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Interaction Tracker Filtered Directories

Technical Reference

Abstract

Tracker Filtered Directories are a feature in Interaction Desktop. This content describes how to create and configure custom client directories using Tracker contacts. Interaction Desktop users can increase daily productivity by quickly accessing their contacts that have been created and organized using Interaction Tracker attributes.

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

For copyright and trademark information, see https://help.genesys.com/cic/desktop/copyright_and_trademark_information.htm.

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Introduction

The Interaction Tracker Filtered Directories feature enables Interaction Desktop users to create new CIC client directory types based on contacts that are organized in the Interaction Tracker database.

Interaction Tracker Filtered Directories enable users to communicate quickly and easily with contacts in directories created from their established Interaction Tracker customer accounts.

This document includes:

- An overview of the Tracker Filtered Directories feature
- Installation information and prerequisites
- Configuration information for Interaction Administrator
- Information about creating and using Tracker Filtered Directories

CIC client

Customer Interaction Center (CIC) supports several interaction management client applications. This documentation uses the term "CIC client" to refer to Interaction Desktop.

About this information

The information in this technical reference is for partners, planners, installers, administrators, and users, who plan to create and configure Tracker Filtered Directories.

Referenced information

Because the Tracker Filtered Directories feature is integrated with Customer Interaction Center's installation and Interaction Tracker, this document refers to other technical references and guides. These documents are available in the Documentation Library on your CIC server. The latest versions of these documents can also be accessed from the [PureConnect Documentation website](#).

The following guide, help, and links are referred to in this document and provide more information for creating and configuring Tracker Directories:

- PureConnect Installation and Configuration Guide
- License Management website (<http://license.inin.com>)
- Interaction Administrator Help
- Interaction Desktop Help

Overview

Tracker Directories offer a way to create custom CIC client directories using Interaction Tracker contacts. This plug-in is included in the Customer Interaction Center (CIC) Installation.

After an administrator installs CIC, a CIC administrator creates a Contact List Source named IC Tracker Contacts. The Contact List Source allows you or the administrator to create Tracker Directories.

A Tracker Access license is required for each user who creates and uses Tracker Directories. After the CIC administrator creates the IC Tracker Contacts list source, licensed users can create Interaction Tracker directories in the CIC client.

CIC client users can create directory views based on Tracker contacts. These directories can be created using filter specifications based on existing contact information stored in the Tracker database.

CIC client users can increase daily productivity by quickly accessing their contacts which are filtered and organized using Interaction Tracker attributes.

Installation

The Tracker Filtered Directories plug-in is included in the Customer Interaction Center installation.

Prerequisites

This section explains prerequisites for installing the Tracker Filtered Directories plug-in.

Hardware and Software prerequisites

The Tracker Filtered Directories feature has no additional hardware or software prerequisites.

Licensing prerequisites

The Customer Interaction Center installation installs the Tracker Filtered Directories plug-in. **Tracker Directories views** are available to CIC client users with a Tracker Access license.

The following licenses are required:

- A Tracker Feature license (I3_FEATURE_TRACKER) is required for your Interaction Tracker Server installation.
- An Interaction Tracker Access add-on license (I3_ACCESS_TRACKER) is required for each user of Tracker Filtered Directories.

For more information about licensing, see the

- CIC server chapter in the *PureConnect Installation and Configuration Guide*.
- *PureConnect Licensing Technical Reference* in the PureConnect Documentation Library.
- License Management Web site (<http://license.inin.com>).

Security Rights and Access Control Rights

CIC client users need the following licenses to take advantage of all the Interaction Tracker features available in the CIC client.

- The **Related Interactions Page** Security right and the **Customize Client** Security right control whether a user 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 a CIC client user the necessary rights to the interactions belonging to all or selected users.
- **Tracker Policy** Security rights control which Tracker functions are available to CIC client users.

Tracker Policy Right	Description
Add Individuals	Enables you to add a Tracker contact or Quick add a contact.
Add Organizations	Enables you to add a Tracker organization.
Delete Individuals	Enables you to delete a Tracker contact.
Delete Organizations	Enables you to delete a Tracker organization.
Have Private Contacts	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.
Modify Individuals	Enables you to modify Tracker contact information.
Modify Organizations	Enables you to modify Tracker organization information.
Related Interactions Page	Enables you to use the Related Items view.
Tracker Administrator	Grants you all the Tracker Policy Rights, enabling you to perform all the Tracker functions that require any Tracker Policy Right.
View Other People's Private Interactions	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.

Configuration

After an administrator installs CIC, a CIC administrator completes these tasks to make **Tracker Directory views** available in the CIC client.

- Verify the Tracker Server license.
- Verify the Tracker Access Licenses for authorized users.
- Verify that Interaction Tracker Server is configured and running.
- Create an **IC Tracker Contact List Source** in Interaction Administrator.

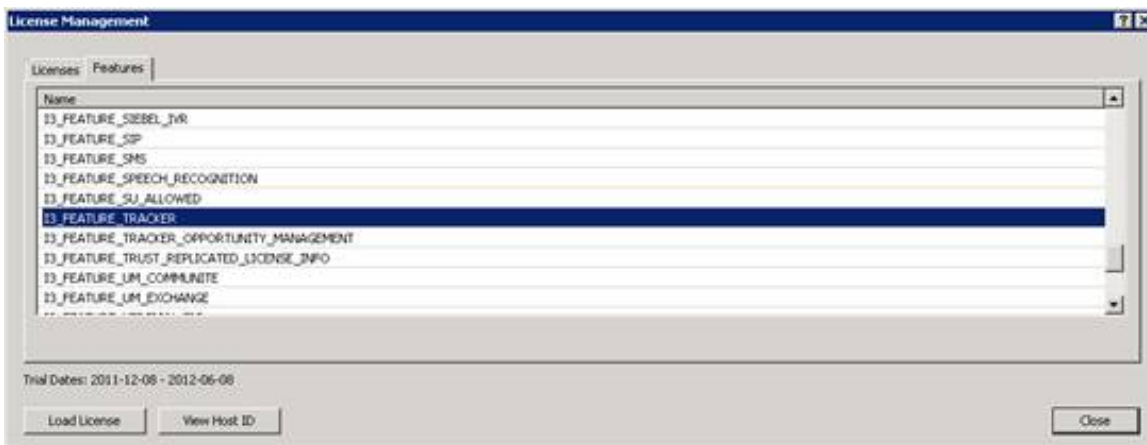
Verify the Tracker Server License

The Tracker Server must have the appropriate license to enable you to configure Tracker Filtered Directories.

To verify your license:

1. In Interaction Administrator, from the **File** menu, select **License Management**.

Result: The **License Management** dialog appears.



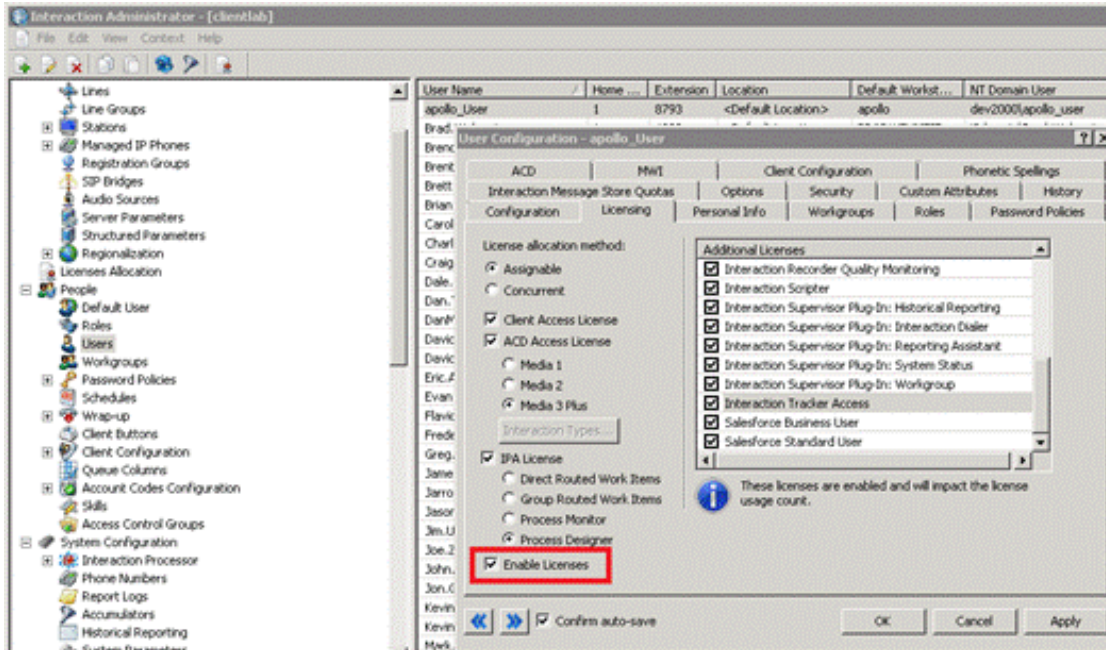
2. Verify that you have the I3_FEATURE_TRACKER license.
3. **Close** the dialog.

Verify the Tracker Access licenses

To create and access Tracker Filtered Directories, users must have a Tracker Access license.

To assign Tracker access licenses:

1. In Interaction Administrator, right-click on a selected user and then select **Properties**.
Result: The **User Configuration** dialog box appears.
2. On the **Licensing** tab, select the **Interaction Tracker Access** license, and apply it to the configuration for this user.



3. Make sure the **Enable Licenses** check box is selected.
4. To save your selections, click **OK**.

Interaction Tracker plug-in

Interaction Tracker features are controlled with licensing. The Tracker plug-in is always loaded in the CIC client. Tracker Directory views are available only if the CIC client user has an Interaction Tracker Access license.

Create an IC Tracker Contact List Source

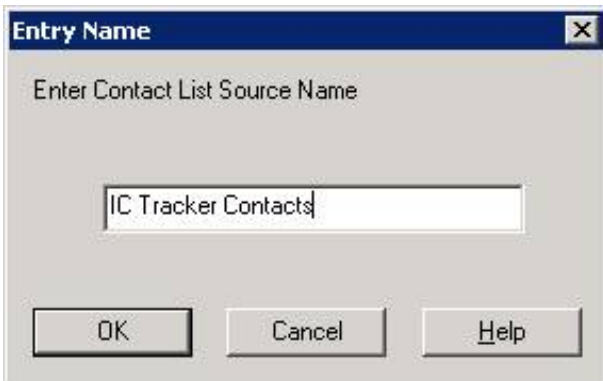
To enable CIC client users to access the **Interaction Tracker Directories** from inside the CIC client, create an **IC Tracker Contacts** Contact List Source in Interaction Administrator.

To add a Tracker Directory Contact List Source:

1. In Interaction Administrator, in the **System Configuration** container, under the **Contact Data Manager**, select **Contact List Sources**.



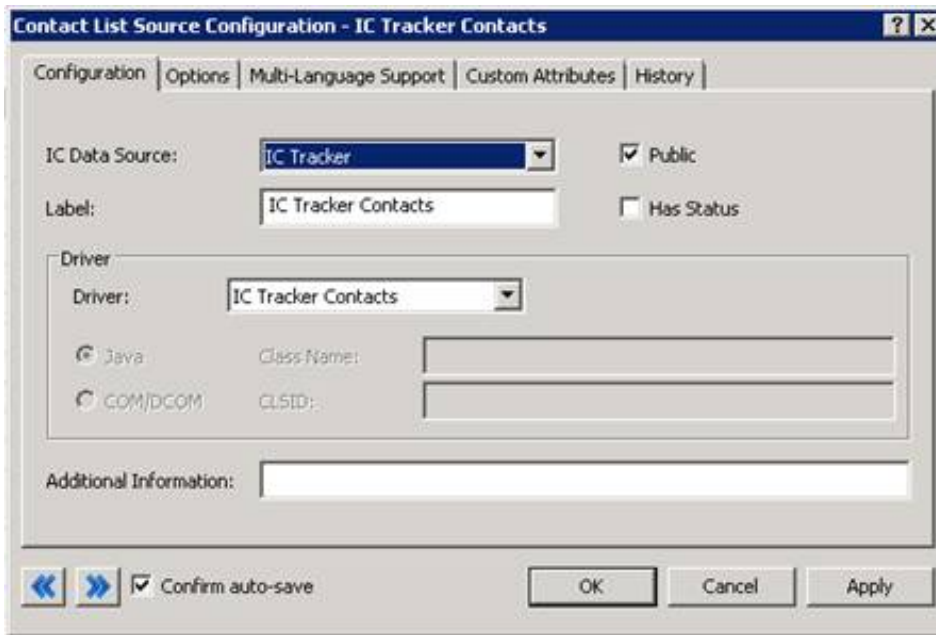
2. Right-click in the **Contact List Source Name** list pane and then select **New**.
Result: The **Entry Name** dialog appears.



3. Type the Contact List Source Name, **IC Tracker Contacts** and click **OK**.

Note: This name *must* be IC Tracker Contacts.

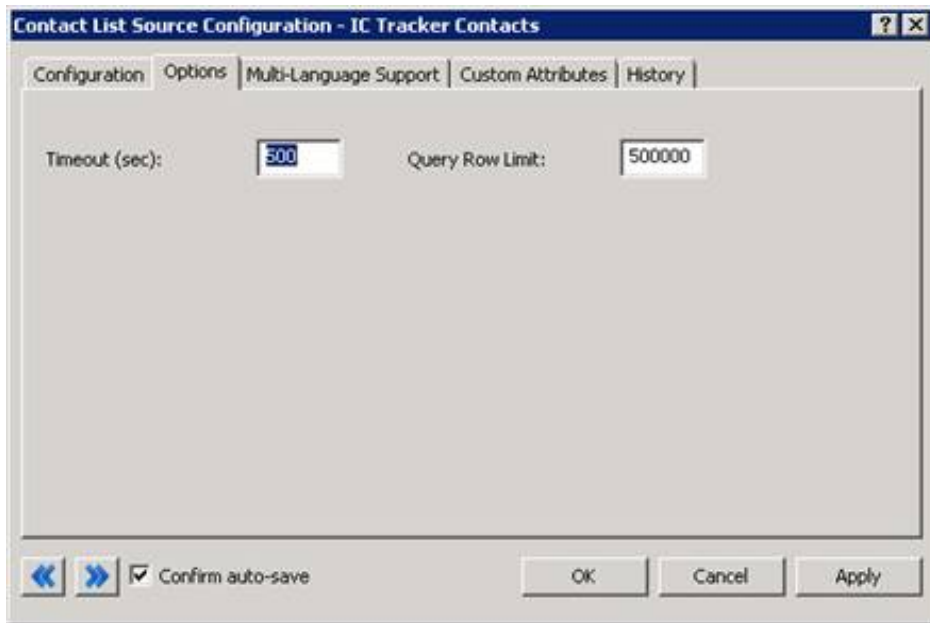
Result: The **Contact List Source Configuration – IC Tracker Contacts** dialog box appears.



4. In the **Configuration** tab, make the following selections:

<p>IC Data Source</p> <p>Select IC Tracker.</p> <p>Note: The IC Data Source can have a different name than <i>IC Tracker</i>. It is named when the data source is created during Interaction Tracker setup.</p>
<p>Label</p> <p>Enter a name. This name appears in the Interaction Administrator Contact List Source Name pane.</p>
<p>Public</p> <p>Select this check box for IC Tracker Contacts. Tracker Filtered Directories contain only Public Tracker Contents.</p>
<p>Driver</p> <p>Select the IC Tracker Contacts driver. This driver applies the appropriate formatting to the Tracker database.</p>

5. In the **Options** tab, make the following selections:



Timeout (sec)

Consider your operating conditions when setting this value:

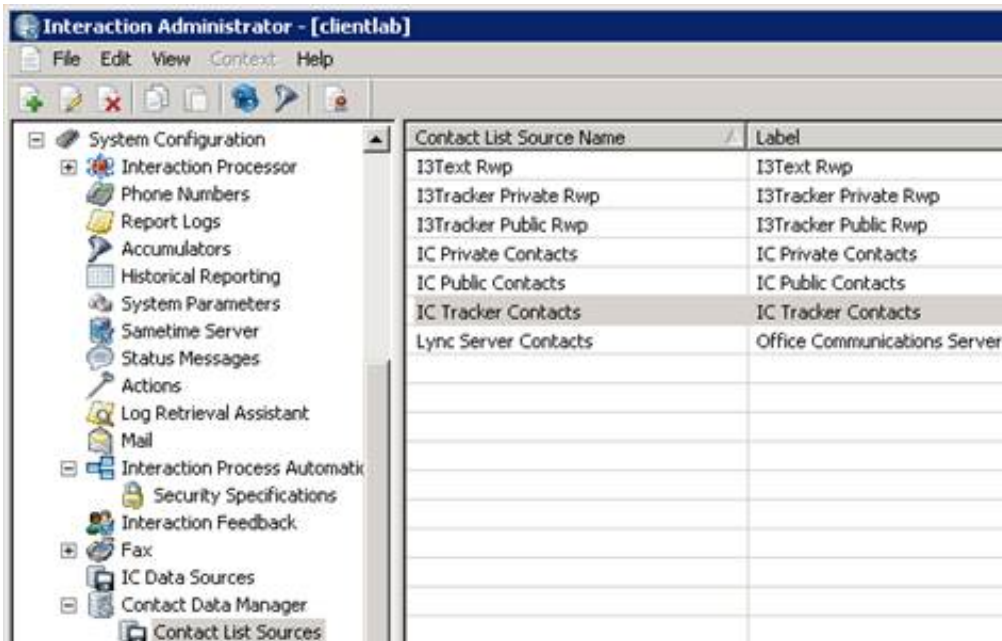
- Under usual operating conditions, set the value to 300
- Under heavy load or high tracing conditions, for example

Query Row Limit

Set this value to no less than 500,000. Increase this value if the customer site requires it. Set this value to more than the combined counts of Individuals, Addresses, Attributes, and Connections.

6. Click **OK**.

Result: The **IC Tracker Contacts** list source appears in the Contact List Source Name pane.



Tracker Filtered Directory Views

Agents create Tracker Filtered Directories views in the CIC client. Agents use these views to communicate quickly with contacts from your Interaction Tracker customer accounts.

Note: Agents with the Tracker Administrator security right can create directory views that contain all matching public and private contacts, including private contacts created by other users. Views created by an agent who does not have the Tracker Administrator security right contain all matching public contacts and only the matching private contacts belonging to the agent.

Create and Display a Tracker Filtered Directory View

You can add an Interaction Tracker Directory view to the CIC client.

To create and display a directory view:

1. Do one of the following:
 - From the **Tracker** menu, select **Manage Tracker Directories**. In the **Tracker Directories** dialog box, click **New**.
 - In Interaction Desktop, from the **File** menu, select **New > 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, click the **Add** button (Plus sign).

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
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Note: None of the filter criteria fields in this dialog 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.

2. In the **General** section, specify the filtering criteria for the new Tracker directory. The contacts created for this directory are based on the information in the existing Tracker database.

Directory Name	Type a name for this directory. This directory view name appears in the CIC client.
Organization	To search for or add an organization, enter the name of an organization or click the Search icon.
Location	To filter by location, after you specify an organization, click the Search icon next to the Location text box to select a location or to add a location. Note: If you do not select an Organization, you cannot select a Location.
Individual Type	The drop-down box contains Individual Types that were created in Interaction Tracker. Select an Individual Type from the drop-down box.
Department	Type a department you want to include when filtering information from the Tracker database for this directory.

3. In the **Address** section, specify any necessary address filtering criteria:

Address Type	From the drop-down list, select an Interaction Tracker address type.
City State Zip Country	Optionally, add any additional address filtering criteria.

4. In the **Attributes** section, create a filter based on Tracker database attributes:

a. Click **New**.

Result: The Add Attribute dialog box appears.



b. In the **Attribute Type** box, select a type that has been created in Interaction Tracker.

c. In the **Attribute Value** box, select a value that is associated with the selected Attribute Type.

d. Click **OK**.

Result: The information you choose appears in the **Name** and **Value** columns in the **Attributes** section.

5. To create the 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.

6. 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: To locate the view name, enter all or part of the view name in the Filter items text box.

Result: The new Interaction Tracker Directory view appears in the CIC client.

Note: See the next section for information about displaying an existing Filtered Tracker Directory view.

Display a Tracker Filtered Directory View

CIC client users with a Tracker Access license can display Tracker Filtered Directory views.

To display an existing Interaction Tracker Filtered Directory view:

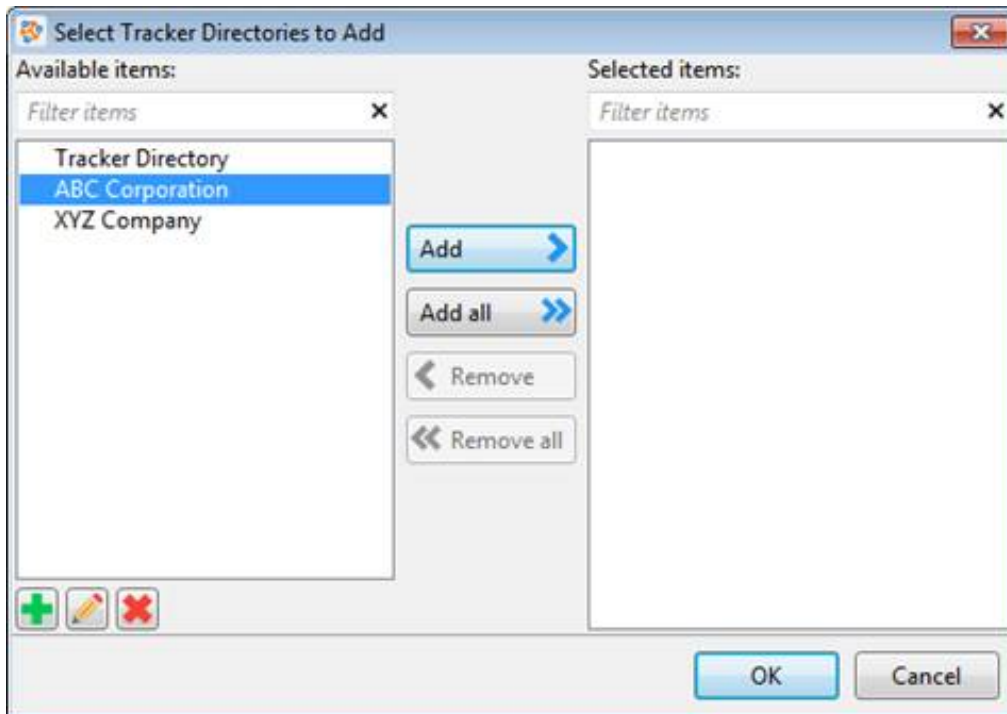
1. Select a tab in the CIC client in the area where you want to display the new view.
2. From the **Tracker** menu, select **Open Directory**.
3. Select the name of the directory view you want to display.

Result: The selected view appears in the CIC client.

You can also choose which Tracker Filtered Directory views to display from the same dialog box where you create views.

1. In Interaction Desktop, from the **File** menu, select **New > View**.
2. In the **Create New View** dialog box, from the **Categories** list select **Directories**.
3. In the **Views** list, select **Tracker Directories**.

Result: All of your previously created Interaction Tracker Filtered Directory views appear in the **Select Tracker Directories to Add** dialog box.

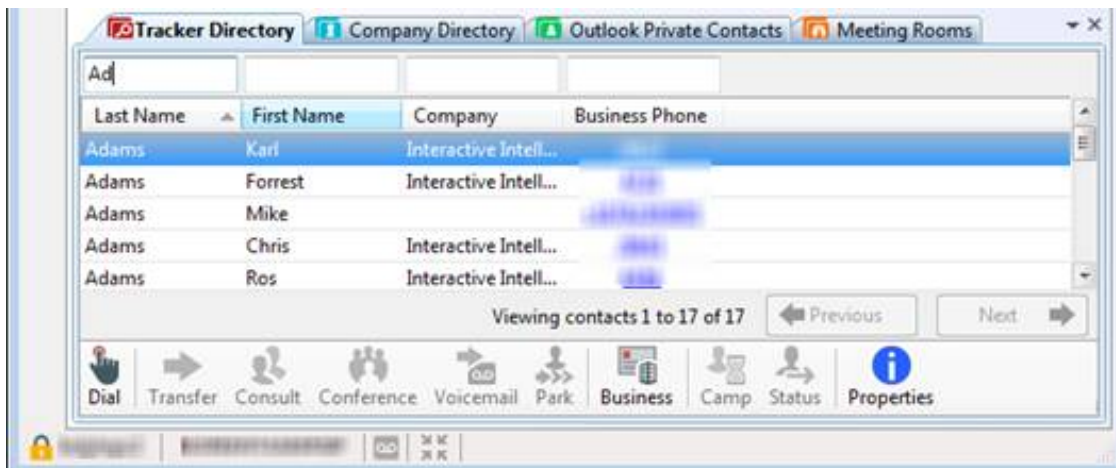


4. From the **Available Items** list, select a directory view and then click **Add >**.

Result: The selected view appears in the **Selected items** list.

5. Optional. Select and add more views to the **Selected items** list.
6. When you complete your selection or selections, click **OK**.

Result: The selected view appears in the CIC client.

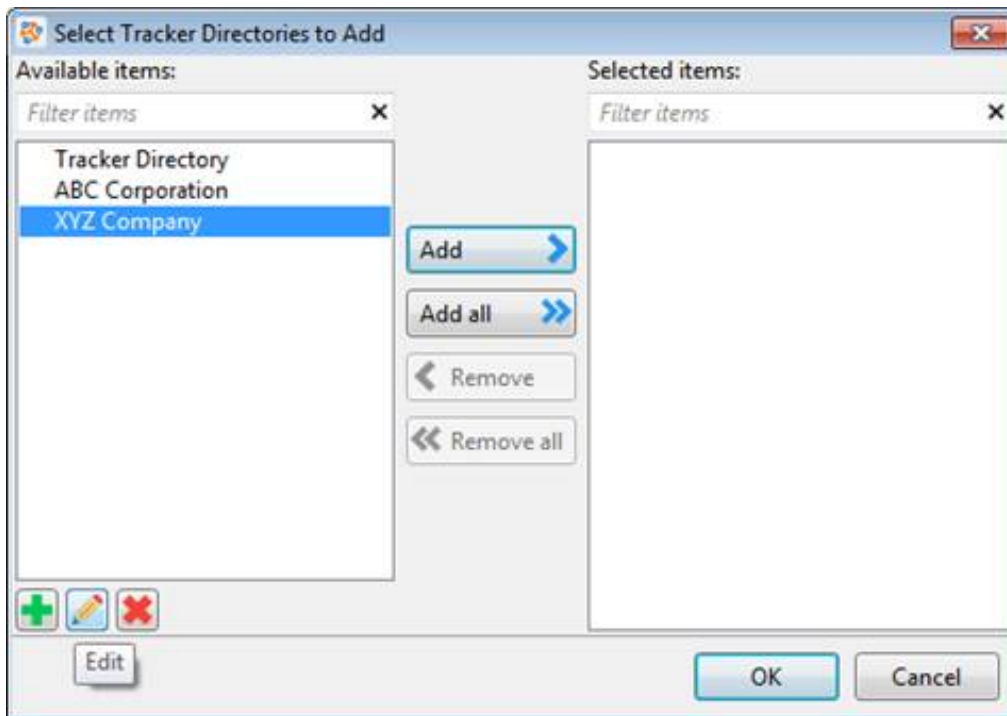


Modify a Tracker directory

You can modify an existing Interaction Tracker Directory to update the filtered information and contacts that are included in the directory.

To modify an existing Interaction Tracker Directory:

1. Do one of the following:
 - From the **Tracker** menu, select **Manage Tracker Directories**. In the **Tracker Directories** dialog box, select the name of the view and click **Edit**.
 - Right-click the tab of a displayed Interaction Tracker Filtered Directory view and click **Rename**.
 - For a non-displayed view, in the **Create New View** dialog box, from the **Categories** list, select **Interaction 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: See [Create and Display a Tracker Filtered Directory](#) for details on filter settings.

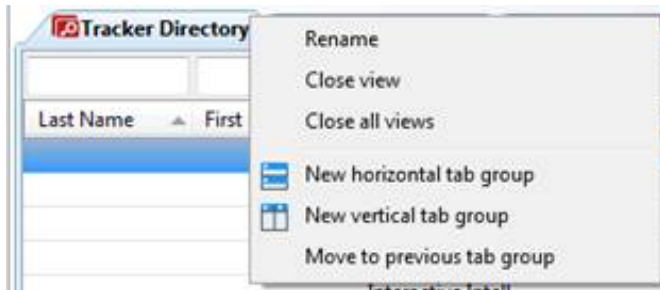
3. Click **OK**.

Close an Interaction Tracker Filtered Directory View

You stop displaying an Interaction Tracker 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.

To close an Interaction Tracker Directory Filtered Directory view:

- In the CIC client, right-click the tab for the Interaction Tracker Filtered Directory view and then click **Close view**.



Result: The Interaction Tracker Filtered Directory view tab no longer appears in your CIC client. However, it remains available for future use.

Delete a Tracker Filtered Directory View

To delete a displayed Interaction Tracker Filtered Directory view:

1. From the **Tracker** menu, select **Manage Tracker Directories**. In the **Tracker Directories** dialog box, select the name of the view and click **Delete**.
2. Click **Yes** to confirm you want to delete the view.

Result: The Interaction Tracker Filtered Directory view is removed from your CIC client interface and from the list of available views.

To delete an Interaction Tracker Filtered Directory view that is not currently displayed:

1. Do one of the following:
 - From the **Tracker** menu, select **Manage Tracker Directories**. In the **Tracker Directories** dialog box, select the name of the view.
 - In the **Create New View** dialog box, from the **Categories** list, select **Directories**. In the **Views** list, select **Tracker Directories**. In the **Select Interaction Tracker Directories to Add** dialog box, in the **Available Items** list, select the view name.

Tip: To locate the view name, enter all or part of the view name in the **Filter items** text box.

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**.

Working with Directory Views

For more information about working with directory views, see the *CIC client help*.

Change Log

Date	Changes
09-January-2012	Updated Copyright and Trademark Information page.
16-March-2012	Updated procedures to 4.0 SU 1. Replaced most screen captures.
07-August-2012	Updated this technical reference for these SCRs: <ul style="list-style-type: none">• IC-89474: Allow Tracker Directories to be added from an expandable menu item collection• IC-89475: Create a form to manage Tracker Directories• IC-89476: Generate a localizable description for Tracker directories using the filter criteria• IC-90267: Tracker Filtered Directories Does Not Honor Private Contacts
25-November-2012	<ul style="list-style-type: none">• Verified technical reference procedures and screen captures are up-to-date and reflect changes in 4.0 SU 2 and SU 3.• IC-101392: Interaction Tracker Filtered Directories TR need to be updated
01-August-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.
31-March-2015	<ul style="list-style-type: none">• Updated document to reflect the changes required for the transition from Interaction Client .NET Edition to Interaction Desktop. This includes a new CIC client section.• Updated the Copyright and Trademarks page.
25-June-2015	<ul style="list-style-type: none">• Rebranding changes, new logo and font colors.• Updated Copyright and Trademark Information page.

28-July-2015	<ul style="list-style-type: none"> • IC-131357 Make rebranding changes in technical references • Introduction <ul style="list-style-type: none"> ◦ Removed reference to Interaction Client .NET Edition. (This is no longer distributed.) • CIC client <ul style="list-style-type: none"> ◦ Removed reference to Interaction Client .NET Edition. ◦ Removed from boilerplate: Starting with CIC 2015 R3, Interaction Desktop replaces Interaction Client .NET Edition as the primary CIC client. • Referenced information <ul style="list-style-type: none"> ◦ Verified URL for license website: http://license.inin.com ◦ Removed Interaction Client .NET Edition Help bullet point. • Security Rights and Access Control Rights <ul style="list-style-type: none"> ◦ Verified right names in Interaction Administrator, CIC 2016 R1. • Configuration <ul style="list-style-type: none"> ◦ Corrected bullet point typo, changed "Create an IC Tracker Contacts C" to "Create an IC Tracker Contact List Source in Interaction Administrator". • Create and Display a Tracker Filtered Directory View <ul style="list-style-type: none"> ◦ Step 1, 2nd bullet point was strictly for ICNET. Corrected it to read: In Interaction Desktop, from the File menu, select New > 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, click the Add button. ◦ Verified Interaction Desktop screen capture. • Display a Tracker Filtered Directory View <ul style="list-style-type: none"> ◦ Removed Tracker Directories dialog box screen capture in step 3. Open Directory now displays a context menu list of directory names. ◦ Changed step 1 of 2nd procedure to "In Interaction Desktop, from the File menu, select New > View." ◦ Replaced Select Tracker Directories to Add dialog box screen capture in step 3. It has IDT icon in title bar now instead of telephone. ◦ In step 6 Result, replaced Tracker Directory view in ICNET with one in Interaction Desktop, showing new tab and button icons. • Modify a Tracker directory <ul style="list-style-type: none"> ◦ In step 1, changed 2nd bullet point to read: Right-click the tab of a displayed Interaction Tracker Filtered Directory view and click Rename. ◦ In step 6 Result, replaced Tracker Directory view in ICNET with one in Interaction Desktop, showing new tab and button icons. Also with tooltip for Edit button. • Close an Interaction Tracker Filtered Directory View <ul style="list-style-type: none"> ◦ To match IDT UI, changed Close (view name) to Close view ◦ Replaced IDT screen capture with one showing new tab icon and updated context menu. • Delete a Tracker Filtered Directory View <ul style="list-style-type: none"> ◦ Removed step 1 bullet point: Right-click the Interaction Tracker Filtered Directory view tab and click Delete (view name). (This does not appear on context menu in IDT.) • Verified IA screen captures in <ul style="list-style-type: none"> ◦ Verify the Tracker Server License ◦ Verify the Tracker Access licenses ◦ Create an IC Tracker Contact List Source
17-January-2018	Converted to HTML format.