Workspace Desktop Edition User's Guide

Handle Internal Instant Messaging

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Handle Internal Instant Messaging

Contents

In this lesson, you will learn how to use the Team Communicator feature to send an Instant Message (IM) to an internal target and receive an IM from an internal target. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call. This lesson contains the following sections:

- Instant Messaging Overview
- Sending and Receiving Internal Instant Messages
- Sending and Receiving Consultation Instant Messages

	You cannot participate in Outbound Campaigns if you are logged in to the Instant Messaging channel.

Instant Messaging Overview

Instant Messaging is a type of real-time, text-based communication between two or more participants over a network. IM enables you to convey a text message immediately and receive an immediate text reply without the overhead and time delay that are associated with e-mail and other text-based communication technologies. This feature enables you to send an IM to another agent (internal target) or receive an IM from an internal target. The Interaction Workspace IM view provides identification of all connected parties, as well as a timestamp for each message.

	Note: At this time, it is not possible to save the contents of an IM session or record notes in the Notepad view.

You can conduct an IM session from the following windows/views:

- Main Window (opens in an IM Interaction window)
- Gadget (opens in an IM Interaction window)
- Voice Interaction (opens in the Voice Interaction window)
- E-Mail Interaction (opens in the E-Mail Interaction window)
- Chat Interaction (opens in the Chat Interaction window)
- Workitem Interaction (opens in the Workitem Interaction window)

Sending and Receiving Internal Instant Messages

Interaction Workspace Instant Messaging (IM) is carried by a SIP switch. To send and receive instant message, your contact-center must have a SIP switch, and your role must include the IM task.

	Note: Interaction Workspace supports only internal IM sessions.

This section contains the following procedures:

- Lesson: Initiating an Instant Messaging session
- Lesson: Receiving an Instant Messaging session

## Lesson: Initiating an Instant Messaging session

Purpose:

- To find an internal target (such as an agent, Routing Point, queue), and begin a text-based message-exchange session.

Prerequisites

- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).

Start

1. Use the Team Communicator in your Main Window view or in your Gadget to find the internal target with whom you want to start an IM session (see Find A Contact Or An Internal Target).

2. Select Send an Instant Message from the Action Menu drop-down list next to the name of the internal target in the Team Communicator pop-up result-list (see the The Send an Instant Message option of the Team Communicator Action menu figure).
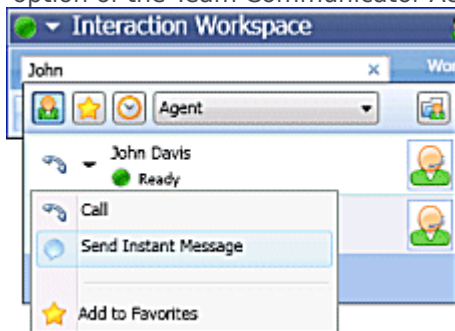
The Send an Instant Message option of the Team Communicator Action menu

The IM interaction window is displayed.

3. Enter a message to your target. The session starts in the Interaction window (see the An Instant Messaging session in the Interaction window figure) when you send your first message. The target is presented with an interactive notification that enables the target to accept or reject your invitation to engage in an IM session. You are notified if the target accepts, rejects, or lets your invitation time-out.
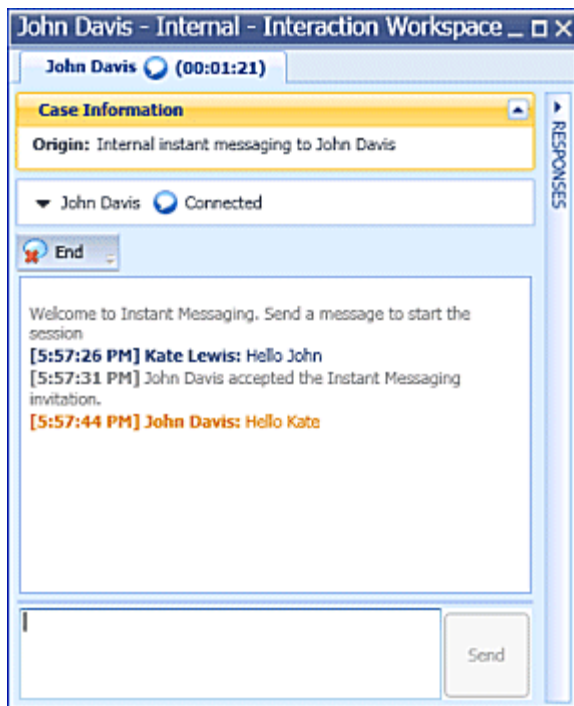
An Instant Messaging session in the Interaction window

4. If your target accepts your invitation, you can conduct an IM session by entering a text message to the internal target in the text field at the bottom of the view.

5. Click Send or press the Enter key on your keyboard to send your message to the internal target. The text of your message is displayed in the Transcript field of your interaction window. Messages from you are identified by your login name and a color that is different from the one that is used to identify replies from the internal target. Replies from the internal target are displayed in the Transcript field along with your messages. Messages are displayed in the order in which they are sent and received. Each message is tagged with a timestamp (see the An Instant Messaging session in the Interaction window figure). The Interaction window displays the name of the party to whom you are connected and the status of the connection: Establishing, Connected, or Ended.

6. When your session is complete, click the End IM button to end the IM session. The internal target can also do this.

7. Click the Done button to close the Interaction window.

End

Lesson: Receiving an Instant Messaging session
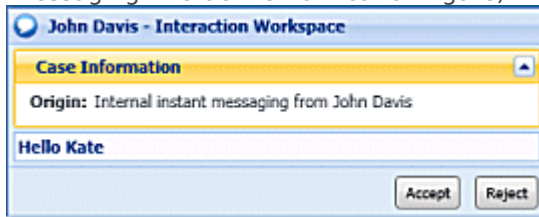
Purpose:

- To receive an invitation to a join a text-based message-exchange session with another agent.

Prerequisites

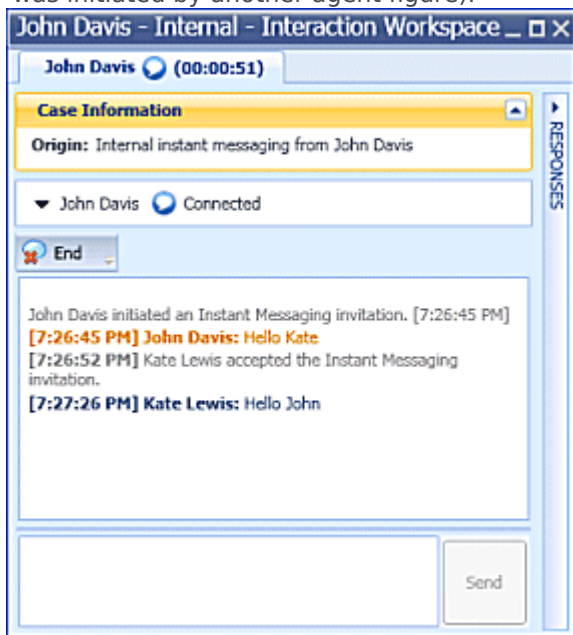- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).

Start

1. If another agent selects you as an internal target for an IM session, an interactive notification is displayed that invites you to accept or reject the invitation to join the IM session (see the Instant Messaging interactive notification figure).

Instant Messaging interactive notification

2. Do one of three things:

   - Click Accept to display the new IM interaction in your Interaction window.

   - Click Reject to refuse the IM interaction.

   - Allow the invitation to time-out. The interactive notification is dismissed.

3. If you clicked Accept, the session starts in your Interaction window. The tab that is displayed at the top of the Interaction window indicates the agent logon of the internal caller with whom you are in an IM session. The status of the connection: Not Connected, Connected, or Ended, is displayed near the top of the Interaction window. The large text field contains a transcript of the IM session. Your logon and the logon of the internal caller are displayed above your messages in different colors to help you to identify who is writing. Each entry is marked with a timestamp. Messages are displayed in the order in which they are sent and received (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure).

Interaction window displaying an Instant Messaging session that was initiated by another agent

4. Reply to the calling agent by entering your message in the field that is displayed next to the Send button.

5. Click Send or press the Enter key on your keyboard to send your message to the internal caller.

6. When your session is complete, click the End IM button to end the IM session. The caller might also do this.

7. Click the Done button to close the Interaction window.

End

Sending and Receiving Consultation Instant Messages

Interaction Workspace Instant Messaging (IM) enables you to start an IM Consultation from an active interaction, such as voice, e-mail, or chat.

	Note: Interaction Workspace supports only internal IM sessions.

This section contains the following procedures:

- Lesson: Starting a Consultation IM session from an active interaction
- Lesson: Receiving a Consultation IM session from an active interaction and transitioning to a Voice Consultation

### Lesson: Starting a Consultation IM session from an active interaction

Purpose:

- To start a Consultation IM session from an active interaction.

Prerequisites

- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).
- You have an active interaction with a contact (see Receiving a Voice Interaction, Receiving and Handling an Inbound E-Mail Interaction, or Receiving and Handling an Inbound Chat Interaction).

Start

1. On your active Interaction view, click Start Consultation to open the Team Communicator (see the Start Consultation Team Communicator in an active interaction figure) to find the internal target with whom you want to start an IM session.

2. Enter the name, e-mail address, or phone number of the internal target (see the Start Consultation Team Communicator in an active interaction figure).

3. From the internal target Action menu, select Start Instant Message Consultation (see the Start Consultation Team Communicator in an active interaction figure).
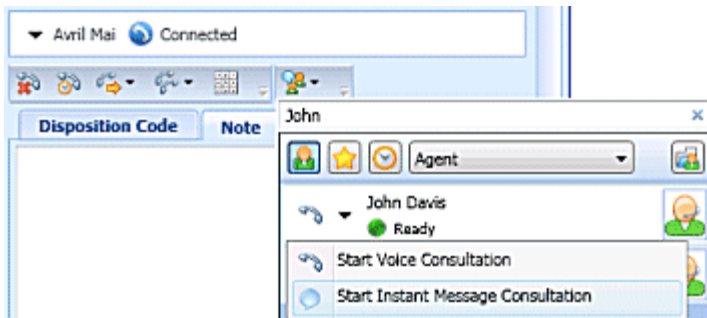
Start Consultation Team Communicator in an active interaction

4. A new Internal IM message view is displayed in the active interaction view. The status is `Not Connected` (see the Internal IM message view in an active interaction window figure).

  • To initiate an Internal IM session, enter a message and click Send.

  • To cancel the IM session, click the Done button.
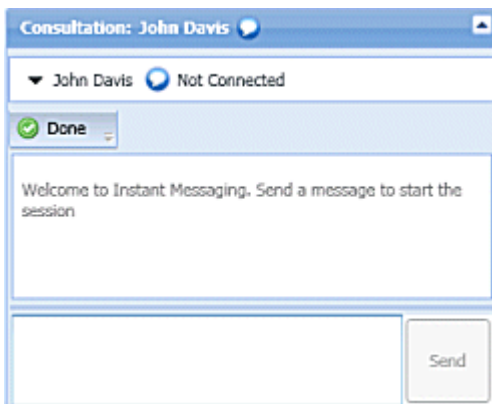
Internal IM message view in an active interaction window

5. If you sent a message (see the Initial message sent to IM Consultation target figure), the internal target receives an interactive notification of your instant message that includes your initial message (see the Instant Messaging consultation interactive notification figure).
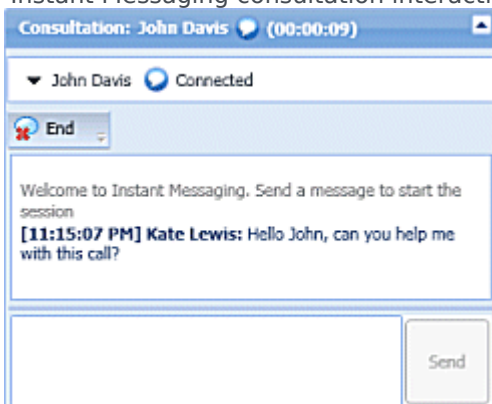
Initial message sent to IM Consultation target

6. If the internal target accepts your invitation, you and the target are engaged in an internal IM session (see the Active IM Consultation session in an active interaction window figure).
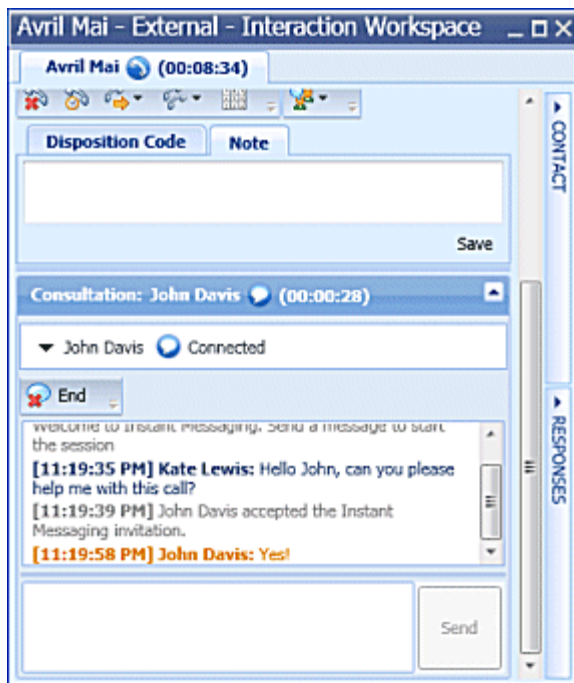
Active IM Consultation session in an active interaction window

All the Case Information about the interaction with the contact is displayed in the IM interaction window of your internal target (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure). The Contact Information and Contact History tabs enable your internal target to view information about your contact and to search the contact history database. The Information tab is read-only. You can do the following in the Consultation IM interaction window:

- Enter messages in the message field.
- Click Send to send the message to the internal target.
- Review the message transcript in the message transcript area.
- Click End session to terminate your IM Consultation.

End

Lesson: Receiving a Consultation IM session from an active interaction and transitioning to a Voice Consultation
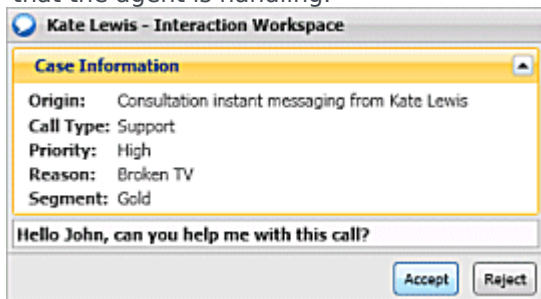
Purpose:

- To handle an IM consultation request and handle a request to transition to a Voice Consultation.

Prerequisites

- You are logged in to Interaction Workspace (see Lesson: Logging in to Interaction Workspace).
- Your status is Ready for the voice-media channel (see Lesson: Going Ready in the Interaction Workspace Main window).
- You are the internal target for the IM consultation interaction.

Start

1. If another agent, who is handling an interaction, selects you as an internal target for an IM consultation session, an interactive notification is displayed that invites you to accept or reject the invitation to join the IM consultation session (see the Instant Messaging consultation interactive notification figure). The notification displays the invitation message from the agent and the case information for the interaction that the agent is handling.

Instant Messaging consultation interactive notification

2. Do one of three things:

   - Click Accept to display the new IM interaction in your Interaction window.

   - Click Reject to refuse the IM interaction.

   - Allow the invitation to time-out. The interactive notification is dismissed.

3. If you clicked Accept, the session starts in your Interaction window. The tab that is displayed at the top of the Interaction window indicates the agent logon of the internal caller with whom you are in an IM session. The status of the connection: Not Connected, Connected, or Ended, is displayed near the top of the Interaction window. The large text field contains a transcript of the IM session. Your logon and the logon of the internal caller are displayed above your messages in different colors to help you to identify who is writing. Each entry is marked with a timestamp. Messages are displayed in the order in which they are sent and received (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure). All the Case Information about the interaction with the contact is displayed in the IM interaction window of your internal target (see the Interaction window displaying an Instant Messaging session that was initiated by another agent figure). The Contact Information and Contact History tabs enable you to view information about the contact and to search the contact history database. The Information tab is read-only.
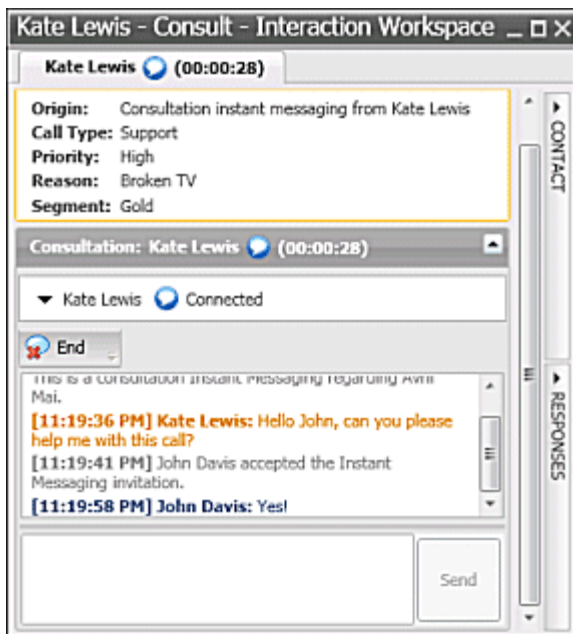
Interaction window displaying an Instant Messaging session that was
initiated by another agent

4. Reply to the calling agent by entering your message in the field that is displayed next to the Send
   button (see the Interaction window displaying an Instant Messaging session that was initiated by
   another agent figure). The IM consultation session can be transitioned to a Voice consultation (see
   Blending Internal Voice Interactions and Internal IM Interactions).

5. Click Send or press the Enter key on your keyboard to send your message to the internal caller (see the
   Interaction window displaying an Instant Messaging session that was initiated by another agent figure).

6. When your session is complete, click the End IM button to end the IM session. The caller might also do
   this (see the Interaction window displaying an Instant Messaging session that was initiated by another
   agent figure).

7. Click the Done button to close the Interaction window.

End