viewer List View

## Use the Fax Viewer List View

You can create a Fax View List view in the CIC client that enables you to view a list of all the current faxes in your Inbox. The Fax Viewer List view simplifies locating and managing faxes.

**Note:** Before you can use the Fax Viewer List view, you must make it available as a view in the CIC client. For more information, see Fax Viewer List.





### To view faxes using the Fax Viewer List:

Do one of the following in the Fax Viewer List view:

- Double-click a selected fax.
- Right-click a selected fax and, from the shortcut menu, select **View**.
- Select a fax and click the **Open this Fax** button (magnifying glass).

**Result:** Interaction Fax displays the selected fax.

**Note:** In Interaction Fax, you can edit, save, send, annotate or print the fax. Interaction Fax has its own Help system that includes instructions for all of these operations.

### To update the Fax Viewer List:

If you delete faxes directly from your email program (e.g., Microsoft Outlook, Microsoft Outlook Express, Lotus Notes, etc.), refresh your Fax View list to synchronize it with your email Inbox.

To ensure that all your current faxes appear in the list, do one of the following:

- Click the **Refresh the List** button (green arrows).
- Right-click anywhere in the Fax Viewer list and, from the shortcut menu, select **Refresh List**.

### To delete a fax:

- To remove a fax from the Fax Viewer List and also from your email Inbox, right-click a selected fax and, from the shortcut menu, select **Delete**. In the **Confirm Delete** dialog box, click **Yes**.

**Note:** The selected fax is not removed from your email Inbox until you refresh the list.

### To save a copy of a fax:

- To save a copy of the fax to a location you select, right-click on a fax and, from the shortcut menu, select **Save As**. In the **Save Fax As** dialog box, browse to the desired location, type a **File name** and click **Save**.

**Note:** The fax is saved in I3F format and can be opened using Interaction Fax. You can save faxes in TIF format in Interaction Fax.

### To delete a copy of a fax:

- To delete a copy of a fax that you previously saved to a location on your workstation or network, right-click a fax and, from the shortcut menu, select **Remove Local Copy**.

**Note:** This option is disabled if you haven't previously saved a local copy of the selected fax.

### Related Topics

Fax Viewer List

Open a Fax From Your Inbox

## Working with 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.

## Working with Interaction Process Automation

### Interaction Process Automation

**Requirements:** Only agents with the appropriate licenses and rights can use Interaction Process Automation. For more information, see IPA User Licenses and IPA User Rights.

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

For example, a customer could place an order, service request, loan application, or insurance claim by completing a form on your company website. Or, an agent could take preliminary information over the phone and launch the appropriate process. IPA then routes the form to the first available agent who is qualified to process it or to the most appropriate workgroup queue. This form appears as a work item in the agent's My Work Items view or in the appropriate workgroup queue, just like any other ACD-routed interaction. If an agent does not pick up the work item (form) within a defined period of time, it is routed to the next available and qualified agent or workgroup. After an agent picks up the work item and completes the necessary task for processing it, IPA could then forward the application to an available supervisor for approval.

### Using IPA

If you have been assigned the appropriate license and user rights in Interaction Administrator, you can:

- pick up a work item and complete a necessary task
- launch a process that routes work items to other members of your organization
- search for an existing process
- view interactions that are associated with a specific instance of a process

**Note:** You do not need an IPA license to transfer a work item. For more information, see Transfer a Work Item.

### User Licenses

The following licenses enable you to use IPA features. These licenses are assigned in Interaction Administrator.

**Note:** Each license in this list enables you also to **use the IPA features included in all the previous licenses in the list**. That is, the Group Routed Work Items license includes the Direct Routed Work Items license. The Process Monitor license includes both of the Routed Work Items licenses. The Process Designer license includes all the other licenses.

- **Direct Routed Work Items** (I3\_ACCESS\_IPA\_USER) license: Enables you to launch any process to which you have rights. It also enables you to receive Work Items that are directly routed to you.
- **Group Routed Work Items** (I3\_ACCESS\_IPA\_USER\_ACD) license: Enables you to receive Work Items that are either routed to you directly or as a member of a workgroup (similar to an ACD queue).
- **Process Monitor** (I3\_ACCESS\_IPA\_MONITOR) license: Enables you to view process status and details in the Process Monitor or to use Process Reporting in IC Business Manager Applications.
- **Process Designer** (I3\_ACCESS\_IPA\_DESIGNER) license: Enables you to use the Process Designer to create and modify IPA processes or to use Process Reporting in IC Business Manager Applications.

**Note:** For more information about designing processes, see the *Interaction Process Automation Technical Reference* and the *Interaction Process Automation Designer Help*.

## User Rights

The following Processes Access Control rights can be assigned in Interaction Administrator. They control which IPA functions you can use.

**Note:** The View Queue Columns Access Control right determines whether you can display the Associated Process column in My Interactions or other queue view.

You can be assigned these rights for all process instances created from all or selected process definitions. For example, your process designer may create process definitions for a car loan, a new account, and a home improvement loan. You could be assigned the rights to launch all of these processes or have the right only to launch a car loan process.

These rights are independent of each other, not cumulative like IPA licenses. For example, you could be able to manage a process, but be unable to launch it in the CIC client if you had only the Manage Process right to that process.

In addition, the following Interaction Process Automation rules apply:

- If you launched the process, view rights for that process are implied.
- If you own the process, launch, view, and modify rights are implied.

## Types of Access Control Rights for Processes

- View Processes: Enables you to search for a process and view process details.
- Launch Processes: Enables you to launch processes in the CIC client.

**Note:** Processes are created in the Process Designer and must be published before they can be launched.

- Manage Processes: In the CIC client, this enables you to remove interaction associations from a process, retry or cancel a process, and view the Actions or Process Variables tabs in the Process Details dialog box. In the Process Monitor, it enables you to manage and modify processes. Managing a process includes canceling a process or changing data elements in a process.

**Note:** Process Monitor is a separate application and is not part of the CIC client. It is an IC Business Manager module and an IC Server Manager module that an administrator can use to monitor, track, or interact with running process instances. For more information, see the *Interaction Process Automation Designer Help*.

## User Status

In order to receive ACD-routed work items, you must set your status to a type that indicates you are available for ACD (Automatic Communication Distribution). Your CIC system administrator determines in Interaction Administrator which user statuses indicate ACD availability. For example, an "Available" status may indicate you are available for ACD, but an "Available, Follow-Me" status could indicate you are not available for ACD. You can receive direct-routed or transferred work items regardless of your status.

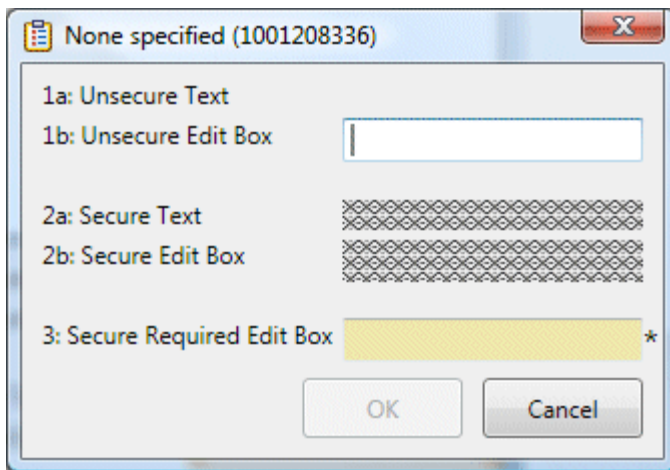
### IPA Security Specifications

IPA security specifications control access to secured data in work items. For example, the ability to view or edit social security numbers or credit card numbers can be restricted to users who are members of the appropriate IPA security specification.

**Note:** IPA security specifications are configured and users are assigned to them in Interaction Administrator. Contact your CIC administrator if you have questions about IPA security specifications.

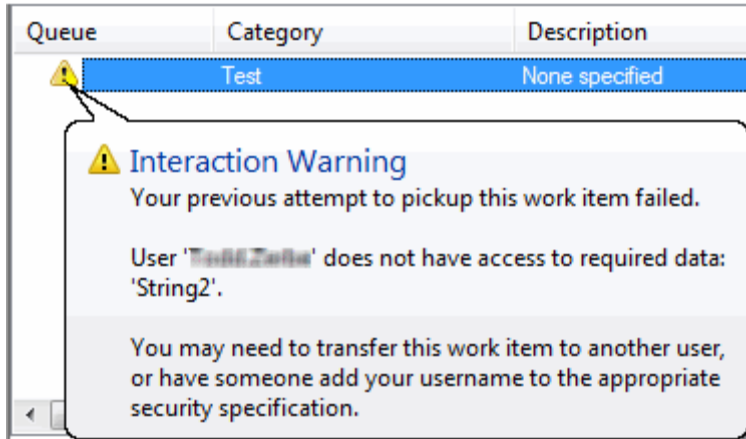
When a work item containing secured data is routed to you, one of the following can happen:

- If you **belong** to the necessary IPA security specifications for all the **required** data fields or controls in the work item, you see the work item. Any **non-required** data fields that call for a security specification to which you do not belong are obscured, as in this example:



- If you **do not belong** to the necessary IPA security specification for any of the **required** data in the work item, you see a Work Item Warning. A Work Item Alert (toast message) can also appear on your desktop. The work item is placed on **hold**.

**Tip:** You can transfer the work item to a user who belongs to the appropriate security specification or ask your CIC administrator to assign you to the necessary security specification.



### Related Topics

Interaction Process Automation Terminology  
 Processes  
 Work Items

## Interaction Process Automation Terminology

**Requirements:** Only agents with the appropriate licenses and rights can use Interaction Process Automation. For more information, see IPA User Licenses and IPA User Rights.

This topic defines Interaction Process Automation (IPA) terms that apply to using IPA. Terms that apply to designing and modifying IPA processes are discussed in the *Interaction Process Automation Designer Help*.

- **Action:** The smallest unit of work. A process consists of structured groups of actions. Actions can include completing a work item, accessing a database, invoking a Web service, calling a handler, interfacing with a mainframe or third-party application, sending email, queuing work items for groups of people, and more.
- **Active:** A process is either active or inactive. A process becomes active when it is published. An administrator can deactivate a process to stop people from using it. The CIC administrator or an IPA process designer can reactivate a process.
- **Form:** The user interface displayed when you pick up a work item. It also includes the work item category, description, and due date of the assigned work.
- **Launch a process:** A process can be initiated (launched) in different ways depending on how it is designed. For example, processes can be launched by a CIC client user or a handler.
- **Process Definition:** A Process Designer creates a process definition. A process is defined first in terms of states. A process is a group of states, running like an assembly line. States define the pipeline through which work flows. Each state is comprised of a series of tasks and actions.
- **Process Instance:** When a process is launched, a new process instance is created from the selected process definition. An instance is a running process. Multiple instances of the same process can run at the same time.
- **Task:** A sequence of actions performed by the IC server and/or CIC client users to achieve a specified result.
- **Work Item:** A work item is a form that is presented to a CIC client user to gather information. When the corresponding process is launched, work items appear in the My Work Items view in the CIC client.
- **Work Item Interaction:** A related interaction, such as a call or fax, which is associated with a work item in the CIC client. You can search for a process and display its associated interactions.

- **Work Item State:** The current condition of a work item. A work item state is similar to an interaction state. For more information, see Work Item States.

## Related Topics

Working with Interaction Process Automation

## Processes

## Processes

**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.

A process is a defined, ordered series of actions taken by Interaction Center and CIC client users to achieve a specific end result. CIC client users are prompted to complete work as part of a process. Processes can also perform actions that involve accessing web sites. For example a process could access a website to look up required information, such as a vehicle's VIN number. The administrator who designs a process determines what actions occur during a process.

For example, your company could have a loan application process that requires several steps. These steps are performed by different CIC client users or automated Customer Interaction Center functions. The process includes actions for collecting, verifying, and evaluating information in the loan application, making a decision to accept or reject the application, and finally notifying the applicant of the decision.

If you have View Process IPA User Rights, you can:

- Add Notes to a Process Instance

If you have an IPA User License and the appropriate IPA User Rights, you can do any of the following:

- Associate an Interaction with a Process
- Display the Search Process View
- Launch a Process
- Remove a Process Association
- Search for a Process
- View Process Details

## Related Topics

Working with Interaction Process Automation  
Interaction Process Automation Terminology  
Work Items

## Display the Search Processes View

**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.

The Search Processes view enables you to locate a specific process instance or display a list of selected process instances. Before you can use the Search Processes view, you must display it.

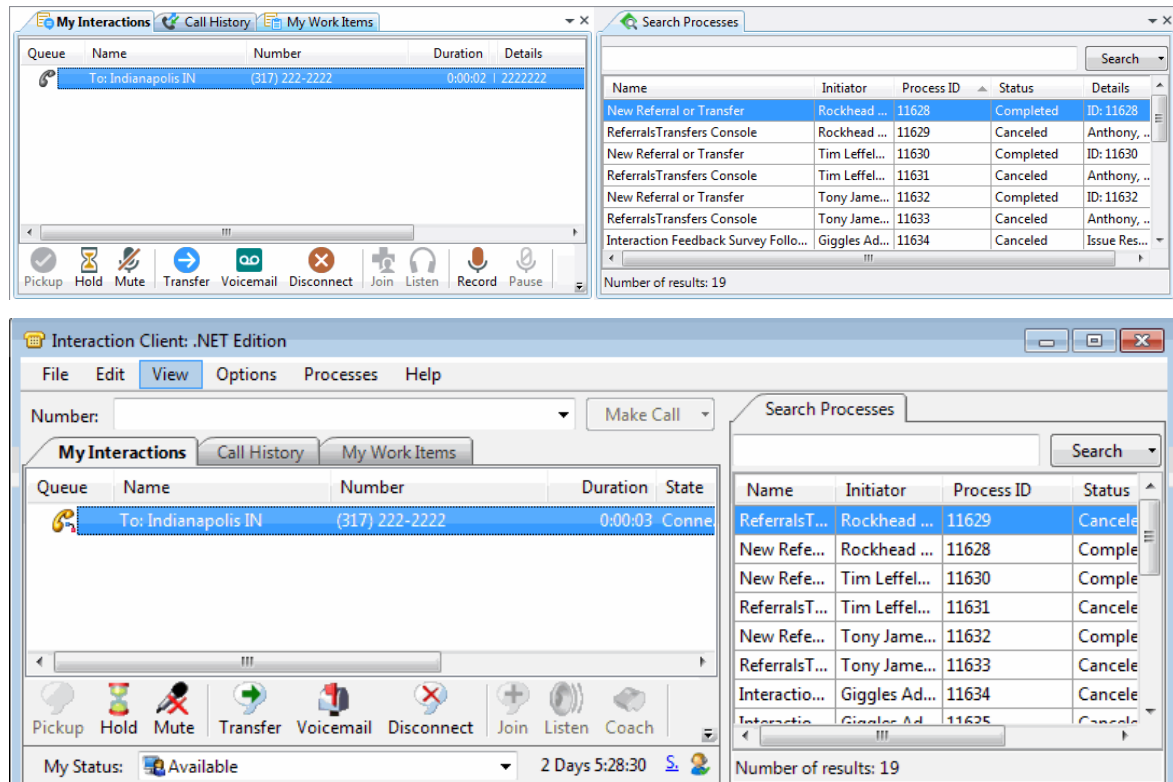
**Tip:** For more information about additional ways to display the Search Processes view, see Add or Close Views.

**To display the Search Processes view:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Process Automation**.
2. In the **Views** list, select **Search Processes**.
3. Click **OK**.

**Result:** The Search Processes view appears.

**Tip:** You may find it easier to use this view to associate a process with an interaction if you display the My Interactions and Search Processes views side by side as shown below. For tips on moving this view to the most convenient location for your use, see Change View Layout.

**Related Topics**

Processes

**Search for a Process**

**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.

Before you can associate a process instance with an interaction or view the details of a process instance, you must first find it.

**To search for a process:**

1. Select the Search Processes view.
2. Do one of the following:

- In the search text box to the left of the **Search** button, type all or part of a process variable value and then click the **Search** button.

**Tips for using process variables:**

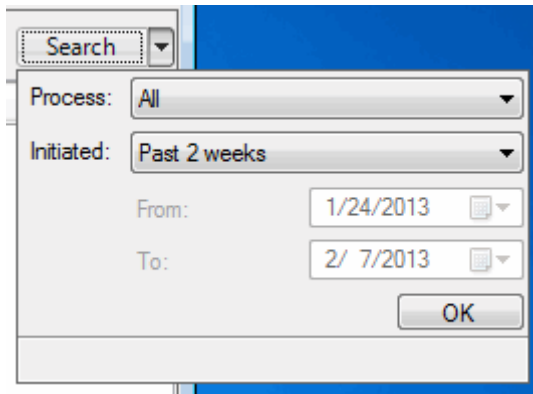
Process variables include the process ID, the name of the user who launched the process (initiator), and process-specific details such as a customer's ID number.

Process-specific variables may not be the same for each process. They are defined by the person who designed the process.

To search by name, type all or part of a user's display name. (Formatting of display names is controlled by your CIC administrator.)

No matter what variable you use to search, a "Begins with" search is used. For example, you can enter just the first few characters of a name or identification number for a search.

- Click the **down arrow** next to the Search button to specify advanced search criteria. Select the appropriate criteria and click **OK**.



**Tips for using advanced search criteria:**

Advanced search criteria are used in conjunction with the search criteria you specify in the search text box to the left of the **Search button**.

The Advanced Search Criteria dialog box enables you to set a date range and select a type of process.

All of the criteria specified in the Advanced Search Criteria dialog box apply to all future searches until changed by you. These settings are saved when you log off or restart the client.

**Result:** Search results appear in a table in the Search Processes view or Search Processes dialog box.

**Note:** You see a message in the Search Results dialog box if your search returns more than the allowed maximum number of results. The Search Results limit is configured by your CIC administrator on the IC server.



Name	Initiator	Process ID	Details	Status
Test	Timothy	10304	None specified	Completed
Test	Timothy	10305	None specified	Running
Test	Timothy	10306	None specified	Running
Test	Eros_user -	10405	None specified	Completed
Test	Eros_user -	10406	None specified	Running
MyProc	Eros_user -	10407	State: Initial State	Running
MyProc	Eros_user -	10408	State: Initial State	Running

Number of results: 7

- Do any of the following in the search results table.
  - Resize the Search Process dialog box or Search Processes view to display more information.
  - Rearrange the column order by clicking and holding on a column heading, dragging it to the desired location and then releasing the column heading.
  - Click a column heading to sort it in ascending order, click again to sort in descending order.
  - Double-click a selected Process to View Process Details.

### Related Topics

Processes  
View Process Details

## Launch a Process

**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.

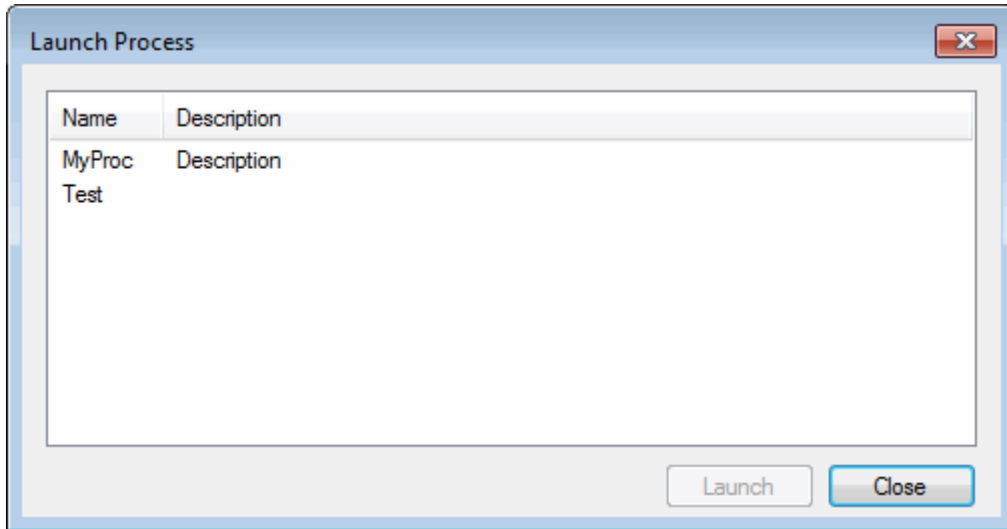
Properly licensed and authorized CIC client users can launch a process. Customers may also be able to launch a process from your company's website, if this option is available and appropriately configured.

### To launch a process:

- In My Interactions, right-click an interaction and, from the shortcut menu, select **Process Automation > Launch Process**.

**Note:** This method both launches a process and associates it with an interaction. You cannot launch a process from an interaction in a User or Workgroup queue that you are monitoring.

**Result:** The Launch Process dialog box appears.



2. Select the appropriate process and click **Launch**.

**Result:** One of two things happens:

- You are alerted to pick up a work item.
- If the work item is routed to another user or it takes a more than a few seconds to route the initial work item to you, the Process Started dialog box appears. Click **OK**.

### Related Topics

Processes

## Associate an Interaction with a Process

**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. The View Queue Columns Access Control right determines whether you can display the Associated Process column in My Interactions or other queue view.

You can associate selected interactions with a process instance. This association enables you to review the interactions (calls, email messages or other types) that are related to a process instance such as a loan application. Associated interactions could include the initial customer email request for an application and agent or customer follow-up calls.

Each process instance can be associated with multiple interactions, but an interaction can be associated with only one process instance. For example, your company has a process for applying for a car loan. You can associate your current interaction (a call from a customer) with the car loan process instance that represents this customer's application. You or another agent can create as many instances of the car loan process as necessary, one for each loan application. Each car loan process instance remains separate and you can associate a call, email, or other interaction with the appropriate process instance, not with the car loan process in general.

**Tip:** You can view all interactions associated with a specific process instance. For more information, see View Process Details.

### Using the shortcut menu

You can use the interaction shortcut menu to associate your current interaction with a process. Select the interaction in My Interactions. You cannot select an interaction in another user's queue or a workgroup queue and associate it with a selected process.

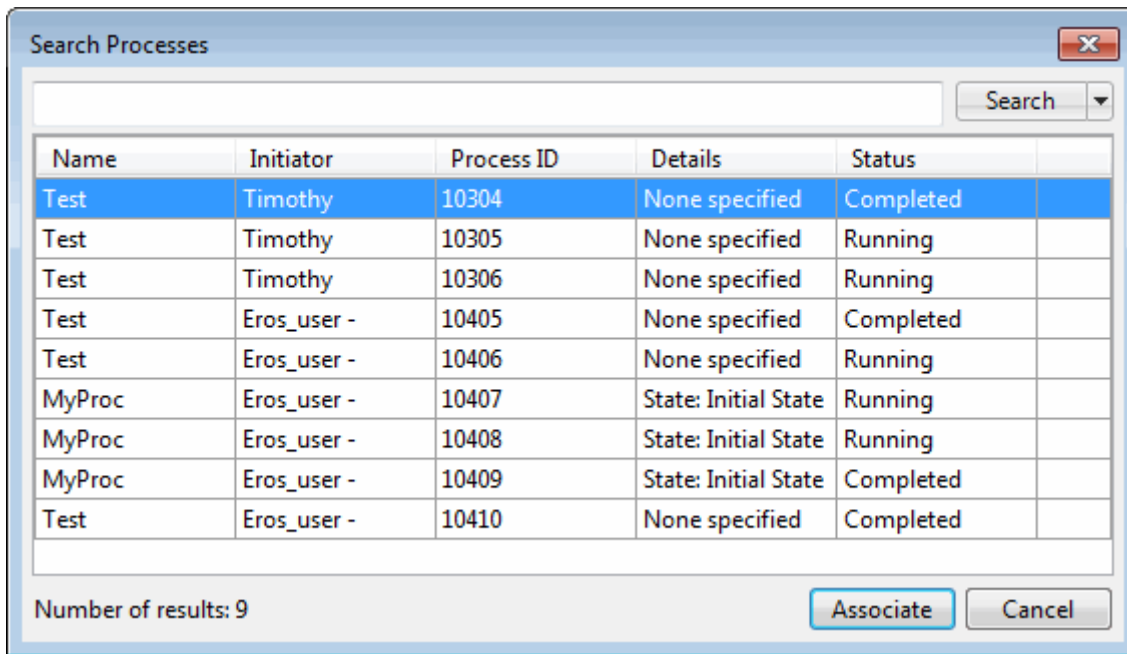
**To use the shortcut menu to associate an interaction with a process:**

1. Pick up an alerting interaction or put an interaction on hold.
2. Right-click the interaction and, from the shortcut menu, select **Process Automation > Associate with process**.

**Result:** The Search Processes dialog box appears.

3. Search for a Process.

**Result:** Process that match your search criteria appear in the Search Processes view or dialog box.



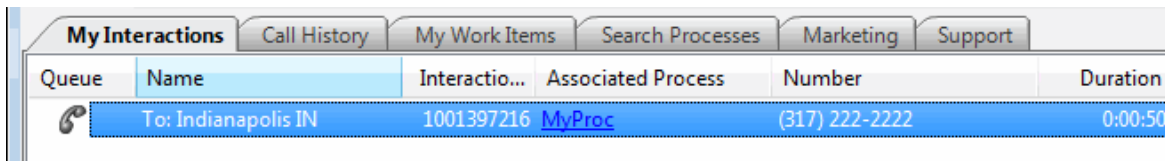
4. In the search results table, select a process and click **Associate**.

**Note:** You can associate an interaction with only one process.

5. If the Confirm Process / Interaction Association dialog box appears, click **Yes**.

**Result:** The selected interaction is associated with the selected process. This interaction is listed, along with any other associated interactions, on the Associated Interactions tab of the Process Details dialog box.

Also the name of the selected process appears on the line containing the associated interaction in My Interactions. Clicking this link displays Process Details dialog box.



**Using Drag and Drop**

You can use your mouse to associate an interaction and a process.

**To use your mouse to associate an interaction with a process:**

1. Use the Search Process view to locate the appropriate process.

## 2. Do one of the following:

- Click a process in the Search process view and then drag and drop this process to an interaction in the My Interactions view.
- Click an interaction in the My Interactions view and drag and drop this interaction to a process in the Search process view.

**Result:** The selected interaction is associated with the selected process. This interaction is listed, along with any other associated interactions, on the Associated Interactions tab of the Process Details dialog box. Also the name of the selected process appears on the line containing the associated interaction in My Interactions. Clicking this link displays Process Details dialog box as shown in the preceding illustration.

### Related Topics

Processes

## Remove a Process Association

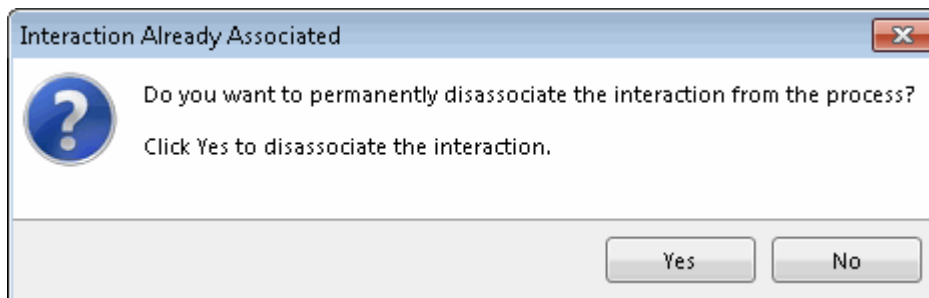
**Requirements:** Only agents with the appropriate licenses and rights can use Interaction Process Automation. For more information, see IPA User Licenses and IPA User Rights. You also need the **Manage Process right** to remove a process association from an interaction.

An interaction can be associated with only one process. After associating an interaction with a process, you may want to remove the association. For example, if you change your mind and want to associate the interaction with a different process, you must first remove the existing process association.

### To remove a process association from a current interaction:

1. From My Interactions, pick up an interaction that is already associated with a process.
2. Right-click the interaction and, from the shortcut menu, select **Process Automation > Remove Process Association**.

**Result:** The **Disassociate Interaction from Process** dialog box appears.



3. Click **Yes**.

**Result:** The interaction is disassociated from the process.

**Tip:** You can confirm that the association was removed by searching for the appropriate process and then checking the Associated Interactions tab of Process Details dialog box. For more information, see View Process Details.

If the interaction has already been removed from the My Interactions queue, you can still remove its process association by first locating the appropriate process.

### To remove a process association from a completed interaction:

1. Search for a Process.
2. In the Process Details dialog box, select the **Associated Interactions tab**.
3. Right click a selected interaction and select **Remove Association**.

**Result:** The Disassociate Interaction from Process dialog box appears.

4. Click **Yes**.

**Result:** The interaction is disassociated from the process.

## Related Topics

Processes  
View Process Details

## View Process Details

**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.

There are two places in the CIC client where you can view detail information for a process instance.

**To view process details, do one of the following:**

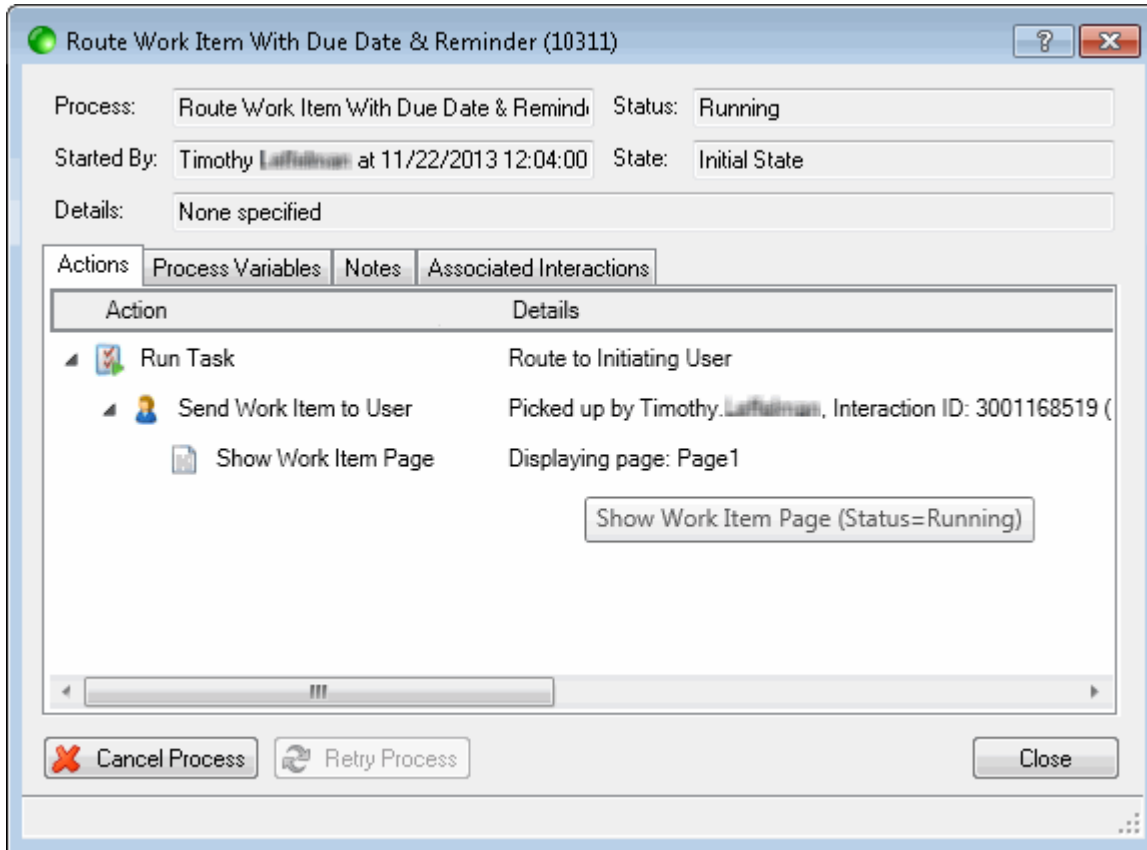
- In the My Work Items view, select a work item and click the Process Details button.

Queue	Interaction Id	State	Category	Description
	1001398202	In progress	Test	None specified
	1001398203	Held	Test	None specified
	1001398205	Held	MyCategory	State: Initial State

- In the My Work Items view, right-click a work item and choose **Process Details** from the shortcut menu.
- Search for a process. In the search results table, double-click a selected Process.

**Result:** The Process Details dialog box appears.

## Process Details dialog box



**Tabs**

The Process Details dialog box contains several tabs that enable you to view information related to this process or to add notes.

**Note:** You need the Manage Process right to see the Actions tab or the Process Variables tab. In addition, these tabs appear only for a current, running process. They do not appear for completed processes.

<p><b>Actions</b></p>	<p>This tab displays the status of the individual tasks that make up a process.</p> <p><b>Note:</b> You can point to any of the individual tasks to display a tooltip with the status of the task.</p>
<p><b>Process Variables</b></p>	<p>This tab displays the data variables for the process. These variables contain values for the selected process instance. For example, if a process requires you to record a customer’s ID number, then a process variable contains this ID number.</p>
<p><b>Notes</b></p>	<p>Click the Notes tab to view or add notes about the process instance. For more information, see Add Notes to a Process Instance.</p>
<p><b>Associated Interactions</b></p>	<p>View the interactions (calls, chats, ACD-routed email messages, etc.) that are associated with this process instance. You can also use this tab to remove a process association. You need the Manage Process right to remove a process association from an interaction. For more information, see Remove a Process Association.</p>

**Buttons**

Action buttons are available on the tabs of the Process Details dialog box.

**Note:** You need the Manage Process right to use the **Cancel Process** or **Retry Process** buttons.

<b>Cancel Process</b>	<p>Use the <b>Cancel Process</b> button to cancel a currently running process.</p> <p><b>Note:</b> After a process is canceled, its status changes to <b>Canceled</b> and the Actions and Process Variables tabs no longer appear.</p>
<b>Retry Process</b>	<p>Use the <b>Retry Process</b> button to restart a process that stopped at some point with an error.</p>
<b>Refresh</b>	<p>Use the <b>Refresh</b> button to update the information displayed on the <b>Notes</b> and <b>Associated Interactions</b> tabs and include the most recent notes or associated interactions.</p> <p><b>Note:</b> New information does not normally appear immediately on these tabs. Typically, if you edit notes or associated interactions, you are not notified this information has been successfully updated because it may not happen immediately. The Process Details dialog box can attempt to auto-refresh the information displayed if you edit notes or associated interactions.</p> <p><b>Tip:</b> The <b>Refresh</b> button is available only <b>after</b> a process is complete.</p>

### Related Topics

- Add Notes to a Process Instance
- Associate an Interaction with a Process

## Add Notes to a Process Instance

**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.

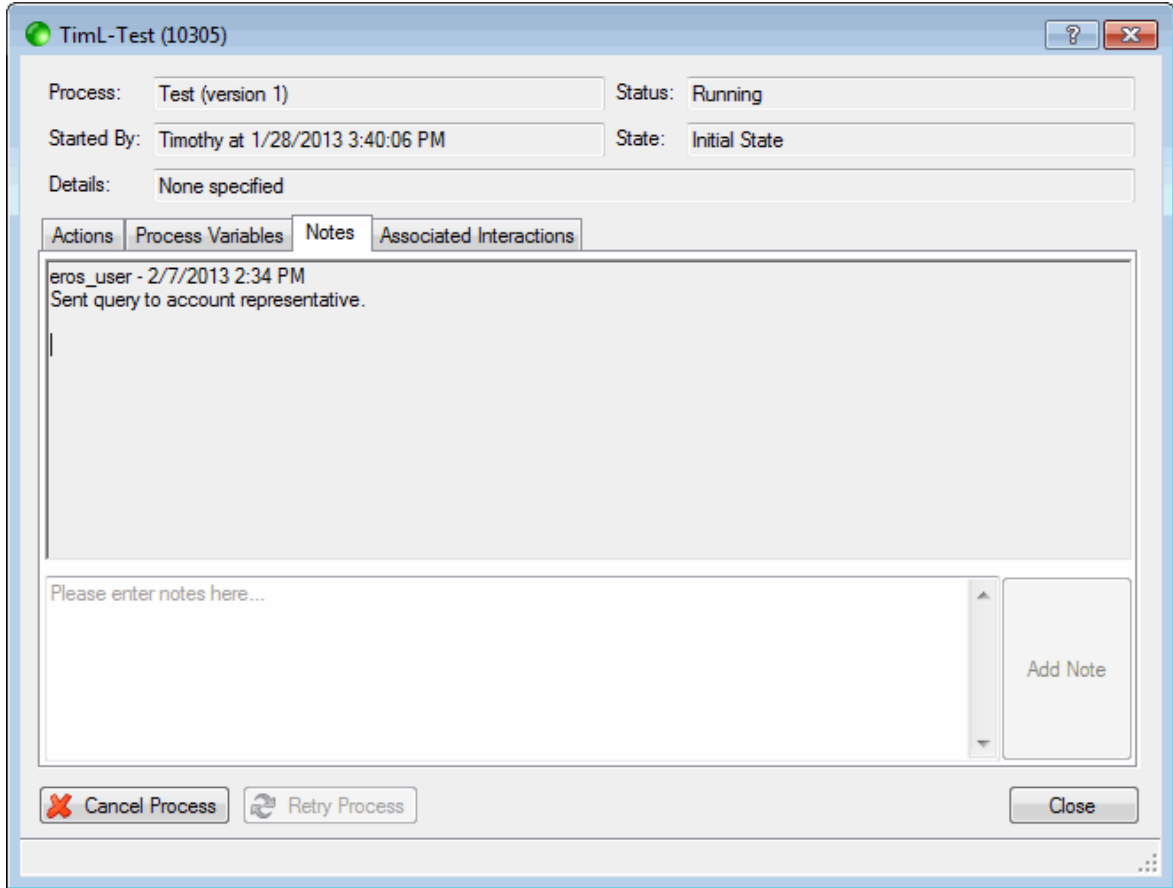
You can add one or more notes to a process instance. You could use these notes to record additional information or to document actions taken in addition to process steps.

### To add notes to a process instance:

1. View the details of a selected process.
 

**Result:** The Process Details dialog box appears.
2. Click the **Notes** tab.
3. Type the text of the note in the text box and click **Add Note**.

**Result:** An update in progress indicator appears. When the update is finished, the note appears on the Notes tab.



### Related Topics

- Processes
- [View Process Details](#)

### Work Items

## Work Items

**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](#).

A work item is a form that is presented to a CIC client user to gather information. When the corresponding process is launched, work items appear in the My Work Items view in the CIC client. Work items can also appear in any user or workgroup queues that you are monitoring.

If you have an IPA User License, the appropriate IPA User Rights, and the appropriate IPA Security Specification for all required data on the form, you can do any of the following:

- Pick Up a Work Item
- Put a Work Item on Hold
- Remove a Work Item from a Queue

### Work Item States



A work item state is the current condition of a work item. A work item state is similar to an interaction state. Possible work item states are:

- **New:** This is the state of a work item that has been routed by CIC to an agent or transferred by one agent to another, but not yet picked up by the recipient.

**Note:** If this is an ACD-routed Work Item, you have a limited time to pick it up before it is re-routed to another agent or workgroup.

- **ACD - Wait Agent:** This is the state of a work item routed by CIC to a workgroup or transferred by an agent to a workgroup. It has not yet been picked up by an agent.
- **In Progress:** This is the state of a work item after you pick it up. It remains in this state while you view or work on the work item.
- **Held:** If you close a work item (i.e. click the red “x” or select the Hold action in its various locations), the work item is placed on hold. It is still assigned to your queue and you have looked at it, but you have not yet completed the work item.

**Note:** A work item can be placed on Hold automatically if you do not belong to the necessary IPA security specification for any of the required data in the work item.

- **Completed:** This is the state of a work item after you finish working on it. After a certain amount of time, around 30 seconds, a Completed work item disappears from the queue and the My Work Items view.

### Related Topics

Monitor Two or More Queues at the Same Time  
 My Work Items View  
 Processes  
 Work Item Alerts  
 Work Item Toolbar

## My Work Items View

**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. The View Queue Columns Access Control determines whether you can display certain columns in the My Work Items view.

The My Work Items view displays the work items that are currently in your user queue. It displays the Work Items currently assigned to you or ACD-routed to you from a workgroup to which you belong. This view appears by default if you have any one of the four IPA-related user licenses.

In several ways, the My Work Items view behaves similarly to the My Interactions view, but it also has some unique behaviors:

### Displaying the view

- You cannot add the My Work Items view to the CIC client or hide it.
- If you have an IPA user license, the My Work Items view appears in the CIC client. If you lack the appropriate license, then you cannot make it appear.
- You can move the My Work Items view to another docking zone or tab location. For more information, see Move Views.

### View contents

- The My Work Items view shows the current work items in your user queue just as the My Interactions view shows the current interactions in your user queue.

**ACD-routed work items**

- If you are a member of one or more ACD workgroups, work items assigned to you from those workgroup queues appear in My Work Items. This process is similar to how ACD-routed interactions assigned to you from those workgroups appear in My Interactions.
- The name of the ACD workgroup from which an interaction or work item came appears in the Queue column.
- An ACD-routed work item that you do not pick up remains in the My Work Items list for a limited time. Then it is routed to another member of your workgroup or other qualified agent.
- If ACD-routed work items are in My Work Items when your IPA user license is **revoked**, these work items remain until you process them. However, no new work items are routed to you after your license is revoked.

**Working with Work Items**

- You pick up a work item by selecting the work item and clicking the **Pickup** button.
- A work item that you have picked up and placed on **hold** remains in the My Work Items list until you finish work with it.
- "Completing" a work item usually means supplying required information for a form or performing a necessary action like clicking an Approved button.
- After you complete a Work Item, the work item is displayed for a short time and is then permanently removed from the My Work Items view.

**Note:** There is no equivalent of a Call History view for work items. Currently, there is no way to locate or view completed work items when they no longer appear in the My Work Items view.

- After you complete a work item, if there are other steps yet to be completed in the process, the process instance performs its next defined action. This next action could be routing a work item to another agent or to automatically sending an email message to a customer.

**Work Item View Features**

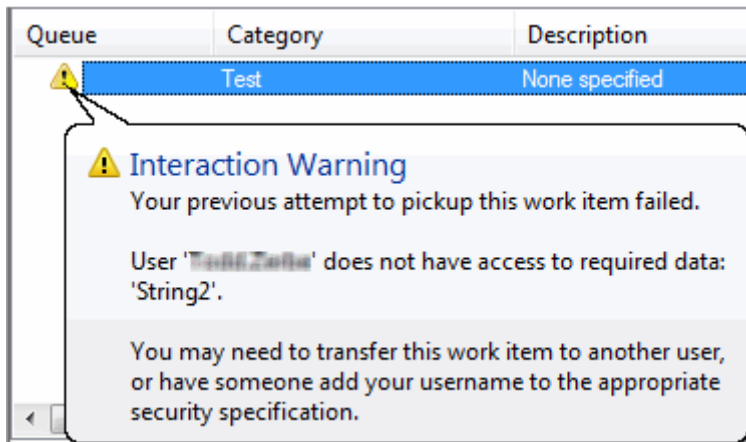
Queue	Interaction Id	State	Category	Description
	1001398202	In progress	Test	None specified
	1001398203	Held	Test	None specified
	1001398205	Held	MyCategory	State: Initial State

Special features of the My Work Items view include:

**Work Item Icons**

- A work item icon appears in the first column of the My Work Items view. This icon changes slightly as the work item state changes.
- Also the work item icon can change to reflect any messages sent regarding this work item. The work item **message icons** are hourglass (Busy), red circle (Error), and yellow triangle (Warning).

- Point your mouse to a work item message icon to display a tooltip containing the message.



### Categories

- Each work item can be associated with a category. The names of the categories of your current work items appear in the category section.
- You can select a category name in the category section to display only the work items belonging to that category in the work items list. Or you can select **My Work Items (All)** to see all the work items currently waiting for your action or work items you recently completed.

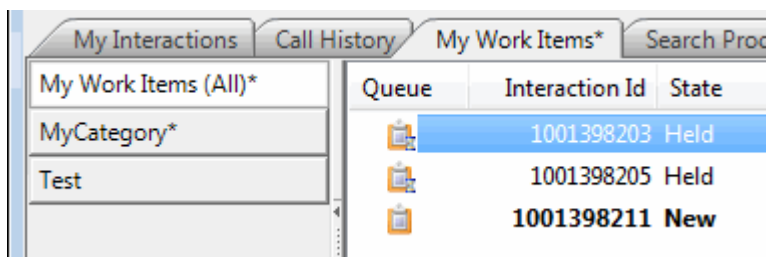
### List Customization

- You can sort the Work Item list by clicking any of the column headings in the list. Click to sort in ascending order. Click again on the same heading to sort in descending order.
- You can also rearrange, add, or remove columns. For more information, see [Customize Columns](#) for details.

### Work Item Alerts

- You are alerted to new work items by changes in the appearance of the My Work Items view.

**Note:** For more information about My Work Item view changes and other kinds of alerts that can occur when you receive a new work item, see [Work Item Alerts](#). The **Pop for Work Items** option controls whether the CIC client appears on top of any other running applications when a new work item arrives. For more information, see [General Alerting Options](#).



### Sections

- The My Work Items view is divided into two sections. The left side displays work item categories. The right side displays a list of your current work items.
- A collapsible splitter separates the category and work items sections. This splitter enables you to hide or show the category section.

### State

- The Work Item list displays the state of each work item. For more information, see Work Item States.

### Toolbar

- You can customize the Work Items view toolbar by adding, moving, or removing buttons or button separators, as in other CIC client toolbars. For more information, see Customizing Toolbars.

### Related Topics

- Pick Up a Work Item
- Put a Work Item on Hold
- View Process Details

## Pick Up a Work Item

**Requirements:** Only agents with the appropriate licenses and rights can use Interaction Process Automation. For more information, see IPA User Licenses, IPA User Rights, and Pickup.

A work item represents one step in a process. After you complete an assigned work item, the process may generate a new work item and send it to the appropriate agent or workgroup to continue the process.

Work items routed to you appear in the **My Work Items** view. Also, you can see the arrival and progress of work items in a Workgroup queue or in another user’s queue, if you have the appropriate rights to view these queues. Work Item Category, Work Item Description, and Work Item Due Date columns are not displayed by default in Workgroup or other user queue views, but you can add these columns. This helps you identify the types of work items in these queues. For more information, see Add or Remove View Columns.

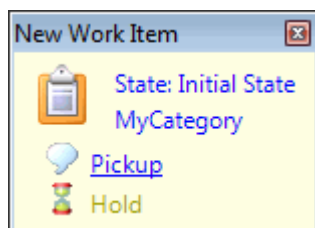
You pick up a work item to complete part of a process.

- You can pick up a work item that is assigned to you from the My Work Items view or from a desktop Work Item Alert.
- You can pick up a work item that is not assigned to you from a Workgroup queue or in another user’s queue, if you have permission to modify the queue in which the work item appears.

**Note:** If you launch a process and that process routes a work item to you in less than 10 seconds, the CIC client automatically picks up the work item. If you do not receive the work item within 10 seconds, then the CIC client displays a message alerting you that the process was started.

### To pick up a work item:

1. Do one of the following:
  - In a Work Item Alert (toast message), click **Pickup**.



- In the My Work Items view or the appropriate user or workgroup queue view, **double-click** a selected work item that is in a New, ACD - Wait Agent, or Held state.
- In the My Work Items view or the appropriate user or workgroup queue view, select a work item that is in a New, ACD - Wait Agent, or Held state and click the Pickup button.

- In the My Work Items view or the appropriate user or workgroup queue view, right-click a work item that is in a New, ACD - Wait Agent, or Held state and choose **Pickup** from the shortcut menu.
- 

**Result:** A form opens.

**Example form:** The form type and contents depend on the way the process is designed.

The screenshot shows a form window with a title bar that reads "Requester\_FullName: Anna Wilson (2001005907)". The form content includes:

- Loan Amount: 1000
- Credit Score: 597
- Customer Name: Anna Wilson
- Deny Reason:
- A large empty text input field.
- Two buttons at the bottom: "Approve" and "Deny".

2. Do one of the following:

- Perform the required action.

**Result:** The state of the work item changes to **Completed**. After a certain amount of time, a Completed work item is removed from the My Work Items view.

**Note:** When you pick up a work item, you are prompted to perform a step in the workflow process. You may need to enter data on a form or you might be required to click a button on a form that indicates you have reviewed or approved some step in a process. It depends entirely on how your organization's Workflow Designer has constructed the process.

- Put the work item on hold.

**Result:** The state of the work item changes to **Held**.

### Tips for Completing Work Items

- Putting a work item on hold **saves the current data**.

**Note:** Invalid data is not saved if you put a work item on hold. The last known good value, if any, for a field containing an error appears when you pick up the work item again.

- Work item required field are indicated by a background color. **Empty required fields** are indicated by asterisks (\*).
- Access to some IPA data can be restricted. For more information, see IPA Security Specifications.
  - If you don't have the necessary IPA security specification to view a **non-required field or control** on the work item, it is obscured.

- If you do not have the necessary IPA security specification for any of the **required data** in the work item, you see an error message that explains you cannot see the work item because you do not have access to the required data.
- Press **Tab** to move from field to field in a work item.

**Tip:** If the work item contains a **multi-line text box**, first press **Insert** to turn off automatic insert, then you can tab through all the fields on the form.

- **Cancel** buttons are always enabled. **Submit** buttons are enabled only when all required fields contain valid entries.
- Data entry errors are highlighted and are also indicated by an arrow. If you point to this arrow, a tool tip appears that can help you correct the error.

**Note:** Depending on the type of control and type of data, data entry errors can be indicated while you are making an entry or only after you move to the next field.

The screenshot shows a form window titled "None specified (1001511012)". The form contains several input fields, some of which are highlighted in yellow. The "Zip" field contains the value "1234" and has a red arrow pointing to it. A tooltip message is displayed over the "Zip" field, stating "The value must be at least 5 characters in length." Other fields include "First" (Sally), "Middle" (empty), "Last" (Ride), "Street Address" (2101 Westside Ave.), "City" (Muncie), "State" (IN), "SSN" (empty), "VIN" (empty), "Loan Amount" (1000), "E-mail Address" (carolyn.west@inin.com), and "Phone Number" (empty). At the bottom of the form are "Submit" and "Cancel" buttons.

### Related Topics

Put a Work Item on Hold  
Work Item Toolbar

## Put a Work Item on Hold

**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.

You can put a work item on hold and later pick up this work item to continue working with it.

**Note:** If you place a work item on hold, it remains on hold until you pick it up again. This applies both to ACD-routed work items and directly-routed work items.

**To put a work item on hold, do one of the following:**

- Click the **X** in the title bar to close a work item form without taking the required action or supplying all of the required information.
- In the My Work Items view, select a work item that is in a New, ACD - Wait Agent, or In Progress state and click the Hold button.
- In the My Work Items view, right-click a work item that is in a New, ACD - Wait Agent, or In Progress state and choose **Hold Work Item** from the shortcut menu.
- If the Work Item Alert is still visible on the desktop, click **Hold**.

**Related Topics**

Pick Up a Work Item  
Work Item Toolbar

## Transfer a Work Item

**Requirements:** 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.

You can transfer a work item to another user or workgroup queue.

### Licenses and Other Conditions

You do not need an IPA license to transfer a work item. You can transfer a work item to another user or workgroup under certain conditions:

- You need the right to transfer an interaction for the queue in which the work item appears.
- You can transfer work items only to other IPA-licensed users or to a workgroup with at least one IPA-licensed user.
- If you transfer a work item to a workgroup, the target workgroup must have an associated queue.
- You can transfer only work items that are in a New, ACD - Wait Agent, or Held state. You cannot transfer a completed work item or a work item you are viewing or revising (**In Progress** state).

**Note:** Interaction Supervisor users can transfer work items that are not on Hold, if necessary to continue a process. If a supervisor transfers a work item while an agent has that work item open, then any data changed or entered by the agent since the work item was picked up may be lost.

### Work Item Transfer Dialog Box

Transferring a Work Item uses the same basic Transfer dialog box as transferring an interaction, with some minor differences.

- The **Options** drop-down list limits your search for a transfer recipient to either users or workgroups or both. You cannot transfer a work item to a phone, station, station group or attendant profile, so these search criteria do not appear.

- The **Override Call Forwarding** check box does not appear as it applies only to transferred calls, not work items.
- The **Park**, **Voice Mail**, and **Consult** buttons are disabled as they do not apply to work items.

#### To transfer a work item from My Work Items or other queue:

1. In the My Work Items view or the appropriate user or workgroup queue view, select a work item that is in a New, ACD - Wait Agent, or Held state.
2. Do one of the following:
  - On the view toolbar, click the **Transfer** button.
  - Right-click the work item and choose **Transfer** from the shortcut menu.

**Result:** The Transfer dialog box appears.

3. In the **Transfer To:** text box, type all or part of the recipient's name.

**Result:** A drop-down list of choices appears.

**Tip:** If the drop-down list does not contain the recipient you expected, check the search criteria selected in the **Options** drop-down list and adjust them if necessary. You can search by user or workgroup name or both.

4. From the drop-down list, select the appropriate recipient.

**Result:** Status information appears for the selected user or workgroup, including whether a selected user is logged onto a CIC client and is available to accept the transferred work item. If the selected recipient is a workgroup, it shows how many interactions are in the workgroup queue, how many agents are logged on and how many agents are available. For more information, see Status Information for Transfer recipient.

5. Click the **Transfer** button.

**Result:** The work item is removed from your My Work Items view or other queue where you selected it and is routed to the selected agent or workgroup.

**Note:** If you are transferring a work item from another user's queue or workgroup queue, you may see this warning: "You do not own this interaction, are you sure you want to perform this action?" Click **Yes** to continue the Transfer.

**Important:** Certain work item settings are no longer in effect after a transfer. For example, work items can have a timeout setting that controls how much time a CIC user has to pick up an alerting work item before it is routed to another user. This pickup time limit no longer applies to the transferred work item because the transfer signals the work item is "being handled" or "under an agent's control."

#### Related Topics

My Work Items View  
Work Items

## Remove a Work Item from a Queue

**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.

You can remove a completed work item from the My Work Items queue if you don't want to wait for it to disappear automatically after you complete it.



**Note:** You can remove only **completed** work items from a queue.

**To remove a work item from the My Work Items view, do one of the following:**

- In the My Work Items view, right-click a work item and select **Remove from Queue** from the shortcut menu.  
**Result:** The work item is removed from the My Work Items view.
- In the My Work Items view, select a work item and press **Ctrl+Shift+R**.  
**Result:** The work item is removed from the My Work Items view.

You can also remove completed work items from workgroup and user queues if you have the right to monitor these queues and also the right to manage processes.

**To remove a work item from a workgroup queue or user queue:**

1. Do one of the following:
  - In the appropriate workgroup or user queue view, right-click on a work item and select **Remove from Queue** from the shortcut menu.
  - In the appropriate workgroup or queue user view, select a work item and press **Ctrl+Shift+R**.
2. If a warning dialog box appears reminding you that you do not own this interaction, click **Yes**.

**Result:** The work item is removed from the workgroup or user

**Related Topics**

My Work Items View  
Work Items

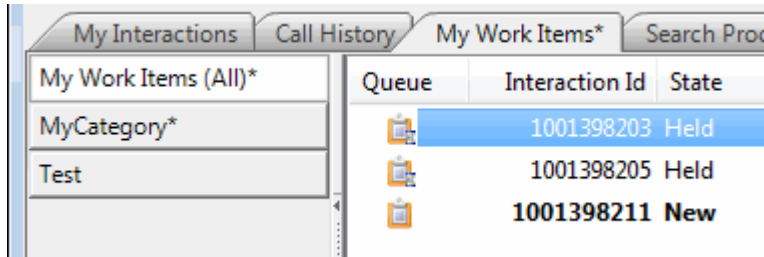
## Work Item Alerts

**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.

When an ACD-routed work item is sent to you, you have a limited time to pick it up before it is re-routed to another agent or workgroup. Because of this time constraint, several things alert you to the arrival of **any new work item** (even one that is not ACD-routed):

- If the CIC client is appropriately configured, the arrival of a new work item causes the CIC client to appear on top of any other application you are running. For more information, see Pop for Work Items.
- If you are occupied with a direct-routed work item (one that was sent to you specifically), you are always alerted to the arrival of any **new ACD-routed work item** in the My Work Items view.
- When a new work item appears in the My Work Items view, the view "pops" to the foreground if it was behind another view.
- The appearance of the My Work Items view changes.

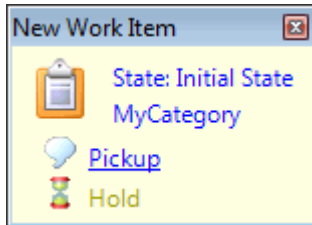
An asterisk (\*) appears on the My Work Items tab. An asterisk (\*) also appears after the name of the appropriate category and after the My Work Items [All] category. Finally, the details of a new work item appear in a **bold** font in the Work Item list.



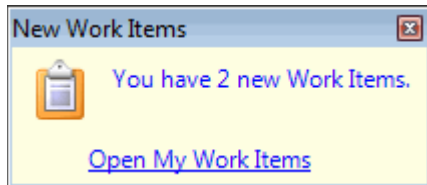
- A Work Item Alert (toast message) can also appear on your desktop.

**Note:** whether this desktop alert appears is controlled by same configuration setting that determines if a desktop alert appears for alerting interactions and camped calls. The amount of time it takes for the desktop alert to fade away is also controlled by a configuration setting. For more information, see Desktop Alerts.

- Normally, you see the alert when the work item arrives in your My Work Items queue. However, if you are not logged onto the CIC client at the time the work item is routed to you, you see the alert the next time you log on to the CIC client if the work item is **still in your queue**. There is no sound associated with this alert.
- You can click **Pickup** in the desktop alert to start processing the work item.



- You see a single desktop alert even if you get multiple work items at the same time. The text changes to show how many new work items you have received. Click **Open My Work Items** to switch to the My Work Items view. Then you can select one work item and click the Pickup button to start processing the work item.



- If a work item with a **defined due date** is currently assigned to you, a reminder dialog box appears on your Windows desktop when this work item reaches a pre-defined interval before its due date. For more information, see Work Item Reminders.

### Related Topics

My Work Items View  
 Pick Up a Work Item  
 Work Items

## Work Item Warnings

**Interaction Process Automation (IPA):** Only agents with the appropriate licenses and rights can use IPA in the CIC client. For more information, see IPA User Licenses and IPA User Rights.

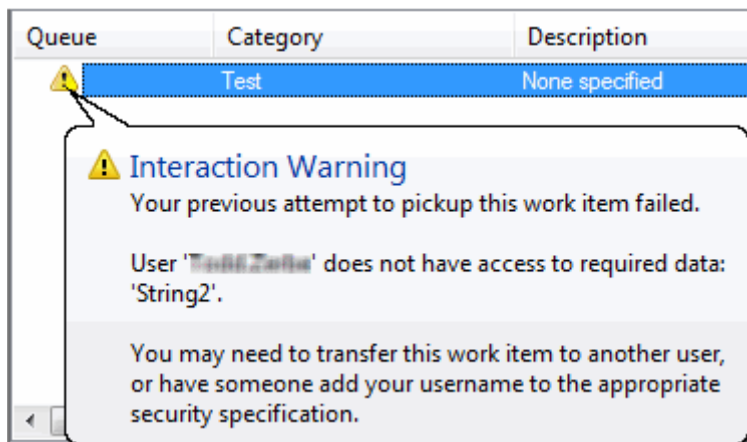
If the CIC client cannot display a work item for some reason, you receive a warning and the work item is placed on **Hold**. A work item may fail to display because you are not a member of the necessary IPA security specification to

view the secured data in the work item. You may not be able to pick up a work item because your version of the CIC client is not compatible with this work item.

The warning explains the reason the work item cannot be displayed and suggests what you can do to resolve the issue. These steps can include requesting the necessary rights from your CIC administrator, transferring the work item to another agent who has the appropriate rights, upgrading the CIC client to the most recent version, or some other appropriate course of action.

Once the issue is resolved, you can pick up the Work Item, if you have not already transferred it to another agent. When dealing with a Work Item warning, note that:

- A work item is placed on **hold** by a Warning. No further processing occurs until the issue is resolved or the work item is transferred to an agent who can handle it.
- The IPA administrator is **not automatically notified** of the issue in the Process Monitor. You must contact the administrator if you need assistance in resolving the issue.
- The Warning is removed if you log off and then log on to the CIC client. If you attempt to pick up the work item without resolving the issue, the Warning reappears.



#### Related Topics

- Work Item Alerts
- Working with Interaction Process Automation

## Work Item Reminders

**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.

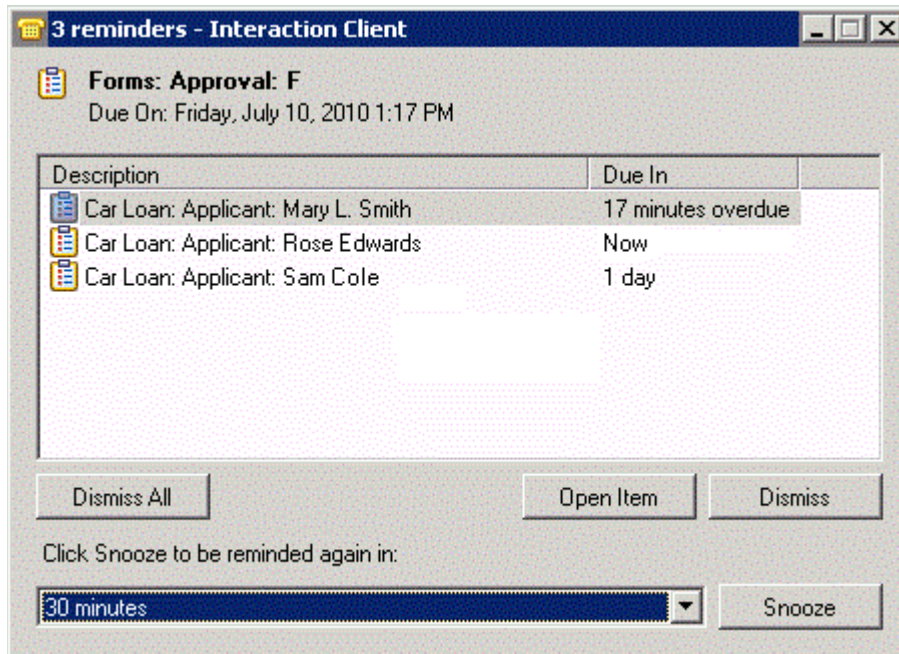
An ACD-routed work item can have a built-in due date. For example, you could be required to approve or deny an application within a week of its submission. IPA displays reminders when work items approach their due dates. The process designer decides whether you are reminded of a due date and how far in advance of the due date a reminder occurs.

**Note:** Work Item Reminders appear automatically only if you are running the CIC client.

#### Work Item Reminder dialog box

If a work item with a defined due date is currently assigned to you, a reminder dialog box appears on your Windows desktop when this work item reaches a pre-defined interval before its due date. If you have already received a

reminder for others work item that you have not yet completed, then both the previous reminders and the current reminder are listed in the Work Item Reminder dialog box, as shown below.



### Using the Work Item Reminder dialog box

You can do any of the following when working with reminders:

- Click **Dismiss All** to prevent any future reminders from appearing to you for any work item listed here.
- Select one or more work items and then click **Dismiss** to prevent any future reminders from appearing to **you** for the selected work item(s).

**Note:** Dismissing a reminder affects reminder behavior only as long as the work item is assigned to you. If you dismiss a reminder and the associated work item is then assigned to another agent, the new agent is reminded when the due date approaches.

- Select a work item and click **Open Item** to pick up the selected work item.
- Select one or more work items, select a reminder interval from the drop-down list and then click **Snooze** to dismiss the current reminder and cause another reminder to appear later.

### Related Topics

**Work Items**

## Work Item Toolbar

**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.

The Work Item toolbar helps you manage work items. It appears on the My Work Items view. The actions available on the Work Item toolbar reflect the state of the currently selected work item. Use any enabled button to manage your current work items.

My Work Items (All)	Queue	Interaction Id	State	Category	Description
MyCategory		1001398202	In progress	Test	None specified
Test		1001398203	Held	Test	None specified
		1001398205	Held	MyCategory	State: Initial State

Pickup
 Transfer
 Hold
 Process Details

### Related Topics

- Pick Up a Work Item
- Put a Work Item on Hold
- View Process Details
- Working with Interaction Process Automation

## Working with Interaction Tracker

### Working with Interaction Tracker

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

Interaction Tracker maintains a history of interactions between CIC client users and outside contacts. It tracks various types of interactions (phone, fax, email, web chat).

Use Interaction Tracker to:

- View an interaction history related to your currently selected interaction.  
For example, the Interactions tab of the Related Items view can include past interactions with the current caller, or with anyone in the caller's organization or with anyone at the same location. Or you can use the Conversation History tab to display a list of e-mails related to the current email interactions.
- View the details of any interaction listed in the Related Items view.
- Display a **directory of selected Interaction Tracker contacts**.
- Use an Interaction Tracker Filtered Directory to **start new interactions with Tracker contacts**.  
For example, you can double-click a Tracker contact's phone number to call the person, or click the appropriate Send Email button on the Directory toolbar to send an email message.
- Match **your current interaction to a contact** in the Interaction Tracker database if the match does not occur automatically or if more than one possible match is found.
- Add a new contact, organization, or location to the Interaction Tracker database.
- Playback a recorded interaction.

### Tracker Licensing and Rights

The following licenses, Access Control Rights, and Security Rights are required for Interaction Tracker features.

**Note:** Contact your CIC administrator if you need a Tracker license or additional rights.

- Your company must have a **Tracker Feature license** in order to create and maintain the Tracker database of interaction histories, contacts, organizations, and locations.
- You need a **Tracker Access license** to:
  - Display and use any Interaction Tracker Filtered directory.
  - Find a Tracker contact or Find a Tracker organization.
  - Display the Related Items view.
- You need a **Tracker Access license** to view survey score information for an interaction in the Related Items View.
- You need a **Tracker Access license** and the appropriate **Tracker Policy Security rights** to add, modify, and delete Tracker contacts, organizations, or locations.
- The Related Interactions Page Security right and Customize Client Security right control whether you can display the Related Items View.
- The View History Users Access Control right determines whose interactions appear in the Related Items view. The CIC administrator can grant you rights to the interactions belonging to all or selected users.
- The Tracker Policy Security rights control which Tracker functions are available to CIC client users.
- You must have the View General Directories Access Control right for the appropriate Interaction Tracker databases in order to resolve a contact manually. For more information, see Resolve a Contact.

**Tip:** The Tracker Administrator Security right gives you all of the Tracker Policy rights.

## Recording License and Rights

To playback a recorded interaction, you need the Recorder Client Access license. You also need to be assigned an Interaction Recorder Policy with the rights to **play recordings** and **retrieve recordings**.

### Related Topics

- Contact Resolution
- Playback a Recorded Interaction
- Working with Interaction Tracker Filtered Directories

## Contact Resolution

### Contact Resolution

**Requirements:** Contact Resolution is available to all users in organizations that maintain an Interaction Tracker database. However, some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

Contact Resolution is a process that matches interactions with contacts listed in Interaction Tracker public and private data sources. Contact Resolution uses an RWP (Reverse White Pages) lookup to match the telephone number of the current interaction with a contact in the Interaction Tracker database.

After an Interaction Tracker contact is associated with an interaction, Interaction Tracker Server saves a record of the interaction in the Interaction Tracker database. Contact Resolution helps ensure more accurate data for trend analysis or other research.

### Contact Resolution Process

Contact resolution uses the following rules to determine if a contact match is made.

- If only one match is found, the interaction is resolved.
- If one private contact match and one public contact match are found, then the private contact match is used and the interaction is resolved.

**Note:** Interaction Contact list sources are defined as either public or private by the administrator of the Interaction Tracker database. Private Interaction Contact list sources are searched only for *inbound* interactions. For more information, contact your CIC administrator.

- If the number of private and public contact matches is greater than one, and the number of private contact matches is **not exactly one**, then the interaction is considered unresolved. You are prompted to resolve the contact.

If the Interaction Tracker contact resolution process results in a match, the contact is considered resolved and you don't need to do anything. If an appropriate contact is not found, you can search for another match or add a new contact. For more information, see [Resolve a Contact](#).

### Related Topics

Add a Tracker Contact  
Find a Tracker Contact  
Resolve a Contact

## Resolve a Contact

**Requirements:** Contact Resolution is available to all users in organizations that maintain an Interaction Tracker database. However, some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. You must have the View General Directories Access Control right for the appropriate Interaction Tracker databases in order to resolve a contact manually. For more information, see [Tracker Licensing and Rights](#).

Contact resolution matches your current interaction to a contact in the Interaction Tracker database. The contact is matched against all public contacts and your private contacts. Contact resolution does not attempt to match the contact to private contacts belonging to other users.

You are prompted to resolve a contact only when it cannot be resolved automatically. An unresolved contact occurs when contact resolution cannot find a match to the telephone number associated with the current interaction in any of your private or public Interaction Tracker contact list sources. It can also occur if contact resolution locates more than one contact with a matching telephone number. For more information, see [Contact Resolution](#).

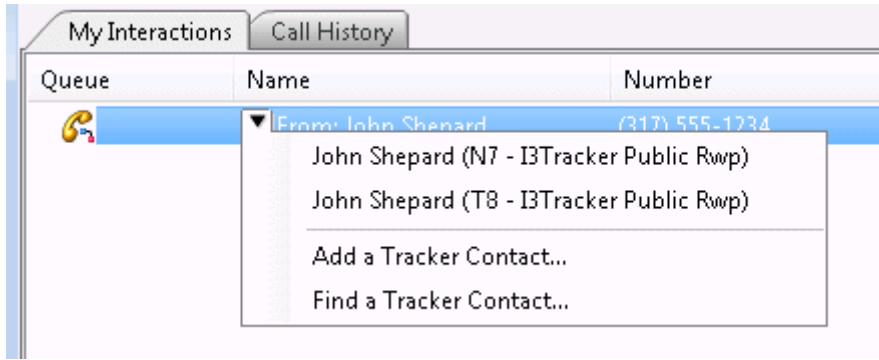
### How to Resolve a Contact

When you need to resolve a contact, the **Contact Resolution down arrow** appears to the left of the caller's name. If you point to the arrow, a tooltip appears.

#### To resolve a contact:

1. Click the Contact Resolution down arrow.

**Result:** The Contact Resolution drop-down list appears.



**Note:** The contact's organization and the name of the Tracker list source containing the contact information appear in parentheses after the contact's name. Use this information to select the correct contact when multiple matches are found.

2. Do one of the following:
  - Select the appropriate contact from the list of matches.
 

**Result:** The name of the selected contact is associated with the interaction and the interaction is resolved.
  - Select **Add a Tracker Contact** to create a new contact in the Interaction Tracker database.
  - Select **Find a Tracker Contact** to use criteria other than the telephone number to search for the appropriate contact.
  - Right-click the current interaction and use the interaction shortcut menu to Quick Add a Contact.

### Related Topics

Contact Resolution  
 Add a Tracker Contact  
 Find a Tracker Contact  
 Quick Add a Contact

## Interaction Resolution

**Requirements:** Contact Resolution is available to all users in organizations that maintain an Interaction Tracker database. However, some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

Interaction resolution is a process that associates an interaction with an Interaction Tracker contact. You can search by Application ID or Tracker attribute or use an advanced search to locate the appropriate Tracker contact.

### To resolve an interaction by application ID or Tracker attribute:

1. Right-click the current interaction.
2. From the interaction shortcut menu, do one of the following:
  - Select **Interaction Tracker > Resolve Interaction > By Application Id.**
  - Select **Interaction Tracker > Resolve Interaction > By Tracker Attribute.**

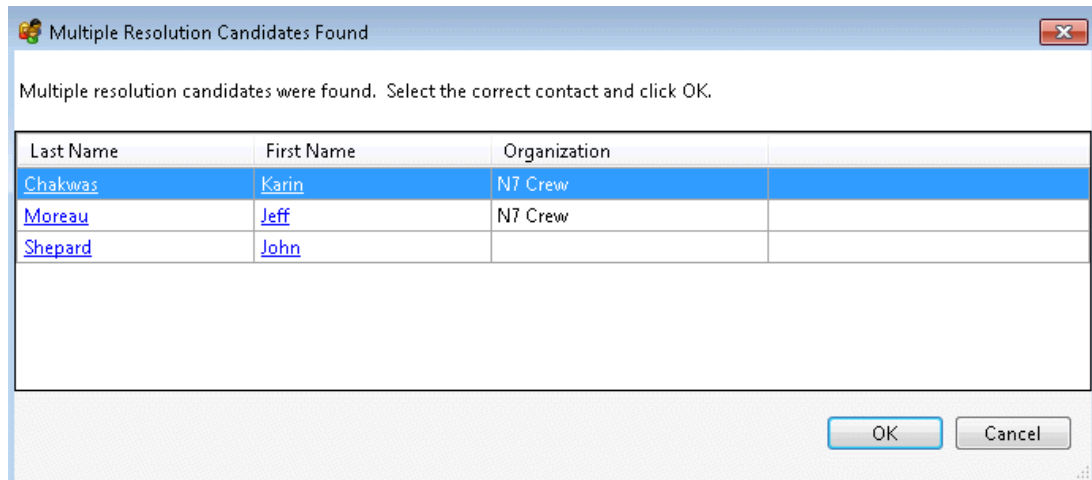
**Result:** The **Resolve Interaction** dialog box appears.

3. Type the Application Id or enter a value for a selected tracker attribute, then click **OK**.

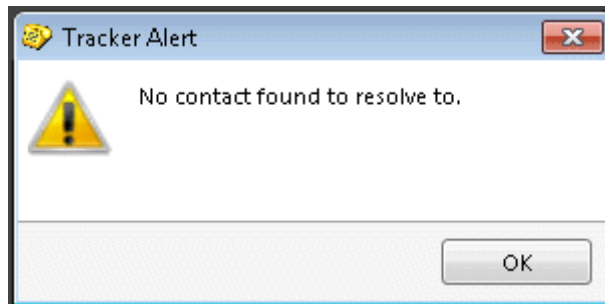


**Result:** One of the following happens:

- If a single matching contact is found, the interaction is associated with that Tracker contact. The caller name on the selected interaction changes to that of the matching contact.
- If more than one matching contact is found, the **Multiple Resolution Candidates Found** dialog box appears. Select the appropriate contact and click **OK**.



- If the appropriate Tracker contact cannot be located, the Tracker Alert dialog box appears. You can search for contact again, using different criteria.



**To resolve an interaction by using an advanced search:**

1. Right-click the current interaction.
2. From the interaction shortcut menu, Select **Interaction Tracker** > **Resolve Interaction** > **Find a contact to resolve to**.

**Result:** The Find Contact Wizard appears.

3. Enter your search criteria and click **Next >**.

**Tip:** For more information, see [Find a Tracker Contact](#).

4. In the Search Results page of the Find Contact Wizard, do one of the following:
  - To complete contact resolution, select an entry and click **Finish**.
  - To further refine your search, click **<Back** and enter additional search criteria.
  - Click the **Last Name** hyperlink or right-click anywhere on the row containing the contact and select **Properties** from the shortcut menu.

**Result:** The Properties for Contact dialog box appears. Use it to modify the contact information, add a Tracker organization, or add a Tracker location, as needed.

Properties for Contact - Gray Robin

General | IC Settings | External Database | Image and Web | Addresses | Interaction Addresses | Attributes | Interactions

First Name: Gray Title: [Dropdown]

Middle Name: [Text Box] Individual Type: External [Dropdown]

Last Name: Robin Owner: [Text Box]

Organization: [Text Box] Company: [Text Box]

Location: [Text Box] Department: [Text Box]

Job Title: [Text Box]

Assistant Name: [Text Box]

Active

OK Cancel

Last Modified: 8/24/2004 1:22 PM Version: 1

## Related Topics

Resolve a Contact

## Working with Interaction Tracker Filtered Directories

### Working with Interaction Tracker Filtered Directories

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing. For more information about Interaction Tracker directories, see the *Interaction Tracker Filtered Directories Technical Reference*.

You can create a new Interaction Tracker Filtered Directory view based on Interaction Tracker contacts. Tracker Filtered Directories are custom directories of Interaction Tracker contacts and contain only "Public" (available to all users) contacts.

You use selection criteria (filters) based on existing contact information in the Interaction Tracker database to create an Interaction Tracker Filtered Directories. This enables you to communicate quickly and easily with contacts in directories created from your established Interaction Tracker customer accounts.

**Note:** Before you can display or use any Interaction Tracker Filtered Directories, you must first create them.

Each Interaction Tracker Filtered directory contains a list of names. You can use these directory entries to:

- Call any number associated with the Tracker contact name by double-clicking on a name, single-clicking on any of the phone number "hot links" or selecting a name and clicking the appropriate Dial toolbar button.
- Transfer a call to a number in a Tracker directory by dragging and dropping a call on a name in a directory.
- Add, remove, sort, re-order, and filter columns. For more information, see Customize Columns.
- Right-click a Tracker directory entry to view associated properties and other information (address, phone numbers, etc.).
- Modify a Tracker directory entry if you have the appropriate permission as assigned to you in Interaction Administrator.

## Related Topics

Close an Interaction Tracker Filtered Directory View  
Create an Interaction Tracker Filtered Directory View  
Display an Interaction Tracker Filtered Directory View  
Edit an Interaction Tracker Filtered Directory View  
Delete an Interaction Tracker Filtered Directory View  
View Tracker Directory Entries

## Close an Interaction Tracker Filtered Directory View

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

You stop displaying an Interaction Tracker Client directory view in the CIC client, but keep it available to display in the future. Close a view instead of deleting it, if you do not currently want to display it, but still want it available for future use. For more information, see Delete an Interaction Tracker Filtered Directory.

### To close an Interaction Tracker Filtered Directory view:

- Right-click the Interaction Tracker Filtered Directory view tab and click **Close** (*view name*).

**Result:** The Interaction Tracker Filtered Directory view tab no longer appears in your CIC client. The Interaction Tracker Filtered Directory view remains available if you decide to display it again.

### Related Topics

Working with Interaction Tracker Filtered Directories

## Create an Interaction Tracker Filtered Directory

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

You can create a new Interaction Tracker Filtered Directory view and add it to your interface.

### To create a new Interaction Tracker Filtered Directory:

- 1.
1. In the Create New View dialog box, from the **Categories** list, select **Directories**. In the **Views** list, select **Tracker Directories**. In the **Select Tracker Directories to Add** dialog box, click the **Add** button.



**Tip:** **Add**, **Edit**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip.

**Result:** The Interaction Tracker Directory Settings dialog box appears.

**Interaction Tracker Directory Settings**

**General**  
Use this page to specify the filter criteria for this Interaction Tracker directory. The contacts listed in this directory will be pulled from the Interaction Tracker database. This feature requires a valid Tracker Access license.

Directory Name:

Organization:   Location:  

Individual Type:  Department:

**Address**

Address Type:  City:  State:

Zip:  Country:

**Attributes**

Name	Value

**Note:** None of the filter criteria fields in the Interaction Tracker Directory Settings dialog box are required. You can filter for any of the filter fields, or none. If you only specify a directory name, and no filter criteria, a directory view is created but does not contain any contacts.

- In **Directory Name**, type a name for the new Tracker Directory view.
- In the **General**, **Address**, and **Attributes** sections, specify the filtering criteria for the new Tracker directory.

**Note:** The contacts included in this directory are based on the information in the existing Customer Interaction Center Tracker database. For more information about filtering criteria, see the *Interaction Tracker Filtered Directories Technical Reference* in the Documentation Library.

**Tip:** Click the Search control next to the Organization text box to search for or add a new organization. If you want a location to be considered when creating your directory, after you have selected or created an organization, click the Search control next to the Location text box to select a location or add a new location.

- To create the new Interaction Tracker Directory view, click **OK**.

**Result:** One of two things happens:

- If you added the new view from the **Tracker Directories** dialog box, the name of the new view appears there.
  - If you added the new view from the **Create New View** dialog box, the name of the new view is added to the **Available Items** list.
- To display your new Interaction Tracker Filtered Directory view, do one of the following:

- From the **Tracker** menu select **Open Directory**. From the **Open Directory** menu, select the name of the directory view you want to display.
- In the **Create New View** dialog box, select the view from the **Available Items** list and click the **Add >** button between the **Available** items and **Selected items** lists. Click **OK**.

**Tip:** Enter all or part of the view name in the Filter items text box to locate the view name.

**Result:** The new Interaction Tracker Directory view appears.

#### Related Topics

Working with Interaction Tracker Filtered Directories

## Delete an Interaction Tracker Filtered Directory View

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

You can permanently remove an Interaction Tracker Filtered Directory view from the list of available directory views.

**Tip:** If you want to stop displaying the directory view but not delete the view, see Close an Interaction Tracker Filtered Directory View.

#### To delete a displayed Interaction Tracker Filtered Directory view:

1. Right-click the Interaction Tracker Filtered Directory view tab and click **Delete** (*view name*).
2. Click **Yes** to confirm you want to delete the view.

**Result:** The name of the Interaction Tracker Filtered Directory view is removed from the list of Available Items and the Interaction Tracker Filtered Directory view is removed from your CIC client interface.

#### To delete an Interaction Tracker Filtered Directory view that is not currently displayed:

1. In the Create New View dialog box, from the **Categories** list, select **Directories**. In the **Views** list, select **Tracker Directories**. In the **Select Tracker Directories to Add** dialog box, from the Available Items list, select the name of the view.

**Tip:** Enter all or part of the view name in the **Filter items** text box to locate the view name.

2. Click the **Delete** button.

**Tip:** The **Delete** button is active only if you have the appropriate rights to the selected Interaction Tracker Filtered Directory view.

**Note:** In the Select Tracker Directories to Add dialog box, the **Add**, **Edit**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip.

3. Click **Yes** to confirm you want to delete the view.

**Result:** The name of the Interaction Tracker Filtered Directory view is permanently removed from the list of **Available Items**.

#### Related Topics

Working with Interaction Tracker Filtered Directories

## Display an Interaction Tracker Filtered Directory View

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

You must first create an Interaction Tracker Filtered Directory before you can display it.

### To display an existing Interaction Tracker Filtered Directory view:

1. In the Create New View dialog box, from the **Categories** list, select **Directories**.
2. In the **Views** list, select **Tracker Directories**.

**Result:** All of your previously created Tracker Directory views appear in the **Select Tracker Directories to Add** dialog box.

3. Select the view name from the **Available Items** list.

**Tip:** Enter all or part of the view name in the **Filter items** text box to locate the view name.

4. Click the **Add >** button.

**Result:** The selected view appears in the **Selected items** list.

5. Optional. Select and add additional views to the Selected items list.
6. When you complete your selection or selections, click **OK**.

**Result:** The selected view or views appears.

### Related Topics

Working with Interaction Tracker Filtered Directories

## Edit an Interaction Tracker Filtered Directory View

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

You can edit an existing Interaction Tracker Directory view to update the filtered information and contacts included in the directory.

### To edit an existing Interaction Tracker Directory view:

1. Do one of the following:
  - Right-click the tab of a displayed Interaction Tracker Filtered Directory view and click **Edit** (*view name*).
  - For a non-displayed view, in the Create New View dialog box, from the **Categories** list, select **Directories**. In the **Views** list, select **Tracker Directories**. In the **Select Tracker Directories to Add** dialog box, from the **Available** Items list, select the name of the view and click the **Edit** button.

**Tip:** The **Add**, **Edit**, and **Delete** buttons appear below the Available Items list. Point your mouse to a button to see an identifying tooltip.

**Result:** The Interaction Tracker Directory Setting dialog box appears.

2. Make any necessary adjustments to the filter settings.

**Tip:** For more information about filter settings, see [Create an Interaction Tracker Filtered Directory](#).

3. Click **OK**.

**Tip:** To display this updated directory, see [Display an Interaction Tracker Filtered Directory](#).

### Related Topics

[Working with Interaction Tracker Filtered Directories](#)

## View Tracker Directory Entries

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see [Tracker Licensing](#).

You can view extended information for Interaction Tracker Filtered Directory entries.

### To view Interaction Tracker Filtered Directory entries:

1. Right-click a directory entry.
2. From the drop-down menu, click **Properties**.

**Result:** The Properties for Contact dialog box appears.

The several tabs of the Properties dialog box can contain similar information to other CIC client directory entries:

- 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

Interaction Tracker-specific information is displayed on these tabs:

- Tracker Addresses

This displays the physical addresses for organizations, locations, and individuals. Addresses have types, such as Home, Business, Business2, and Shipping. Your CIC administrator can extend the address types.

- TrackeriAddresses



This displays the electronic addresses for organizations, locations, and individuals. The iAddresses have types, such as Phone number, Fax number, and email address, and subtypes such as Home, Business, Assistant, and Home2. Your CIC administrator can extend the iAddressconnection types and subtypes.

- Tracker Attributes

This displays user-defined attributes for some of the more significant entities, such as Interaction Segments, Individuals, Locations and Organizations. Additional information can be associated with these entities.

### Related Topics

Add a Tracker Contact  
Working with Interaction Tracker Filtered Directories

### Working with Tracker Information

## Working with Interaction Tracker Information

**Requirements:** You can add, modify, and delete Tracker contacts and organizations only if you have a Tracker Access License and the appropriate Tracker Policy Security rights. Finding Tracker contacts and organizations requires a Tracker Access License. For more information, see Tracker Licensing.

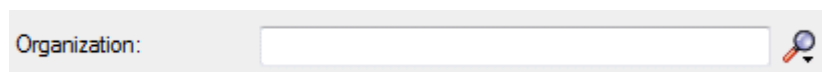
You can create and manage Interaction Tracker information during the Contact Resolution process.

- Add a Tracker Contact
- Find a Tracker Contact
- Modify Tracker Contact Information
- Delete a Tracker Contact
- Add a Tracker Organization
- Find a Tracker Organization
- Add a Tracker Location
- Display an Interaction Tracker Filtered Directory

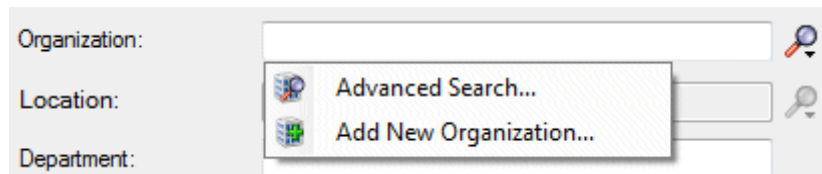
### Search Control

The Search control appears in several places when you work with Tracker information.

- Click the **Search icon** to perform a search based on the information in the associated text box.



- Click the **down arrow** on the Search control to perform an advanced search or to add a new record.



### Related Topics

Contact Resolution

## Working with Interaction Tracker

**Tracker Contacts****Add a Tracker Contact**

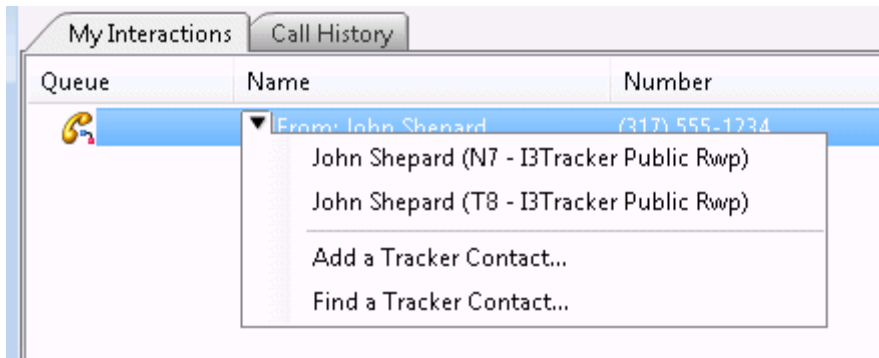
**Requirements:** You need a Tracker Access license and the Add Individuals Security right to add a Tracker Contact. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

If the Contact Resolution process or your own search criteria cannot find the appropriate contact, you can create a contact. To add a contact to the Interaction Tracker database, you need a Tracker Access License and the appropriate Tracker Policy Security rights. For more information, see your CIC administrator.

**Note:** You can also use the interaction shortcut menu to Quick Add a Contact.

**To add a Tracker Contact:**

1. During the contact resolution process, select the current interaction and click the Contact Resolution down arrow. Select **Add a Tracker Contact** from the Contact Resolution drop-down list.



**Result:** The **Add Contact** Wizard appears.

2. In the Name and Individual Type view, complete the necessary information and then click **Next**.

<b>Title</b>	Use the arrow to select a title from the drop-down list.
<b>First Name</b> <b>Middle Name</b> <b>Last Name</b>	Enter the contact's first, middle, and last names in the appropriate text boxes.
<b>Individual Type</b>	Use the arrow to select a type from the drop-down list. Examples of contact types include <b>System, IC User, External, Internal, Customer, Partner, Vendor, and Public Relations.</b>
<b>Allow others access to this Contact?</b>	Select <b>Yes</b> or <b>No</b> to control whether others can view or use this Contact information. Selecting <b>No</b> indicates that this contact is private.  <b>Rights:</b> To indicate that a Tracker contact is private, you must have created the contact and have the Have Private Contacts Security right

**Result:** The Organization page of the Add Contact Wizard appears.

**Add Contact - Joe Gray**

**Organization**  
Enter the information for the organization that the contact belongs to. If you enter an organization, you can also enter a location. If you do not know any of this information, you can leave it blank.

Organization:

Location:

Department:

Job Title:

Assistant Name:

< Back    Next >    Cancel

- In the Organization text box, type all or part of the Organization's name and press **Enter** or click the Search control next to this text box.

**Result:** The Organization drop-down list appears.

Organization:

Location:

Department:

Job Title:

Assistant Name:

- Interactive Intelligence, Inc
- Interactive Intelligence, Inc.
- Advanced Search...
- Add New Organization "Interactive Intelligence, Inc" ...

- Do one of the following:
  - If the Organization is already in the Tracker database, select it from the list.
  - If you think the organization is in the Tracker database, but does not appear in the list, select **Advanced Search**. Specify additional search criteria in the Find Organization Wizard. For more information, see Find a Tracker Organization.
  - Click **Add New Organization** to add this organization to the Tracker database.

**Result:** The Add Organization Wizard appears. For more information, see Add a Tracker Organization.

- In the Location text box, if an organization has more than one location, type all or part of the location name. Then press **Enter** or click the Search control next to this text box.

**Tip:** Display the entire list of Locations for this Organization by pressing **Enter** or clicking the Search control before typing anything in the Location text box.

**Result:** The Location drop-down list appears.

The screenshot shows a form with the following fields and values:

- Organization:** Interactive Intelligence, Inc.
- Location:** A dropdown menu is open, displaying a list of locations:
  - Deerfield Beach (Deerfield Beach, FL United States)
  - EMEA (United States)
  - Indy HQ (Indianapolis, Indiana United States)
  - Netherlands (Amsterdam Netherlands)
  - St. Louis (St. Louis, MO United States)
  - Add New Location...
- Department:**
- Job Title:**
- Assistant Name:**

- Do one of the following:
  - If the location is already in the Tracker database, select it from the list.
  - Click **Add New Location** to add a location for this organization to the Tracker database.

**Result:** The Add Location Wizard appears. For more information, see Add a Tracker Location.

- Complete any or all of the remaining information and then click **Next**.

<b>Department</b>	Type the name of the department to which this contact belongs.
<b>Job Title</b>	Type the contact's job title.
<b>Assistant Name</b>	Type the name of this contact's assistant.

**Result:** The Business Contact Information page of the Add Contact Wizard appears.

The screenshot shows a dialog box titled "Add Contact - Joe Gray" with a close button (X) in the top right corner. The main heading is "Business Contact Information" with a sub-instruction: "Enter the address, phone, fax and e-mail address for this contact." The form contains the following fields:

- Street Address: 7601 Interactive Way
- City, State/Province: Indianapolis IN
- Zip, Country: 46278 USA
- Phone: [Empty] Ext. [Empty] [Green Checkmark]
- Fax: [Empty] Ext. [Empty] [Green Checkmark]
- E-mail: [Empty]

At the bottom of the dialog are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel".

8. In the Business Contact Information page, supply the business address, phone, and other information for this contact and then click **Next**.

**Tip:** You can type the name of any state or province in the **State/Province** text box or the name of any country in the **Country** text box. Click the Phone Number control to validate and format the phone number.

**Result:** The Addresses page of the Add Contact Wizard appears.

**Add Contact - Joe Gray**

**Addresses**  
Each Contact can have any number of addresses. Use the buttons below to manage the list of addresses for this Contact.

Address	Address Type
<input checked="" type="checkbox"/> 7601 Interactive Way Indianapolis IN 46278 USA	Business

9. Do one of the following:

- If you have added all the necessary addresses for this contact, click **Next >** and **skip the next step.**
- To update the business address information, click **< Back** and **return to the previous step.**
- To add another address for this contact, click **Add** and **go to the next step.**

**Result:** The Address Properties dialog box appears.

**Address Properties**

Street Address:

City:

State/Province:

Zip:

Country:

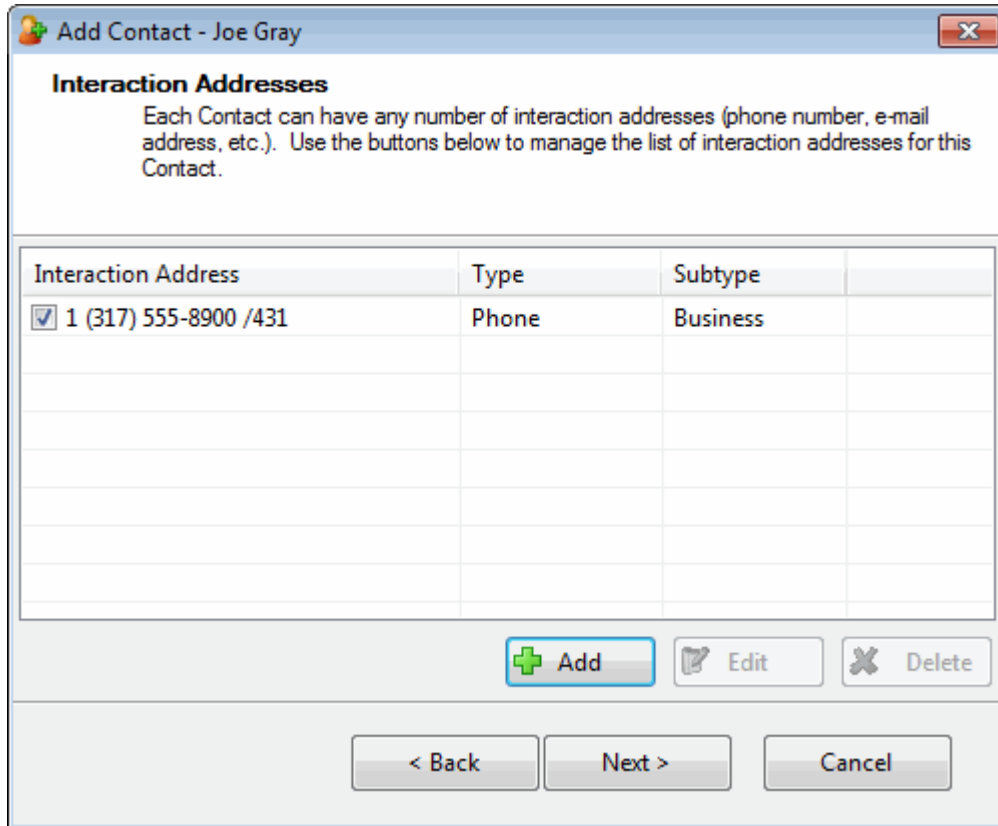
Address Type:

10. In the Address Properties dialog box, supply the information for this address. Use the arrow at the end of the **Address Type** drop-down list to identify the type of address. Click **OK**.

**Note:** **Home**, **Shipping**, and **Billing** are default Interaction Tracker address types. Your CIC administrator can define different or additional address types. If you have any questions about address types, see your administrator.

Click **Add** in the Addresses page and repeat this step for each address you want to add for this contact. After you finish supplying physical addresses for this contact, click **Next >** and continue to the next step.

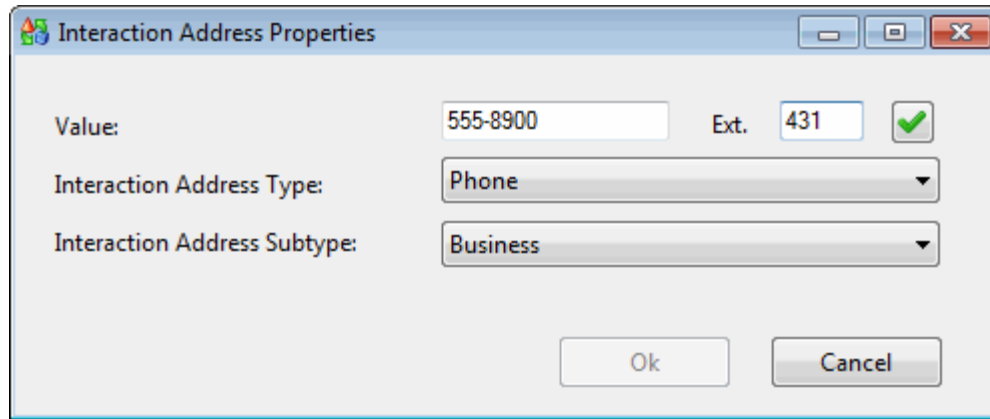
**Result:** The Interaction Addresses page of the Add Contact Wizard appears.



11. In the Interaction Addresses page, do one of the following:
  - If you have added all the necessary addresses for this contact, click **Next >** and **skip the next step**.
  - To add another physical address, click **< Back** and click **Add** in the Addresses page.
  - To add an iAddress for this contact, click **Add** and **go to the next step**.

**Result:** The Interaction Address Properties dialog box appears.





- In the Interaction Address Properties dialog box, enter the contact’s interaction address information and click **OK**.

**Note:** An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. Phone numbers, fax numbers, email addresses, and web chat addresses are kinds of interaction addresses.

<b>Value</b>	Enter the phone number, fax number, email address, or web chat address, depending on which iAddress type you select.
<b>Ext.</b>	Enter the extension number, if applicable.
<b>Interaction Address Type</b>	Use the arrow at the end of this drop-down list to select the type of iAddress you want to add ( <b>Phone, Mobile, Pager, Chat, Email, Fax</b> or <b>URL</b> ).
<b>Interaction Address Subtype</b>	Use the arrow at the end of this drop-down list to select the iAddress subtype ( <b>Business, Business 2, Home, Home 2, Assistant</b> , or <b>Unclassified</b> ).

Click **Add** in the Interaction Addresses page for each iAddress you want to add for this contact. After you finish supplying electronic addresses for this contact, click **Next** and continue to the next step.

**Result:** The Tracker Attributes page of the Add Contact Wizard appears.

**Add Contact - Joe Gray**

**Tracker Attributes**  
Tracker attributes can be assigned to contacts, organizations and locations. Use the controls below to assign attribute values. (Note: Values can be left blank as well.)

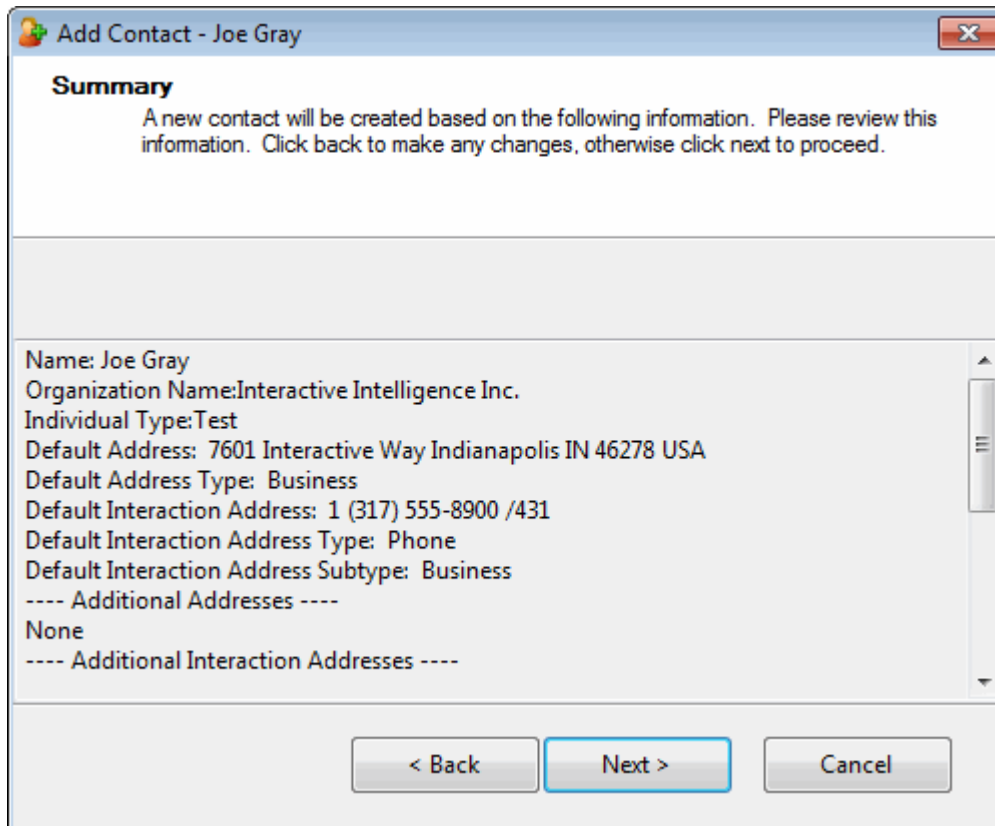
Attribute Type	Value
Remarks	
Gender	
Subtype	
NT Domain User	
Income Level	
Partner Level	
VMSegmentDuration	
OrgOnly_WithLegalVals	
OrgOnly_WithNoLegalVals	
Reason For Call	

< Back    Next >    Cancel

- In the Tracker Attributes page, supply values for the displayed Attribute Types and click **Next**.

**Note:** Interaction Tracker enables you to store attributes for contacts, organizations or locations. These attributes can include such information as personal characteristics, historical notes about a particular situation, or other significant details.

**Result:** The Summary page of the Add Contact Wizard appears.

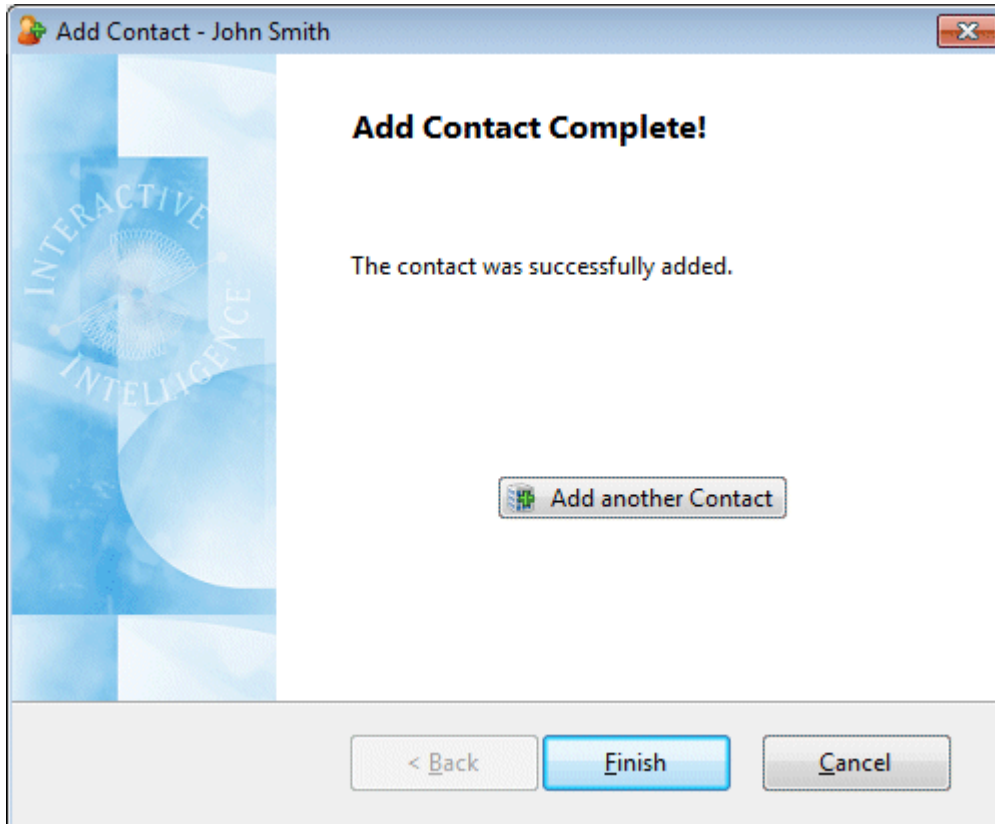


The screenshot shows a dialog box titled "Add Contact - Joe Gray" with a close button (X) in the top right corner. The dialog is divided into three main sections. The top section is titled "Summary" and contains the text: "A new contact will be created based on the following information. Please review this information. Click back to make any changes, otherwise click next to proceed." Below this is a large, empty rectangular area. The middle section is a scrollable list of contact details: "Name: Joe Gray", "Organization Name: Interactive Intelligence Inc.", "Individual Type: Test", "Default Address: 7601 Interactive Way Indianapolis IN 46278 USA", "Default Address Type: Business", "Default Interaction Address: 1 (317) 555-8900 /431", "Default Interaction Address Type: Phone", "Default Interaction Address Subtype: Business", "---- Additional Addresses ----", "None", and "---- Additional Interaction Addresses ----". The bottom section contains three buttons: "< Back", "Next >", and "Cancel".

14. In the Summary page, do one of the following:

- Click < **Back** to return to the appropriate page and make corrections.
- Review your entries and click **Next** to save this contact information.

**Result:** The "Add Contact Complete!" page appears.



15. In the Add Contact Complete! page, do one of the following:
- Click **Add another Contact**. Return to the beginning of this procedure.
  - Click **Finish** to return to the CIC client.

#### Related Topics

Contact Resolution  
Find a Tracker Contact  
Modify Tracker Contact Information  
Delete a Tracker Contact  
Resolve a Contact

### Quick Add a Contact

**Requirements:** You need the Add Individuals Security right to quick add a Tracker Contact. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

If the Contact Resolution process does not find the Interaction Tracker contact that you want, and you are unable to find the appropriate contact using your own search criteria, you can create a new contact in the Interaction Tracker database if you have a Tracker Access License and the appropriate Tracker Policy Security rights. For more information about this feature or your right to use it, see your CIC administrator.

When you "quick add" a new Tracker contact, you need to specify only the most important Tracker contact information.

**Note:** You can also click the contact resolution down arrow next to the current interaction to add a Tracker contact or you can use the Tracker menu to add a Tracker contact at any time.

**To quick add a Tracker Contact:**

1. Right-click the current interaction.
2. From the interaction shortcut menu, select **Interaction Tracker > Quick Add Contact**.

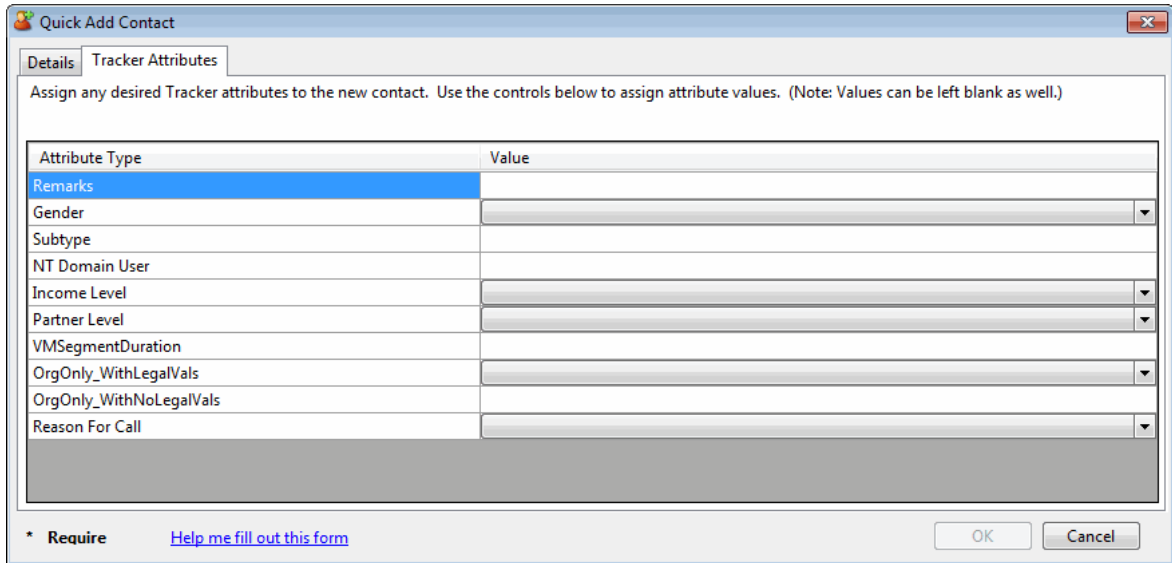
**Result:** The Quick Add Contact dialog box appears.

3. In the **Contact Information** tab, complete the required information and as much of the optional information as you deem necessary.

**Tip:** Required information is indicated by an asterisk (\*). Notice that the phone number for the selected interaction appears automatically in the **Business Phone** text box. Click the Phone Number control to validate and format the phone number. The Search icon next to **Organization** enables you to locate the name of an existing organization.

4. In the **Tracker Attributes** tab, supply values for the displayed Attribute Types for this contact and click **OK**.

**Note:** Interaction Tracker enables you to electronically store attributes for contacts, organizations or locations. These attributes can include such information as personal characteristics, historical notes about a particular situation, or other significant details.



**Result:** The Tracker contact information is saved and the interaction is associated with this new Tracker contact.

### Related Topics

- Contact Resolution
- Add a Tracker Contact
- Find a Tracker Contact

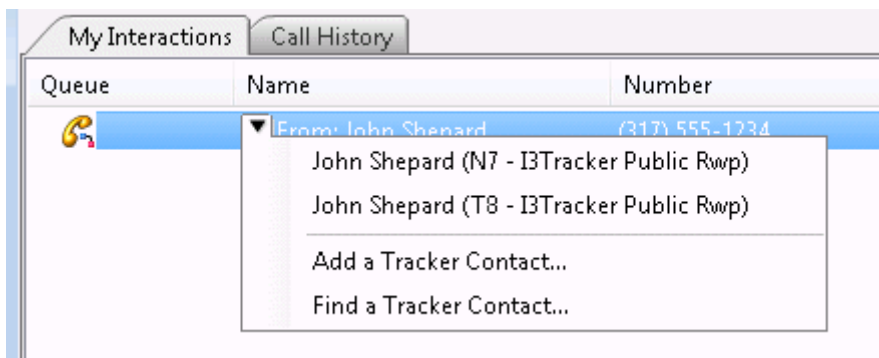
## Find a Tracker Contact

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

If the Contact Resolution process does not find the Interaction Tracker contact that you want, you can conduct your own search for a contact if you have a Tracker Access License. You can use a variety of name and address selection criteria to find the appropriate Tracker contact.

### To find a Tracker Contact:

1. Select the current interaction and click the Contact Resolution down arrow. Select **Find a Tracker Contact** from the Contact Resolution drop-down list.



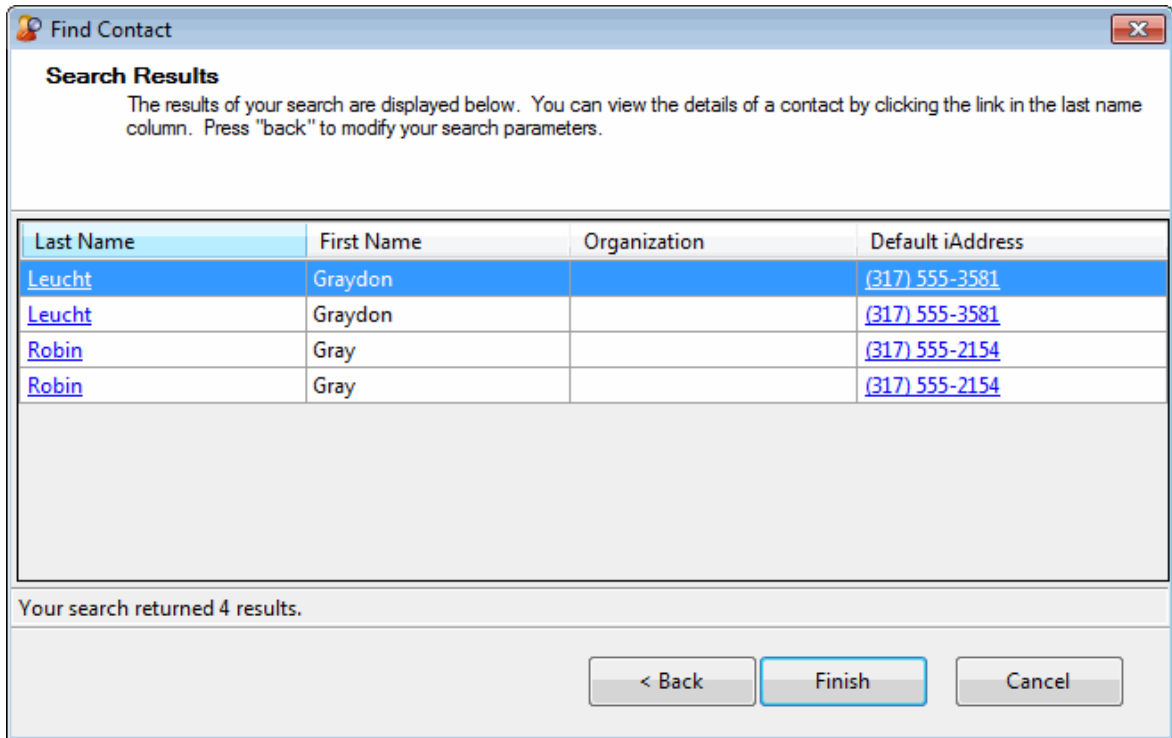
**Result:** The Find Contact Wizard appears.

2. Enter your search criteria and click **Next >**.

**Note:** If you have Tracker Administrator user rights, you have the right to search Private Tracker databases. The **Owner ID** text box appears and you can enter the Owner ID for the appropriate database(s). This is optional.

**Tip:** Click the More Search options > link to specify additional search criteria, including address information and Tracker attributes.

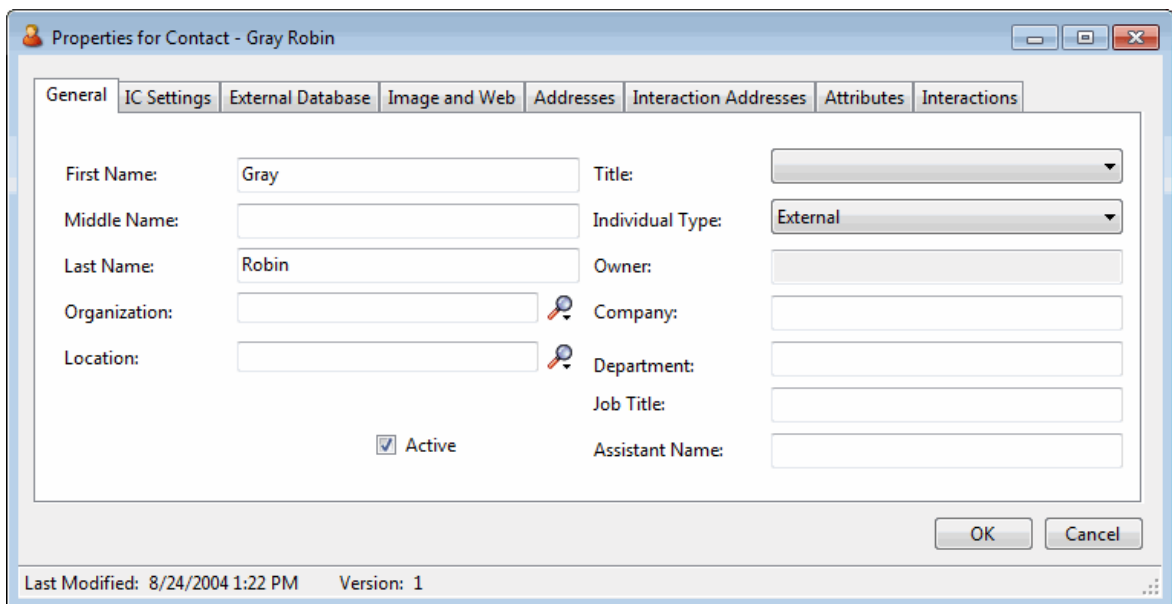
**Result:** The Search Results page of the Find Contact Wizard appears. It lists all matching contacts.



3. In the Search Results page, do one of the following:

- To complete contact resolution, select an entry and click **Finish**.
- To further refine your search, click **<Back** and enter additional search criteria.
- Click the **Last Name** hyperlink or right-click anywhere on the row containing the contact and select **Properties** from the shortcut menu.

**Result:** The Properties for Contact dialog box appears. Use it to modify the contact information, add a Tracker organization, or add a Tracker location, as needed.





**Related Topics**

- Add a Tracker Contact
- Contact Resolution
- Resolve a Contact
- Working with Contact Resolution

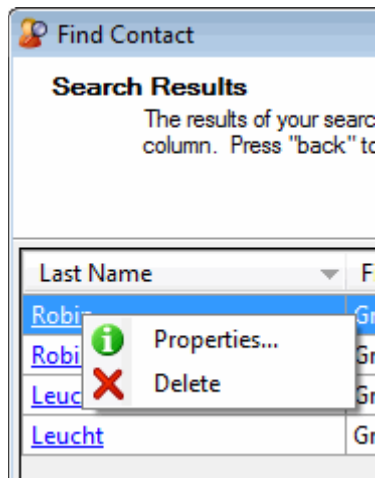
**Modify Tracker Contact Information**

**Requirements:** You need the Modify Individuals Security right or the Tracker Administrator Security Right to modify Tracker Contact information. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

You can change some information on Tracker private and public contacts if you have a Tracker Access License and the Modify Individuals access right or if you are a Tracker administrator. If so, you can modify the Owner, IC User Name, Site Id, Application Id, External Id, and External Source using the Properties for Contact dialog box. For more information about this feature or your right to use it, see your CIC administrator.

**To modify Tracker Contact information:**

1. Find a Tracker Contact. In the Search Results page of the Find Contact Wizard, do one of the following:
  - Click the **Last Name** hyperlink.
  - Right-click anywhere on the row containing the contact and select **Properties** from the shortcut menu.



**Result:** The Properties for Contact dialog box appears.

3. In the General tab, supply name, organization, location and other information.

<p><b>First Name</b> <b>Middle Name</b> <b>Last Name</b></p>	<p>Type the contact's first, middle, and last names in the appropriate text boxes.</p>
<p><b>Organization</b></p>	<p>In the Organization text box, type all or part of the Organization's name and press <b>Enter</b> or click the Search control next to this text box. In the drop-down list that appears, do one of the following:</p> <ul style="list-style-type: none"> <li>• If the Organization is already in the Tracker database, select it from the list.</li> <li>• If you think the organization is in the Tracker database, but does not appear in the list, select <b>Advanced Search</b>. Specify additional search criteria in the Find Organization Wizard. For more information, see Find a Tracker Organization.</li> <li>• Click <b>Add New Organization</b> to add this organization to the Tracker database. For more information, see Add a Tracker Organization.</li> </ul>
<p><b>Location</b></p>	<p>In the Location text box, if an organization has more than one location, type all or part of the location name and press <b>Enter</b> or click the Search control next to this text box. In the drop-down list that appears, do one of the following:</p> <ul style="list-style-type: none"> <li>• If the location is already in the Tracker database, select it from the list.</li> <li>• Click <b>Add New Location</b> to add a location for this organization to the Tracker database. For more information, see Add a Tracker Location.</li> </ul>
<p><b>Private</b></p>	<p>Select <b>Private</b> to restrict access to this contact information. Private Tracker Contact information cannot be viewed or modified by other CIC users.</p> <p><b>Requirements:</b> You must have created the contact and have the Have Private Contacts Security right in order to mark a Tracker</p>

	contact as private. The Private checkbox is hidden from other users.
<b>Active</b>	Select <b>Active</b> to make this contact active which includes displaying this contact in a Tracker contacts directory and using this contact's information for resolving a contact for an interaction.
<b>Title</b>	Use the arrow to select a title from the drop-down list.
<b>Individual Type</b>	Use the arrow to select a type from the drop-down list. Examples of contact types include <b>System, IC User, External, Internal, Customer, Partner, Vendor,</b> and <b>Public Relations.</b>
<b>Owner</b>	This defaults to the name of the CIC user who created this Tracker Contact.
<b>Company</b>	Type the name of the company to which this contact belongs. <b>Tip:</b> You may want to supply a company name if the contact does not belong to an organization.
<b>Department</b>	Type the name of the department to which this contact belongs.
<b>Job Title</b>	Type the contact's job title.
<b>Assistant Name</b>	Type the name of this contact's assistant.

- In the IC Settings tab, supply Customer Interaction Center settings for this contact.

**Caution:** These settings apply to CIC users only. You should modify these settings only if you are familiar with CIC user configuration in Interaction Administrator and are certain of values you enter here.

<b>IC Username</b>	Type the contact's Customer Interaction Center user name.
<b>Site Id</b>	Type the site identifier for the Interaction Center site to which this contact belongs.

- In the External Database tab, supply Interaction Tracker identification information.

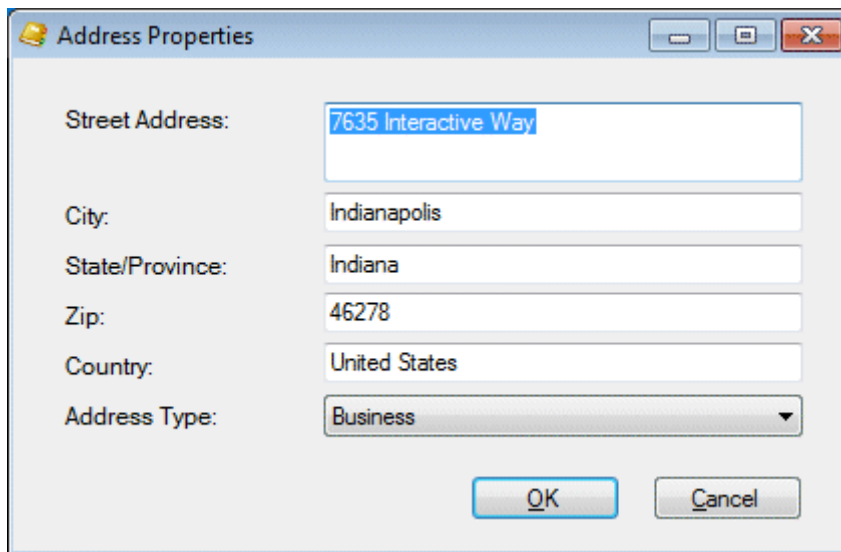
<b>Application Id</b>	Type the Application ID associated with this contact in the Tracker database. <b>Note:</b> Use of an Application Id is entirely optional. An Application Id is used by Interaction Tracker to enable users to visually distinguish between contacts. It can be used for display purposes in place of the unique (but somewhat confusing) internal Id's that Interaction Tracker assigns to contacts.
<b>External Id</b>	If this Tracker contact was imported from another system (MS Outlook Private Contacts, for example), this is the unique Id for this contact used by the other system.
<b>External Source</b>	This identifies the external system from which this Tracker contact information was imported.

- In the Image and Web tab, enter some additional contact information.

**Tip:** This information is entirely optional and may not apply to your installation's use of Interaction Tracker. Contact your CIC administrator about these entries.

<b>File Location</b>	<b>Reserved for future use.</b> This text box is designed to store the file location and file name for a picture of this contact.
<b>Individual URL</b>	Optionally, supply a URL for a webpage that is specific to this contact. <b>Example:</b> You might want to record the location of this contact's company home page, the contact's MySpace page address, or any other useful URL associated with this contact.
<b>Web Logon</b>	If your company permits customers to log on to reserved areas of your company's website, enter the contact's website logon ID.
<b>Web Password Confirm Password</b>	In the <b>Web Password</b> text box, type the contact's password for your company's website, then re-enter the password in the <b>Confirm Password</b> text box.

7. In the Addresses tab, do any of the following:
  - Select an address and click **Edit** to modify the address information.
  - Select an address and click Delete to remove an address from the contact.
  - Click **Add** to add another address for this contact. In the Address Properties dialog box, supply the information for this address. Use the arrow at the end of the **Address Type** drop-down list to identify the type of address. When finished, click **OK**.



**Note:** Tracker addresses contain standard physical address information. **Home**, **Shipping**, and **Billing** are default Interaction Tracker address types. Your Interaction Administrator can define different or additional address types. If you have any questions about address types, see your administrator.

**Tip:** You can type the name of any state or province in the State/Province text box or the name of any country in the Country text box.

8. In the Interaction Addresses tab, do any of the following:

**Note:** An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. Phone numbers, fax numbers, email addresses, and Web chat addresses are kinds of interaction addresses.

- Select an address and click **Edit** to modify the address information.
- Select an address and click Delete to remove an address from the contact.
- Click **Add** to add another address for this contact. In the Interaction Address Properties dialog box, supply the information for this address. Use the arrow at the end of the **Address Type** drop-down list to identify the type of address. When finished, click **OK**.

An interaction address contains the following information:

<b>Value</b>	Enter the phone number, fax number, email address, or Web chat address, depending on which iAddress type you select. <b>Tip:</b> If you enter a phone number or fax number, click the Phone Number control to validate and format the phone number.
<b>Interaction Address Type</b>	Use the arrow at the end of this drop-down list to select the type of iAddress you want to add ( <b>Phone, Mobile, Pager, Chat, Email, Fax</b> or <b>URL</b> ).
<b>Interaction Address Subtype</b>	Use the arrow at the end of this drop-down list to select the iAddress subtype ( <b>Business, Business 2, Home, Home 2, Assistant,</b> or <b>Unclassified</b> ).

9. In the Attributes tab, supply values for any of the contact attributes defined by your CIC administrator.
10. In the Interactions tab, view a list of interactions related to this contact.

**Tip:** This view is similar to the Interactions tab and you can perform the same functions here. For more information, see [Use the Related Items View](#).

11. When you have made all necessary changes, click **OK** to save your changes.

### Related Topics

Add a Tracker Contact  
Find a Tracker Contact

## Delete a Tracker Contact

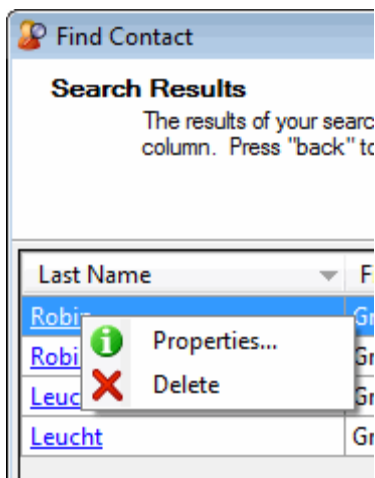
**Requirements:** You need the Delete Individuals Security right to delete a Tracker Contact. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

You can delete a Tracker private or public contact if you have a Tracker Access License and the appropriate Tracker Policy Security rights. For more information about this feature, or if you have questions about your right to use it, see your CIC administrator.

**Note:** For a list of Tracker functions that are available only if you have a Tracker Access License and the appropriate Tracker Policy Security rights, see Working with Tracker Information.

#### To delete a Tracker Contact:

1. Find a Tracker Contact.
2. In the Search Results page of the Find Contact Wizard, right-click a contact name and select **Delete** from the shortcut menu.



**Result:** The Confirm Delete dialog box appears.

3. In the Confirm Delete dialog box, click **Yes**.

**Result:** The contact is removed from the Search Results page of the Find Contact Wizard and from the Tracker directory.

#### Related Topics

Add a Tracker Contact  
 Find a Tracker Contact  
 Modify Tracker Contact Information

### Tracker Organizations

#### Add a Tracker Organization

**Requirements:** You need the Add Organizations Security right to add a Tracker Organization. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

You can add new Tracker Organizations when you add or modify Tracker Contacts during the contact resolution process.

**To add a Tracker Organization:**

1. Do one of the following:
  - Add a Tracker contact. Optionally, in the Organization text box, enter all or part of the organization name. Click the Search control next to the **Organization** text box. From the drop-down list, select **Add New Organization**.

**Add Contact - Joe Olive**

**Organization**  
Enter the information for the organization that the contact belongs to. If you enter an organization, you can also enter a location. If you do not know any of this information, you can leave it blank.

Organization:  🔍

Location:

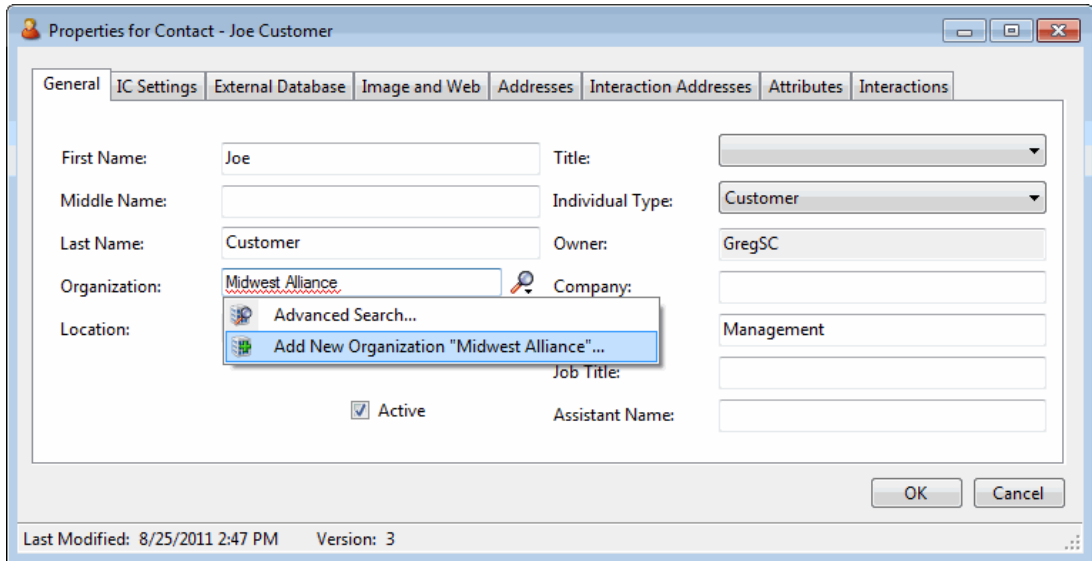
Department:

Job Title:

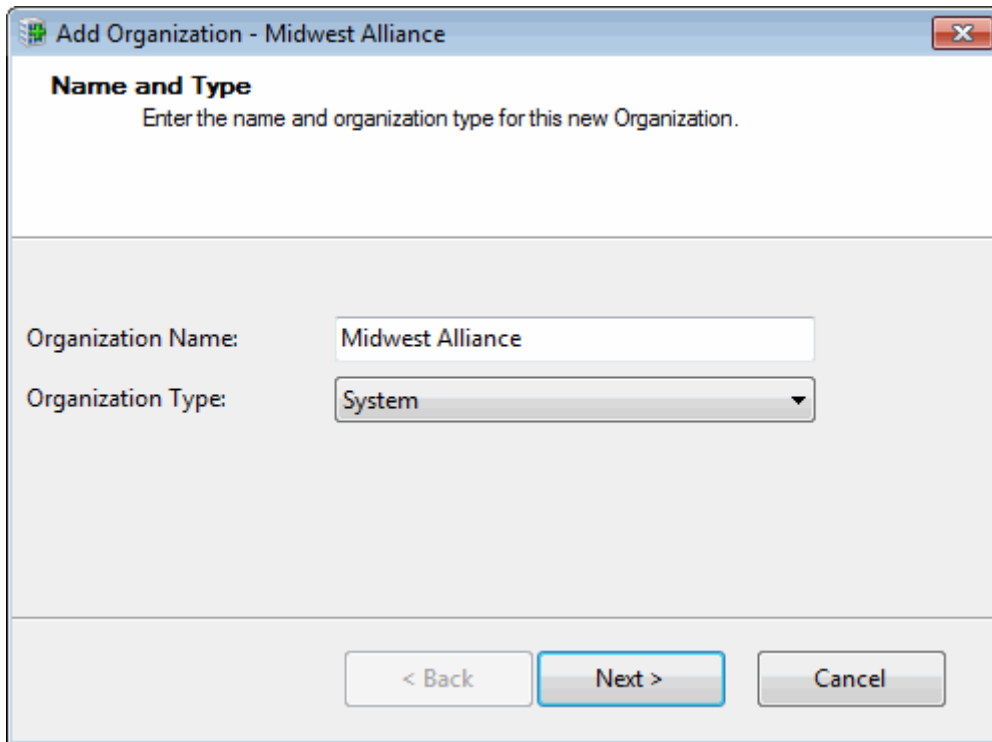
Assistant Name:

< Back    Next >    Cancel

- Find a Tracker Contact. In the Search Results page of the Find Contact Wizard, right-click a contact name and select **Properties**. In the Properties for Contact dialog box, in the Organization text box, type all or part of the Organization's name, then click the Search control. Click **Add New Organization**.



**Result:** The Add Organization Wizard appears.



2. In the Name and Type page, complete the following information and click **Next**.

<p><b>Organization Name</b></p>	<p>Type the name of the Organization.</p> <p><b>Caution:</b> Each Organization Name must be unique.</p>
<p><b>Organization Type</b></p>	<p>Use the arrow to select a type from the drop-down list. Examples of organization types include <b>System, IC User, External, Internal, Customer, Partner, Vendor, and Public Relations.</b></p>



**Result:** The Business Contact Information page of the Add Organization Wizard appears.

The screenshot shows a window titled "Add Organization - Midwest Alliance" with a close button in the top right corner. The main heading is "Business Contact Information" with a sub-instruction: "Enter the address, phone, fax and e-mail address for this organization." Below this, there are several input fields:

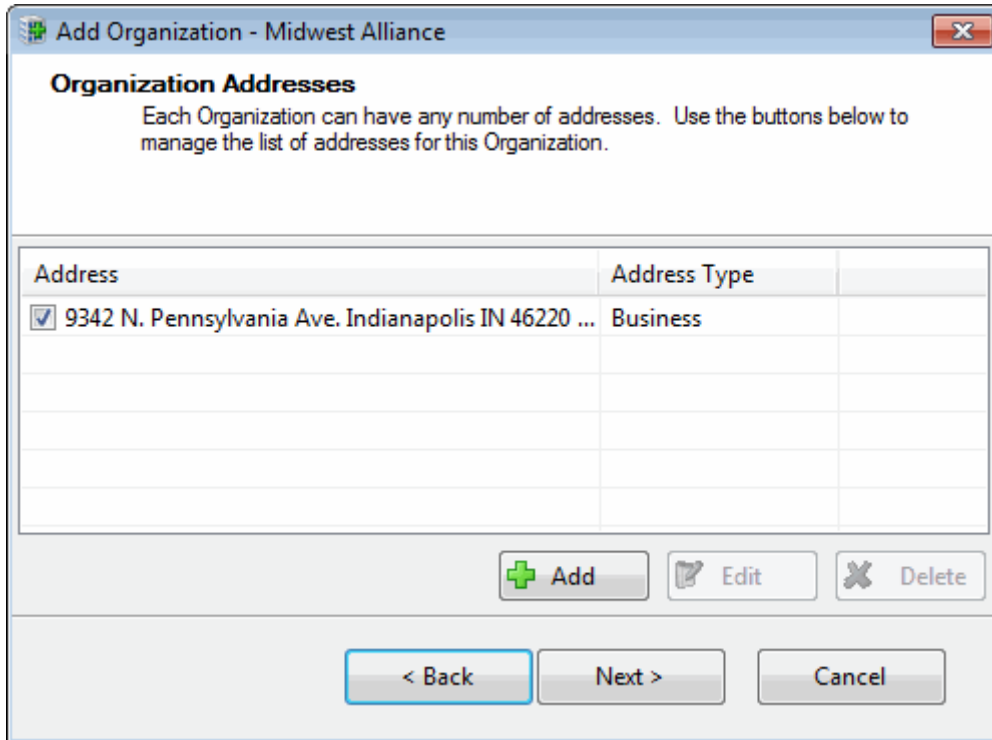
- Street Address: 9342 N. Pennsylvania Ave.
- City, State/Province: Indianapolis IN
- Zip, Country: 46220 United States
- Phone: 1 (317) 555-2353 (with a pencil icon for editing)
- Fax: 1 (317) 555-2344 (with a pencil icon for editing)
- E-mail: midwestun@alliance.net

At the bottom of the form, there are three buttons: "< Back", "Next >" (highlighted in blue), and "Cancel".

**Tip:** You can type the name of any state or province in the State/Province text box or the name of any country in the Country text box. Click the Phone Number control to validate and format the phone number.

3. In the Business Contact Information page, complete address information and click **Next**.

**Result:** The Organization Addresses page of the Add Organization Wizard appears. The address you just added appears in the list.



**Note:** **Home**, **Shipping**, and **Billing** are default Interaction Tracker address types. Your CIC administrator can define different or additional address types in Interaction Administrator. If you have any questions about address types, contact your CIC administrator.

4. In the Organization Addresses page, do one of the following:
  - Click **Add** to add another address for this organization.
  - Select an address in the list and click **Edit** to change the address information.
  - Select the check box of one of the addresses in the list to designate the default address.
  - Select an address in the list and click **Delete** to remove the address from this Organization.
  - Click **Next>** to continue creating the organization.

**Result:** The Organization Interaction Address page of the Add Organization Wizard appears.

**Add Organization - Midwest Alliance**

**Organization Interaction Addresses**  
 Each Organization can have any number of interaction addresses (phone number, e-mail address, etc.). Use the buttons below to manage the list of interaction addresses for this Organization.

Interaction Address	Type	Subtype
<input checked="" type="checkbox"/> +13175552353	Phone	Business
<input type="checkbox"/> 1 (317) 555-2344	Fax	Business
<input type="checkbox"/> midwestun@alliance.net	Email	Business

**Note:** An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. Phone numbers, fax numbers, email addresses, and web chat addresses are kinds of interaction addresses.

5. In the Organization Interaction Address page, do one of the following:
  - Click **Add** to add another interaction address for this organization.
  - Select an address in the list and click **Edit** to change the address information.
  - Select the check box of one of the addresses in the list to designate the default interaction address.
  - Select an address in the list and click **Delete** to remove the interaction address from this Organization.
  - Click **Next>** to continue creating the organization.

**Result:** The Tracker Attributes page of the Add Organization Wizard appears.

**Add Organization - Midwest Alliance**

**Tracker Attributes**  
Tracker attributes can be assigned to contacts, organizations and locations. Use the controls below to assign attribute values. (Note: Values can be left blank as well.)

Attribute Type	Value
Remarks	<input type="text"/>
Gender	<input type="text"/>
Subtype	<input type="text"/>
NT Domain User	<input type="text"/>
Income Level	<input type="text"/>
Partner Level	<input type="text"/>
VMSegmentDuration	<input type="text"/>
OrgOnly_WithLegalVals	<input type="text"/>

< Back    Next >    Cancel

- In the Tracker Attributes page, supply values for any of the displayed Attribute Types and click **Next >**.

**Note:** Interaction Tracker enables you to store attributes for contacts, organizations or locations. These attributes can include such information as historical notes about a particular situation, or other significant details. Tracker Attributes are configured in Interaction Administrator. Contact your CIC administrator if you have questions about Tracker Attributes.

**Result:** The Summary page of the Add Organization Wizard appears.

**Add Organization - Midwest Alliance**

**Summary**  
A new Organization will be created based on the following information. Please review this information. Click back to make any changes, otherwise click next to proceed.

Organization Name:Midwest Alliance  
 Organization Type:System  
 Default Address: 9342 N. Pennsylvania Ave. Indianapolis IN 46220 United States  
 Default Address Type: Business  
 Default Interaction Address: +13175552353  
 Default Interaction Address Type: Phone  
 Default Interaction Address Subtype: Business  
 ---- Additional Addresses ----  
 None  
 ---- Additional Interaction Addresses ----  
 1 (317) 555-2344 [Business Fax]

< Back    Next >    Cancel

7. In the Summary page, do one of the following:
- Click **<Back** to return to the appropriate page and make corrections.
  - Review your entries and click **Next >** to save this organization information.

**Result:** The "Add Organization Complete!" page appears.

**Add Organization - Midwest Alliance**

**Add Organization Complete!**

The organization was successfully added.

If you would like to add locations for this new Organization, click "Add Locations" to

Add Locations

< Back    Finish    Cancel

8. In the Add Organization Complete! page, do one of the following:
  - Click **Add another Organization**. Return to the beginning of this procedure.
  - Click **Add Locations**. For more information, see Add a Tracker Location.
  - Click **Finish** to return to the CIC client.

## Related Topics

Find a Tracker Organization

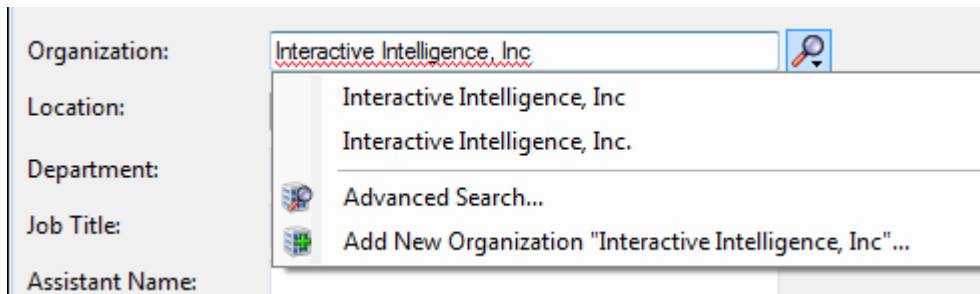
## Find a Tracker Organization

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

When you work with Tracker information, there are several places where it is necessary to search for Tracker Organizations. Tracker Organizations are associated with Tracker Contacts. Tracker Locations are associated with Tracker Organizations.

### To find a Tracker Organization:

1. Click the Search control next to an Organization text box and then select **Advanced Search**.



**Result:** The Find Organization Wizard appears.

The screenshot shows a window titled "Find Organization" with a close button in the top right corner. Below the title bar, the text "Search Criteria" is displayed, followed by the instruction "Enter the search criteria below then click 'Next'".

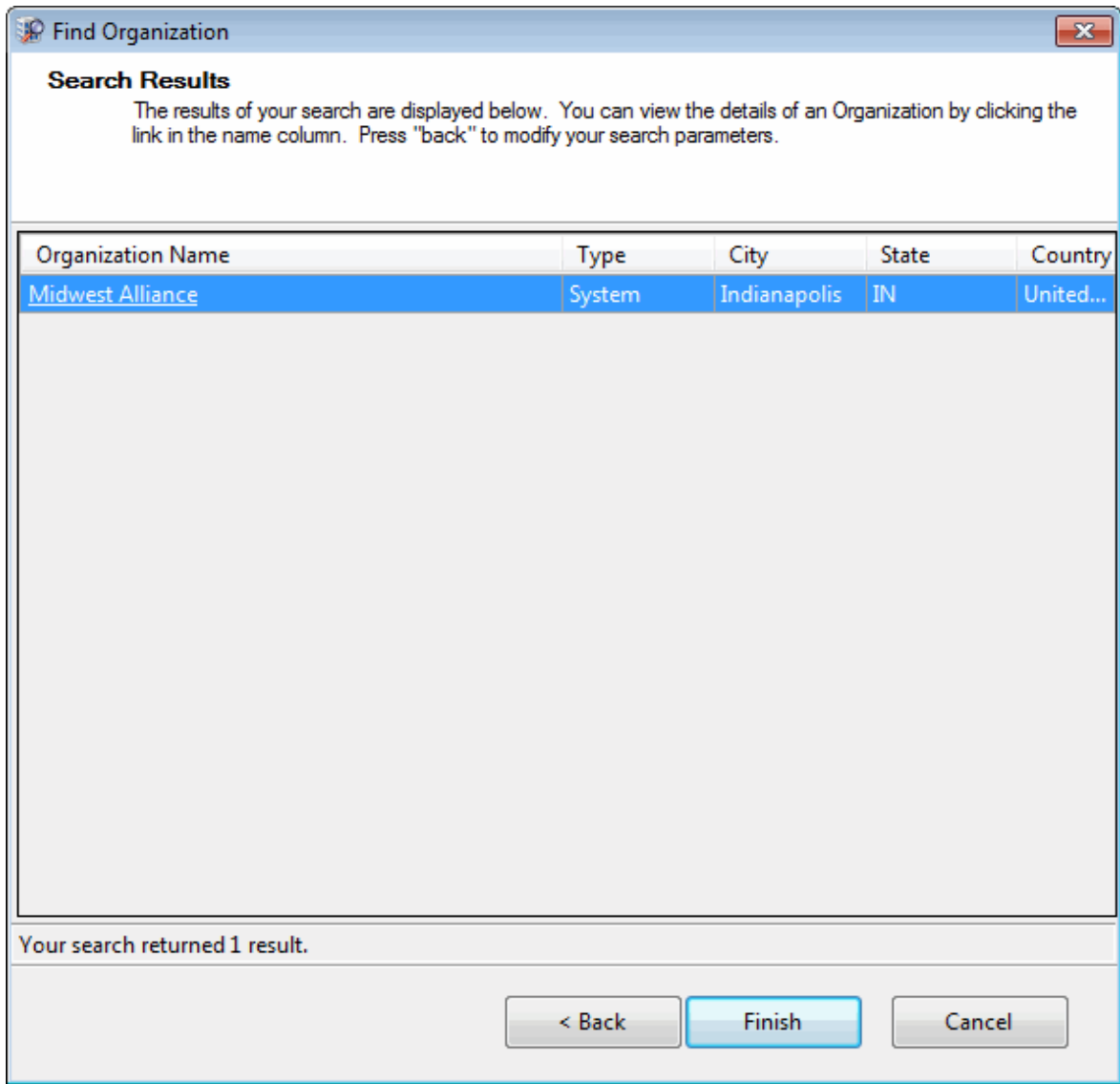
The form is divided into several sections:

- General:** Contains two rows of input fields. The first row has "Name:" with a text box containing "M" and "Type:" with a dropdown menu. The second row has "Application Id:" with an empty text box and "Active/Inactive:" with a dropdown menu showing "Active".
- Address:** Contains four input fields: "Street:" (a wide text box), "State/Province:" (a text box), "City:" (a text box), and "Zip:" (a text box). There is also a "Country:" label next to an empty text box.
- Interaction Address:** Contains a text box with the instruction: "Enter a phone number, fax number, e-mail address, or any other interaction address. Use standardized form for phone numbers (e.g. +13178723000, /999, sip:). Partial matching is possible." Below this is an empty text box.
- Tracker Attribute:** Contains two input fields: "Name:" with a dropdown menu and "Value:" with a text box.

At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a blue border.

2. Enter your search criteria and click **Next>**.

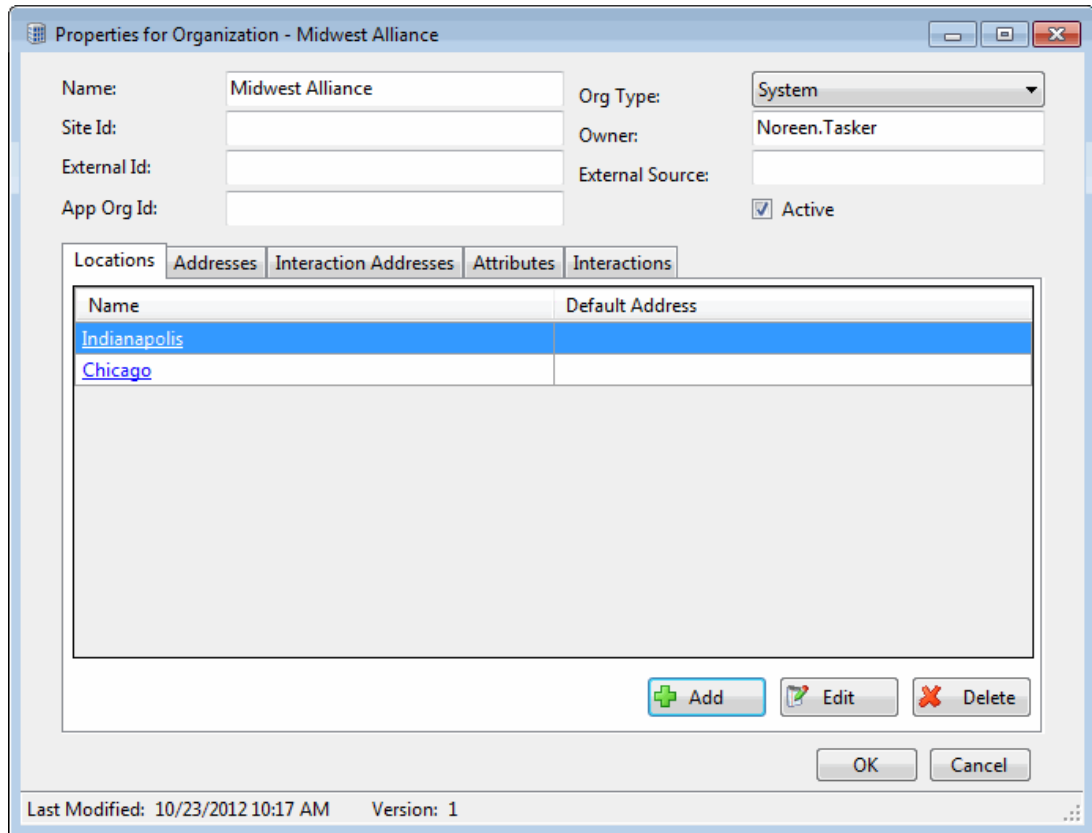
**Result:** The Search Results page of the Find Organization Wizard appears. It lists all matching organizations.



3. Do one of the following:
  - To finish selecting an Organization or return to the CIC client, select an entry and click **Finish**.
  - To further refine your search, click **<Back** and enter additional search criteria.
  - Click the **Organization Name** hyperlink.
  - Right-click anywhere on the row containing the organization and select **Properties** from the shortcut menu.

**Result:** The Properties for Organization dialog box appears. From this dialog box, you can modify the organization information or Add a Tracker Location, as needed.





**Related Topics**

- Modify Tracker Organization Information
- Delete a Tracker Organization

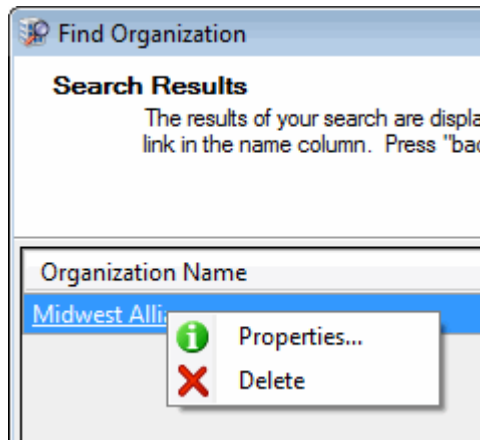
**Modify Tracker Organization Information**

**Requirements:** You need the Modify Organizations Security right to modify Tracker Organization information. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

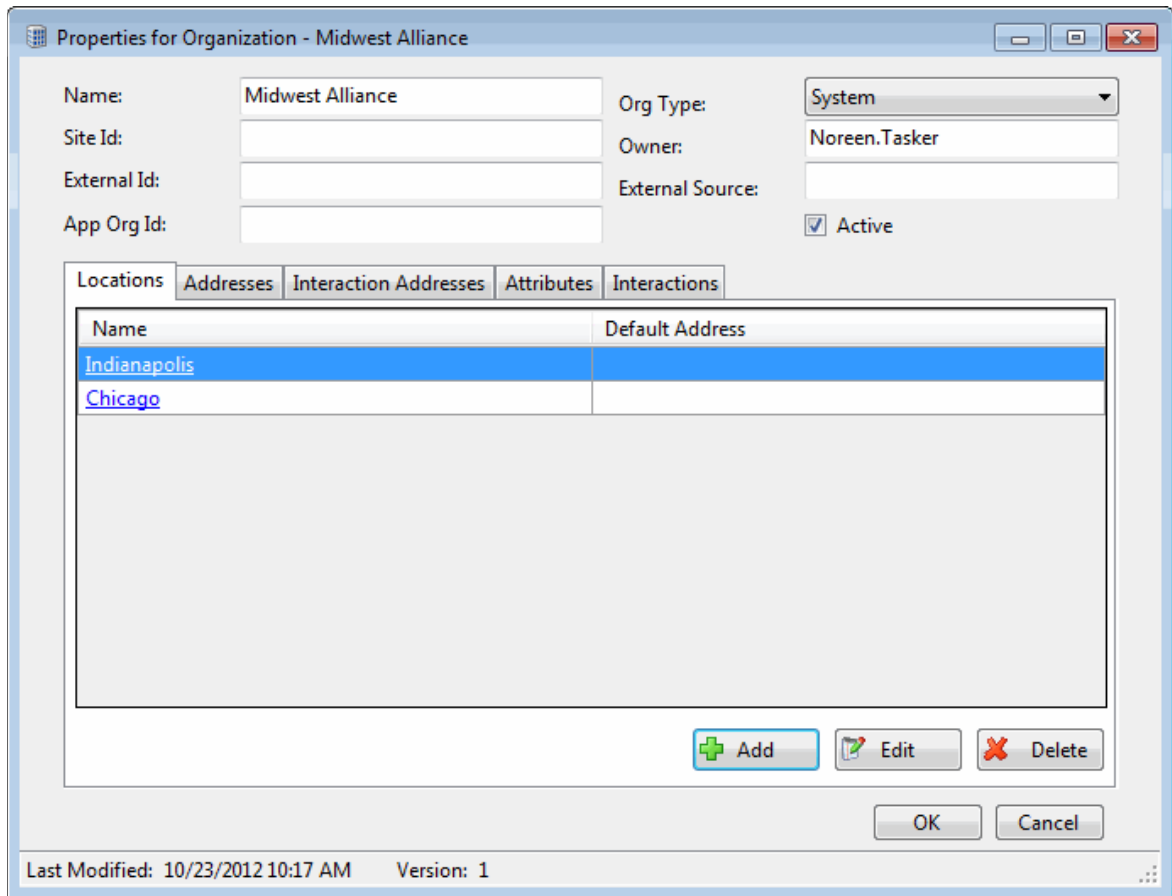
You can change the information on Tracker organizations if you have a Tracker Access License and the appropriate Tracker Policy Security rights. For more information about this feature or your right to use it, see your CIC administrator.

**To modify Tracker Organization information:**

1. Find a Tracker Organization.
2. In the Search Results page of the Find Organization Wizard, do one of the following:
  - Click the **Organization Name** hyperlink.
  - Right-click anywhere on the row containing the organization and select **Properties** from the shortcut menu.



**Result:** The Properties for Organization dialog box appears.



3. Modify any of the Organization information, as necessary.

<b>Name</b>	Type the organization's name.
<b>Org Type</b>	Use the arrow to select a type from the drop-down list. Examples of organization types include <b>System</b> , <b>IC User</b> , <b>External</b> , <b>Internal</b> , <b>Customer</b> , <b>Partner</b> , <b>Vendor</b> , and <b>Public Relations</b> .

<b>Site Id</b>	Type the site identifier for the Interaction Center site to which this organization belongs.  <b>Caution:</b> Modify this setting only if you are familiar with the site numbers configured in Interaction Administrator and are certain of value you enter here.
<b>Owner</b>	This defaults to the name of the CIC user who created this Tracker organization.
<b>External Id</b>	If this Tracker organization was imported from another system), this is the unique Id for this organization used by the other system.
<b>External Source</b>	This identifies the external system from which this Tracker organization information was imported.
<b>App Org Id</b>	Type the Application ID associated with this organization in the Tracker database.  <b>Note:</b> Use of an Application Id is entirely optional. An Application Id is used by Interaction Tracker to enable users to visually distinguish between organizations. It can be used for display purposes in place of the unique (but somewhat confusing) internal Id's that Interaction Tracker assigns to organizations.
<b>Active</b>	Select <b>Active</b> to enable users to assign this organization to Tracker contacts.

4. In the Locations tab, do one of the following:
  - Select a location and click **Edit** to modify the location information.
  - Select a location and click Delete to remove a location from the organization.
  - Click **Add** to add another location for this organization. In the Add Location Wizard, supply the information for this location. For more information, see Add a Tracker Location. When finished, click **OK**.
  
5. In the Addresses tab, do any of the following:
  - Select an address and click **Edit** to modify the address information.
  - Select an address and click Delete to remove an address from the organization.
  - Click **Add** to add another address for this organization. In the Address Properties dialog box, supply the information for this address. Use the arrow at the end of the **Address Type** drop-down list to identify the type of address. When finished, click **OK**.

**Address Properties**

Street Address: 7635 Interactive Way

City: Indianapolis

State/Province: Indiana

Zip: 46278

Country: United States

Address Type: Business

OK Cancel

**Note:** Tracker addresses contain standard physical address information. **Home**, **Shipping**, and **Billing** are default Interaction Tracker address types. Your Interaction Administrator can define different or additional address types. If you have any questions about address types, see your administrator.

**Tip:** You can type the name of any state or province in the State/Province text box or the name of any country in the Country text box.

6. In the Interaction Addresses tab, do any of the following:

**Note:** An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. Phone numbers, fax numbers, email addresses, and Web chat addresses are kinds of interaction addresses.

- Select an address and click **Edit** to modify the address information.
- Select an address and click **Delete** to remove an address from the organization.
- Click **Add** to add another address for this organization. In the Interaction Address Properties dialog box, supply the information for this address. Use the arrow at the end of the **Address Type** drop-down list to identify the type of address. When finished, click **OK**.

**Interaction Address Properties**

Value: 555-8900 Ext. 431 ✓

Interaction Address Type: Phone

Interaction Address Subtype: Business

Ok Cancel

An interaction address contains the following information:

<b>Value</b>	Enter the phone number, fax number, email address, or Web chat address, depending on which iAddress type you select.  <b>Tip:</b> If you enter a phone number or fax number, click the Phone Number control to validate and format the phone number.
<b>Interaction Address Type</b>	Use the arrow at the end of this drop-down list to select the type of iAddress you want to add ( <b>Phone, Mobile, Pager, Chat, Email, Fax</b> or <b>URL</b> ).
<b>Interaction Address Subtype</b>	Use the arrow at the end of this drop-down list to select the iAddress subtype ( <b>Business, Business 2, Home, Home 2, Assistant</b> , or <b>Unclassified</b> ).

7. In the Attributes tab, supply values for any of the organization attributes defined by your CIC administrator.
8. In the Interactions tab, view a list of interactions related to this contact.

**Tip:** This view is similar to the Interactions tab and you can perform the same functions here. For more information, see [Use the Related Items View](#).

9. When you have made all necessary changes, click **OK** to save your changes.

### Related Topics

[Find a Tracker Organization](#)

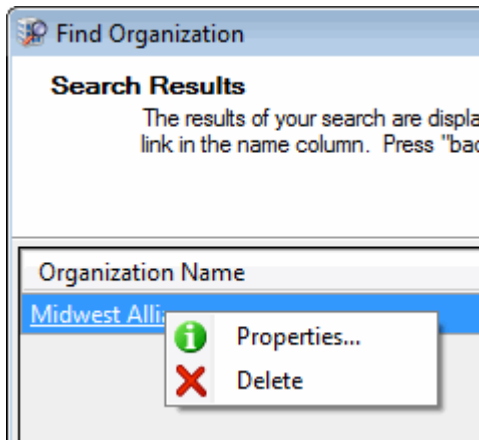
## Delete a Tracker Organization

**Requirements:** You need the Delete Organizations Security right to delete a Tracker Organization. Other Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see [Tracker Licensing and Rights](#).

You can delete a Tracker organization if you have a Tracker Access License and the appropriate Tracker Policy Security rights. For more information about this feature, or if you have questions about your right to use it, see your CIC administrator.

### To delete a Tracker Organization:

1. Find a Tracker Organization
2. In the Search Results page of the Find Organization Wizard, right-click an Organization name and select **Delete** from the shortcut menu.



**Result:** The Confirm Delete dialog box appears.

3. In the Confirm Delete dialog box, click **Yes**.

**Result:** The organization is removed from the Search Results page of the Find Organization Wizard and from any contacts associated with this organization.

#### Related Topics

- Add a Tracker Organization
- Find a Tracker Organization
- Modify Tracker Organization Information

#### Tracker Locations

### Add a Tracker Location

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

Locations are associated with Organizations. Locations are typically named for their functions, such as Headquarters, or the city name. You can add new Tracker Locations when you add or modify Tracker Organizations during the contact resolution process.

#### To add a Tracker Location:

1. Do one of the following:
  - At the end of the Add a Tracker Organization process, click **Add Locations**.
  - Add a Tracker Contact. In the Organization page of the Add Contact Wizard, select an Organization. Click the Search control next to the **Location** text box. From the drop-down list, select **Add New Location**.

**Add Contact - Joe Olive**

**Organization**  
Enter the information for the organization that the contact belongs to. If you enter an organization, you can also enter a location. If you do not know any of this information, you can leave it blank.

Organization:  🔍

Location:  🔍

Department:

Job Title:

Assistant Name:

Chicago  
Indianapolis  
Add New Location...

Click to find and...

< Back    Next >    Cancel

- Find a Tracker Contact. In the Search Results page of the Find Contact Wizard, right-click on a contact name and select **Properties**. In the Properties for Contact dialog box, in the Organization text box, select an Organization. Click the Search control next to the **Location** text box. From the drop-down list, select **Add New Location**.

**Result:** The Add Location Wizard appears.

**Add Location**

**Name**  
Enter the name and organization for this new location.

Location Name:

Organization:  🔍

< Back   **Next >**   Cancel

2. In the Name page, type a **Location Name**.
3. If the Organization name has not defaulted from a previous screen, click the Search control next to the Organization text box and do one of the following:
  - Select **Advanced Search** to Find a Tracker Organization.
  - Select Add New Organization to Add a Tracker Organization.
4. After you have supplied a location and organization name, click **Next**.

**Result:** The Business Contact Information page of the Add Location Wizard appears.



The screenshot shows a dialog box titled "Add Location - Dayton" with a close button (X) in the top right corner. The main heading is "Business Contact Information" with a sub-instruction: "Enter the address, phone, fax and e-mail address for this location." The form contains the following fields:

- Street Address: 5521 West 83rd Street
- City, State/Province: Dayton | Ohio
- Zip, Country: 45426 | United States
- Phone: 1 (937) 555-1631 (with a phone icon)
- Fax: (empty) Ext. (empty) (with a checkmark icon)
- E-mail: (empty)

At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

**Tip:** You can type the name of any state or province in the State/Province text box or the name of any country in the Country text box. Click the Phone Number control to validate and format the phone number.

5. In the Business Contact Information page, supply the address information for this location and click **Next**.

**Result:** The Addresses page of the Add Location Wizard appears.

**Add Location - Dayton**

**Addresses**  
Each location can have any number of addresses. Use the buttons below to manage the list of addresses for this location.

Address	Address Type
<input checked="" type="checkbox"/> 5521 West 83rd Street Dayton Ohio 45426 United...	Business

**Note:** **Home**, **Shipping**, and **Billing** are default Interaction Tracker address types. Your CIC administrator can define different or additional address types in Interaction Administrator. If you have any questions about address types, contact your CIC administrator.

6. In the Addresses page, do one of the following:
  - Click **Add** to add another address for this location.
  - Select an address in the list and click **Edit** to change the address information.
  - Select the check box of one of the addresses in the list to designate the default address.
  - Select an address in the list and click **Delete** to remove the address from this Location.
  - Click **Next>** to continue creating the location.

**Result:** The Interaction Addresses page of the Add Location Wizard appears.

**Interaction Addresses**  
Each location can have any number of interaction addresses (phone number, e-mail address, etc.). Use the buttons below to manage the list of interaction addresses for this location.

Interaction Address	Type	Subtype
<input checked="" type="checkbox"/> 1 (937) 555-1631	Phone	Business

**Note:** An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. Phone numbers, fax numbers, email addresses, and web chat addresses are kinds of interaction addresses.

7. In the Interaction Addresses page, do one of the following:
  - Click **Add** to add another interaction address for this location.
  - Select an address in the list and click **Edit** to change the interaction address information.
  - Select the check box of one of the addresses in the list to designate the default interaction address.
  - Select an address in the list and click **Delete** to remove the interaction address from this location.
  - Click **Next>** to continue creating the location.

**Result:** The Tracker Attributes page of the Add Location Wizard appears.

**Add Location - Dayton**

**Tracker Attributes**  
Tracker attributes can be assigned to contacts, organizations and locations. Use the controls below to assign attribute values. (Note: Values can be left blank as well.)

Attribute Type	Value
Remarks	
Gender	
Subtype	
NT Domain User	
Income Level	
Partner Level	
VMSegmentDuration	
OrgOnly_WithLegalVals	

< Back    Next >    Cancel

- In the Tracker Attributes page, supply values for any of the displayed Attribute Types and click **Next>**.

**Note:** Interaction Tracker enables you to store attributes for contacts, organizations or locations. These attributes can include such information as historical notes about a particular situation, or other significant details. Tracker Attributes are configured in Interaction Administrator. Contact your CIC administrator if you have questions about Tracker Attributes.

**Result:** The Summary page of the Add Location Wizard appears.

**Summary**

A new location will be created based on the following information. Please review this information and click back to make any changes, otherwise click next to proceed.

Location Name:Dayton  
 Organization Name:Midwest Alliance  
 Default Address: 5521 West 83rd Street Dayton Ohio 45426 United States  
 Default Address Type: Business  
 Default Interaction Address: 1 (937) 555-1631  
 Default Interaction Address Type: Phone  
 Default Interaction Address Subtype: Business  
 ---- Additional Addresses ----  
 None  
 ---- Additional Interaction Addresses ----  
 None

< Back    Next >    Cancel

9. In the Summary page, do one of the following:
- Click **<Back** to return to the appropriate page and make corrections.
  - Review your entries and click **Next >** to save this location information.

**Result:** The "Add Location Complete!" screen appears.

**Add Location Complete!**

The location was successfully added.

Add another location

< Back    Finish    Cancel

10. In the **Add Organization Complete!** page, do one of the following:
  - Click **Add another location**. Return to the beginning of this procedure.
  - Click **Finish** to return to the CIC client.

### Related Topics

Find a Tracker Organization

## Modify Tracker Location Information

**Requirements:** You can change Interaction Tracker location information if you have a Tracker Access License and the appropriate Tracker Policy Security rights. For more information about this feature or your right to use it, see your CIC administrator.

### To modify Tracker Location information:

1. Find a Tracker Organization.
2. In the Properties for Organization dialog box, select the Locations tab.
3. In the Locations tab, do one of the following:
  - Select a location name and click **Edit**.
  - Click the location name hyperlink.

**Result:** The Properties for Location dialog box appears.

Properties for Location - Chicago

Name:  Owner:

Site Id:  App Loc Id:

External Id:  External Source:

Active

Addresses | Interaction Addresses | Attributes | Interactions

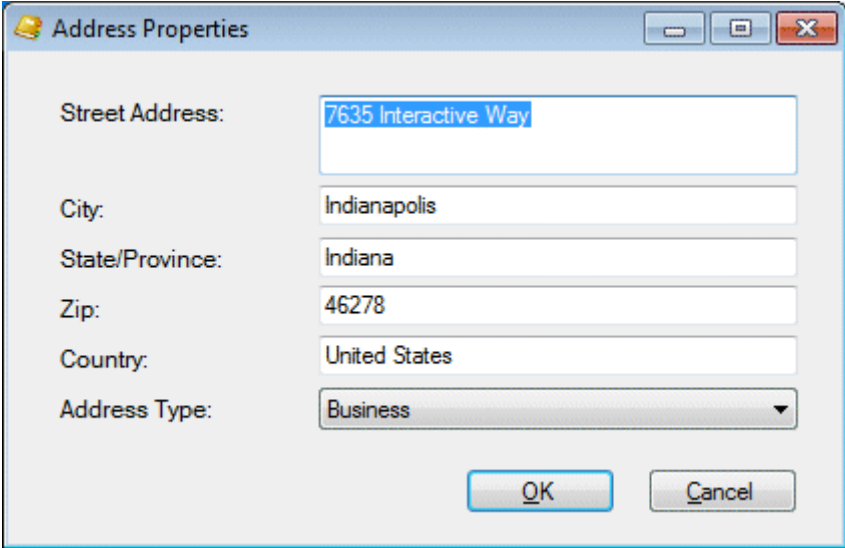
Address	Address Type

Last Modified: 10/23/2012 10:51 AM Version: 1

4. Modify any of the Location information, as necessary.

<b>Name</b>	Type the location's name.
<b>Owner</b>	This defaults to the name of the CIC user who created this Tracker location.
<b>Site Id</b>	Type the site identifier for the Interaction Center site to which this location belongs. <b>Caution:</b> Modify this setting only if you are familiar with the site numbers configured in Interaction Administrator and are certain of value you enter here.
<b>App Loc Id</b>	Type the Application ID associated with this organization in the Tracker database. <b>Note:</b> Use of an Application Id is entirely optional. An Application Id is used by Interaction Tracker to enable users to visually distinguish between organizations. It can be used for display purposes in place of the unique (but somewhat confusing) internal Id's that Interaction Tracker assigns to organizations.
<b>External Id</b>	If this Tracker location was imported from another system), this is the unique Id for this location used by the other system.
<b>External Source</b>	This identifies the external system from which this Tracker organization information was imported.
<b>Active</b>	Select <b>Active</b> to enable users to assign this organization to Tracker contacts.

5. In the Addresses tab, do any of the following:
- Select an address and click **Edit** to modify the address information.
  - Select an address and click Delete to remove an address from the organization.
  - Click **Add** to add another address for this organization. In the Address Properties dialog box, supply the information for this address. Use the arrow at the end of the **Address Type** drop-down list to identify the type of address. When finished, click **OK**.



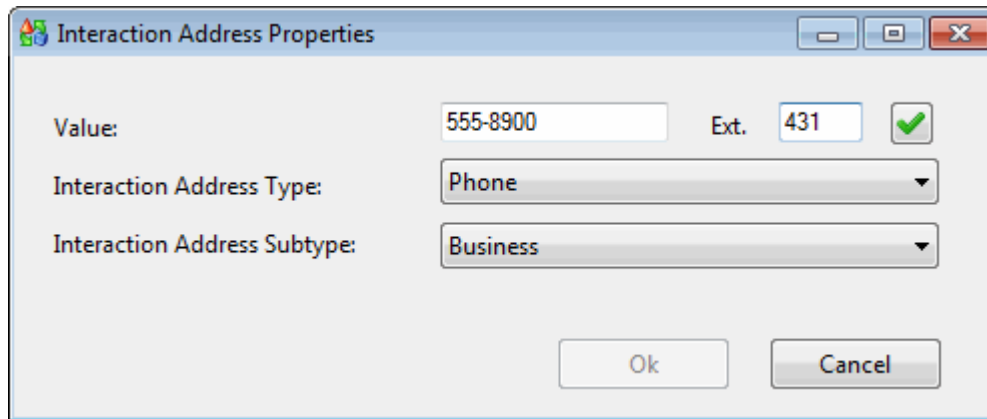
**Note:** Tracker addresses contain standard physical address information. **Home, Shipping,** and **Billing** are default Interaction Tracker address types. Your Interaction Administrator can define different or additional address types. If you have any questions about address types, see your administrator.

**Tip:** You can type the name of any state or province in the State/Province text box or the name of any country in the Country text box.

6. In the Interaction Addresses tab, do any of the following:

**Note:** An interaction address, or iAddress, is a media-specific, electronic address against which interactions take place. Phone numbers, fax numbers, email addresses, and Web chat addresses are kinds of interaction addresses.

- Select an address and click **Edit** to modify the address information.
- Select an address and click **Delete** to remove an address from the organization.
- Click **Add** to add another address for this organization. In the Interaction Address Properties dialog box, supply the information for this address. Use the arrow at the end of the **Address Type** drop-down list to identify the type of address. When finished, click **OK**.



An interaction address contains the following information:

<b>Value</b>	Enter the phone number, fax number, email address, or Web chat address, depending on which iAddress type you select. <b>Tip:</b> If you enter a phone number or fax number, click the Phone Number control to validate and format the phone number.
<b>Interaction Address Type</b>	Use the arrow at the end of this drop-down list to select the type of iAddress you want to add ( <b>Phone, Mobile, Pager, Chat, Email, Fax</b> or <b>URL</b> ).
<b>Interaction Address Subtype</b>	Use the arrow at the end of this drop-down list to select the iAddress subtype ( <b>Business, Business 2, Home, Home 2, Assistant,</b> or <b>Unclassified</b> ).

7. In the Attributes tab, supply values for any of the organization attributes defined by your CIC administrator.
8. In the Interactions tab, view a list of interactions related to this contact.



**Tip:** This view is similar to the Interactions tab and you can perform the same functions here. For more information, see Use the Related Items View.

- When you have made all necessary changes, click **OK** to save your changes.

### Related Topics

Find a Tracker Organization

### Tracker Attributes

## Assign Interaction Tracker Attributes

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing and Rights.

Interaction Tracker enables you to store attributes for contacts, organizations, locations or interactions. An interaction attribute can include such information as notes about a particular situation, duration of the interaction, or other significant details.

#### To add Tracker Attributes to the current interaction:

- Right-click the current interaction.
- From the interaction shortcut menu, select **Interaction Tracker > Interaction Tracker Attributes**.

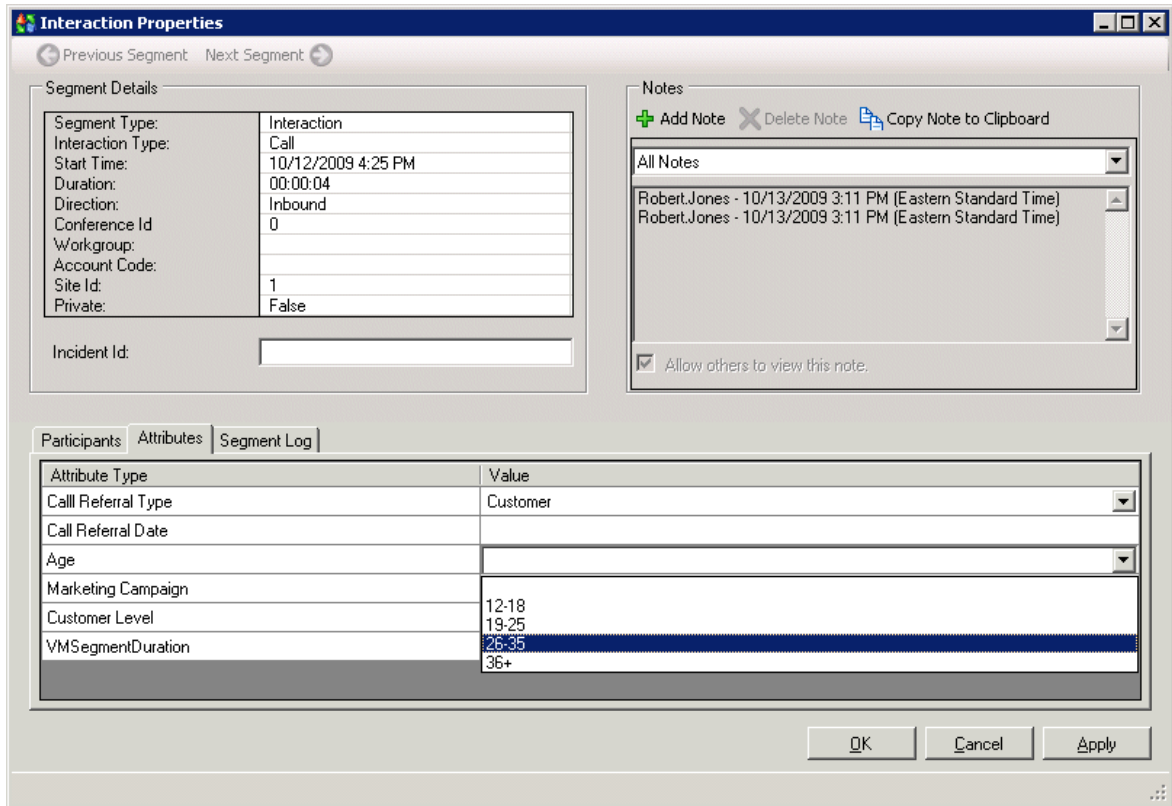
**Result:** The Interaction Tracker Attributes dialog box appears.

Attribute Type	Value
Remarks	
Gender	
Subtype	
NT Domain User	
Income Level	
Partner Level	
VMSegmentDuration	
OrgOnly_WithLegalVals	
OrgOnly_WithNoLegalVals	
Reason For Call	

- Supply values for the displayed Attribute Types for this interaction and click **OK**.

**To assign Tracker Attributes to a related interaction:**

1. Find the appropriate related interaction.
2. In the Interaction Properties dialog box, select the Attributes tab.



3. Supply values for the displayed Attribute Types for this interaction and click **OK**.

**Related Topics**

- Find Related Interactions
- Use Interaction Notes
- Working with Tracker Information

**Tracker Related Interactions**

**Working with Related Interactions**

**Requirements:** Some Interaction Tracker functions are available only if you have the appropriate licenses and security rights. For more information, see Tracker Licensing.

Interaction Tracker enables you to associate interactions with Tracker contacts, organizations and locations. You can search for and review this related interaction history in several ways:

- **Related Items**

You can display views of the most recent interactions with **external** callers:

- The **Interactions tab** displays a list of interactions associated with the contact for the currently selected interaction. Only interactions for the current contact appear in this view. For more information, see Use the Interactions Tab.

**Note:** Only successful interactions (those connected to an agent or a station) appear in this view. Voicemails and abandoned interactions are not included.

- The **Conversation History** tab displays a list of email interactions associated with the currently selected **email interaction**. For more information, see Use the Conversation History Tab.

- Interaction History

You can view a list of the most recent interactions with a selected Tracker contact, organization, or location in the Interactions tab of the Properties for Contact, Properties for Organization, or Properties for Location dialog boxes. For more information, see Interaction History.

- **Interaction Search**

You can use the Find Interactions Wizard to locate related interactions and review the associated Tracker information. For more information, see Find Related Interactions.

### Related Topics

Display the Related Items View  
 Find Related Interactions  
 Interaction History  
 Playback a Recorded Interaction  
 Use Interaction Notes  
 Use the Related Items View  
 View Related Interaction Properties

## Display the Related Items View

**Requirements:** You need a Tracker Access License and the appropriate rights to display the Related Items view. You need the Customize Client Security right in order to add a new view to the CIC client. Also, you need the Related Interactions Page Security right to display the Related Items view. The View History Users Access Control right determines whose interactions appear in the Related Items view. Optionally, you need the View Other People's Private Interactions Security Right to view other users' private interactions in the Interactions tab.

You can add the Related Items view to the CIC client. It contains two tabbed views:

- Interactions Tab

The Interactions tab enables you to view a list of interactions associated with the contact for your currently selected interaction. Your CIC administrator controls the types of interactions that can appear in this tab. Possible interaction types include calls, chats, e-mails, and faxes. For more information, see Use the Related Items View and Configure the Interactions Tab.

- Conversation History Tab

A Conversation History is not a record of the content of the email interactions. The email text is not preserved as part of this history. It provides a record of the contact between parties to the conversation, but not the details. For more information, see Use the Conversation History Tab.

### To display the Related Items view:

1. In the **Create New View dialog box**, from the **Categories** list, select **Tracker**.
2. In the **Views** list, select **Related Items**.

3. Click **OK**.

**Result:** The Related Items view appears.

#### Related Topics

- Add or Remove View Columns
- Change View Layout
- Find Related Interactions
- Interaction History
- Use the Related Items View

## Configure the Interactions Tab

**Requirements:** You need the Customize Client Security right to configure the Interactions tab. Client templates can contain configuration settings that determine your Interaction History Result Settings and control whether you can alter configuration settings.

The interactions displayed in the Interactions tab of the **Related Items view** are based on the contact for the currently selected interaction and are limited to past interactions that match the selected criteria. Only interactions for the current contact are included in the search.

You can configure the maximum number of related interactions displayed in the Interactions tab of the Properties for Contact, Properties for Organization or Properties for Location dialog boxes.

#### To configure Interactions Tab search criteria:

1. In the Configuration dialog box, click the **Tracker** node.

**Result:** The Tracker properties details pane of the Configuration dialog box appears.

2. From the **Show interactions from the previous** drop-down list, select a time limit:
  - Week
  - Month
  - 3 Months
3. From the **Maximum number of interactions to show** drop-down list, select the maximum number of related interactions you want to appear at one time in the Related Items view or Interaction History tab:
  - 10
  - 50
  - 100
4. Click **Apply** to save your settings.
5. Click **OK** to close the dialog box.

#### Related Topics

- Display the Related Items View
- Tracker Related Interactions
- Use the Related Items View

## Find Related Interactions

**Requirements:** Only agents with the appropriate licenses and security rights can create and manage Interaction Tracker information from inside the CIC client. For more information, see Tracker Licensing.

The Interactions tab displays a list of interactions associated with the **currently selected interaction** in My Interactions.

You can also view the interactions associated with a selected Contact, Organization or Location. For more information about using the appropriate Properties dialog box, see Modify Tracker Contact Information, Modify Tracker Organization Information, or Modify Tracker Location Information.

### Related Topics

Use the Interactions Tab

## Playback a Recorded Interaction

**Requirements:** To playback a recorded interaction, you need the Recorder Client Access license. You also need to be assigned an Interaction Recorder Policy with the rights to **play recordings** and **retrieve recordings**. To locate and select the appropriate recording, you need a Tracker Access License and the necessary rights to display the needed views. For more information, see Working with Interaction Tracker.

If you have the appropriate licenses and rights, you can playback a recorded interaction. You can playback recordings of calls, chats, and email interactions. The type of recording depends on the type of interaction. For example, a chat session recording is a transcript of the chat.

There are two way to locate and playback a recorded interaction. Recorded interactions appear in the Use the Related Items View in both the Interactions and Conversation History tabs. You can also playback recordings appearing in the Interactions tab of the Properties for Contact, Properties for Organization, or Properties for Location dialog boxes.

### To playback a recording:

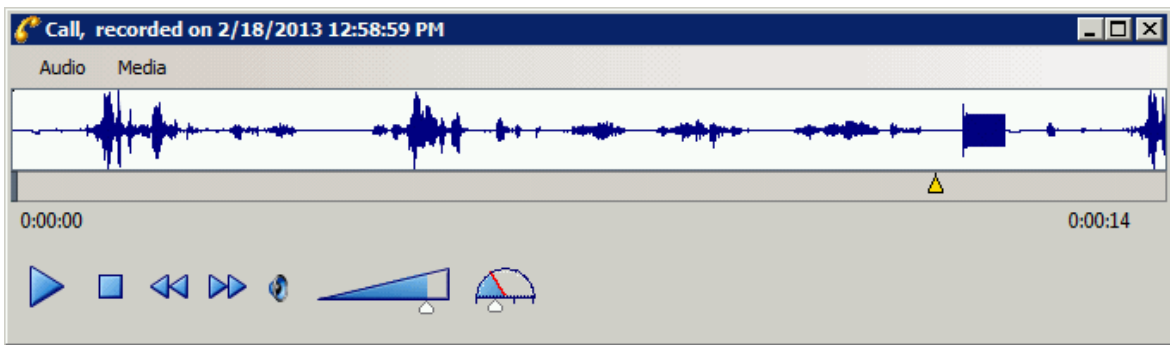
1. Locate the appropriate recording by doing one of the following:
  - Use the Related Items view to display a list of interactions associated with the **currently selected interaction** in My Interactions. Recordings appear in the Interactions tab and the Conversation History tabs.
  - Find a Tracker contact and then, in the Properties for Contact dialog box, click the **Interactions** tab.
  - Find a Tracker organization, and then, in the Properties for Organization dialog box, click the **Interactions** tab.
  - Find a Tracker location by following the instructions to Modify Tracker Location Information, And then, in the Properties for Location dialog box, click the **Interaction** tab.

**Note:** The Related Recording icon (red circle) appears for interactions with an associated recording.

2. Right-click the selected interaction and select **Play Recording** from the shortcut menu.

Found 9 related interactions.						
	Date	Duration	Internal Party	External Party	External Role	Organization
		00:00:25	sg-clay15_user	Interactive Intelligence	Initiator	
		00:00:06	sg-clay15_user	Interactive Intelligence	Initiator	
		00:00:34	sg-clay15_user	Interactive Intelligence	Initiator	
	Friday, February 15, 2013,...	00:00:05	sg-clay15_user	Interactive Intelligence	Initiator	
	Friday, February 15, 2013,...	00:01:32	sg-clay15_user	Interactive Intelligence	Initiator	
	Friday, February 15, 2013,...	00:00:13	sg-clay15_user	Interactive Intelligence	Initiator	
	Wednesday, February 13,...	00:00:14	sg-clay15_user	Interactive Intelligence	Initiator	
	Tuesday, February 12, 20...	00:00:07	sg-clay15_user	Interactive Intelligence	Initiator	
	Tuesday, February 12, 20...	00:00:04	sg-clay15_user	Interactive Intelligence	Initiator	

**Result:** The appropriate recording media viewer appears. A recorded call appears in this example.



### Playback a Call

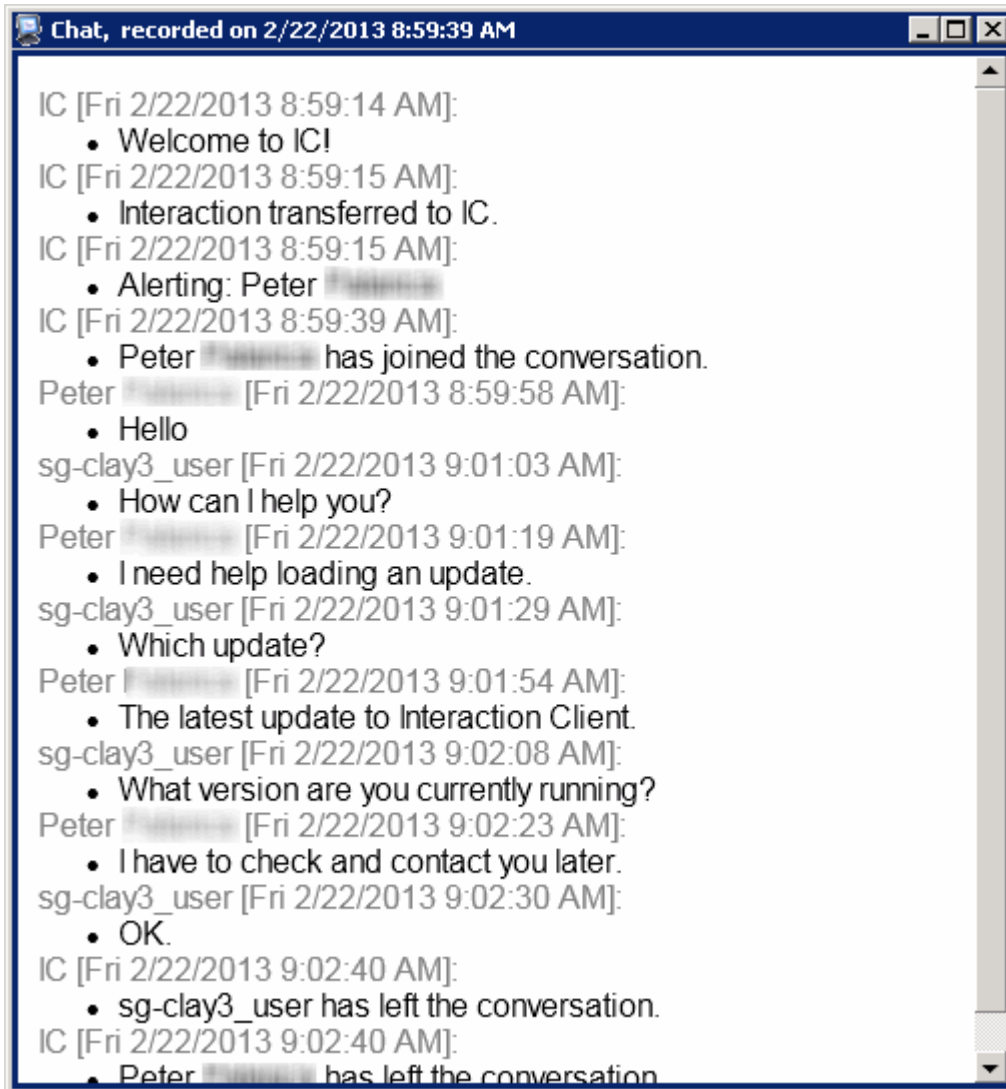
- The **Waveform** displays a graphic representation of the sound in the recording. The Waveform area includes a recording timeline that displays a position indicator and time, and the length of the recording.
- Use the **Audio** menu to select the audio device for the playback. The options are **Primary Sound Driver** or **Telephone Handset**.
- If you use the **Primary Sound Driver**, pause the mouse over a playback control to display its function. Use the sliders to control the Volume and Speed of the audio playback. Audio timing indicators display the current position in the recording and the total time of the recording.
- If you use the **Telephone Handset**, use the telephone keypad to control the playback. Press: **1** to slow down the recording; **2** to speed up the recording; **3** to decrease the volume; **4** to increase the volume; **5** to rewind ten seconds and return to normal speed; and **6** to fast forward ten seconds.

**Note** When playing back a recording through the telephone handset, the audio disconnects when the recording has finished playing or when the stop button is pressed.

- Select **About** from the **Media** menu to view Media Information properties, including Length, Audio format, and compression type.

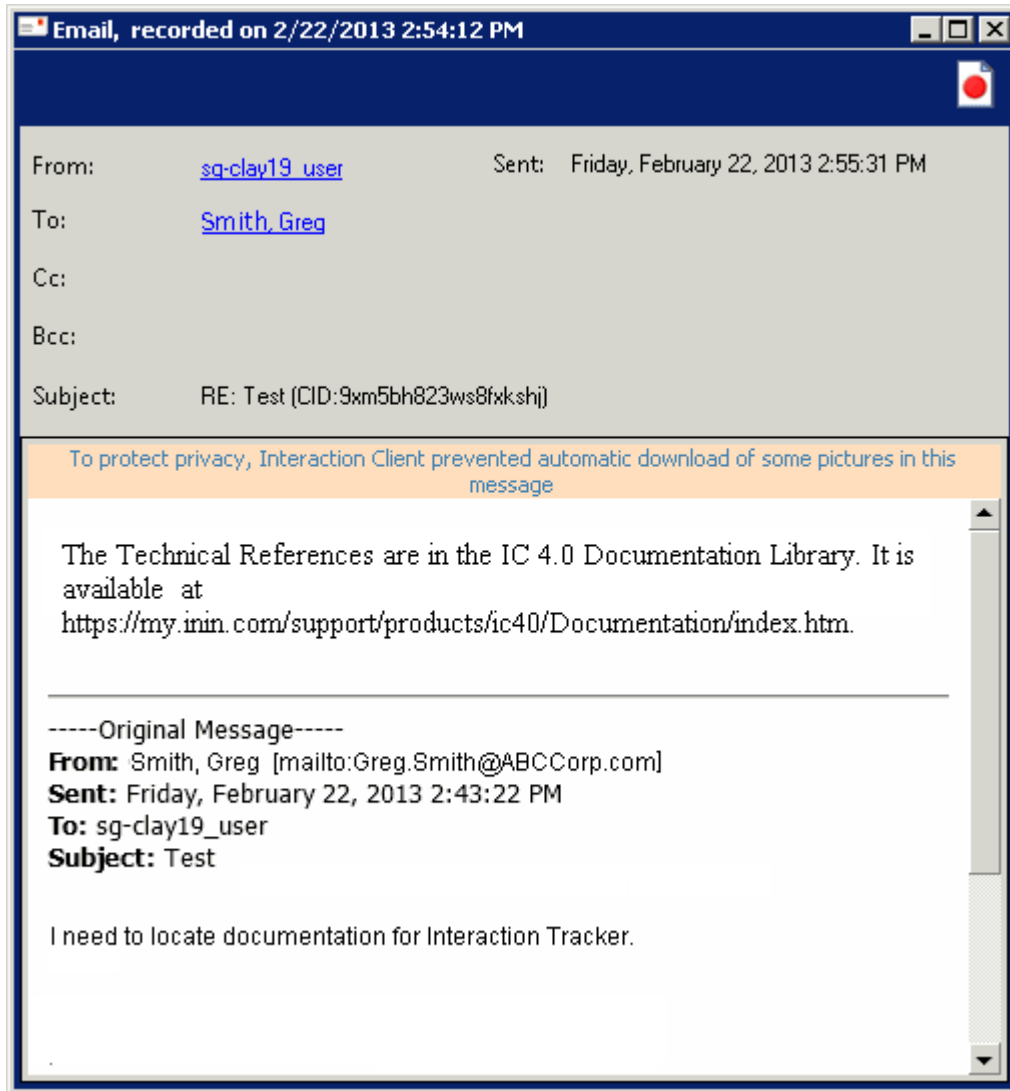
### Playback a Chat Interaction

The Chat Playback window shows a transcript of the recorded chat.



### Playback an Email Interaction

The Email Playback window shows a transcript of the recorded email conversation.



### Related Topics

- Use the Related Items View
- Use the Conversation History Tab

## View Interaction Properties

**Requirements:** Only agents with the appropriate licenses and security rights can create and manage Interaction Tracker information from inside the CIC client. For more information, see Tracker Licensing.

You can review the Interaction Tracker information stored for any interaction previously associated with a tracker contact.

**Note:** You can add, edit, or delete **some** of the information in the Interaction Properties dialog box. In particular, you can work with Notes and Attributes information. For more information, see Use Interaction Notes and Assign Interaction Tracker Attributes.

**To view interaction properties, do one of the following:**



- In the Related Items view, double-click a selected interaction.
- In the Related Items view, right-click a selected interaction, then select **Interaction Details** from the shortcut menu.

**Result:** The Interaction Properties dialog box appears.

**Interaction Properties**

Previous Segment Next Segment

**Segment Details**

Segment Type:	Interaction
Interaction Type:	Call
Start Time:	10/26/2011 12:04 PM
Duration:	00:00:17
Direction:	Outbound
Conference Id:	0
Workgroup:	
Account Code:	
Site Id:	1
Is Private:	False
Incident Id:	

**Notes**

+ Add Note X Delete Note Copy Note to Clipboard

All Notes

perseus\_User - 10/28/2011 2:34 PM (Eastern Standard Time)

Allow others to view this note.

**Participants** Attributes Segment Log

Indianapolis IN	Name:	Indianapolis IN
perseus_user -	Role:	Respondent
	Start Time:	10/26/2011 12:04 PM
	Duration:	00:00:17
	Wrapup Code:	
	Station:	
	How Ended:	RemoteDisconnect
	Interaction Id Key:	300108190320111026
	Interaction Address:	+1317222222

OK Cancel Apply

## Related Topics

Tracker Related Interactions

## Interaction History

**Requirements:** Only agents with the appropriate licenses and security rights can create and manage Interaction Tracker information from inside the CIC client. For more information, see Tracker Licensing.

You can view a list of the most recent interactions with a Tracker contact, organization, or location in the Interactions tab of the Properties for Contact, Properties for Organization or Properties for Location dialog boxes.

## Related Topics

Display the Related Items View  
 Modify Tracker Contact Information  
 Modify Tracker Organization Information

Modify Tracker Location Information

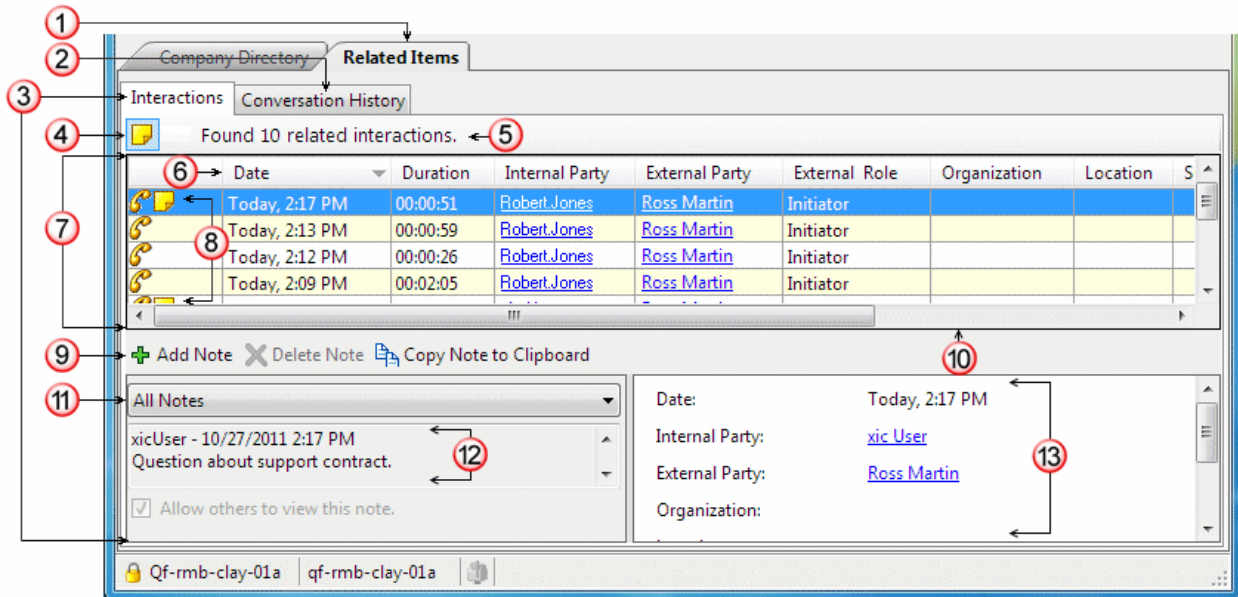
### Use the Related Items View

**Requirements:** You need the appropriate licenses and rights to Display the Related Items View in order to see the Related Items view.

The Interactions tab appears inside the Related Items view. The Interactions tab displays a list of interactions associated with the **currently selected interaction** in My Interactions.

You can also see lists of related interactions in the Interactions tab of the Properties for Contact, Properties for Organization and Properties for Location dialog boxes. For more information, see Modify Tracker Contact Information, Modify Tracker Organization Information, or Modify Tracker Location Information.

**Important:** Your CIC administrator can configure the IC server to stop processing the automatic queries that provide the information displayed in the Related Items view. This emergency shutoff prevents CIC system performance degradation caused by too many simultaneous queries from multiple CIC client systems. Interaction History and Interaction Search are still available during a Related Interactions Emergency Shut Off.



<p><b>1</b></p>	<p><b>Related Items view</b></p>	<p>The Interactions tab and the Conversation History tab appear inside the Related Items view.</p> <p><b>Tip:</b> For more information about on enabling this view to appear in the CIC client, see Display the Related Items View.</p>
<p><b>2</b></p>	<p><b>Conversation History</b></p>	<p>The Conversation History tab displays a list of email interactions associated with the <b>currently active email interaction</b>. For more information, see Use the Conversation History Tab.</p>
<p><b>3</b></p>	<p><b>Interactions</b></p>	<p>The Interactions tab displays a list of interactions associated with the <b>currently selected interaction</b> in My Interactions. It also enables you to view, add, or delete notes linked to these associated interactions.</p> <p><b>Tip:</b> You can configure the search criteria used to determine which related</p>

		interactions appear on this view.
4	<b>Toggle Notes view</b>	Click the icon to toggle between a list view and a combined list and notes view of related interactions.
5	<b>Interaction count</b>	This displays the total number of interactions contained in this scrollable list.
6	<b>Column headings</b>	Right-click on a column heading to add or remove columns from the Interactions tab. Sort the Interactions tab by clicking on a column heading.
7	<b>Interaction list</b>	This is a list of interactions associated with the <b>currently selected interaction</b> in My Interactions. <b>Note:</b> Only successful interactions (those connected to an agent or a station) appear in this view. Voicemails and abandoned interactions are not included.
8	<b>First column</b>	<ul style="list-style-type: none"> <li>The type of interaction is indicated by a call, email, fax, or chat icon.</li> <li>The presence of interaction notes is indicated by the Note icon.</li> <li>The Related Recording icon (red circle) appears for interactions with an associated recording. For more information, see Playback a Recorded Interaction.</li> </ul>
9	<b>Notes toolbar</b>	Use the Notes toolbar to add or remove notes from a selected interaction or to copy a note to the Windows clipboard. <b>Tip:</b> For more information, see Interaction Notes.
10	<b>View Splitter</b>	Adjust the relative size of the list and notes areas in a combined view by locating the splitter control and moving it up or down.
11	<b>Select Notes</b>	From the drop-down list in the Notes view, select the name of the writer of the appropriate note or select All Notes. <b>Tip:</b> For more information, see Interaction Notes.
12	<b>Notes</b>	This area displays the note text, author's name, and the date and time of the note.
13	<b>Interaction details</b>	This area displays the details of the interaction selected in the Interactions list.

### Tips for Using the Interactions Tab

- Double-click a selected interaction to view Interaction Properties.

**Note:** The details available in the Interaction Properties dialog box include notes, participant details, and interaction attributes.

- Click an Internal Party or an External Party **hyperlink** to view or modify Contact Properties.

**Note:** The details available in the Properties for Contact dialog box include address and Tracker attribute information. In addition, you can view a list of interactions related to this contact in the Interactions tab, including viewing interaction properties and working with interaction notes. For more information, see Modify Tracker Contact Information.

### Related Topics

Display the Related Items View  
Playback a Recorded Interaction

View Related Interaction Properties  
Use Interaction Notes

## Use the Conversation History Tab

**Requirements:** You need the appropriate licenses and rights to Display the Related Items View in order to see the Conversation History tab. The Conversation History tab appears inside the Related Items view. In addition, the Conversation History tab is blank unless your CIC administrator enables the **Threaded Email** feature in Interaction Administrator. If the Threaded Email feature is not enabled, email interactions may still appear in the Interactions tab if the administrator configures Interaction Tracker to log email interactions. Contact your CIC administrator if you have questions.

The Conversation History tab displays a list of email interactions associated with the **currently active email interaction**. Replies to an email interaction or the transfer of an email interaction are related to the original email interaction by means of a **Conversation ID**. These related interactions form a Conversation History. Only the agent who has picked up the interaction can view the Conversation History.

A Conversation History is not a record of the content of the email interactions. The email text is not preserved as part of this history. It provides a record of the contact between parties to the conversation, but not the details.

**Note:** No text of the conversation is preserved unless a separate application such as Interaction Recorder is used. Interaction Recorder is designed to manage the security risks inherent in preserving and managing access to communications.

Company Directory		Related Items		
Interactions		Conversation History		
	To	From	Subject	Received
	Noreen.Tankar	Aaron Lench		10/24/2011 6:03:15 PM
↓	Aaron Lench	Noreen.Tankar	RE: Marketing (CID:r1958g\$c\$wdf3f3pjd)	10/21/2011 8:58:11 PM
	Noreen.Tankar	Aaron Lench	RE: Marketing (CID:r1958g\$c\$wdf3f3pjd)	10/21/2011 8:40:18 PM
↓	Aaron Lench	Noreen.Tankar	RE: Marketing (CID:r1958g\$c\$wdf3f3pjd)	10/21/2011 8:40:04 PM
	Noreen.Tankar	Aaron Lench	RE: Marketing (CID:r1958g\$c\$wdf3f3pjd)	10/21/2011 8:34:30 PM
↓	Aaron Lench	Noreen.Tankar	RE: Marketing (CID:r1958g\$c\$wdf3f3pjd)	10/21/2011 8:34:17 PM
	Noreen.Tankar	Aaron Lench	RE: Marketing (CID:r1958g\$c\$wdf3f3pjd)	10/21/2011 8:28:39 PM
↓	Aaron Lench	Noreen.Tankar	Marketing	10/21/2011 8:28:32 PM
↓	Dale Brubaker	Noreen.Tankar	Marketing	10/21/2011 8:28:06 PM

(first column)	<p>The first column indicates the importance set on the email interaction.</p> <ul style="list-style-type: none"> <li>• <b>blank:</b> Normal importance</li> <li>• <b>exclamation point:</b> high importance</li> <li>• <b>down arrow:</b> low importance</li> </ul> <p>The Related Recording icon (red circle) appears for email interactions with an associated recording. For more information, see Playback a Recorded Interaction.</p>
<b>To</b>	<p>For an <b>email reply</b>, this is the name of an Interaction Tracker Contact. If the name does not appear in the Tracker database, then the name of the external party (the sender of the original email message) appears.</p> <p>For an <b>incoming or transferred email interaction</b>, this is the name of the agent who picked up the interaction.</p>
<b>From</b>	<p>For an <b>email reply</b>, this is the name of the agent who sent the reply.</p> <p>For an <b>incoming or transferred email interaction</b>, this is the name of the Interaction Tracker Contact. If the name does not appear in the Tracker database, then the name of</p>

	the external party (the sender of the original email message) appears.
<b>Subject</b>	This is the subject text of the original ACD-routed email interaction. When an agent replies, a <b>Conversation ID</b> is created and appended to the subject text. This same Conversation ID is appended to the subject text for all subsequent email interactions that are part of the same conversation or email thread.
<b>Received</b>	For an <b>email reply</b> , this is the date and time the agent sent the reply. For an <b>incoming or transferred email interaction</b> , this is the date and time the agent picked up the interaction.

#### To view a Conversation History:

1. An email interaction alerts on a queue.

**Note:** Conversation History is available only for a connected interaction. You cannot search for a completed and disconnected email interaction and display its Conversation History.

2. Pick up the interaction.

**Result:** The Conversation History tab displays a list of email interactions associated with the currently selected email interaction.

#### Related Topics

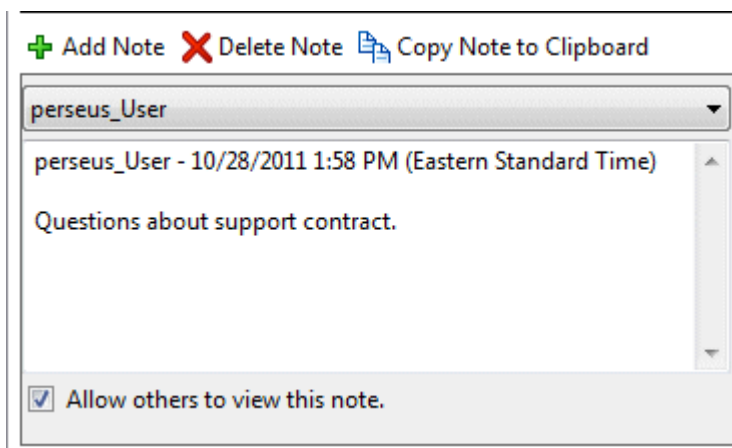
Display the Related Items View  
Playback a Recorded Interaction  
Working with Related Interactions

## Use Interaction Notes

**Requirements:** Only agents with the appropriate licenses and security rights can create and manage Interaction Tracker information from inside the CIC client. For more information, see Tracker Licensing.

Use Interaction Notes to review, add, delete or copy notes. This section appears in both the Interaction Properties dialog box and on the Interactions tab. It also appears in the Interactions tab of the Properties for Contact, Properties for Organization and Properties for Location dialog boxes. For more information, see Modify Tracker Contact Information, Modify Tracker Organization Information, or Modify Tracker Location Information.

**Tip:** You can also use the Interaction Information view to add notes to an interaction.



To add a note:

1. Click the **Add Note** button.

**Result:** The Notes typing area becomes available. Notice that your user ID, and the current date and time default to this space.

2. Click to place your cursor in this area and begin typing.

#### To display a selected note:

- From the drop-down list in the Notes view, select the name of the writer of the appropriate note.

**Result:** The note appears in the Notes typing area.

#### To copy and paste a note:

1. From the drop-down list in the Notes view, select **All Notes** or a specific note.

2. Do one of the following:

- Click the **Copy Note to Clipboard** button.

**Result:** This selects all the text in the current note, including the identifying information (user ID, date and time), and copies it to the Windows clipboard.)

- Select some of the text in the Note typing area and type **Ctrl+C**.

**Result:** This copies only the selected text to the Windows Clipboard.

3. Press **Ctrl+V** to copy the text to any standard Windows application

#### To delete a note:

1. Display the appropriate note.
2. Click the **Delete Note** button.

**Result:** The currently displayed note is deleted.

#### Related Topics

Display the Related Items View  
Use the Related Items View  
View Related Interaction Properties

## Working with the Microsoft Lync Integration

### Working with the Microsoft Lync Integration

**Requirements:** Your organization or company must have the Lync Integration feature license. Your CIC administrator must appropriately configure your user record to enable you to use the embedded Lync client in the CIC client. Finally, you must install Microsoft Lync on your workstation. Microsoft Lync must be running at the same time as the CIC client. Contact your CIC administrator if you have questions about these requirements or your user configuration. For more information, see the *Interaction Center Integration to Microsoft® Lync™ Server Administrator's Guide*.

Customer Interaction Center supports integration to Microsoft Lync Server. Lync Server and Customer Interaction Center, when used together, provide a new range of capabilities to users of both systems:

- Users who previously used only Lync now have access to all the powerful contact center and IP PBX capabilities of Interaction Center.

- The integration provides CIC client users with the instant messaging and video capabilities of Lync, and the functionality available in the Lync Server platform.
- Call center agents using CIC client can now view the availability of Lync users who are not Customer Interaction Center users.

In addition to benefiting from the features of each system, users of the integrated systems can realize some more specific functionality.

- **Additional Call Functionality**

Lync users can place calls from the Lync client to a CIC client user or to the PSTN (public switched telephone network). CIC client users can place calls to Lync users. In addition, calls from the PSTN can be directed to Lync users.

- **CIC client with embedded Lync client**

Lync-only users can use the Lync interface, while Lync-enabled CIC users can use the Lync functionality embedded in the CIC client. With the embedded Lync client, CIC client users can start an instant message conversation or video chat with a Lync user or share their desktop with a Lync user. Customer Interaction Center handles voice communications, while Lync Server handles video communications.

- **Lync-enabled Company Directory**

The Lync-enabled Company Directory combines CIC client users and Lync-enabled CIC client users in a single directory view. It features a toolbar designed to make it easy to use the Instant Messaging, Share Desktop, and Video chat functions of the Lync Integration.

## Related Topics

Lync Embedded Client  
 Lync-Enabled Company Directory  
 Lync Integration User Types

## Lync Integration Status Synchronization

**Requirements:** See Working with the Microsoft Lync Integration for feature license and user rights requirements.

You can specify your status in the CIC client. Customer Interaction Center uses status information to determine if you are available to participate in chat or to pick up a call or other interaction. You can specify a **presence state** in Lync. Lync Server uses presence information to indicate if you are available to participate in an instant message conversation.

If you are a Lync-enabled CIC client user, you can use either the CIC client or Lync to indicate your availability. If your CIC administrator has configured Lync Integration Status Synchronization, status or presence changes made in one of these applications are mirrored in the other.

### Synchronization Configuration Profiles

Synchronization Configuration Profiles determine how CIC status and Lync presence state are synchronized. A profile is a collection of status synchronization mappings from CIC to Lync and from Lync to CIC. The Lync Integration includes three default synchronization profiles. Your CIC administrator can also create custom profiles or modify the mappings in the default profiles. Your CIC administrator can assign more than one profile to you.

Profiles have configurable conditions. These conditions determine which of your assigned profiles is used to synchronize your Lync presence state and CIC status, or even if any synchronization takes place at all. Conditions also

determine if the synchronization is one-way. For example, a change to your CIC status could trigger a Lync presence state change, but not the reverse. Some of the conditions include:

- Whether you are logged into the CIC client or Lync or both.
- Your user type:
  - **Enterprise Voice:** You use Lync as your telephony endpoint instead of a CIC station.
  - **Remote Call Control:** You use a CIC station as your audio device.
  - **IM:** You use Lync only for Instant Messaging.

In its simplest form, status synchronization works like this:

- If Customer Interaction Center detects a **change to your Lync presence state**, it checks the Synchronization Configuration Profiles assigned to you. If a profile's conditions are met and it contains a mapping for your new Lync presence state, Customer Interaction Center changes your CIC client user status.
- If Customer Interaction Center detects a **change to your CIC client status**, it checks the Synchronization Configuration Profiles assigned to you. If a profile's conditions are met and it contains a mapping for your new CIC client user status, Customer Interaction Center changes your Lync presence state.

**Note:** A profile setting can append "In Queue" to your Lync presence state, if you are an active member (available to take calls) in a workgroup that has an ACD queue. For example, your Lync status could appear as **Available, in queue**.

### Mappings Example

This table is an example of status to presence state mappings. Different status mappings could be used in the Synchronization Configuration Profiles assigned to you.

**Note:** (Lync -> CIC) indicates the CIC status that is used for the corresponding Lync presence state. For example, if you change your status to **Away** in Lync, then your CIC status is synchronized and set to **Away from Desk**.

CIC Status	Lync Presence State
Available (Lync -> CIC) Available, Forward Available, No ACD Available, Follow Me Working at Home	Available
In a Meeting (Lync -> CIC) At a Training Session	Busy, In a Meeting Busy
Do Not Disturb (Lync -> CIC)	Do Not Disturb
Away from Desk (Lync -> CIC) At Lunch Gone Home Out of the Office Out of Town On Vacation	Away
Follow Up ACD Agent Not Answering	None



None

Be Right Back

**Related Topics**

Working with the Microsoft Lync Integration

**Lync Integration User Types**

**Requirements:** For licensing, configuration, and other requirements, see Working with the Microsoft Lync Integration.

The Customer Interaction Center integration with Microsoft Lync Server (Lync) involves three types of users:

**Lync-enabled CIC client user**

A user configured in both Lync Server and Interaction Administrator. This user benefits from the advanced integration features of both the CIC client and the Lync client.

Lync-enabled CIC client users can be classed as follows:

- Enterprise Voice users
- RCC users
- A Remote Call Control user
- IM only users

If you use Lync as your telephony endpoint, your Lync Server administrator must configure your Lync Server user account with the appropriate telephony settings on the Lync Server. In addition, your CIC administrator must configure your Interaction Center user account to use Lync as your telephony endpoint.

**CIC client user**

A CIC client user, configured in Interaction Administrator. This user does not have a Lync Server user account.

**Lync user**

A Lync client user, configured in Lync Server. This user does not have a Customer Interaction Center user account.

**Related Topics**

Working with the Microsoft Lync Integration

**Lync Embedded Client**

**Requirements:** See **Working with the Microsoft Lync Integration** for feature license and user rights requirements. The standard Microsoft Lync client must be running at the same time you are using the Lync Embedded Client. The standard Lync client can be minimized.

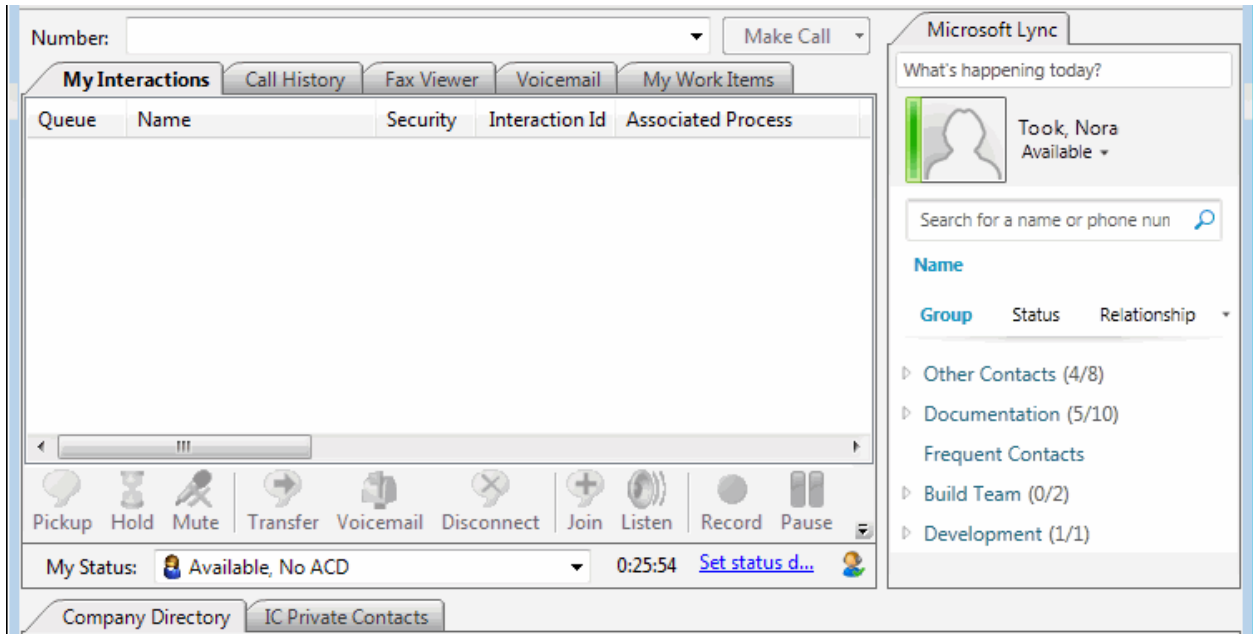
The Lync Embedded Client is a view of the Microsoft Lync client that appears in the CIC client. This view enables you to take advantage of the unique features of each application in a single interface. You can use the instant messaging and video capabilities of the Lync Server platform. You can search for and view the availability of Lync contacts who are not Customer Interaction Center users. At the same time, you are able to use the powerful contact center features and audio functions of the CIC client.

- The Lync Embedded Client features the same Contacts lists as the full Microsoft Lync client.
- You can manage your Lync presence information and view Lync presence for other Lync users.
- You can use the Lync Embedded Client to send email messages, instant messages, and video chat with other Lync users or Lync-enabled CIC client users.

**Note:** We recommend that you use the CIC client for all audio calls. For more information, see [Audio Calls and the Lync Embedded Client](#). For more information about sending an instant message or other standard Lync functions, see the [Microsoft Lync help](#).

You can use the Lync Embedded Client to perform almost all the functions available in the Microsoft Lync client. However, in the current version, use the standard Microsoft Lync Client to:

- Log on and Log off.
- Adjust your Lync configuration.
- Set your location.



### Related Topics

[Working with the Microsoft Lync Integration](#)

## Display the Lync Embedded Client

**Requirements:** See [Working with the Microsoft Lync Integration](#) for feature license and user rights requirements.

Lync-enabled CIC users can display the Lync client inside the CIC client.

### To display the Lync Embedded Client:

1. In the **Create New View dialog box**, from the **Categories** list, select **Unified Communications**.
2. In the **Views** list, select **Microsoft Lync**.
3. Click **OK**.

**Result:** The Lync Embedded Client appears.

**Tip:** You can move this view to another part of the interface. For more information, see Customizing the Interface.

### Related Topics

Lync Embedded Client  
Working with the Microsoft Lync Integration

## Lync-enabled Company Directory

**Requirements:** See Working with the Microsoft Lync Integration for feature license and user rights requirements. The standard Microsoft Lync client must be running at the same time you are using the Lync Embedded Client. The standard Lync client can be minimized.

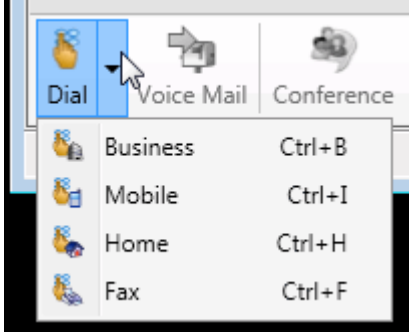
The Lync-enabled Company Directory combines CIC client users and Lync-enabled CIC client Users in a single directory view. It features a toolbar designed to make it easy to use the IM, Share Desktop, and Video chat functions of the Lync Integration.

**Note:** Your CIC administrator could include Lync-only users in this directory view. For more information about user types, see Lync Integration User Types.

Department	Extension	Last Name	First Name	Lync Presence	Status Summary
Sales	<a href="#">122</a>	Adams	Joe		
Support...	<a href="#">5555</a>	Adams	Justin		
Develop...	<a href="#">7777</a>	Adams	Kyle		
Develop...	<a href="#">4444</a>	Adams	Mark		

The special features of the Lync-enabled Company Directory view include:

<p><b>1</b></p>	<p><b>Lync Presence column</b></p>	<p>An icon indicates a Lync user's presence state. Green means available, red means busy. For information about the meaning of other Lync presence state icons, see the Microsoft Lync help.</p> <ul style="list-style-type: none"> <li>You can <b>hover</b> over a Lync user's Lync presence state icon to display the Lync contact card. Use the Lync features on this contact card to send an email or instant message, start a video call or share your desktop.</li> </ul>  <ul style="list-style-type: none"> <li>You can <b>click</b> a Lync presence state icon to display the Lync contact card and the Lync user's organization and contact information.</li> </ul>  <p><b>Tip:</b> For information about how to add this column to the Lync-enabled Company Directory view, see Add or Remove View Columns.</p>
<p><b>2</b></p>	<p><b>Enhanced Status Summary column</b></p>	<p>Both Lync presence icons and CIC client status icons appear in the Status Summary column. In addition, for CIC users, a check mark indicates that a user is logged on to the CIC client while an X indicates that the user is logged off.</p> <p><b>Tip:</b> For information about how to add this column to the Lync-enabled Company Directory view, see Add or Remove View Columns.</p>
<p><b>3</b></p>	<p><b>Dial, Transfer, and Consult toolbar</b></p>	<p>You can dial any phone number associated with a contract or transfer an interaction to any of a contact's numbers. Select the number from the drop-</p>

	<p>down list associated with the Dial, Transfer, and Consult toolbar buttons.</p>  <ul style="list-style-type: none"> <li>• To dial the default number, select an entry in the Lync-enabled Company Directory and then click the <b>Dial</b> button</li> <li>• Select an entry in the Lync-enabled Company Directory and then click the arrow on the <b>Dial</b> button. To dial the associated number, click one of the displayed phone number types.</li> </ul>
<p>4 <b>Lync-related toolbar buttons</b></p>	<p>The Lync-enabled Company Directory view toolbar includes command buttons for Lync functions. These Lync functions also appear on the shortcut menu for a Lync-enabled user.</p> <p>Lync-enabled CIC client users can select a contact from the Lync-enabled Company directory and then click a button to start an instant message conversation. You can also video chat with a Lync user or share your desktop with a Lync user.</p> <p><b>Note:</b> You cannot customize the appearance of the Lync-enabled Company Directory toolbar by adding, removing, or moving toolbar buttons.</p>

**Related Topics**

Working with the Microsoft Lync Integration

**Display the Lync-enabled Company Directory**

Lync-enabled CIC client users can display the Lync-enabled Company Directory.

**To display the Lync-enabled Company Directory:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Directories**.
2. In the **Views** list, select **Company Directory (Lync-enabled)**.
3. Click **OK**.

**Result:** The Lync-enabled Company Directory appears.

**Tip:** You can move this view to another part of the CIC client interface. For more information, see Customizing the Interface. However, you cannot customize the appearance of the Lync-enabled Company Directory toolbar by adding, removing, or moving toolbar buttons. For more information about these toolbar buttons, see Lync-enabled Company Directory.

**Related Topics**

Lync-enabled Company Directory

Working with the Microsoft Lync Integration

## Audio Calls and the Lync Embedded Client

We recommend that all users of the Integration to Microsoft Lync use the CIC client for **all calls**. Calls made from the Lync client or the Lync Embedded Client to another Lync user do not show up in the CIC client. You can always call a Lync user by typing the phone number in the CIC client **Number** field.

### Related Topics

- Make a Call Using the Number Field
- Working with the Microsoft Lync Integration

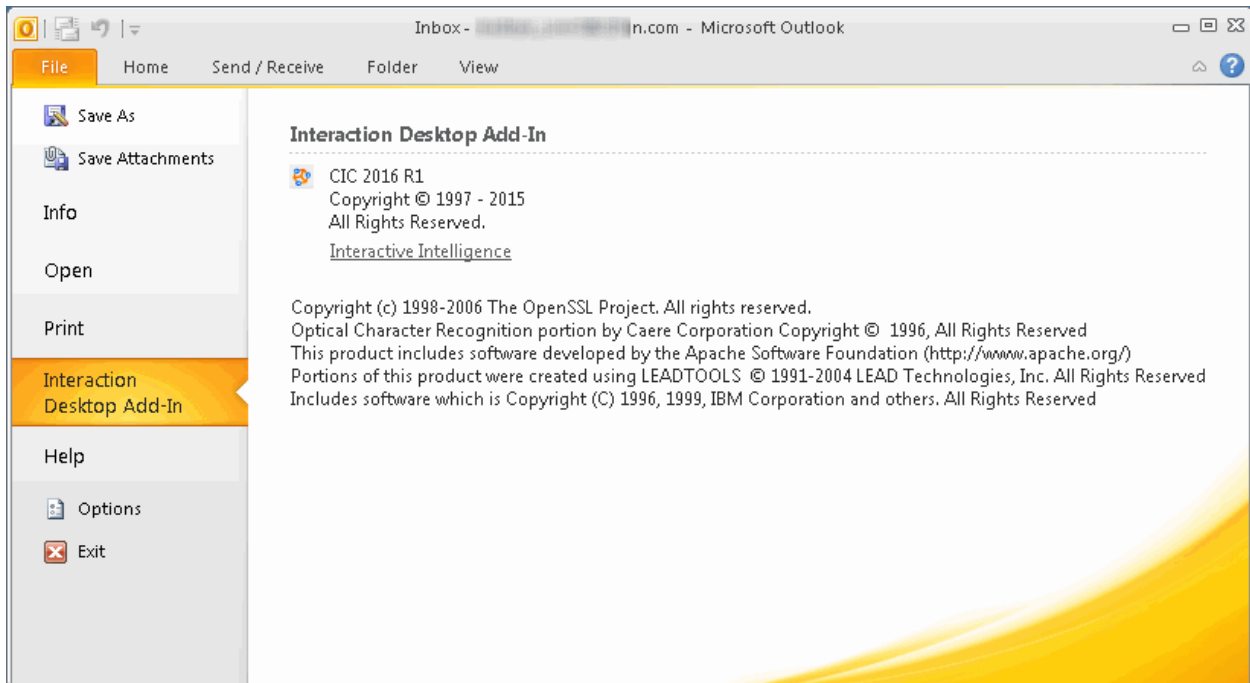
## Working with the Microsoft Outlook Interaction Client Add-in

### Working with the Microsoft Outlook Interaction Desktop Add-In

**Requirements:** To use the Microsoft Outlook Interaction Desktop Add-In, you need both the Interaction Client Outlook Add-In license and the Client Access license. You must also install the add-in on your workstation. Contact your CIC administrator.

The Microsoft Outlook Interaction Desktop add-in enables you to call both Outlook contacts and other CIC client users. It also provides up-to-date status information for other CIC client users in your organization.

**Tip:** The version number for the Microsoft Outlook Interaction Desktop add-in is available in the Outlook backstage area.



### Related Topics

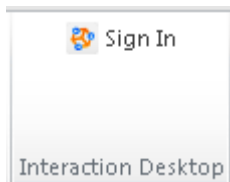
- Sign In
- Use the Interaction Desktop Group to Dial a Number

Use the Outlook Shortcut Menu to Dial a Number  
View User Status in Outlook

## Sign In

The Microsoft Outlook Interaction Desktop Add-In uses features in the CIC client to place calls and check the status of Customer Interaction Center users.

Log on to the CIC client before using the Microsoft Outlook Interaction Desktop Add-In. If you are not logged on, a Sign In button appears in the Interaction Desktop group.



### To sign in:

1. In the Outlook **Home** tab, in the **Interaction Desktop** group, click the **Sign In** button.
2. Follow your standard CIC client logon procedure. For more information, see Logging On and Logon Settings.

### Related Topics

Working with the Microsoft Outlook Interaction Desktop Add-in

## Use the Interaction Desktop Group to Dial a Number

**Requirements:** See Working with the Microsoft Outlook Interaction Desktop Add-in.

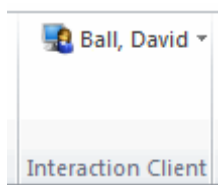
You can use the drop-down list in the **Interaction Desktop** group to dial a number.

The **Interaction Desktop** group appears on the **Home** tab ribbon in the Inbox or other email folder. It also appears in the **Message** tab in an open email message and in the **Meeting**, **Meeting Occurrence** or **Meeting Series** tab in an open appointment.

### To use the Interaction Desktop Group drop-down list to dial a number:

1. Do one of the following:
  - In the Outlook Inbox or other email message folder, select an email message.
  - Open an email message.
  - Open an Outlook Calendar appointment.

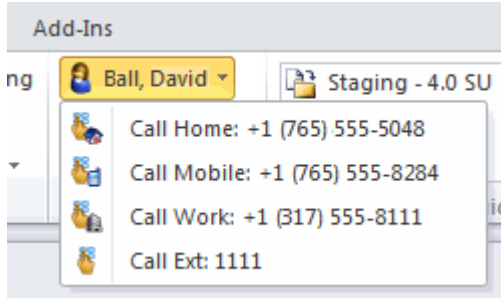
**Result:** The name of the email message sender or meeting organizer appears in the Interaction Desktop group.



2. Click the down arrow next to the name.

**Note:** The drop-down arrow is enabled only if telephone numbers are available for this CIC client user or Outlook contact.

**Result:** A drop-down list of phone numbers appears.



3. Click one of the displayed phone numbers.

**Result:** The CIC client appears on top of any open windows and dials the selected number.

### Related Topics

Use the Outlook Shortcut Menu to Dial a Number  
Working with the Microsoft Outlook Interaction Desktop Add-in

## Use the Outlook Shortcut Menu to Dial a Number

**Requirements:** See Working with the Microsoft Outlook Interaction Desktop Add-in.

You can use the Outlook shortcut menu to dial a number for a Customer Interaction Center user or an Outlook contact. When you view an email message or calendar appointment, you can right-click a name and with two additional clicks, dial any of this phone numbers associated with this person.

To use the Outlook shortcut menu to dial a number:

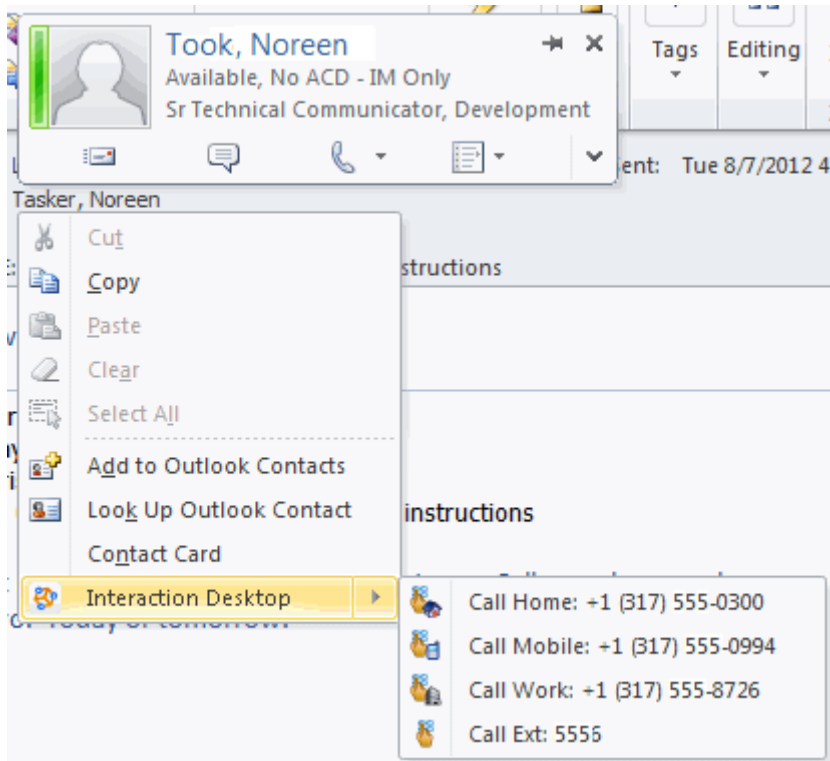
1. Do one of the following:
  - Select or open an email message.
  - Select or open an Outlook Calendar appointment.
2. Right-click the name of one of the following:
  - The email message sender
  - One of the email message recipients
  - The meeting organizer
  - A meeting participant

**Note:** You can right-click a name in an open Email or Appointment window or in the Reading pane.

**Result:** The Outlook shortcut menu appears.



3. Select **Interaction Desktop** and then select one of the phone numbers associated with the selected CIC client user or Outlook contact.



**Result:** The CIC client appears on top of any open windows and dials the selected number.

#### Related Topics

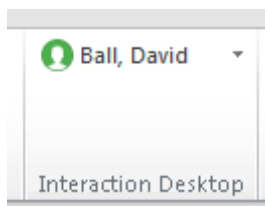
Use the Interaction Desktop Group to Dial a Number  
Working with the Microsoft Outlook Interaction Desktop Add-in

## View User Status in Outlook

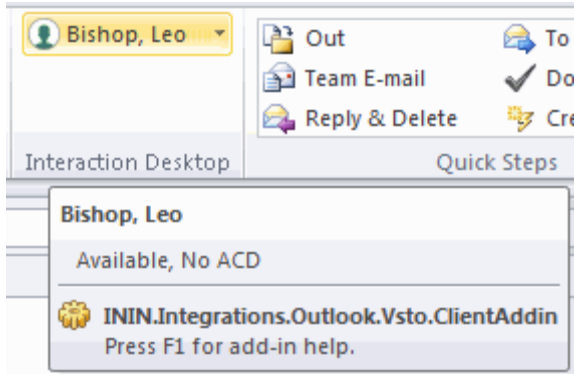
**Requirements:** See Working with the Microsoft Outlook Interaction Desktop Add-in.

The Microsoft Outlook Interaction Desktop add-in displays up-to-date status information for other CIC client users listed in your Company Directory. The Microsoft Outlook Interaction Desktop add-in appears in the **Interaction Desktop** group on the **Home** tab ribbon in the Inbox or other email folder. It also appears in the **Message** tab in an open email message and in the **Meeting**, **Meeting Occurrence** or **Meeting Series** tab in an open appointment.

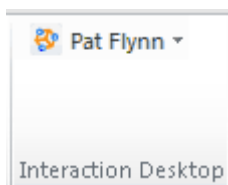
- A **status icon** indicates a CIC client user's status.



- If you point to the name of a CIC client user, a **tooltip** displays this user's name and status.

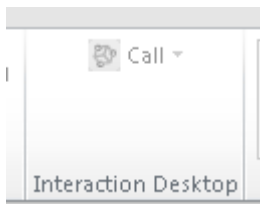


- A **CIC client icon** or a **telephone icon** appears next to the name of an Outlook contact.



**Note:** If this Outlook Contact does not have an associated telephone number, the name is dimmed.

- If the email message sender or meeting organizer is not a CIC client user or one of your Outlook contacts, the Interaction Desktop group displays "Call." The lack of a name and a dimmed drop-down list indicate that this person or organization is unidentified.



**To view user status, do one of the following:**

- In the Outlook Inbox or other email message folder, select an email message.
- Open an email message or calendar appointment.
- Open an Outlook Calendar appointment.

**Related Topics**

Use the Interaction Desktop Group to Dial a Number  
Use the Outlook Shortcut Menu to Dial a Number  
Working with the Microsoft Outlook Interaction Desktop Add-in

**Working with Orbit Queues**

**Orbit Queues**

**Requirements:** You need the Orbit Queue Security right to display the Orbit Queue view.

An orbit queue is a list of all calls parked to specific numbered orbits. This feature is especially helpful for Public Announcement system operators who can park a call in Orbit, then page the recipient and relay that he or she has a call on a specific Orbit number. For example, the operator could announce: "John Smith, you have a call on Orbit 12", thus enabling John Smith to move to any station and pick up the call.

When you park a currently active call in a specific orbit it removes the call from your station. This enables you to pick up the call from another station and resume the call without having to transfer it to a specific extension.

**Note:** In order to pick up a call from orbit from a queue view, you must display the Orbit Queue view. Alternatively, you can use a Polycom phone configured as a SIP station to pick up a call from an orbit. For more information, see [Pick Up a Call from an Orbit](#).


## Displaying the Orbit Queue View

You can view a list of all parked calls by displaying the Orbit Queue view. The Orbit Queue view contains the details of parked calls, including the orbit number and how long the call has been parked on an orbit.

### To display the Orbit Queue view:

1. In the **Create New View dialog box**, from the **Categories** list, select **Queues**.
2. In the **Views** list, select **Orbit Queue**.
3. Click **OK**.

**Result:** The Orbit Queue view appears.

Queue	Orbit	Name	Interaction...	Associated Process	Number	Duration	State
	10	From: Joe Smith	1066717307		3176960994	0:01:08	Parked

### Related Topics

- Introduction to Queues
- Park a Call on Orbit
- Pick up a Call from an Orbit

## Park a Call on Orbit

**Requirements:** You need the Orbit Queue Security right to display the Orbit Queue view. For more information, see [Park on Orbit](#).

You can place any connected call in a specific orbit. This places the call on hold and removes it from your station. Depending on the hold behavior your CIC administrator configures, callers "in orbit" hear a combination of music and messages. To a caller, there is no difference between being on hold or in orbit.

Calls in orbit can be picked up at another station. This enables you to move to another station and resume the call without having to transfer the call to a specific extension. You can view and pick up calls in orbit by displaying the Orbit Queue view in the CIC client. For more information, see [Orbit Queues](#).

**Note:** Your CIC administrator can configure a **maximum hold time** for calls. By default, calls on hold for longer than fifteen minutes are disconnected. Your administrator can also configure the behavior that occurs once the hold time is exceeded. For example, your administrator may choose to transfer calls on hold longer than twenty minutes to another queue. For more information, see your administrator.

**Tip:** You can also use a Polycom phone configured as SIP station to park a call on orbit. For more information, see the *Polycom® SoundPoint® Quick Reference Cards* available in the CIC Documentation Library.

**To park a call on orbit:**

1. In My Interactions, if the call is not already selected, click the call to select it.
2. Do one of the following:
  - Right-click the call and choose **Park on Orbit** from the menu that appears.
  - Press **Ctrl+K**.
  - Click the Park on Orbit button in the Queue Control toolbar.

**Note:** This is an optional button. For more information about adding this button to the Queue Control toolbar, see Customizing Toolbars.

3. In the Orbit Park dialog box, assign a number to this orbit by typing a number in the **Park call on Orbit** text box.

**Note:** You can use any single digit number (starting with 1) up to the 10-digit number 4294967294. Avoid orbit numbers starting with 0 (zero). The number defaults to the last orbit number used.

4. Click **Park**.

**Note:** If the orbit number is currently in use, you are prompted to choose another orbit number.

**Result:** The call is removed from My Interactions or other queue and the call's state changes to **Parked**. You can view the call in the Orbit Queue view.

Queue	Orbit	Name	Interaction...	Associated Process	Number	Duration	State
	10	From: Joe Smith	1066717307		3176960994	0:01:08	Parked

5. To suppress on-hold music for the other party, click the Mute button before or after placing the call in orbit.
6. To pick up a call from an orbit, see Pick up a Call from an Orbit.

**Related Topics**

- Introduction to Queues
- Orbit Queues
- Pick up a Call from an Orbit

**Pick Up a Call from an Orbit**

**Requirements:** See Pickup.

You can pick up a call from an orbit from any station.

**To pick up a call from an orbit:**

1. Click the Orbit Queue view.
2. Do one of the following:
  - Right-click a call in the orbit queue and choose **Pickup** from the menu that appears.

- Select the call then click the Pickup button.

**Result:** You are now connected to the call.

**Tip:** You can also use a Polycom phone configured as SIP station to park a call on orbit. For more information, see the *Polycom® SoundPoint® Quick Reference Cards* available in the CIC Documentation Library.

### Related Topics

Introduction to Queues  
Orbit Queues  
Park a Call on Orbit

## Working with Personal Rules

### Personal Rules

**Requirements:** You need the Personal Rules Security right to create and run personal rules.

You can use personal rules to automatically manage your interactions. After you create a rule, Customer Interaction Center applies the rule when you place a call or when a call is placed directly to you (a non-ACD interaction). For example, you can automatically display a desktop alert when you receive a call from your boss, send all calls from a designated phone number directly to voice mail, or change your status to "Do Not Disturb" when you make a call to a selected number.

### Related Topics

Creating Quick Call Rules  
Setting Up Personal Rules

## Setting Up Personal Rules

**Requirements:** You need the Personal Rules Security right to create and run personal rules.

Use the Personal Rules dialog box to set up personal rules that automatically perform specific actions when triggered by designated interactions. You select the conditions which control how a rule is triggered, when it runs, and what it does.

### You can:

- Create a personal rule
- Define an attribute
- Copy a personal rule
- Edit a personal rule
- Rearrange personal rule processing order
- Turn a personal rule on or off
- Delete a personal rule

### Create a Personal Rule

**To create a personal rule:**

1. Display the Personal Rules dialog box.

**Note:** In the Interactive Intelligence Oracle Service Integration, you access the Personal Rules dialog box by first creating a Quick Call Rule and then clicking the Display Personal Rules link.

2. In the **Personal Rules** dialog box, click **New**.
3. In the **I want this rule to be based on** section of the Rule Wizard, select one of the following:

<b>Template</b>	Build a rule based on a template. <b>Note:</b> A template is a pre-built rule based on an event with various conditions, actions, and exceptions that you can customize using the Rule Wizard.
<b>An Event</b>	Build a rule based on an event such as "When I receive a call."

4. Select a template or an event from the displayed list.

**Result:** The default rule conditions appear in the lower part of the Rule Wizard.

5. Perform either or both of these optional steps or skip to the next step:
  - In the **Name** text box, change the rule name by typing over the default name.
  - Clear the **Turn on Rule** check box to suspend the processing of this rule at this time.
6. Define any attributes in the rule conditions.
7. Click **Next** and further define the rule in the Rule Wizard.

**Defining a rule:** There are three pages in the Rule Wizard. They define rule conditions, actions, and exceptions. For each page:

- Select the check box for any item that applies to your rule definition.
- Clear the check box to remove an item from the rule definition.
- Supply required attribute names or values. For more information, see Specify Attribute Names or Values.

**1st Page:** In the **When should the rule run?** page, select check boxes for conditions that cause the rule to run. Supply required attribute names or values. Click Next.

**2nd Page:** In the **What do you want to have the rule do?** page, select check boxes for actions you want performed when the rule runs. Supply required attribute names or values. Click Next.

**Note:** A rule must have at least one action. Actions are performed in top to bottom order. Use the up and down arrows to change the order in which actions are performed in the rule. Some actions stop rule processing. For more information, see Rearrange Personal Rule Processing Order.

**Do Not Disturb Status:** If you configure a rule based on a "Do Not Disturb" status which alerts you by playing an audio file or displaying a desktop alert, you must also include the "alert me even if I'm in a do not disturb status" action. The rule conditions should look like this:

```
When I receive a call
If my status is a do not disturb status
Then alert me even if I'm in a do not disturb status
  And ring my PC with <audio file>
```

**3rd Page:** In the **Are there any exceptions when the rule should not run?** page, select check boxes for exceptions to the rule that cause it not to run. Supply required attribute names or values. Click Next.

9. Click **Finish**.

**Result:** The rule appears in the **Rules** list in the Personal Rules dialog box.

10. Click **Apply** to save the rule.

11. Click **OK** to close the Personal Rules dialog box.

### Specify an Attribute Name or Value

Attributes are information tags attached to an Interaction in the system. Attributes have names and values. CIC uses attributes to contain most of the data about an interaction. In addition, your CIC administrator can add custom attributes to an interaction as part of the call handling on the server.

In Personal Rules, attributes can be used to further define rule conditions.

- Rules that require attribute names have the hyperlink [<attribute name>](#) in them. Click [<attribute name>](#) and supply the name of the desired attribute before continuing to the next Rule Wizard section.

**Note:** The CIC Documentation Library stored on the IC server includes the *Interaction Attributes Technical Reference* which documents attributes available in a standard IC server installation. Consult your CIC system administrator about custom attributes used in your installation.

- Rules that require an attribute value have a hyperlink with the attribute name inside it (example, [<status>](#), [<time>](#), or [<phone number>](#)).

**Note:** If the attribute you are specifying is an audio file, see the following section, Audio Files.

#### To specify an attribute name or value:

1. Click any [<attribute name>](#) or [<attribute value>](#) hyperlink displayed in the rule conditions.
2. Enter the attribute name or select an attribute value in the attribute-specific dialog box that appears.
3. Click **OK** to save the attribute name or attribute value.

### Playing Audio Files to Caller

When a rule plays audio files, the audio files must be saved in a Personal Storage area on the IC server.

#### To play an audio file:

1. When you Create a Personal Rule, select an action such as "play <audio file> to the caller" or "ring my PC with <audio file>."
2. Click the <audio file> hyperlink displayed in the rule conditions.

**Result:** The Audio Files dialog box is displayed.

3. Do one of the following:
  - In the File Name list, select an audio file from your personal storage area.
  - If the file you want is not listed, click **Manage**. In the Personal Storage Management dialog box, click **Add**. In the Open dialog box, locate the appropriate.wav file and click **Open**. Click **Close**. In the File Name list, select an audio file from your personal storage area.
4. In the Audio Files dialog box, click **OK**.

**Result:** The name of the selected audio file appears in the rule condition.

## Copy a Personal Rule

### To copy a personal rule:

1. In the Personal Rules dialog box, select a rule.
2. Click **Copy**.
3. Do one of the following:
  - Click **Edit** to make changes to the copied rule.
  - Click **OK** to save the copy and close the Personal Rules dialog box.

## Edit a Personal Rule

### To edit a personal rule:

1. In the Personal Rules dialog box, select a rule.
2. Click **Edit**.
3. Make any necessary changes. For more information, see Create Personal Rules.
4. Click **Finish**.
5. Click **Apply** to save the rule.
6. Click **OK** to close the Personal Rules dialog box.

## Rearrange Personal Rule Processing Order

Rules are processed in top-to-bottom order based on the rules list in the Personal Rules dialog box.

Rules that contain actions which halt rule processing are indicated by **Yes** in the **Actions Halt Processing** column in the rules list. If all conditions for a rule are met and the rule includes a "stop processing rules" action, then CIC does not process the remaining rules in the Personal Rules list for the current interaction. Some other actions, such as sending a call to voice mail, can also stop the processing of subsequent rules.

### To change personal rule processing order:

1. In the Personal Rules dialog box, select a rule.
2. Click the up or down arrows to the right of the rule list to move the selected rule to a new position in the list.
3. Click **Apply** to save the rule processing order.
4. Click **OK** to close the Personal Rules dialog box.

## Turn a Personal Rule On or Off

You can suspend the processing of a selected rule without removing it from the rule list in the Personal Rules dialog box. Rules that are **On** have a check mark to the left of the rule name. Click this check box to turn a selected rule on or off.

## Delete a Personal Rule

### To delete a personal rule:

1. In the Personal Rules dialog box, select a rule.
2. Click **Delete**.
3. In the Client Rules dialog box, click **Yes**.
4. Click **OK** to close the Personal Rules dialog box.



## Related Topics

Creating Quick Call Rules  
Personal Rules

## Creating Quick Call Rules

**Requirements:** You need the Personal Rules Security right to create and run Quick Call rules.

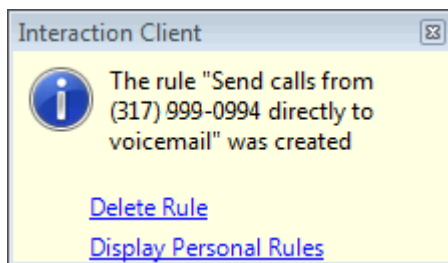
You can create a Call Rule for the currently selected call in My Interactions or Call History. You can send all future calls from this number directly to voice mail or create a custom rule for future calls from this number.

**Note:** You can also use Personal Rules to set up call rules at any time. For more information, see [Setting Up Personal Rules](#).

### To send all calls from a selected number directly to voice mail:

- Do one of the following:
  - Right-click a selected call in My Interactions or Call History. From the shortcut menu, select **Quick Call Rules**, then select **Always send caller directly to voice mail**.
  - Select a call in My Interactions and press **Ctrl+Shift+M**.

**Result:** A desktop alert appears:

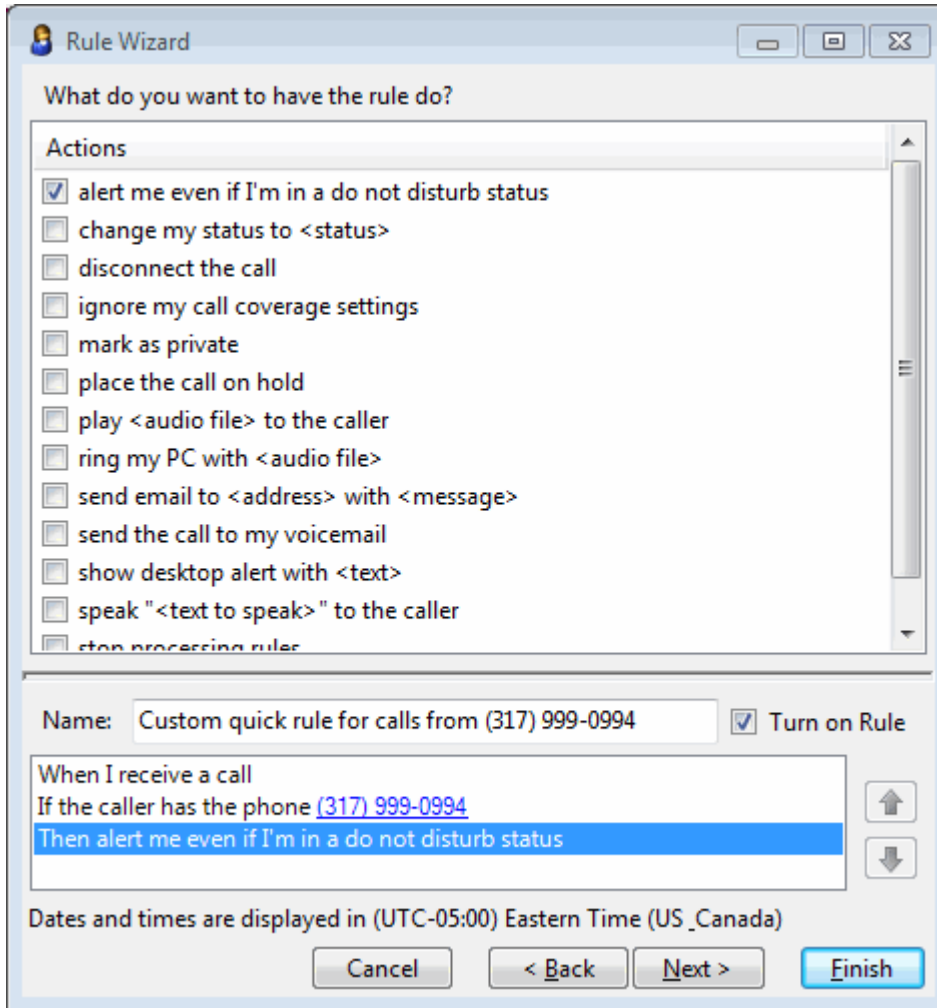


- Do one of the following:
  - Verify that the correct number appears in your new rule. Then either allow the desktop alert to fade away automatically or click the X to close the alert.
  - Click **Delete Rule** to discard the rule.
  - Click **Display Personal Rules** to open the Personal Rules dialog box. You can create additional rules, edit existing rules, rearrange rule processing order and perform other rule maintenance tasks. For more information, see [Setting Up Personal Rules](#).

### To create a custom rule for the currently selected number:

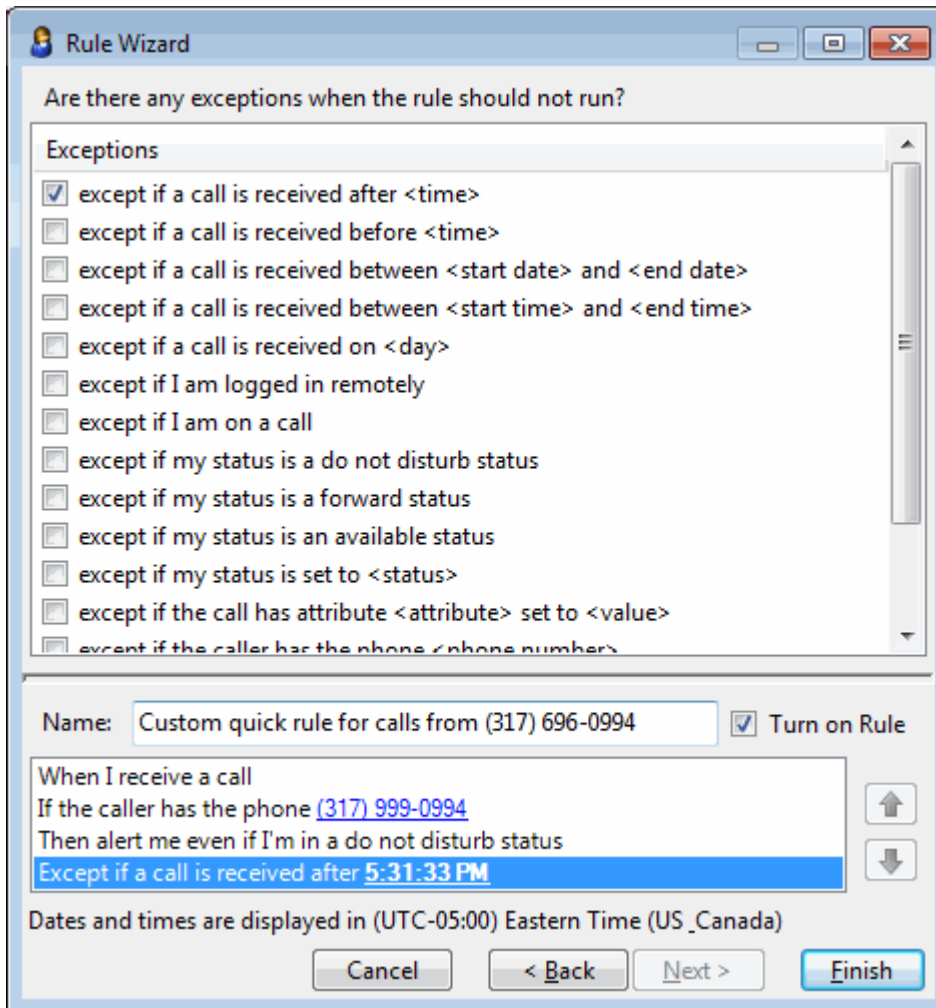
- Do one of the following:
  - Right-click a selected call in My Interactions or Call History. From the shortcut menu, select Quick Call Rules, then select Custom.
  - Select a call in My Interactions and press **Ctrl+Shift+C**.

**Result:** The Rule Wizard dialog box appears:



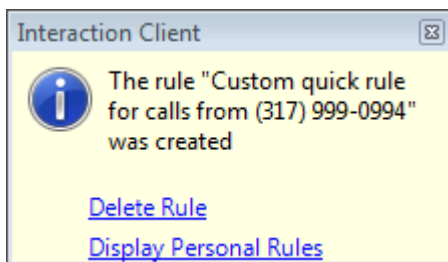
2. In the Actions list, do any of the following:
  - Select the check box for an action you want to occur.
  - Clear a check box to remove an action from the rule.
  - Supply any required attribute values. For more information, see Specify an Attribute Name or Value.
3. Click **Next >**.

**Result:** The Exceptions page of the Rule Wizard appears:



4. In the Exceptions list, do any of the following:
  - Select the check box for any conditions when the rule should not run.
  - Clear a check box to remove an exception from the rule.
  - Supply any required attribute values. For more information, see Specify an Attribute Name or Value.
5. Click **Finish**.

**Result:** The custom rule is added to your Personal Rules and a desktop alert appears:



6. Do one of the following:

- Verify that the correct number appears in your new rule. Then either allow the desktop alert to fade away automatically or click the X to close the alert.
- Click **Delete Rule** to discard the rule.
- Click **Display Personal Rules** to open the Personal Rules dialog box. You can create additional rules, edit existing rules, rearrange rule processing order and perform other rule maintenance tasks. For more information, see Setting Up Personal Rules.

### Related Topics

Personal Rules  
Setting Up Personal Rules

## Working with Queues

### Introduction to Queues

**Requirements:** The View Station Queues, View User Queues and View Workgroup Queues Access Control rights determine which queues you can display. The Modify Station Queues, Modify User Queues, Modify Workgroup Queues, Monitor Station Queues, Monitor User Queues, and Monitor Workgroup Queues Access Control rights determine which actions you can perform on the interactions in a displayed 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.

### Related Topics

Monitor Two or More Queues at the Same Time  
Pick Up a Call From a Queue  
Remove Disconnected Calls from Queue  
Workgroup Statistics View

## 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.

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** or **Record** interactions can be individually assigned for a selected queue.

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.

**Note:** You can also monitor selected user queues by creating Monitored Appearances. For more information, see [Configure Monitored Appearances](#).

#### To monitor additional queues:

1. In the **Create New View dialog box**, from the **Categories** list, select **Queues**.
2. In the **Views** list, click the appropriate view or type of view.  
**Result:** A selection dialog box may appear. If it does not, skip to last step.
4. From the **Available Items** list, select the appropriate view and click **Add >**.

**Tip:** Views with contents that are unique to your interface have the text "**Private**" in their name (for example, IC Private Contacts.)

5. Optional. Select and add additional views to the **Selected items** list.
6. When you complete your selection or selections, click **OK**.

**Result:** An additional queue tab appears for each queue you selected.

#### Related Topics

[Introduction to Queues](#)

## Pick Up a Call From a Queue

**Requirements:** See Pickup.

You can pick up a call in any displayed queue if you have security 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.

**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

## 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 information about customizing a queue view, see [Add or Remove View Columns](#).

Column	Description
<b>Account Code</b>	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 <a href="#">Understanding Account Codes</a> .
<b>ACD Wait Reason</b>	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.
<b>Associated Process</b>	This column displays the name of the process with which this interaction is associated. This is a feature of Interaction Process Automation. For more information, see <a href="#">Associate an Interaction with a Process</a> .  <b>Tip:</b> Clicking on the associated process link displays the <a href="#">Process Details</a> . For more information, see <a href="#">View Process Details</a> .
<b>Attachments</b>	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.
<b>Chat Response Time</b>	This column shows the time that has elapsed since anybody involved in the chat entered some text. For more information, see <a href="#">Working with Chat Sessions</a> .
<b>Details</b>	This column displays context-specific information based on the interaction type. <ul style="list-style-type: none"> <li>For calls, it displays the Remote Address (phone number) that you dialed or the phone number of the party on an incoming call.</li> <li>For callbacks, it displays the subject entered by the website visitor requesting the callback. For more information, see <a href="#">Working with Callback Requests</a>.</li> <li>For email messages, it displays the email subject as well as an importance icon and an attachments icon, if needed. For more information, see <a href="#">Working with E-mail Messages</a>.</li> <li>For chats, it displays the name of the user who last typed, and the text they entered. It also displays a typing indicator (icon) to indicate that someone participating in the chat is currently typing. For more information, see <a href="#">Working with Chat Sessions</a>.</li> </ul>
<b>Duration</b>	Duration displays the amount of time an interaction has been active.
<b>Importance</b>	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.

<b>Interaction Id</b>	The interaction's identification number. Numbers are assigned sequentially and reset to zero any time the server is restarted.
<b>Interaction Type</b>	This is a code that corresponds to the interaction type. For example, 0 is a call and 1 is a chat. See the <i>CIC Data Dictionary Technical Reference</i> in the CIC Documentation Library for more details.
<b>Line</b>	The line queue on which the interaction is located.
<b>Lstns</b>	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 <i>Determine if Someone is Listening to or Recording Your Interactions</i> .  <b>Note:</b> 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.
<b>Name</b>	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 <i>Caller Name</i> .  <b>Note:</b> Voice Mail appears in the Name column for voice mail messages played back through your Telephone Handset.
<b>Number</b>	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.  <b>Note:</b> 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.
<b>Process ID</b>	Each instance of a process has a unique process ID. For more information, see <i>Associate an Interaction with a Process</i> .
<b>Queue</b>	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.
<b>Recs</b>	If someone is recording your interaction, a record icon appears in the Recs column in your queue view. For more information, see <i>Determine if Someone is Listening to or Recording Your Interactions</i> .  <b>Note:</b> 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.
<b>Security</b>	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."
<b>State</b>	The current condition of an interaction. For more information, see <i>Understanding a Call's State</i> .
<b>Station</b>	The station queue on which the interaction is located.
<b>Subject</b>	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.
<b>User</b>	The user queue on which the interaction is located.
<b>Work Item Category</b>	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 the My Work Items view.  <b>Note:</b> Work Item columns can appear only in the My Work Items view.
<b>Work Item</b>	A Work Item Process creates Work Items as needed. Work Items are routed to agents to

<b>Created On</b>	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.
<b>Work Item Description</b>	A description of the Work Item.
<b>Work Item Due Date</b>	The date by which this Work Item must be completed.
<b>Work Item Error</b>	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. For more information, see Working with Interaction Process Automation and Work Item Warnings.
<b>Wrapup Code</b>	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

## Remove Disconnected Interactions from a Queue

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:

1. In My Interactions or other queue, if the interaction is not already selected, click the interaction to select it.
2. Right-click the interaction and choose **Remove from Queue** from the menu that appears or press **Ctrl+Shift+R**.

**Result:** The disconnected interaction is removed from your queue.

**Tip:** You can also use the **Hide disconnected interactions** configuration option to remove interactions from the My Interactions view or other queue view immediately after you disconnect them. For more information, see General Options.

### Related Topics

Introduction to Queues

## Workgroup Statistics View

**Requirements:** The Workgroup Statistics Security right enables you to display the Workgroup Statistics view. The Statistics Workgroups Access Control right determines which workgroups can be included in the Workgroup Statistics view. Membership in a workgroup does not confer the right to view statistics for that workgroup.

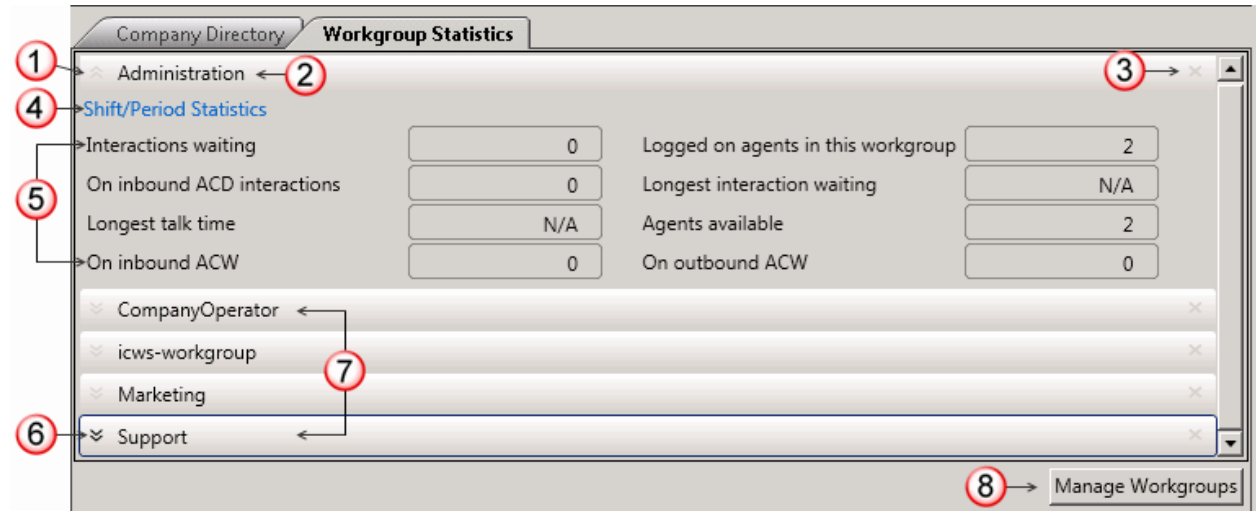
You can view basic statistics for workgroup queues. Workgroup statistics can help you determine when you can take a short break.

### Workgroup Statistics



The workgroup-specific sections of the Workgroup Statistics view display a quick overview of the selected workgroup.

**Note:** If the Workgroup Statistics tab 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 the Workgroup Statistics tab, it "wakes up" and re-populates the statistics panels.



1	<b>Minimize</b>	Click this control to minimize the statistics section for a selected workgroup.
2	<b>Workgroup Name</b>	The name of the workgroup as defined in Interaction Administrator.
3	<b>Close</b>	Click this control to remove a selected workgroup statistics section from the Workgroup Statistics view.
4	<b>Shift\Period Statistics</b>	Click this link to display a statistical summary of the <b>current</b> shift or period. For more information, see Shift\Period Statistics.
5	<b>Statistics</b>	<p>These statistics appear for each workgroup:</p> <ul style="list-style-type: none"> <li>• <b>Interactions waiting:</b> Number of interactions waiting on this workgroup queue.</li> <li>• <b>On inbound ACD interactions:</b> Total number of agents working on inbound ACD interactions in this workgroup queue.</li> <li>• <b>Longest talk time:</b> The longest connection time of any of the currently connected interactions. "N/A" indicates no interactions are currently connected.</li> <li>• <b>On inbound ACW:</b> Total number of agents performing after call wrap-up work to conclude an inbound ACD interaction on this workgroup queue.</li> <li>• <b>Logged on agents in this workgroup:</b> Total number of agents in this workgroup who are logged on, regardless of their status.</li> <li>• <b>Longest interaction waiting:</b> The longest amount of time any of the interactions presently in this workgroup queue have been waiting to be picked up.</li> <li>• <b>Agents available:</b> The number of agents in this workgroup who are logged in, have an "Available" status, and are activated.</li> <li>• <b>On outbound ACW:</b> Total number of agents performing after call wrap-up work to conclude an outbound ACD interaction on this workgroup queue.</li> </ul>
6	<b>Maximize</b>	Click this control to expand and display the statistics section for a selected

		workgroup.
7	<b>Minimized sections</b>	A workgroup name identifies a minimized workgroup statistics section.
8	<b>Manage Workgroups</b>	Click the <b>Manage Workgroups</b> button to add new workgroups, remove workgroups or to rearrange the order of the displayed workgroups. <b>Note:</b> When you add this view, all workgroups to which you have the Statistics Workgroups Access Control right appear.

### Shift\Period Statistics

The Shift/Period Statistic view displays a statistical summary of the current shift and period. Separate columns display statistics for the currently selected workgroup and your personal statistics as a member of that workgroup.

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*.

**Note:** The Shift/Period Statistics pop-up displays a snapshot of the statistics. It does not update while opened.

Shift Statistics	Workgroup	My Stats
Average Talk Time	00:02:47	00:02:26
Longest Talk Time	Not a shift statistic	00:00:43
Interactions Received	708	278
Interactions Answered	700	278
Interactions Completed	708	278
Period Statistics	Workgroup	My Stats
Average Talk Time	00:02:22	00:02:23
Longest Talk Time	Not a period statistic	00:00:32
Interactions Received	708	6
Interactions Answered	700	6
Interactions Completed	708	6

- **Average Talk Time:** Average connection time for all currently connected calls.  
**Note:** If there are no currently connected calls, Average Talk Time is set to N/A.
- **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 have been picked up.
- **Interactions Completed:** Number of interactions that have been picked up and disconnected, sent to voice mail, parked on orbit, or transferred.

### Displaying the Workgroup Statistics View

To display the Workgroup Statistics view:

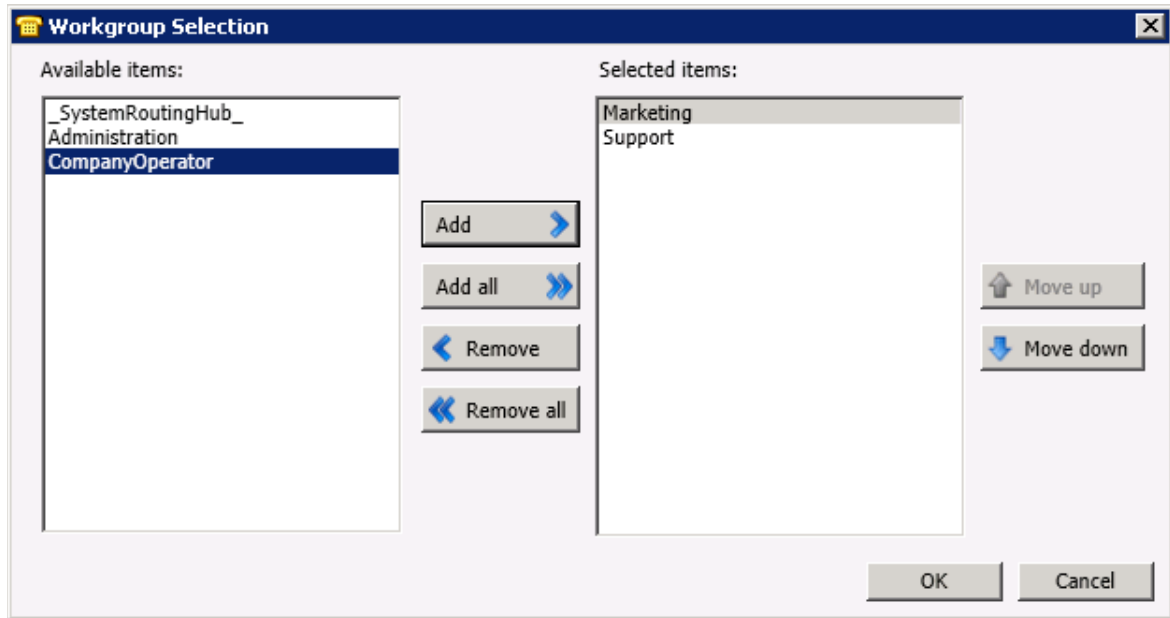
1. In the **Create New View dialog box**, from the **Categories** list, select **Statistics**.

2. In the **Views** list, select **Workgroup Statistics**.
3. Click **OK**.

**Result:** The Workgroup Statistics view appears. It contains a section for each workgroup for which you have the Statistics Workgroups Access Control right.

4. To change the workgroup selection, in the Workgroup Statistics view, click **Manage Workgroups**.

**Result:** The Workgroup Selection dialog box appears.



5. Do one of the following:
  - From the **Available items** list, select a workgroup and click **Add**.

**Note:** Repeat this step for each workgroup queue you want to monitor.

- To add all workgroups, click **Add all**.

**Result:** The selected workgroup or workgroups appear in the **Selected items** list.

6. When finished selecting workgroups, click **OK**.

**Result:** The Workgroup Statistics view of the selected workgroups appears in the CIC client.

**Note:** Each selected workgroup appears in a separate section of the Workgroup Statistics view.

## Related Topics

Introduction to Queues

## Working with Response Management

### Working with Response Management

**Requirements:** To search for and use 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.

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 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](#).

## 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:

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 Support representatives and a general-purpose response library for all users. If you have the appropriate rights, these libraries appear in the My Responses window.

**Note:** You 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 Support representatives and a general-purpose response library for all users. If you have the appropriate rights, these response appear in the Responses Sidebar.

- **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 two 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.

## Related Topics

[Using Response Management](#)

## Using Response Management

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

You use stored responses to avoid typing the same information over and over again. 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 an Email Message

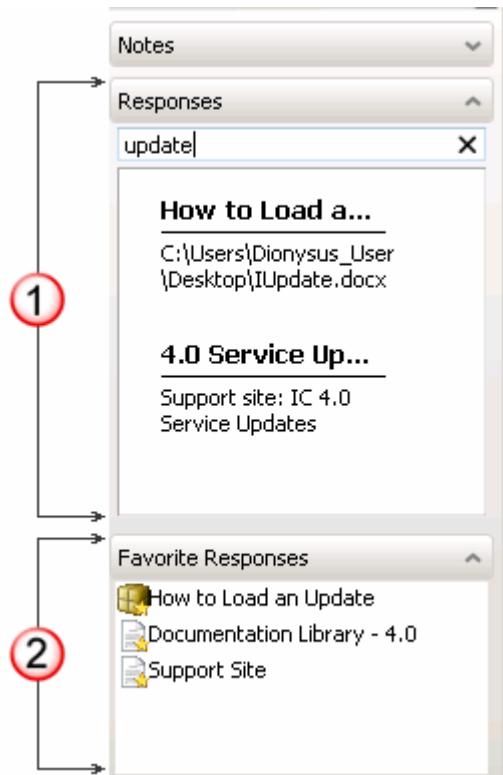
**Related Topics**

Search for a Response  
 Working with Response Management

**Responses Sidebar**

The Responses and Favorite Responses drop-down sections appear in the sidebar area of the Chat window and the Email Window for Outgoing Messages. The Responses section is also available in the Callback window. For more information, see Use Response Management During a Chat Session or Use Response Management in an Email Message.

To expand or collapse the Responses or Favorites Responses sections, click the arrow on the section control.



1	<b>Responses</b>	This section provides full-text search capabilities for your personal responses and the system-wide responses to which you have the appropriate Response Management View Access Control Right. Responses which match your search criteria appear here. <b>Note:</b> For more information, see Search for a Response.
2	<b>Favorite Responses</b>	This list provides easy access to your favorite responses. <b>Note:</b> In the current release, you cannot create and maintain a list of favorite responses in the Interactive Intelligence Oracle Service Cloud Integration.

## Related Topics

- Use Response Management During a Chat Session
- Use Response Management in an Email Message

## Response Management View

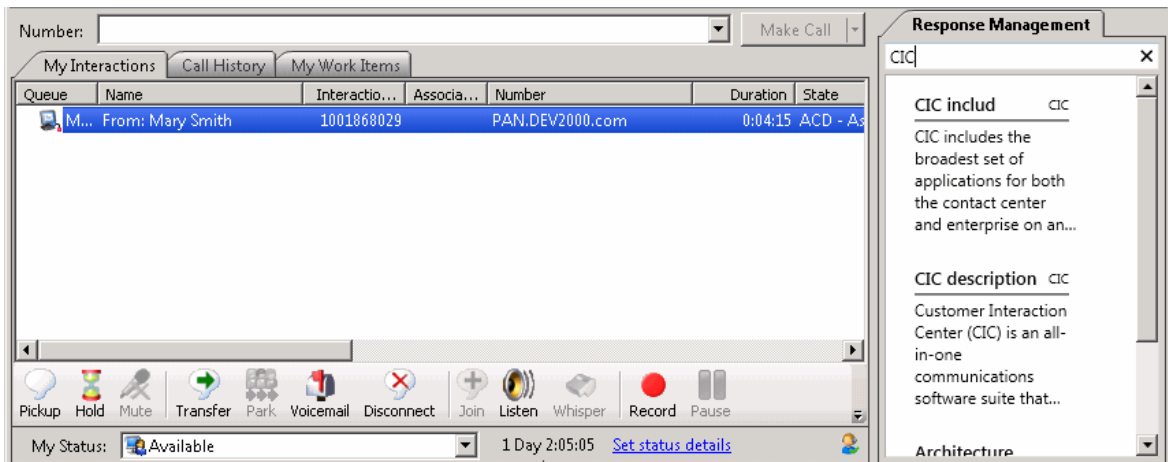
You can use the Response Management view to search for stored responses during any interaction. You can insert these responses in a chat response, email reply, or interaction notes. You can relay the information verbally during a call.

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. In the **Create New View dialog box**, from the **Categories** list, select **Interactions**.
1. In the **Create New View dialog box**, set **Group by** to **Categories**, and then from the list of categories, select **Interactions**.
2. In the **Views** list, select **Response Management**.
3. Click **OK**.

**Result:** The Response Management view appears.



## Related Topics

- Change View Layout
- Search for a Response
- Using 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 Responses sidebar in the Chat window, Email Window for Outgoing Messages and the Callback window.
- The Response Management View.

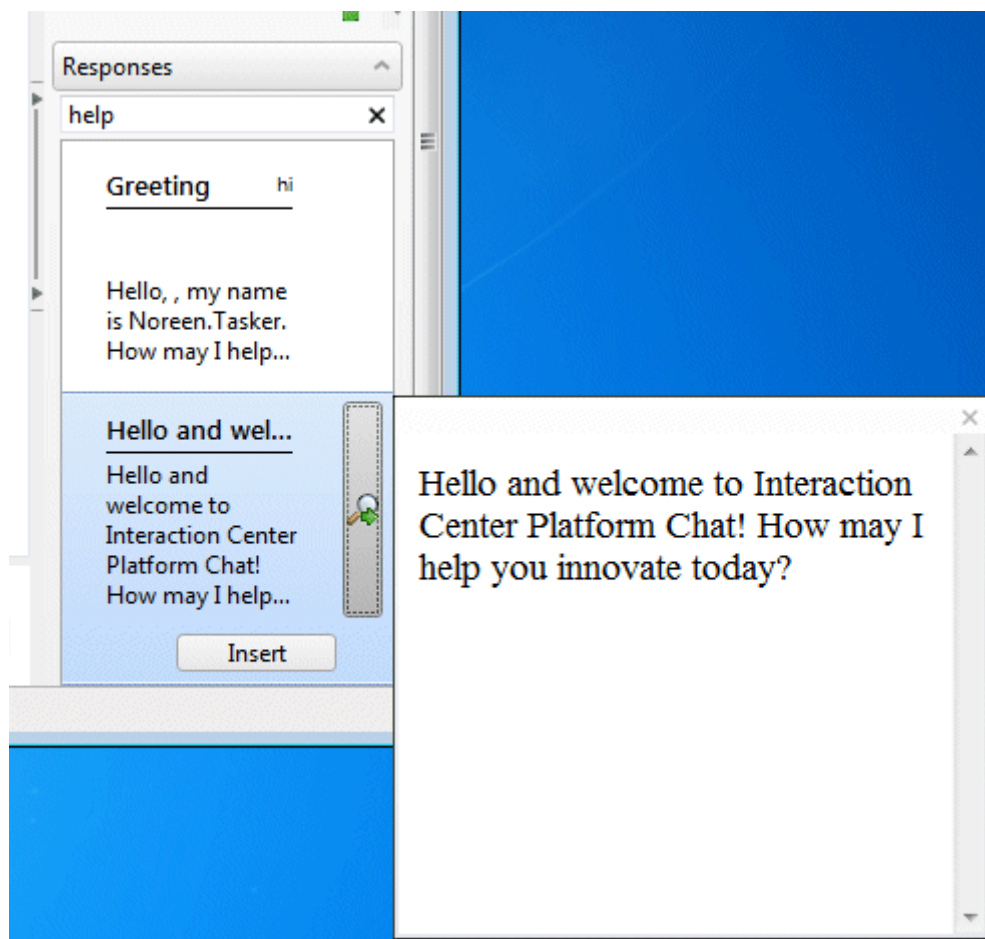
#### To search for a response item:

1. In the **Search** text box, type all or the first part of the word or words that identify the response item and then press **Enter**.

**Tip:** See Search Language for tips on constructing a multi-term search.

**Result:** Matching response items appear.

2. Optionally, preview the response by selecting a response item from the search results and then clicking the **Preview** button.



2. Preview the response by selecting a response item from the search results.

## Context Search

Context-based search is also available for response items. Clear all text from the **Search** text box and Response Management automatically searches for response items based on the content of your chat or email interaction. This content is the last five words you typed in a chat or email reply.

## Search Language

The Response Management search language is similar to that used in most common Internet search engines. Use this search language in any Response Management **Search** text box.

## Boolean Operators

You can use **AND**, **OR**, and **NOT** Boolean operators.

**Note:** A plus sign (+) is the same as **AND**. A space is the same as **OR**. A minus sign (-) is the same as **NOT**.

- **Foot OR Hand** searches for items containing either of these words.
- **Foot AND Hand** searches for items containing both words.
- **Foot NOT Hand** searches for items containing foot, but not hand.

## Exact Phrase

Enclose an exact phrase searches in quotation marks.

- **"Foot and Hand"** searches for items containing that exact phrase.

## Grouping

Enclose a grouped search in parentheses.

- **(Jack AND Jill) hill fell** searches for items containing both Jack and Jill or the word hill or the word fell.

## Fields

You can confine your search to the Name, Shortcut, or Labels fields on a response item.

- **Shortcut:update** searches only for items with a shortcut field containing the word update or beginning with update.

## Related Topics

Using Response Management

## Use a Response Shortcut

**Requirements:** See Working with Response Management.

Your CIC administrator can assign shortcuts to responses. You can use a response shortcut to insert a stored response when you are participating in a Chat Session or composing an Email Reply. Response shortcuts are available in the composition areas of the Email Window for Outgoing Messages, Chat Window, and Chat view.

### To use a shortcut:

1. Type all or part of the shortcut and press **Ctrl+Space**.

**Result:** If there is only one matching response item, it is automatically inserted in the composition area of the Chat window or the reply area of the Email Window for Outgoing Messages.

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

Using Response Management

## Working with 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, your CIC administrator can enable the CIC client to screen pop the appropriate contact or incident workspace record when you receive a call from a contact in your Oracle Service Cloud database and automatically associate it with the interaction.

**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.

### Related Topics

Associate an Interaction with a Workspace

## Working with Speed Dial

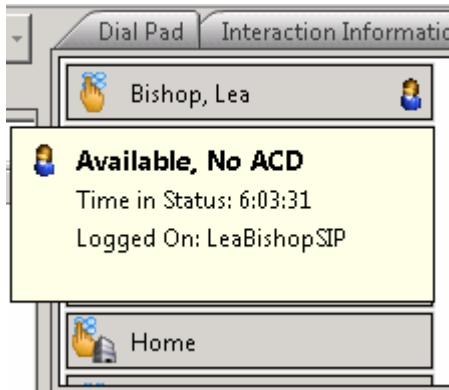
### Working with Speed Dial Views

### Working with Speed Dial Views

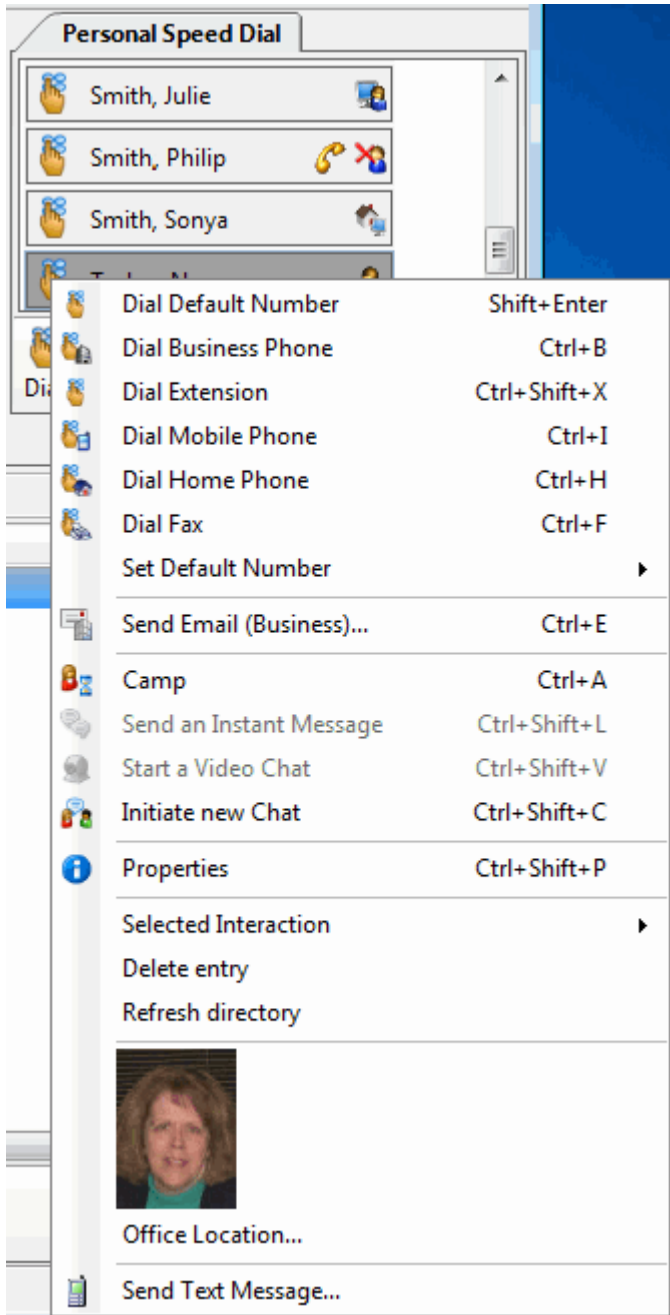
**Requirements:** You need the Can Create Speed Dials Security right to enable you to Create a Speed Dial View.

Speed dial views provide a quick way to dial frequently called contacts. Speed dial entries include the directory contact and a dial icon for the number the system dials when you double-click the entry. You also see a user status icon and Busy Lamp field icon for each CIC client user. For more information, see Speed Dial Features.

Display CIC status information by pointing to the status icon in a speed dial entry.



When you right-click a speed dial entry, a menu appears, offering you options such as dialing, sending email, camping, viewing properties, and changing status. This menu is similar to the menu shown if you right-click a directory contact on a directory view.



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.

### Related Topics

- Close a Speed Dial View
- Create a Speed Dial View
- Delete a Speed Dial View
- Display a Speed Dial View
- Employee Photo and Office Location
- Rename a Speed Dial View
- Refresh a Speed Dial View
- Working with Speed Dial Entries

## Close a Speed Dial View

You can close a Speed Dial view instead of permanently deleting the view. For more information, see [Delete a Speed Dial View](#).

### To close a speed dial view:

- Right-click the Speed Dial view tab and click **Close** (*view name*).

**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](#)  
[Using 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 access to the CIC client workspace and the Can Create Speed Dials Security right to create a Speed Dial view.

A Speed dial view provides a quick way to dial frequently called contacts.

**Warning:** Once a Speed Dial view is created, its settings cannot be changed.

### To create a Speed Dial view:

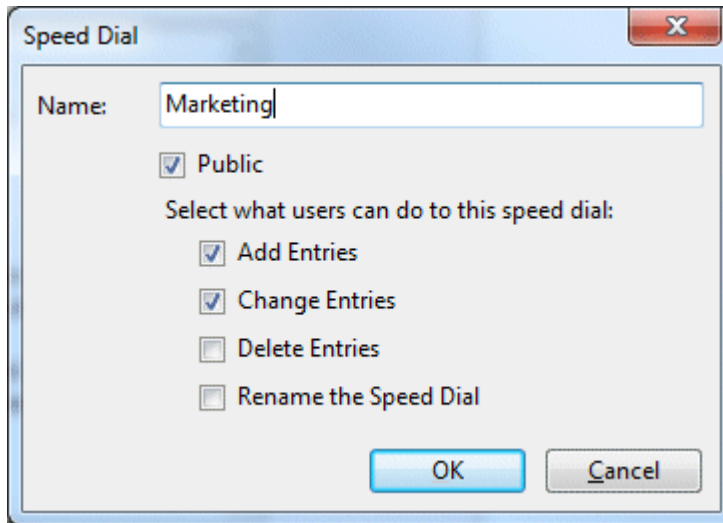
1. In the **Create New View dialog box**, from the **Categories** list, select **Directories**.
2. In the **Views** list, select **Speed Dial**.
3. Click **OK**.

**Result:** The current list of Speed Dial views appears in the **Select Speed Dial to Add** dialog box.

**Note:** **Add**, **Edit**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip.

4. Click the **Add** button.

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



5. In the **Name:** field, enter a unique name for your new speed dial directory.
6. If you want other users to be able to add your Speed Dial view to their CIC client interface, select **Public**.
7. 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 Admin** user 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**.
8. To create the Speed Dial view, click **OK**.  
**Result:** The new view is added to the **Available Items** list.
  9. To display your new Speed Dial view, select the view from the Available Items List. Click the **Add >** button between the **Available** items and **Selected items** lists. Click **OK**.

**Tip:** Enter all or part of the view name in the Filter items text box to locate the view name.

**Result:** The new Speed Dial view appears in the CIC client.

**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 rights, you can delete any Speed Dial view. For more information, see Create a Speed Dial View.

**Tip:** If you want to leave this view available for other CIC client users or for future use, see Close a Speed Dial View.

### To delete a displayed Speed Dial view:

1. Right-click the Speed Dial view tab and click **Delete** (*view name*).
2. Click **Yes** to confirm you want to delete the view.

**Result:** The Speed Dial view is no longer available for any CIC client user.

### To delete a Speed Dial view that is not currently displayed:

1. In the Create New View dialog box, from the **Categories** list, select **Directories**.
2. In the **Views** list, select **Speed Dial**.

**Result:** The current list of Speed Dial views is displayed in the **Select Speed Dial to Add** dialog box.

3. Select the view name from the **Available Items** list.

**Tip:** Enter all or part of the view name in the **Filter items** text box to locate the view name.

4. Click the **Delete** button.

**Note:** **Add**, **Edit**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip. The **Delete** button is active only if you have the appropriate rights to the selected Speed Dial view.

5. Click **Yes** to confirm you want to delete the view.

**Result:** The name of the Speed Dial view is removed from the list of **Available Items**. The Speed Dial view is removed from the CIC client interface for every user.

### Related Topics

Using Speed Dial  
Working with Speed Dial Views

## Display a Speed Dial View

**Requirements:** You can display any Speed Dial view you create. You can also display any "Public" Speed Dial view. For example, your CIC administrator or other co-worker could create a speed dial view for emergency numbers and make it available for all CIC client users. For more information, see Create a Speed Dial View.

**To display an available Speed Dial view:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Directories**.
2. In the **Views** list, select **Speed Dial**.

**Result:** The current list of Speed Dial views is displayed in the **Select Speed Dial to Add** dialog box.

3. Select the view name from the **Available Items** list.

**Tip:** Enter all or part of the view name in the **Filter items** text box to locate the view name.

4. Click the **Add >** button.

**Result:** The selected view appears in the **Selected items** list.

5. Optional. Select and add additional views to the Selected items list.
6. When you complete your selection or selections, click **OK**.

**Result:** The selected view or views appear.

**Related Topics**

Create a Speed Dial View  
 Close a Speed Dial View  
 Using Speed Dial

**Refresh a Speed Dial View**

Sometimes the underlying data provider that acts as the data source for a directory contact does not send out notifications when contact information is updated. The CIC client automatically refreshes the data when it starts up, but you can also refresh contact information on demand.

**To refresh the contents of a Speed Dial view:**

- Right-click a Speed Dial entry or in the blank area of the Speed Dial view, and choose **Refresh Directory** from the shortcut menu.

**Related Topics**

Working with Speed Dial Views

**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 rights, you can rename any Speed Dial view. For more information, see Create a Speed Dial View.

**To rename a displayed Speed Dial view:**

1. Right-click the Speed Dial view tab and click **Edit** (*view name*).
2. In the **Speed Dial** dialog box, in the **Name** text box, type a new name for the view.
3. Click **Rename**.

**Result:** The name of the Speed Dial view is changed in the CIC client and in the list of **Available Items** in the **Select Speed Dial to Add** dialog box.

**To rename a Speed Dial view that is not currently displayed:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Directories**.
2. In the **Views** list, select **Speed Dial**.

**Result:** The current list of Speed Dial views is displayed in the **Select Speed Dial to Add** dialog box.

3. Select the view name from the **Available Items** list.

**Tip:** Enter all or part of the view name in the **Filter items** text box to locate the view name.

4. Click the **Edit** button.

**Tip:** **Add**, **Edit**, and **Delete** buttons appear below the **Available Items** list. Point your mouse to a button to see an identifying tooltip. The **Edit** button is active only if you have the appropriate rights to the selected Speed Dial view.

5. In the **Speed Dial** dialog box, in the **Name** text box, type a new name for the view.
6. Click **Rename**.

**Result:** The name of the Speed Dial view is changed in the list of **Available Items** in the **Select Speed Dial to Add** dialog box.

**Related Topics**

Using Speed Dial  
Working with Speed Dial Views

**Working with 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**

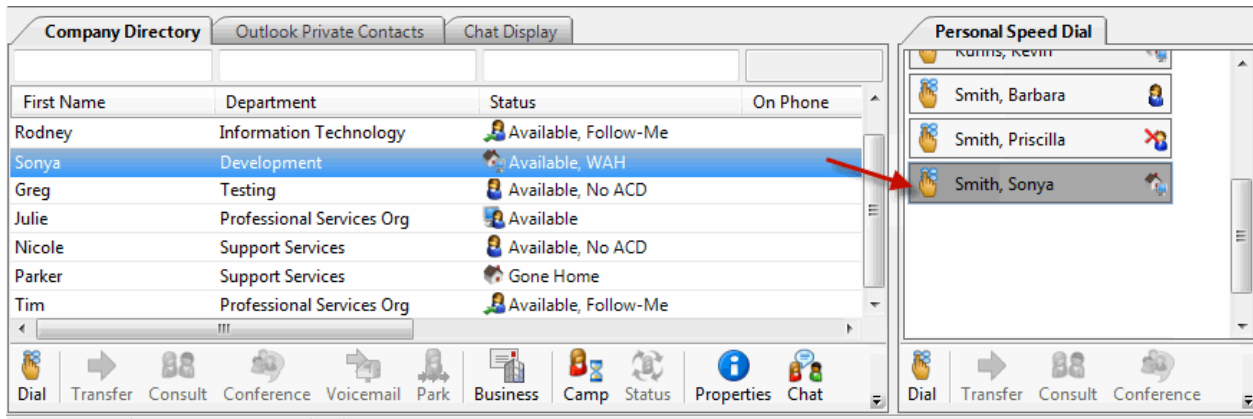
Add a Directory Contact to a Speed Dial View  
Change a Speed Dial Entry Default Number  
Resize Speed Dial Entries  
Delete a Speed Dial Entry

**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 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.





**Note:** You can add only general directory or Company Directory contacts to a speed dial view. To view a list of general directories, in the Create New View dialog box, in the **Categories** list, select **Directories**. In the **Views** list, click **General Directories**. In the **Select General Directories to Add** dialog box, a list of directories appears in the **Available Items** list.

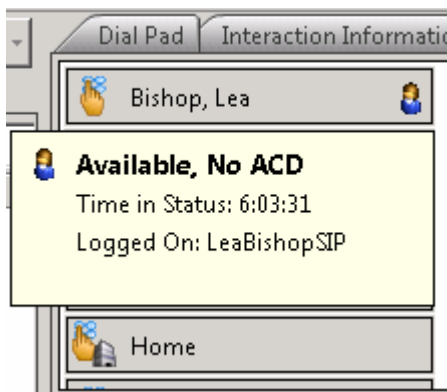
### Related Topics

Display a Speed Dial View  
Working with Speed Dial Views

## Speed Dial Features

Speed Dial entries for the CIC client users display these additional features:

- **Status icon and status tooltip:** A CIC client user's status appears as an icon on the Speed Dial entry. When you point to the speed dial entry icon, additional status information appears in tooltip form.



- **Busy Lamp Field status:** If a Customer Interaction Center user is on the telephone, the Busy Lamp Field displays a yellow telephone icon.

### Related Topics

Working with Speed Dial Entries  
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 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. Right-click the speed dial entry and choose **Set Default Number**.
2. From the menu that appears, choose the new default telephone number; for example, Mobile, Extension, Business, or Home.

**Note:** If a menu item is unavailable, such as Business 2, then no Business 2 phone number is defined for the directory contact.

**Result:** The icon on the speed dial entry changes to reflect the newly selected default number. For example, it could change from the icon for Dial Home to the icon for Dial Mobile. For a list of dial icons, see [Dial Buttons](#).

#### 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 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:

- Right-click the entry and choose **Delete entry** from the shortcut menu.

#### Related Topics

[Working with Speed Dial Views](#)

## Resize Speed Dial Entries

You can adjust the width of speed dial entries. When you resize one speed dial entry, all other entries on the speed dial view are resized to match the entry you adjust. The CIC client applies changes to the width of speed dial entries on a view-per-view basis, so different speed dial views can have different widths for the entries on each view.

If, for example, you have two speed dial views, **Private Contacts** and **Marketing**. You adjust the width of one entry in the Private Contacts speed dial view. All other entry widths in the Private Contacts view automatically adjust to match. However, no width changes are applied to entries in the Marketing speed dial view.

#### To resize speed dial entries:

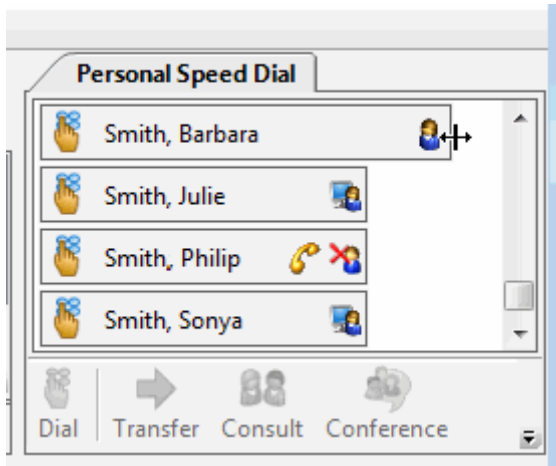
1. Move your mouse to the right edge of a speed dial entry.

**Note:** If a speed dial entry can be resized, the pointer changes from an arrow to a resizing symbol.

2. Left-click and hold your mouse button, then move the pointer to resize the entry.
3. When the entry reaches the preferred width, release your mouse button.

**Result:** All entries on the view are resized to match the width of the entry you changed.

**Note:** The CIC client stores these customizations locally. Resizing speed dial entries on your system does not affect the speed dial entry sizing for other users who use the same Speed Dial view.



### Related Topics

Working with Speed Dial Views

## Using Speed Dial

### Using Speed Dial

Each speed dial entry on a speed dial view represents a number that you call frequently. This section contains the following topics:

- Dial a Number Using Speed Dial
- Understanding Speed Dial Hyperlinks
- Drag and Drop Transfer to a Speed Dial Entry

### 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:
  - To call the default number associated with the speed dial entry, double-click the speed dial entry for the person you want to call.
  - To dial a number other than the default number for a speed dial entry, right-click the speed dial entry and choose another number from the shortcut menu.

- In the CIC client workspace, drag and drop the speed dial entry on the **Number** field and click **Make Call**. For more information, see [Make a Call Using the Number Field](#).

**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](#)
- [Create a New Directory Entry in Speed Dials](#)
- [Display a Speed Dial View](#)
- [Understanding Speed Dial Hyperlinks](#)

## Drag and Drop Transfer to a Speed Dial Entry

You can drag and drop calls onto a speed dial entry, making the transfer of calls much quicker and more efficient.

### To transfer by dragging a call onto a speed dial entry:

1. Tell the caller that the caller is going to be transferred.
2. If it is not already open, click a speed dial tab and scroll (or search) until you can see the name of the transfer recipient.
3. Select and drag the call from My Interactions to the name in the Speed Dial view.
4. In the Transfer Interaction dialog box, click **Yes**.

**Result:** The caller is placed on hold, and the recipient's telephone rings. The call disappears from your My Interactions queue. If the transfer recipient is a CIC client user, the call appears as a notifying call in the transfer recipient's My Interactions.

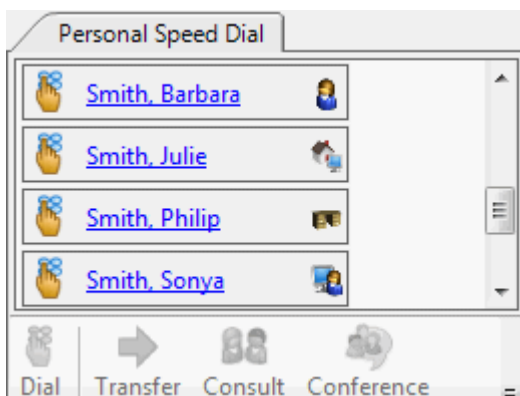
### Related Topics

- [Dial a Number Using Speed Dial](#)

## Understanding Speed Dial Hyperlinks

Speed dial contacts within a speed dial view appear as hyperlinks when an interaction is selected. A speed dial hyperlink is blue in color and is underlined, just as a typical hyperlink would appear.

When you click an enabled hyperlink, the CIC client dials the default telephone number associated with that contact.



### Related Topics

Dial a Number Using Speed Dial

## Working with Status Settings

### 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

**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

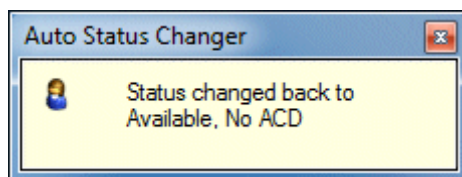
Possible Status Values  
Set DND Status with Your Phone  
Unavailable Status Reminder

## Automatic Status Changer

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

Use the Automatic Status Changer to change your CIC status when your screen saver turns on or off or when your workstation is locked or unlocked. For example, Automatic Status Changer could set your status to "Available" when your screen saver turns off.

When Automatic Status Changer resets your status, it displays a desktop alert.



#### Special Circumstances

If the Automatic Status Changer doesn't change your status or your status is not what it set it to, Automatic Status Changer doesn't reset your status when you resume work. For example, Automatic Status Changer sets your status to Away From Desk when you lock your workstation. Then you use the TUI (Telephone User Interface) to set your status to Available, Forward. Automatic Status Changer does not change your status back to Away From Desk when you unlock your workstation.

If your status is already set to what the Automatic Status Changer would change it to when you resume work, it does change your status.

Also, setting a user's status requires a **valid connection with the IC server**. If your server connection drops, the Automatic Status Changer does not change your status when the screen saver turns on or off or the workstation is locked or unlocked.

**Warning:** Do not use the Automatic Status Changer if you set up **Power Options Properties** in Control Panel to turn off your monitor after a set amount of time. When the monitor's power is turned off, the Automatic Status Changer thinks the screen saver has turned off. It changes your status back to either what it was before the screen saver started or to a pre-defined status specified in the Automatic Status Changer dialog. In the rare case that you run more than one type of CIC client at the same time, do not enable Automatic Status Changer in both applications. For example, running Interaction Desktop and Interaction Connect at the same time is not a supported configuration. Enable Automatic Status Changer in only one CIC client.

### Configuring Automatic Status Changer

**Note:** Automatic Status Changer is a required plug-in. Required plug-ins cannot be removed from the CIC client and do not appear in the Plug-ins property details pane of the Configuration dialog box. You configure this plug-in in the Auto Status Changer property details pane of the Configuration dialog box.

#### To configure the Automatic Status Changer:

1. In the Configuration dialog box, click the **Auto Status Changer** node.
2. Use the **When to Change** tab to enable or disable the auto status changer. The two options are:

<b>Not at this time. I wish to disable the auto status changer.</b>	Disable the Automatic Status Changer.
<b>When my workstation locks or the screen saver starts.</b>	Change user's CIC status whenever the screen saver turns on or off or when the workstation locks or unlocks. If this option is selected, screen saver activation or workstation locking is interpreted as you going away. If screen saver activation causes your CIC status to change, then stopping the screen saver sets your status back. Similarly, if the workstation locks and causes your CIC status to change, then unlocking the workstation resets your status.

3. If you enable the Automatic Status Changer, use the **What to Change** tab to determine what status is set when the screen saver turns on or off.
4. In the **What to do when I go away** section:

<b>Set my status to:</b>	Choose the status you want the Automatic Status Changer to set when your screen saver activates or your workstation locks. For example, your status can be set automatically to "Away from Desk."
<b>Only change my status if my current status is in the Selected list</b>	Select this check box for additional control over <b>when</b> the Automatic Status Changer changes your status if the screen saver activates or the workstation locks. <b>If checked</b> , the Automatic Status Changer changes your status when the screen saver activates or the workstation locks <b>only if your current status is in the Selected list</b> . Click a status in the Available list and then click the >> button to move it to the Selected list. Use the << button to move a status from the Selected list back to the Available list. <b>If cleared</b> , the Automatic Status Changer always changes your status when the screen saver activates or the workstation locks. It changes your status to the status specified in the <b>Set my status to</b> drop-down list.

<p><b>If my status is changed, set my status notes to:</b></p>	<p>If you want to have status notes set for the status to which you are changed, check this check box and enter the status notes in the text box provided.</p> <p><b>Note:</b> Status notes work on a per status basis. Status notes appear in the Status Notes column which can be displayed for CIC users. For example, both workgroup and the Company Directory can display Status Notes.) For more information, see <a href="#">Customize Columns</a>.</p>
--	--

5. In the **What to do when I come back** section:

<p><b>Set my status to what it was auto-changed from</b></p>	<p>Select this radio button to change your status to what it was before the screen saver activated or the workstation locked.</p> <p><b>Note:</b> The Automatic Status Changer does not change your status back to one you could not have selected and which was automatically set for you. For example, CIC could automatically set your status to "Follow Up" after you disconnect an ACD interaction. After a period of inactivity, the Automatic Status Changer sets your status to "Away from Desk." When you unlock your workstation or turn off your screen saver, the Automatic Status Changer does <b>not</b> set your status back to "Follow Up." "Follow up" is not a user-selectable status. Your status remains set to "Away from Desk."</p>
<p><b>Set my status to</b></p>	<p>Select this radio button and select a status from the list to change your status to a pre-determined status when the screen saver turns off or the workstation unlocks.</p>

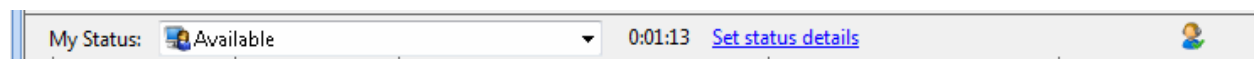
- 6. Click **Apply** to save your selections.
- 7. Click **OK** to close the Configuration dialog box.

**Related Topics**

- Possible Status Values
- Set Status Details
- Set Your Status
- Set Another User's Status
- Setting Status
- Understanding the Configuration Dialog Box
- Unavailable Status Reminder
- View Another User's Status

**My Status**

The CIC client workspace has a My Status section that enables you to set your current status, monitor time in current status, view or specify status details and set your workgroup activation status:



<p><b>My Status drop-down list</b></p>	<p>The My Status drop-down list displays your current status and enables you to change your status. For more information, see <a href="#">Set Your Status</a>.</p>
--	--

<b>Time in current status</b>	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."
<b>Set status details</b>	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 <b>Set status details</b> link appears.
<b>Workgroup Activation icon</b>	Click this icon 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**

- Set Your Status
- Set Status Details
- Workgroup Activation Button
- [Workgroup Statistics](#)

**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:** 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

- [Automatic Status Changer](#)
- [Set DND Status with Your Phone](#)
- [Set Your Status](#)
- [Set Another User's status](#)
- [Set Status Details](#)
- [Setting Status](#)
- [Unavailable Status Reminder](#)
- [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 or other directory view and do one of the following:
  - Right-click and select **Change User's Status** from the menu that appears.
  - Click the Change User's Status button in the Directory toolbar.
  - Press **Ctrl+S**.

**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

- Automatic Status Changer
- Possible Status Values
- Set Status Details
- Set Your Status
- Setting Status
- Unavailable Status Reminder
- 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 CIC 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.

**Tip:** You may also be able to configure DND Status Synchronization, see [Configure Your IP Phone](#).

#### Related Topics

- Configure Your IP Phone
- 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. Do one of the following:
  - Click the Set Status Details button in the Interactive Intelligence Media Bar.
  - In the CIC client workspace, click the **Set status details** link next to the **My Status** drop-down list.

**Result:** The Set Status dialog box appears.

- Complete the fields as described below.

<b>Status Notes</b>	<p>Enter any additional information on your current status.</p> <p>As a convenience, the notes from the last time you selected this status appear in Status Notes. You can make any necessary changes to these notes.</p> <p><b>Requirements:</b> You need the Status Notes right in order to create or modify Status Notes.</p>
<b>Forward Number</b>	<p>This is enabled only for selected statuses such as <b>Available, Forward</b>.</p> <p>Enter a telephone number to which calls can be forwarded.</p> <p><b>Note:</b> The last forwarding number you used for this status defaults to the Forward Number box.</p>
<b>Date Time</b>	<p>Depending on the selected status, you may select the <b>Date</b> or <b>Time</b> check box to use the default date and time.</p> <p><b>Note:</b> The current date appears in the <b>Date</b> field. The CIC client automatically rounds the current time to the next whole hour, and sets that time in the <b>Time</b> field.</p> <p>To change the date and time, select the check box, and click the arrow at the end of the box to choose a date or time.</p> <p><b>Note:</b> The date and time you select are played for your incoming calls.</p>

- Click the **OK** button

### Related Topics

[Automatic Status Changer](#)  
[Possible Status Values](#)  
[Set Your Status](#)  
[Set Another User's status](#)  
[Setting Status](#)  
[Unavailable Status Reminder](#)  
[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 the Company Directory or other directories that are set to display the Status column. If the Status column is not displayed, other CIC client users can view your status by right-clicking your name in the Company Directory.

### To set your status in the Interactive Intelligence Media Bar:

- Click the Status Drop-Down List.

**Note:** The Status Drop-Down List displays your current status.

- Select a status from the Status list.

**Note:** The Status list displays up to 10 of the most-recently-used statuses at the top of the list. Your current status appears first, followed by the next most recently used statuses in order. A line visually separates the most recently used statuses from a list of all selectable statuses. The list also displays the icon assigned to each status. For more information, see Possible Status Values.

3. Optionally, enter status details by clicking the Set Status Details button.

#### To set your status in the My Status section in the CIC client workspace:

1. Click the **My Status** drop-down list.

**Tip:** You can press **Alt+S** to navigate to the My Status drop-down list.

2. Select a status from the Status list.

**Note:** The Status list displays up to 10 of the most-recently-used statuses at the top of the list. Your current status appears first, followed by the next most recently used statuses in order. A line visually separates the most recently used statuses from a list of all selectable statuses. The list also displays the icon assigned to each status. For more information, see Possible Status Values.

3. Optionally, enter status details by clicking the **Set status details** link.

#### To set your status from your taskbar:

1. Right-click the CIC client status icon in the Windows system task tray.
2. Select a status from the list that appears.

#### To set your status via the Company Directory or other directory view:

1. Right-click your name in the Company Directory or other directory view.
2. Select **Change User's Status** from the menu that appears.

**Result:** The **Set Status** dialog box appears.

3. In the Set Status dialog box, select a status from the drop-down list and enter other status information that is applicable.

**Tip:** Some fields are available only for certain statuses.

4. Click **OK**.

#### Related Topics

- Automatic Status Changer
- My Status
- Possible Status Values
- Set Another User's status
- Set DND Status with Your Phone
- Set Status Details
- Setting Status
- Unavailable Status Reminder
- 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 Another User's Status
- Set Status Details
- Set Your Status
- Setting Status
- Unavailable Status Reminder
- 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. The View Directory Status Columns Access Control right also determines whether you can view a user's status in the directory shortcut menu.

You can add a Status Summary column to your Company Directory view or the Lync-enabled 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

## Unavailable Status Reminder

When you are in an unavailable status, the CIC client status icon in the Windows task bar blinks for 2 minutes every 10 minutes to remind you that you are in an unavailable status.

### Related Topics

- Automatic Status Changer
- Possible Status Values
- Set Another User's status
- Set Status Details
- Set Your Status
- Setting Status
- View Another User's Status

## 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. The View Directory Status Columns Access Control right also determines whether you can view a user's status in the directory shortcut menu.

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. Or, you can right-click the user's name. The user shortcut menu shows the user availability status.


**Note:** Interaction Center tracks status information for users on different IC servers. If the connection to the server that tracks this information is temporarily unavailable, the text in the Status column appears faded. If you point your mouse to one of these status entries, a tooltip appears indicating the status may not be up-to-date.

**Tip:** You can add the Status or Status Summary columns to your Company Directory view.

**Related Topics**

- Add or Remove View Columns
- Automatic Status Changer
- Camp on an Internal Extension
- Possible Status Values
- Set Another User's Status
- Set Status Details
- Set Your Status
- Setting Status
- Unavailable Status Reminder

**Workgroup Activation Button**

<b>Icon</b>	
<b>Location</b>	My Status section
<b>Description</b>	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 <b>Active</b> , and have your user status set to an "Available" type. For more information, see Change Your Workgroup Activation Status.

**Related Topics**

- Workgroup Statistics

**Working with Voicemail**

**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 Interactive Intelligence Oracle Service Cloud Integration, 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 Message view in the CIC client workspace.

Voice mail is managed in one of these ways in the Interactive Intelligence Oracle Service Cloud Integration:

- 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 (for example, Microsoft Media 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 Message 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 *Telephone User Interface User's Guide* and the *Telephone User Interface Quick Reference* available in the IC 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 Message View](#)  
[Voicemail Message View](#)

## 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 Message View in the CIC client workspace
- 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 Interaction Center User Applications Setup. For more information, see the *IC Installation and Configuration Guide*.

### 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

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 IC 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:

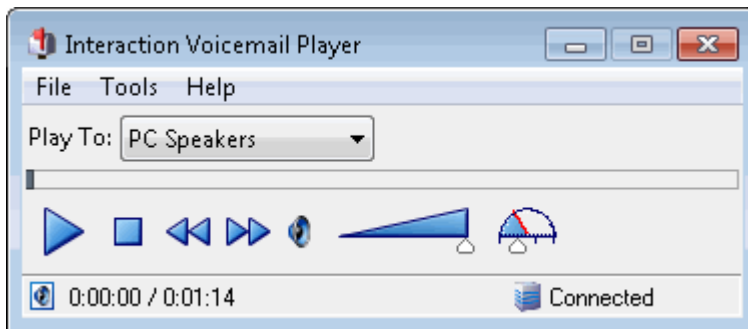
- Play voice mail messages directly from electronic mail.
- Control the playback of voice mail messages.
- Clear a message waiting indicator light

**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
Play To: <input type="text" value="PC Speakers"/>	Select the device to play your voice mail. <b>Note:</b> If you restart the CIC client, this defaults to the device you selected for your last voice mail. <b>PC Speakers</b> Selecting a playback other than PC Speakers may result in slower startup times.



	<p><b>Remote Telephone</b></p> <p>Selecting this device causes CIC to dial the specified number and play the voice mail.</p> <p><b>Tip:</b> 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><b>Note:</b> 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

**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.
- Press **Ctrl+L**.
- Right-click the call and select **Send to 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:** Interactive Intelligence, Inc. disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record 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

## 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.

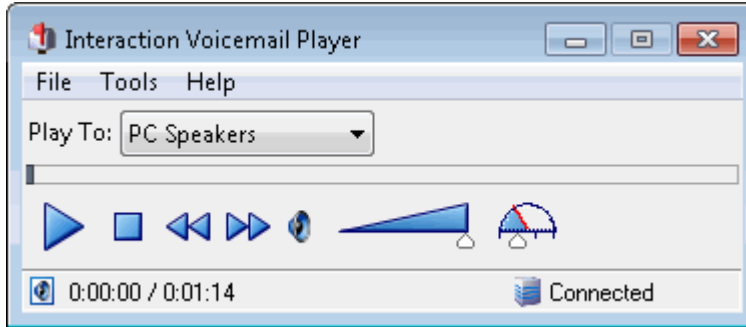
### Tips

- 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.
- You 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.
- Your Customer Interaction Center system may be integrated with the Yap® voice mail preview service. In this configuration, a voice mail-to-text version of the message appears in the email to which it is attached. This provides a convenient approximation of the voice mail message content, but is not a replacement for listening to the message.

### 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.
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

Voice Mail / Fax Paging  
Interaction Voicemail Player Controls

## 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 **Voice Mail** button may be disabled 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 t 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

These procedures assume you are transferring calls from My Interactions, but you can transfer calls from any queue you are monitoring. There are several ways to transfer a call to another person's voice mail.

### 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:
  - In the Interactive Intelligence Media Bar, click the Transfer button.
  - In the CIC client workspace, 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 **Voice Mail** button.

**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 an asterisk (\*):

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 the transfer recipient's number followed by an asterisk (\*).

**Example:** 1234\*

**Result:** A drop-down list of choices appears.

4. From the drop-down list, select "Dial [your entry] as Digits."
5. Click the **Transfer** button.

**Result:** The call is transferred to the recipient's voice mail and disappears from **My Interactions**.

### 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:**

- In the Interactive Intelligence Media Bar, click the Voicemail button.
- In the CIC client workspace, on the Queue Control Toolbar, click the Voicemail button or press **Ctrl+M**.
- If the call is connected, right-click the call and select **Send to 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 or the Voicemail Message view.

**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  
Use the Voicemail Message View

### Voicemail Message View

**Requirements:** You must install Interaction Voicemail Player on your workstation in order to display the Voicemail Message view.

The Voicemail Message view includes a playback interface that enables you to listen to your voice mail messages on a choice of devices. For more information, see Use the Voicemail Message View.

**To display the Voicemail Message view and player:**

1. In the **Create New View dialog box**, from the **Categories** list, select **Unified Messaging**.
2. In the **Views** list, select **Voicemail**.
3. Click **OK**.

**Result:** The Voicemail Message view appears.

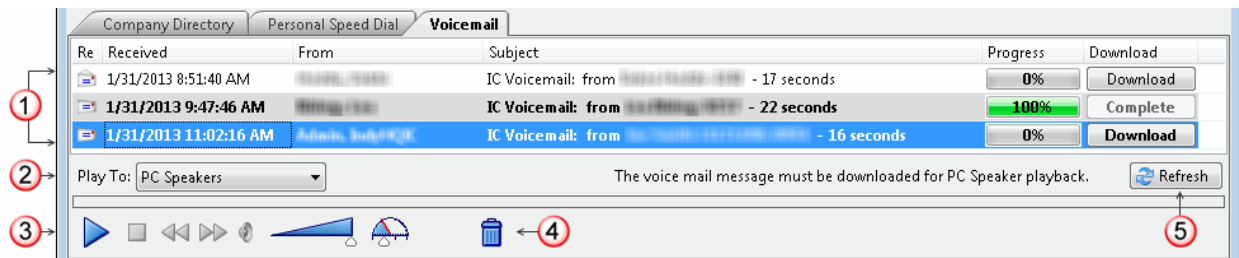
**Related Topics**

- Add or Close Views
- Customizing the Interface
- Use the Voicemail Message View

## Use the Voicemail Message View

You can create a Voicemail Message view that enables you to view a list of current voice mail messages and play them on your station.

**Note:** Before you can use the Voicemail Message view, you must make it available as a view in the CIC client. For more information, see Voicemail Message View.



<b>1</b>	<b>Voicemail messages</b>	The voicemail list contains your current voicemail messages. Heard and unheard messages are distinguished by icons and font. The currently selected voicemail message is highlighted.
<b>2</b>	<b>Play To</b>	Select the device to play your voice mail message. For more information, see Interaction Voicemail Player Controls.
<b>3</b>	<b>Player controls</b>	Use any of these standard controls for voice mail message playback. For more information, see Interaction Voicemail Player Controls.
<b>4</b>	<b>Delete</b>	Click this control to delete the voice mail message.
<b>5</b>	<b>Refresh</b>	Click this button to update your list of voice mail messages.

**To play back voice mail messages using the Voicemail Message view:**

1. Select the Voicemail Message view.

2. Verify that your playback location is set correctly in the **Play To** drop-down list. If you select **Remote Telephone**, enter this remote phone number in the **Number** box that appears when you select this option.

**Note:** The Remote Telephone option enables you to play back voice mail messages to your cell phone or other telephone. This number does **not** default from the remote telephone number you can configure in the Interaction Voicemail Player options.

3. To ensure that all your current voice mail messages appear in the list, do one of the following:
  - Click the **Refresh** button.
  - Right-click anywhere in the Voicemail Message view and select **Refresh List**.
4. Select a voice mail message and click the **Play** button.

#### During playback, you can also:

- Click the **Stop** button at any time to stop playback.
- Click a column heading to sort the Voicemail Message view by that column.
- Adjust playback volume and speed.
- Click the **Delete** control to remove the message from the Voicemail Message view.
- Right-click a voice mail message and select **Save As** to save a copy of the voice mail message to a location you select.

**Note:** The **Save As** option is available only if your CIC administrator enables you to save local copies of voice mail messages.

- Select a message and click **Download** to prepare the voice mail for PC Speaker playback.

**Note:** A local copy is also saved whenever you play a voice mail message through the PC Speakers. You can right-click a message and select **Remove Local Copy** to delete these downloaded voice mail messages from your local drive.

#### When you view voice mail messages in the Voicemail Message view, you can:

- Select a voice mail message and click the **Discard** control, or press the **Del** key, or right click a message and select **Delete** to delete a message.

#### Related Topics

Open Voice Mail From Your Inbox  
Use the Telephone Dial Pad to Control Playback  
Voicemail Message View

## Working with Workgroups

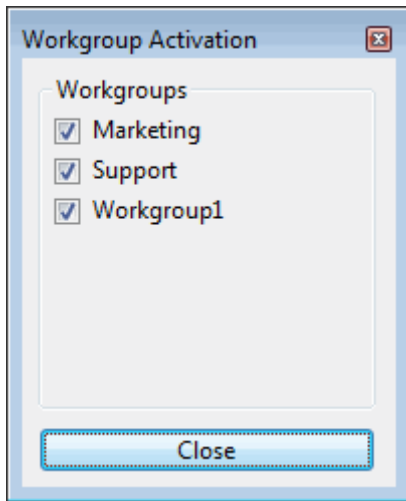
### Change Your Workgroup Activation Status

**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 icon** in the My Status section to display the Workgroup Activation dialog box where you can select or clear activation status check boxes for the workgroups to which you belong.

**Related Topics**

View Other Workgroup Members Activation Status  
Introduction to Queues

**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 **Create New View dialog box**, from the **Categories** list, select **Directories**.
2. In the **Views** list, select **Workgroups/Profiles**.
3. Click **OK**.

**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



## Display the Workgroup Statistics View

**Requirements:** The Workgroup Statistics Security right enables you to display the Workgroup Statistics view. The Statistics Workgroups Access Control right determines which workgroups can be included in the Workgroup Statistics view. Membership in a workgroup does not confer the right to view statistics for that workgroup.

### To display the Workgroup Statistics view:

1. In the **Create New View dialog box**, from the **Categories** list, select **Statistics**.
2. In the **Views** list, select **Workgroup Statistics**.
3. Click **OK**.

**Result:** The Workgroup Statistics view appears.

**Tip:** You can move this view to another part of the interface. For more information, see [Customizing the Interface](#).

### Related Topics

[Workgroup Statistics View](#)

## 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:
  - In the Interactive Intelligence Media Bar, click the Transfer button.
  - In the CIC client workspace, on the Queue Control Toolbar, click the Transfer button.
  - Right-click the call and choose **Transfer** from the menu that appears.

**Result:** The **Transfer dialog box** appears.

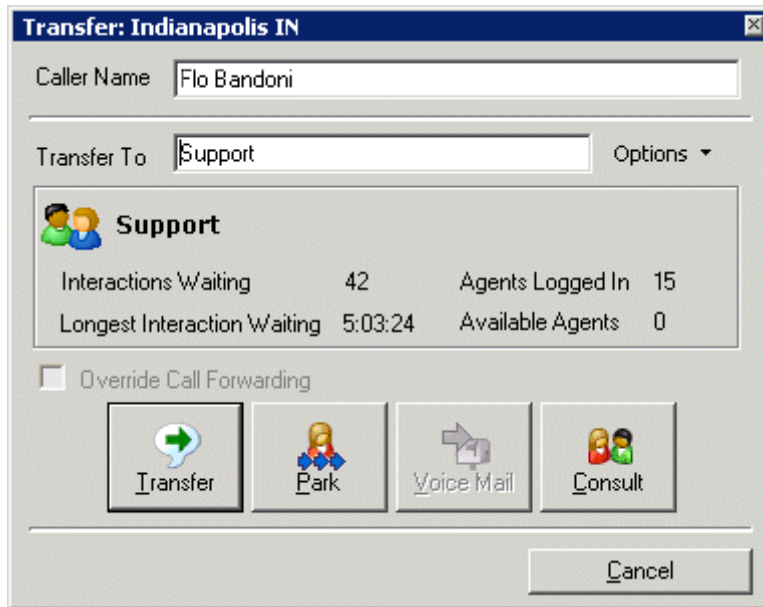
3. In the **Transfer To:** text box, type all or part of the Workgroup's name or number.

**Result:** A drop-down list of choices appears.

**Tip:** If the drop-down list does not contain the workgroup you expected, check the search criteria selected in the **Options** drop-down list and make sure **Workgroups** is selected.

4. From the **Transfer To** drop-down list, do one of the following:
  - Select the appropriate workgroup name and associated extension number.
  - Select "Dial [your entry] as Digits" to convert a text entry into numbers.

**Result:** Status information for the selected CIC Workgroup appears. This enables you to check the workgroup's current statistics before transferring the call. Use this information to estimate the probable wait time for a transferred call.



5. Click the **Transfer** button.

**Result:** The transferred call disappears from My Interactions or other queue and is routed to the selected CIC Workgroup.

### Using the Workgroups and Profiles Directory to Transfer a Call

**Note:** Before you can transfer a call to a workgroup using this method, you must Display the Workgroup and Profile View. You also need the appropriate user rights to view the name of the workgroup in the Workgroup and Profiles directory.

#### To transfer a call to a Workgroup in the Workgroups and Profiles directory:

1. Tell the caller that he or she is going to be transferred.
2. Do one of the following:
  - Drag the call to a workgroup in the Workgroups and Profiles directory view. In the **Transfer Interaction** dialog box, click **Yes**.
  - Select a workgroup name in the Workgroups and Profiles directory view and press **Enter**.
  - Right-click a workgroup name in the Workgroups and Profiles directory view. From the shortcut menu, select **Selected Interaction**, then select the desired transfer option.

- Click on a workgroup name in the Workgroups and Profiles directory view. In the Directory toolbar, click a Blind Transfer button.

**Note:** For a list of available buttons, see [Directory Toolbar Buttons](#). For more information about adding buttons to a toolbar, see [Customizing Toolbars](#).

**Result:** The call disappears from **My Interactions** and is transferred to the appropriate Workgroup queue.

### Related Topics

Introduction to Queues  
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](#).

Company Directory		All Customer Contacts		IC Private Contacts		Safety Wardens	
Last Name	First Name	Extension	Department	Activated			
Smith	Christopher	<a href="#">1262</a>	EDU Education	✓			
Smith	Stacy	<a href="#">1334</a>	HEM CaaS Solu...	✓			
Smith	Stephen	<a href="#">1530</a>	SAE Engageme...	✗			
Smith	Zachary	<a href="#">1308</a>	HSU CaaS Supp...	✓			

**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  
Customizing Toolbars  
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.
- Right-click the member and select **Dial Default Number** or other **Dial** option from the menu that appears.
- Click any phone number in the row for the member.

**Related Topics**

- Add or Close Views
- View Other Workgroup Members Activation Status
- Working with Other Directories

**Workgroup Statistics View**

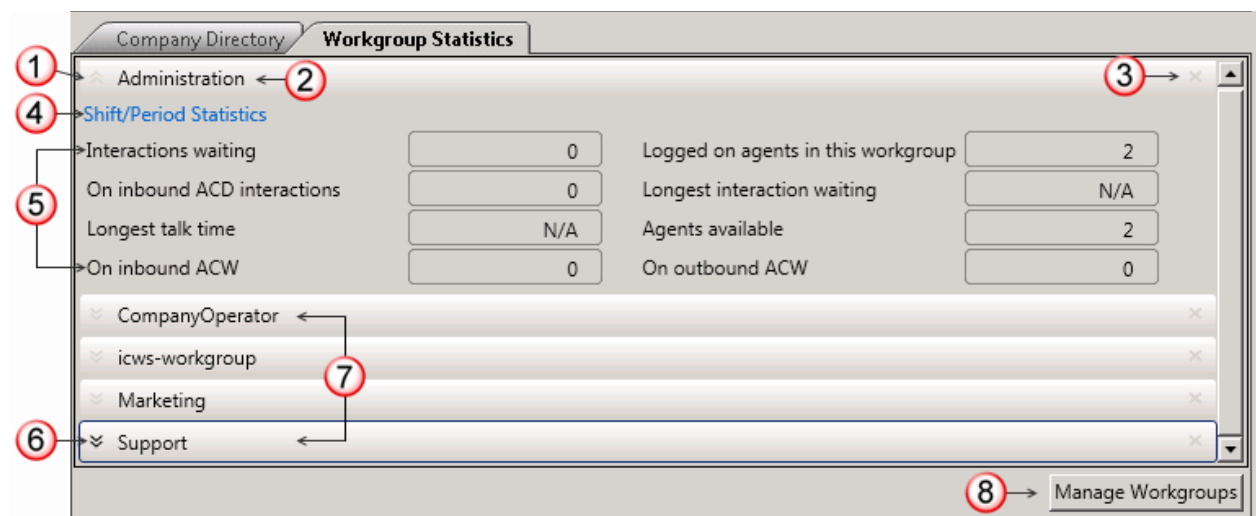
**Requirements:** The Workgroup Statistics Security right enables you to display the Workgroup Statistics view. The Statistics Workgroups Access Control right determines which workgroups can be included in the Workgroup Statistics view. Membership in a workgroup does not confer the right to view statistics for that workgroup.

You can view basic statistics for workgroup queues. Workgroup statistics can help you determine when you can take a short break.

**Workgroup Statistics**

The workgroup-specific sections of the Workgroup Statistics view display a quick overview of the selected workgroup.

**Note:** If the Workgroup Statistics tab 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 the Workgroup Statistics tab, it "wakes up" and re-populates the statistics panels.



1	<b>Minimize</b>	Click this control to minimize the statistics section for a selected workgroup.
2	<b>Workgroup</b>	The name of the workgroup as defined in Interaction Administrator.

	Name	
3	<b>Close</b>	Click this control to remove a selected workgroup statistics section from the Workgroup Statistics view.
4	<b>Shift\Period Statistics</b>	Click this link to display a statistical summary of the <b>current</b> shift or period. For more information, see Shift\Period Statistics.
5	<b>Statistics</b>	<p>These statistics appear for each workgroup:</p> <ul style="list-style-type: none"> <li>• <b>Interactions waiting:</b> Number of interactions waiting on this workgroup queue.</li> <li>• <b>On inbound ACD interactions:</b> Total number of agents working on inbound ACD interactions in this workgroup queue.</li> <li>• <b>Longest talk time:</b> The longest connection time of any of the currently connected interactions. "N/A" indicates no interactions are currently connected.</li> <li>• <b>On inbound ACW:</b> Total number of agents performing after call wrap-up work to conclude an inbound ACD interaction on this workgroup queue.</li> <li>• <b>Logged on agents in this workgroup:</b> Total number of agents in this workgroup who are logged on, regardless of their status.</li> <li>• <b>Longest interaction waiting:</b> The longest amount of time any of the interactions presently in this workgroup queue have been waiting to be picked up.</li> <li>• <b>Agents available:</b> The number of agents in this workgroup who are logged in, have an "Available" status, and are activated.</li> <li>• <b>On outbound ACW:</b> Total number of agents performing after call wrap-up work to conclude an outbound ACD interaction on this workgroup queue</li> </ul>
6	<b>Maximize</b>	Click this control to expand and display the statistics section for a selected workgroup.
7	<b>Minimized sections</b>	A workgroup name identifies a minimized workgroup statistics section.
8	<b>Manage Workgroups</b>	<p>Click the <b>Manage Workgroups</b> button to add new workgroups, remove workgroups or to rearrange the order of the displayed workgroups.</p> <p><b>Note:</b> When you add this view, all workgroups to which you have the Statistics Workgroups Access Control right appear.</p>

### Shift\Period Statistics

The Shift/Period Statistic view displays a statistical summary of the current shift and period. Separate columns display statistics for the currently selected workgroup and your personal statistics as a member of that workgroup.

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*.

**Note:** The Shift/Period Statistics pop-up displays a snapshot of the statistics. It does not update while opened.

Shift Statistics	Workgroup	My Stats
Average Talk Time	00:02:47	00:02:26
Longest Talk Time	Not a shift statistic	00:00:43
Interactions Received	708	278
Interactions Answered	700	278
Interactions Completed	708	278
Period Statistics	Workgroup	My Stats
Average Talk Time	00:02:22	00:02:23
Longest Talk Time	Not a period statistic	00:00:32
Interactions Received	708	6
Interactions Answered	700	6
Interactions Completed	708	6

- **Average Talk Time:** Average connection time for all currently connected calls.

**Note:** If there are no currently connected calls, Average Talk Time is set to N/A.

- **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 have been picked up.
- **Interactions Completed:** Number of interactions that have been picked up and disconnected, sent to voice mail, parked on orbit, or transferred.

## Displaying the Workgroup Statistics View

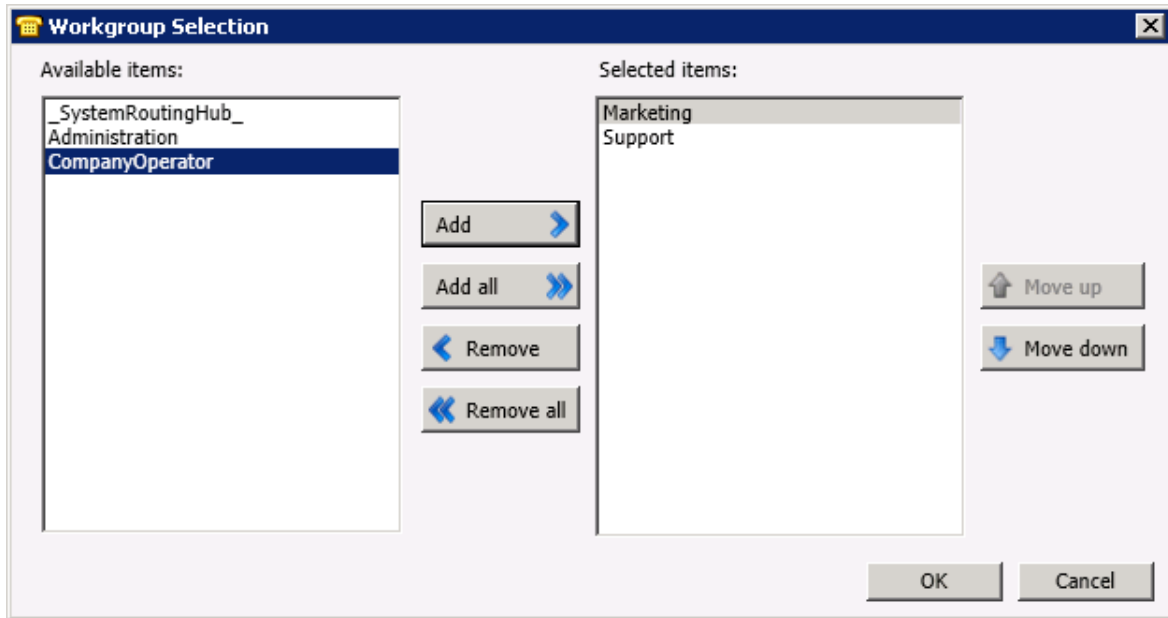
### To display the Workgroup Statistics view:

1. In the **Create New View dialog box**, from the **Categories** list, select **Statistics**.
2. In the **Views** list, select **Workgroup Statistics**.
3. Click **OK**.

**Result:** The Workgroup Statistics view appears. It contains a section for each workgroup for which you have the Statistics Workgroups Access Control right.

4. To change the workgroup selection, in the Workgroup Statistics view, click **Manage Workgroups**.

**Result:** The Workgroup Selection dialog box appears.



5. Do one of the following:

- From the **Available items** list, select a workgroup and click **Add**.

**Note:** Repeat this step for each workgroup queue you want to monitor.

- To add all workgroups, click **Add all**.

**Result:** The selected workgroup or workgroups appear in the **Selected items** list.

6. When finished selecting workgroups, click **OK**.

**Result:** The Workgroup Statistics view of the selected workgroups appears in the CIC client.

**Note:** Each selected workgroup appears in a separate section of the Workgroup Statistics view.

## Related Topics

Introduction to Queues

## Interaction Client 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.

**Note:** If you have the appropriate rights, you can configure the synchronization between the Do Not Disturb (DND) setting on your phone and your CIC client user status.

- Configure distinctive ring tones for incoming Internal, External, and Direct Dialed calls.

## Related Topics

- Configure Your IP Phone
- Set DND Status with Your Phone

## About Session Manager

A subsystem component called Session Manager acts as a “traffic cop” or “broker” between CIC client connections and a specified IC server.

Session Manager can run on the IC 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 IC server ever fails, in less than 30 seconds the server can switch control to another mirror image IC server with minimal phone disruption. In addition, administrators can manually switch the “active” IC server with no phone disruption. It takes from 90 to 150 seconds for the CIC client to reconnect.

You can manually reconnect after the server switchover occurs by clicking the Logon button. However you do not need to log on again after a switchover occurs.

**Note:** CIC may disconnect your current call during a switchover.

## Related Topics

- Auto Reconnect

## General Information

### Copyright and Trademark Information

*Interactive Intelligence, Interactive Intelligence Customer Interaction Center, Interaction Administrator, Interaction Attendant, Interaction Client, Interaction Designer, Interaction Tracker, Interaction Recorder, Interaction Mobile Office, Interaction Center Platform, Interaction Monitor, Interaction Optimizer, and the “Spirograph” logo design* are registered trademarks of Interactive Intelligence, Inc. *Customer Interaction Center, EIC, Interaction Fax Viewer, Interaction Server, ION, Interaction Voicemail Player, Interactive Update, Interaction Supervisor, Interaction Migrator, and Interaction Screen Recorder* are trademarks of Interactive Intelligence, Inc. The foregoing products are ©1997-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Dialer and Interaction Scripter* are registered trademarks of Interactive Intelligence, Inc. The foregoing products are ©2000-2015 Interactive Intelligence, Inc. All rights reserved.

*Messaging Interaction Center and MIC* are trademarks of Interactive Intelligence, Inc. The foregoing products are ©2001-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Director* is a registered trademark of Interactive Intelligence, Inc. *e-FAQ Knowledge Manager and Interaction Marquee* are trademarks of Interactive Intelligence, Inc. The foregoing products are ©2002-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Conference* is a trademark of Interactive Intelligence, Inc. The foregoing products are ©2004-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction SIP Proxy and Interaction EasyScripter* are trademarks of Interactive Intelligence, Inc. The foregoing products are ©2005-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Gateway* is a registered trademark of Interactive Intelligence, Inc. *Interaction Media Server* is a trademark of Interactive Intelligence, Inc. The foregoing products are ©2006-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Desktop* is a trademark of Interactive Intelligence, Inc. The foregoing products are ©2007-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Process Automation, Deliberately Innovative, Interaction Feedback, and Interaction SIP Station* are registered trademarks of Interactive Intelligence, Inc. The foregoing products are ©2009-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Analyzer* is a registered trademark of Interactive Intelligence, Inc. *Interaction Web Portal, and IPA* are trademarks of Interactive Intelligence, Inc. The foregoing products are ©2010-2015 Interactive Intelligence, Inc. All rights reserved.

*Spotability* is a trademark of Interactive Intelligence, Inc. ©2011-2015. All rights reserved.



*Interaction Edge*, *CaaS Quick Spin*, *Interactive Intelligence Marketplace*, *Interaction SIP Bridge*, and *Interaction Mobilizer* are registered trademarks of Interactive Intelligence, Inc. *Interactive Intelligence Communications as a Service™*, and *Interactive Intelligence CaaS™* are trademarks or service marks of Interactive Intelligence, Inc. The foregoing products are ©2012-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Speech Recognition* and *Interaction Quality Manager* are registered trademarks of Interactive Intelligence, Inc. *Bay Bridge Decisions* and *Interaction Script Builder* are trademarks of Interactive Intelligence, Inc. The foregoing products are ©2013-2015 Interactive Intelligence, Inc. All rights reserved.

*Interaction Collector* is a registered trademark of Interactive Intelligence, Inc. *Interaction Decisions* is a trademark of Interactive Intelligence, Inc. The foregoing products are ©2013-2015 Interactive Intelligence, Inc. All rights reserved.

*Interactive Intelligence Bridge Server* and *Interaction Connect* are trademarks of Interactive Intelligence, Inc. The foregoing products are ©2014-2015 Interactive Intelligence, Inc. All rights reserved.

The veryPDF product is ©2000-2015 veryPDF, Inc. All rights reserved.

This product includes software licensed under the Common Development and Distribution License (6/24/2009). We hereby agree to indemnify the Initial Developer and every Contributor of the software licensed under the Common Development and Distribution License (6/24/2009) for any liability incurred by the Initial Developer or such Contributor as a result of any such terms we offer. The source code for the included software may be found at <http://wpflocalization.codeplex.com>.

A database is incorporated in this software which is derived from a database licensed from Hexasoft Development Sdn. Bhd. ("HDSB"). All software and technologies used by HDSB are the properties of HDSB or its software suppliers and are protected by Malaysian and international copyright laws. No warranty is provided that the Databases are free of defects, or fit for a particular purpose. HDSB shall not be liable for any damages suffered by the Licensee or any third party resulting from use of the Databases.

Other brand and/or product names referenced in this document are the trademarks or registered trademarks of their respective companies.

#### DISCLAIMER

INTERACTIVE INTELLIGENCE (INTERACTIVE) HAS NO RESPONSIBILITY UNDER WARRANTY, INDEMNIFICATION OR OTHERWISE, FOR MODIFICATION OR CUSTOMIZATION OF ANY INTERACTIVE SOFTWARE BY INTERACTIVE, CUSTOMER OR ANY THIRD PARTY EVEN IF SUCH CUSTOMIZATION AND/OR MODIFICATION IS DONE USING INTERACTIVE TOOLS, TRAINING OR METHODS DOCUMENTED BY INTERACTIVE.

Interactive Intelligence, Inc.  
7601 Interactive Way  
Indianapolis, Indiana 46278  
Telephone/Fax (317) 872-3000  
[www.ININ.com](http://www.ININ.com)



## Index

### A

About dialog box ..... 46  
Access Control Rights ..... 5  
account codes ..... 147, 149, 150, 151, 152, 235, 276  
Activation Status ..... 461, 465  
adding 109, 132, 133, 140, 235, 275, 336, 346, 356, 372, 411, 436, 438  
alerts ..... 49, 105, 106, 109, 161, 226, 412  
answering calls ..... 178  
application settings ..... 92  
Assistance button ..... 69  
Attendant ..... 191, 462  
audio ..... 145, 147  
auto login ..... 99  
auto reconnect ..... 20  
auto status changer ..... 95, 443

### B

Basic Client layout ..... 140  
Basic Operator Layout ..... 140  
blind transfer ..... 90

### C

call back ..... 156, 165  
call history ..... 47  
call state ..... 176  
callback requests ..... 154, 155, 156, 157  
calls 41, 47, 67, 76, 86, 90, 100, 106, 108, 111, 114, 115, 117, 118, 119, 159, 164, 165, 166, 167, 168, 169, 170, 171, 172, 174, 175, 176, 178, 179, 181, 182, 183, 185, 188, 189, 193, 194, 195, 196, 197, 198, 199, 200, 204, 206, 207, 208, 211, 214, 215, 220, 405, 406, 419, 422, 441, 457, 459, 463  
calls options ..... 111  
Camp button ..... 85  
camping ..... 49, 85, 209  
**cancel process** ..... 309

Change User's Status button ..... 85  
chats ..... 88, 224, 226, 227, 230, 233, 235, 236, 237, 238, 239, 240, 241, 245, 246, 247, 266, 275, 276, 290, 426  
check names in e-mail ..... 283  
CIC client ..... 1, 4, 45, 159  
click to dial ..... 166  
Coach button ..... 70  
coaching ..... 70, 211  
columns ..... 132, 136, 140  
Company Directory ..... 251, 258, 401  
conference .. 40, 73, 74, 86, 204, 205, 206, 207, 213, 236  
configuring ..... 49, 57, 91, 92, 97, 99, 100, 102, 106, 111, 121, 133, 136, 143, 453, 462  
connection settings ..... 98  
consult transfer ..... 86  
contacts ..... 324, 325, 336, 346, 348, 351, 355, 438  
context search ..... 428  
conversation history ..... 394  
Copyright and Trademarks ..... 470  
coverage ..... 114, 199  
creating ..... 411, 434, 438  
custom button ..... 65  
customizing ..... 65, 131, 132, 135, 137, 140

### D

default number ..... 251, 439  
deleting ..... 131, 332, 355, 371, 436, 440  
dial on behalf of a workgroup ..... 148  
dial pad ..... 50, 459  
dialing ..... 50, 87, 148, 166, 171, 172, 257, 405, 406, 459  
directories ..... 51, 58, 183, 188, 247, 251, 252, 254, 255, 257, 258, 330, 332, 333, 451, 465  
Directory Toolbar ..... 81, 82, 83, 195  
Disconnect button ..... 37, 71  
Do Not Disturb ..... 97, 448

docking architecture.....138, 142

Drag and drop transfer.....183, 442

**E**

e-FAQ.....246, 258, 260, 261, 262, 263, 266, 290

e-mail messages.. 89, 158, 235, 266, 267, 268, 270, 273, 276, 280, 281, 285, 288, 289, 290, 291, 394, 426

emergency calls.....161

exiting.....20, 22

**F**

faxes.....109, 292, 293, 294

features .....4, 14, 16, 19

Follow me routing .....112, 201, 202, 204

Forwarding.....115, 117, 118, 119, 198, 200, 276

**G**

generic objects.....296

**H**

Help button.....37, 72

Hold button.....38, 72

**I**

Initiate New Chat button.....88

integration .....396, 404

interaction error.....179

Interaction Messaging.....453

Interaction Process Automation.....296, 299, 300, 301, 303, 304, 306, 307, 309, 310, 311, 314, 316, 318, 319, 321, 322, 391

Interaction Tracker .... 323, 324, 325, 326, 329, 330, 332, 333, 334, 335, 336, 346, 348, 351, 355, 356, 364, 367, 371, 372, 380, 383, 385, 386, 387, 390, 392, 394, 395

Interaction Voicemail Player.....453, 454

interactions.....52, 54, 55, 100, 149, 150, 208, 213, 326, 386

Intercom chat .....224

Introduction .....1

**J**

Join button.....73, 213

joining a call.....73, 206, 213

**L**

language.....22

listen.....42, 73, 77, 157, 214, 238, 278, 455

Listen button .....73, 212

**Lock**.....93

log.....54

logging off.....22, 28, 39

logging on.....20, 21, 23, 25, 28, 32, 39, 98, 99

Logon or Logoff button.....39

long distance .....167

Lync integration .....396, 397, 399, 400, 401, 403, 404

**M**

making a call.....148, 172, 174, 204

memos.....61

messages.....61

modifying.....351, 367

monitor .....157, 238, 278, 418

Monitored Appearances.....123, 124, 131, 418

moving views.....138

**N**

notes.....54, 222, 235, 275, 309, 450

**O**

office location.....251

operator.....165

Operator Console.....140

Oracle Service Cloud Integration33, 36, 38, 39, 43, 166, 208

orbit queues.....75, 180, 181, 408, 409, 410

organization.....356, 364, 367, 371

Outlook.....102, 405

**P**

parking a call.....75, 88, 109, 180, 184, 409

parking on orbit .....75, 405, 406, 407

parking on queue .....88, 184, 280

password.....20

- pause before dialing.....257
- personal prompts .....121
- personal rules .....411, 415
- phone numbers ..... 58
- phones..... 97, 469
- photo.....251
- picking up calls .....41, 76, 178, 181, 182, 410, 419, 457
- picking up chat request.....239
- picking up e-mail messages.....268, 281
- Pickup button .....41, 76
- placing calls on hold..... 38, 72, 175, 182
- playback.....387, 459
- plugins.....95, 142, 143, 443
- printing.....240, 281
- Private button..... 77, 238
- Process ..... 300, 301, 303, 304, 306, 307, 309
- profile.....25, 28, 191
- properties.....77, 89, 222
- Provisioning Wizard .....146
- Q**
- Queue Control toolbar .....65, 67, 68, 137, 196
- queues 109, 133, 181, 215, 408, 418, 419, 420, 422, 466
- Quick Call Rules.....415
- R**
- reconnect.....20
- Record button .....42, 77, 212
- recording ..... 41, 42, 75, 77, 79, 214, 220, 241, 387
- refreshing .....437
- related interactions ..... 384, 386, 387, 392, 394
- reminders .....321
- remote .....20, 25, 28, 29, 31, 200
- renaming .....437
- replying .....281, 285
- requesting help.....215, 243
- resetting.....140
- resizing .....142, 440
- Response Management .....158, 247, 290, 291, 425, 426, 427, 428, 430
- retry process** .....309
- rights .....5, 10
- S**
- screen pops.....431
- screen saver .....95, 443
- searching .....254, 301, 348, 364, 386, 428
- secure input .....78, 220, 221
- security.....10, 159
- Send Email Message Buttons .....89, 288
- Send to Voicemail button .....90
- session manager .....470
- Shortcut Keys.....59, 61, 82, 92, 430
- SIP (Session Initiation Protocol)..... 144, 145, 146, 147
- sorting .....255
- sounds.....108, 211
- speed dial... 169, 431, 434, 436, 437, 438, 439, 440, 441, 442
- spell check e-mail.....283
- station.....21, 36, 98
- statistics .....422, 466
- status.. 43, 58, 85, 95, 121, 397, 407, 443, 445, 446, 447, 448, 449, 450, 451, 452
- supervisor.....215, 243
- Supervisor Client Memos .....61
- switchover .....470
- system information.....46
- T**
- telephone keypad.....459
- templates .....140
- toolbar buttons 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 65, 70, 71, 72, 73, 74, 75, 76, 77, 79, 80, 83, 87, 88, 89, 90, 137

toolbars ..... 64, 65, 67, 81, 82, 137, 195, 196

Transfer button ..... 44, 80, 86, 90

transferring.. 44, 62, 80, 86, 90, 183, 185, 188, 189, 191,  
193, 194, 195, 196, 197, 245, 289, 317, 457, 459, 463

## U

unavailable status reminder ..... 451

updating ..... 14, 16

USB Audio ..... 147

## V

version ..... 46

viewing ..... 77, 222, 255, 451, 465

views..... 49, 52, 132, 133, 136, 138, 140, 230, 260, 300,  
333, 400, 436, 462

voice mail. 45, 80, 90, 101, 104, 109, 182, 193, 194, 245,  
452, 453, 454, 455, 456, 457, 459, 460

Voicemail button ..... 45, 80

## W

warnings ..... 320

Windows Authentication ..... 25, 28

Work Item.. 310, 311, 314, 316, 317, 318, 319, 320, 321,  
322

workgroup statistics ..... 422, 463, 466

workgroups 171, 189, 422, 446, 452, 461, 462, 463, 465,  
466

wrap-up codes ..... 147, 153, 235, 276

## Y

Yap ..... 456