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# Workspace Desktop Edition User's Guide

Workspace Desktop Edition 8.1.3

2/11/2022

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# Interaction Workspace 8.1 User's Guide

## Getting Started

Find information about concepts and terminology and learn how to log in and start using the application.

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[Getting Started](#)

## Handling Interactions

Find information about handling interactions, such as voice, IM, E-mail, Chat, SMS, and Social Media.

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[Handling Interactions](#)

## Contact Management

Find information about viewing and managing previous interactions with a contact.

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[Contact Management](#)

## Using Workbins

Find detailed information about accessing interactions that are stored in a workbin.

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[Using Workbins](#)

## Team Lead Functionality

Find information about how a Team Supervisor can monitor, coach, and barge-in on agents who are handling voice and chat interactions.

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[Team Lead Functionality](#)

## Contact Center Tasks

Find information about how to view KPIs and statistics, receive business and system messages, and personalize your workspace.

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[Contact Center Tasks](#)

### Document Change History

A list of topics that are new or that have changed since the previous release.

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For information about releases 8.1.3 and earlier, see [Interaction Workspace 8.1.3 User's Guide](#)

# Getting Started

These lessons introduce you to Interaction Workspace, the next-generation Genesys agent desktop interface, and show you how to get started accepting interactions. Getting Started

- [Interaction Workspace Concepts](#)
- [Log In](#)
- [Manage Your Status](#)
- [Forward Your Calls](#)
- [Find A Contact Or An Internal Target](#)

# Interaction Workspace Concepts

This lesson introduces you to Interaction Workspace, the next-generation Genesys agent desktop interface. Privilege- and role-driven capabilities, as well as features that focus on the needs of the user, make Interaction Workspace a total agent solution. The Interaction Workspace agent interface enables users to invoke interactions that are related to existing interactions--ensuring a consistent customer experience. This lesson contains the following sections:

- [Introduction](#)
- [Interaction Workspace Windows and Views](#)
- [Team Communicator Overview](#)
- [Finding Contacts, Internal Targets, and Interactions](#)
- [Definition--Role-Based](#)
- [Definition--Role Privilege](#)
- [Basic Use-Case Summary](#)

## Introduction

Interaction Workspace is the customer-interaction user interface for the Genesys 8 suite. The Interaction Workspace application enables you to manage, from your workstation desktop, both Public Switched Telephone Network (PSTN)-based and Internet-based contact interactions. Interaction Workspace enables you to handle customer interactions, manage your status, and interact with others in your contact center. Privileges are assigned to you, based on your role. You might be a junior agent who has only a limited set of media and controls, you might be an expert agent who has access to all of the privileges that are available through Interaction Workspace, or you might have a specialized role created for you by your administrator that enables you to handle specific types of interactions.

## Interaction Workspace Windows and Views

Interaction Workspace displays on your workstation desktop a set of **Composite Views**, which are composed of **Atomic Views** components that enable you to perform the tasks that are assigned to you, based on your privileges. Composite views enable you to perform multiple functions, such as previewing and accepting interactions; or managing your status, settings, and contacts. Atomic views typically enable you to perform a single function, such as viewing case information or specifying a disposition code. Some atomic views, such as the Case Information view, are displayed in separate windows. Other atomic views are part of a composite view, such as the Voice Interaction window; these are displayed in one window along with other atomic views. See the *Interaction Workspace 8.1 Help* for details on the functionality in each window and view.

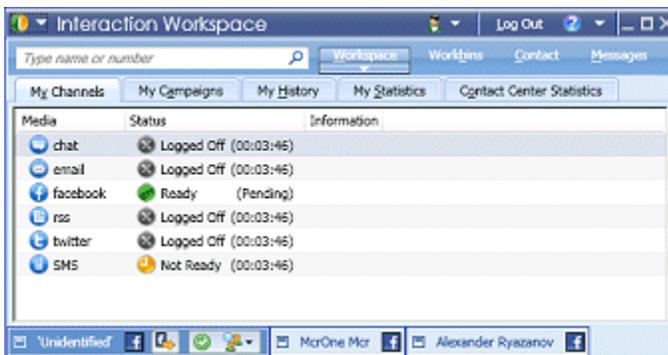
## Composite Views

The Interaction Workspace composite views enable you to perform multi-step tasks and provide you with many functional options. The following composite views are included in Interaction Workspace; however, through customization, many more can be created:

- **Login Window**--The first view that you see (see [Log In](#)). It enables you to identify yourself and, if required, enter additional login data, based on your role or on the technical environment.



- **Main Window**--Enables you to manage your status, contacts, and settings; view your Key Performance Indicators (KPIs) and system messages; and launch new interactions (see [Interaction Workspace Main Window](#)).



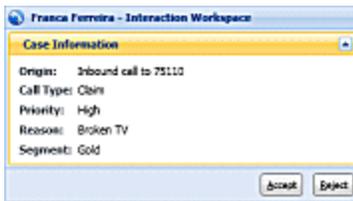
- **Gadget**--Enables you to manage your status and contacts, create new interactions, and access information about interactions that are currently active (see [Interaction Workspace Gadget](#)).



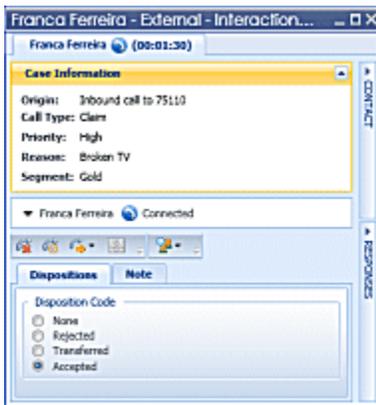
- **Statistics Gadget**--Enables you to view your KPIs and Contact Center Statistics in a permanent view. Statistics can be viewed in a ticker and/or in a static view (see [Statistics Gadget](#)).



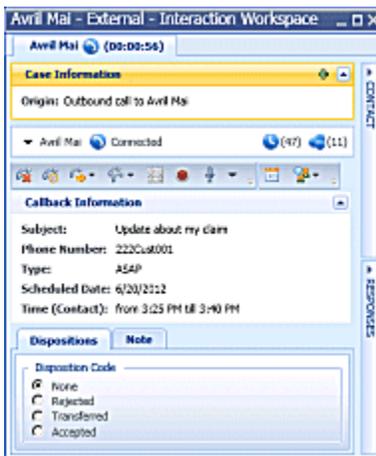
- **Interaction Preview**--Displays an interactive notification of a new inbound interaction. The preview includes case information to enable you to decide whether to accept, reject, or redirect the interaction (see [Handling Voice Interactions](#)).



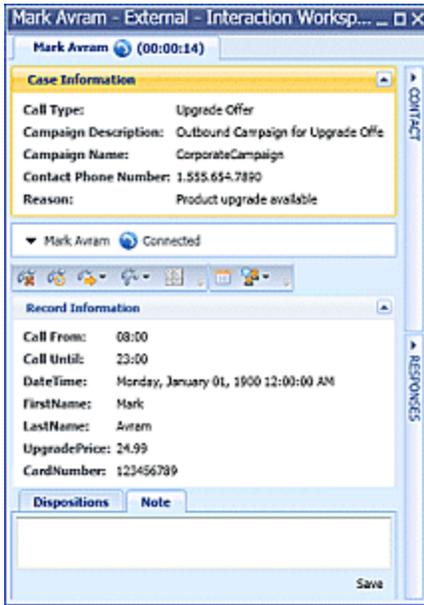
- **Voice Interaction Window**--Enables you to view all of the information that is necessary to handle a voice interaction with a contact (see [Interaction Workspace Voice Interaction Window](#)). This window also contains information about contacts and the Team Communicator (see [Atomic Views](#)).



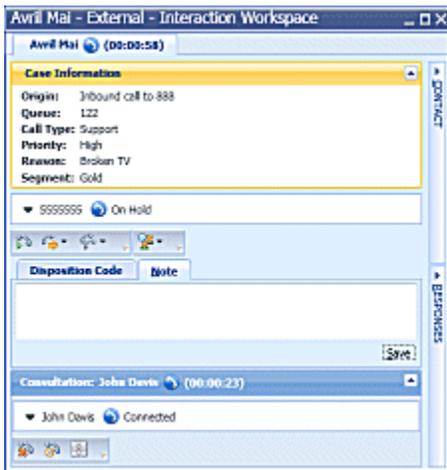
- **Web Callback**--Enables you to view all of the information that is necessary to handle a Web Callback voice interaction with a contact.



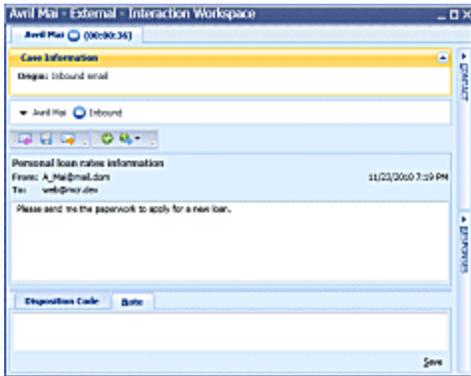
- **Outbound Campaign**--Enables you to view all of the information that is necessary to handle an Outbound Campaign voice interaction with a contact.



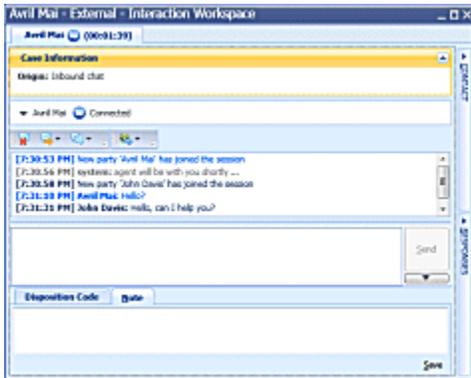
- **Consultation**--Enables you to initiate a call to an internal expert or support person. It is part of the Team Communicator functionality (see [Atomic Views](#)).



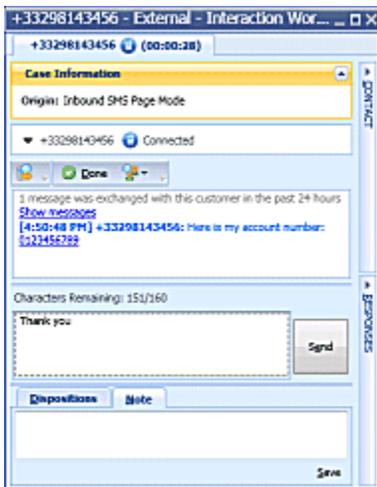
- **E-Mail**--Enables you to view all of the information that is necessary to handle an e-mail interaction with a contact.



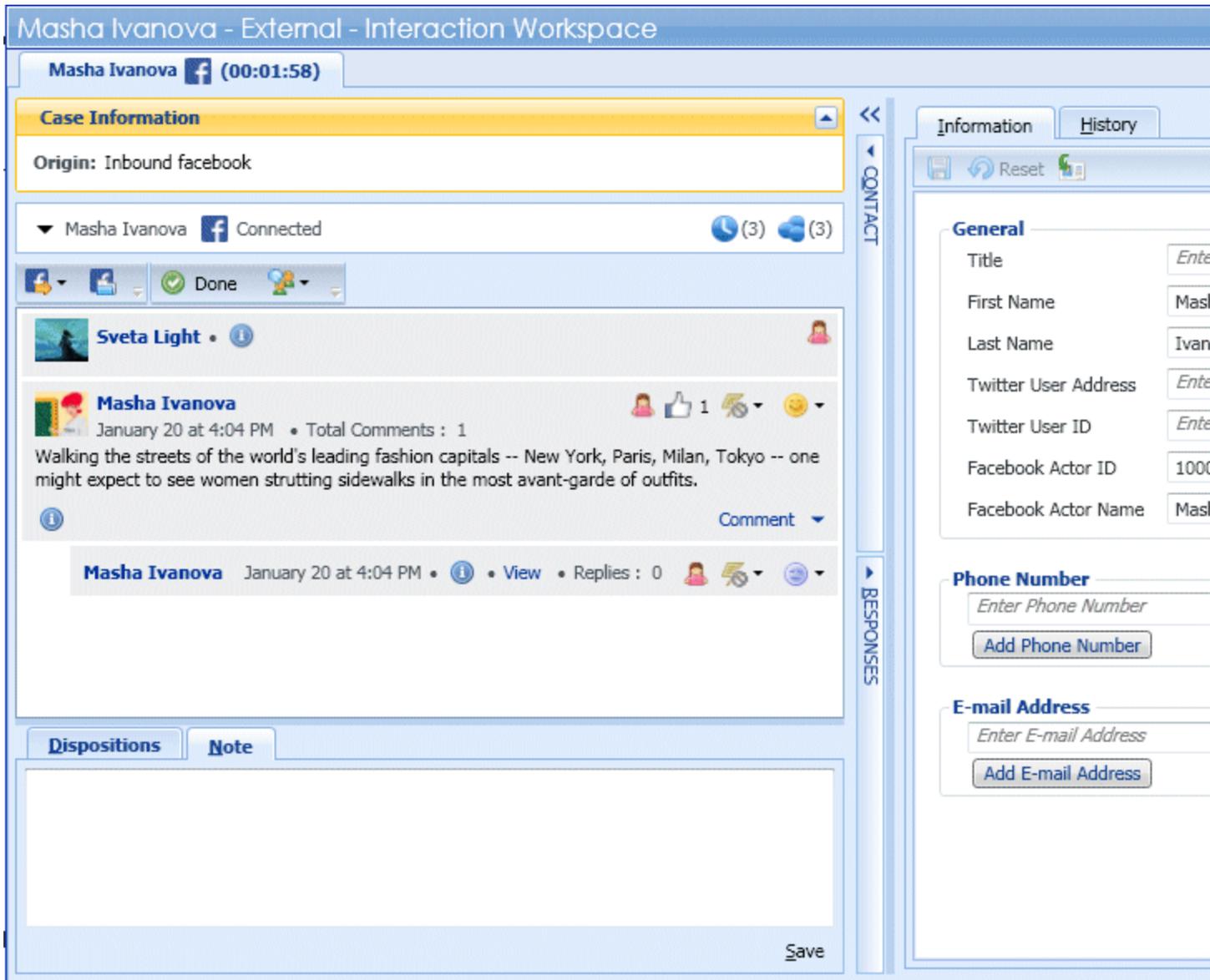
- **Chat**--Enables you to view all of the information that is necessary to handle a chat interaction with a contact.



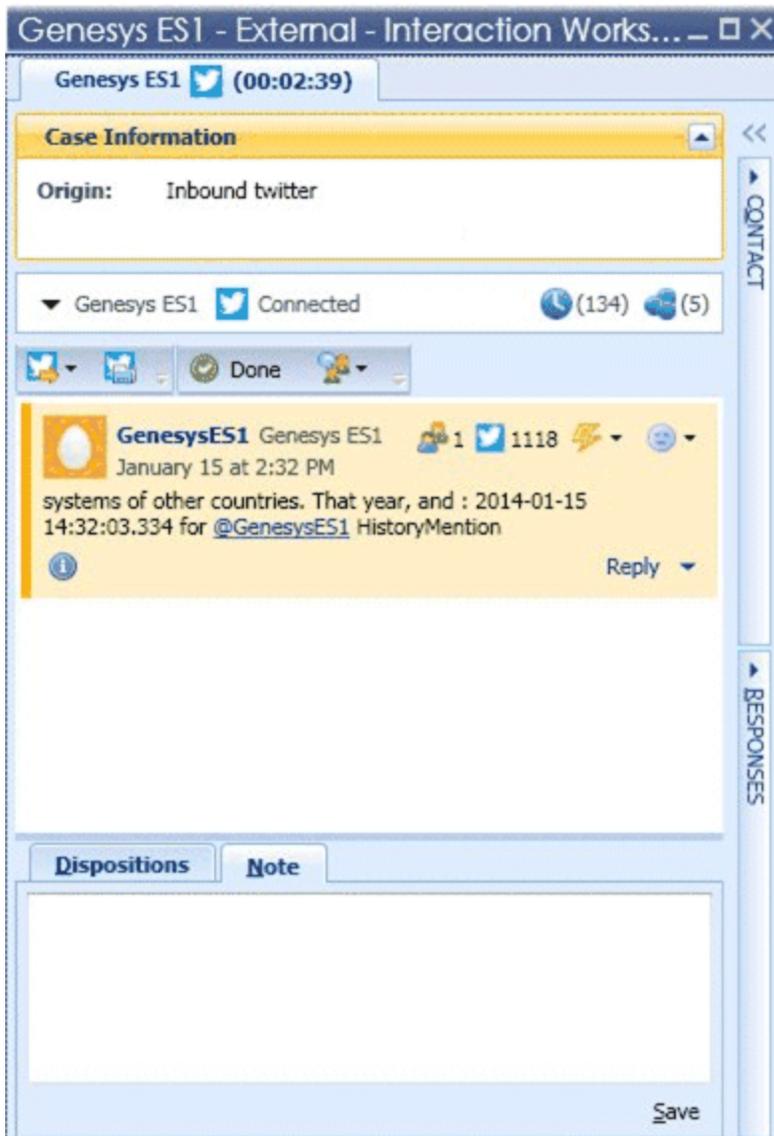
- **SMS**--Enables you to view all of the information that is necessary to handle an SMS Page interaction or an SMS Session interaction with a contact.



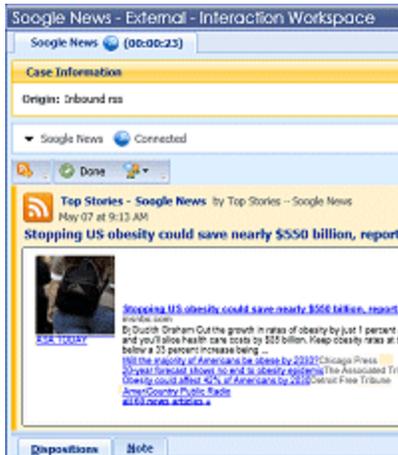
- **Facebook**--Enables you to view all of the information that is necessary to handle a Facebook Page interaction with a contact.



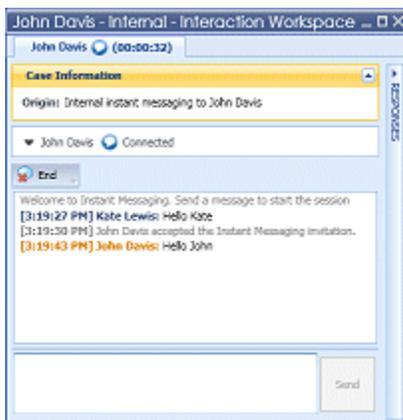
- **Twitter**--Enables you to view all of the information that is necessary to handle a Twitter Page interaction with a contact.



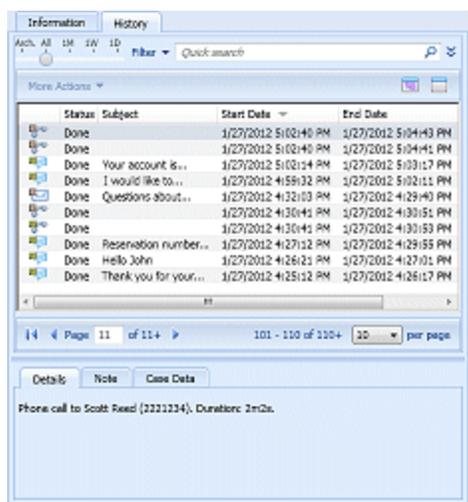
- **RSS**--Enables you to view all of the information that is necessary to handle a RSS Web Feed interaction with a contact.



- **Workitems**--Documents that might be directed to you for handling. They include numerous non-interactive media types, such as faxes, that you might have to view while you are handling interactions of another type, such as e-mail.
- **Internal IM**--Enables you to initiate an Instant Messaging (IM) session with an internal expert or support person. It is part of the Team Communicator functionality (see [Atomic Views](#)).



- **History**--Enables you to view case data (business context of the case). Compiles the attached data that is associated with the main interaction of the case into a Case History (see [Manage Contacts](#)). It is part of Interaction Workspace functionality for processing voice interactions as well as other media types.



## Atomic Views

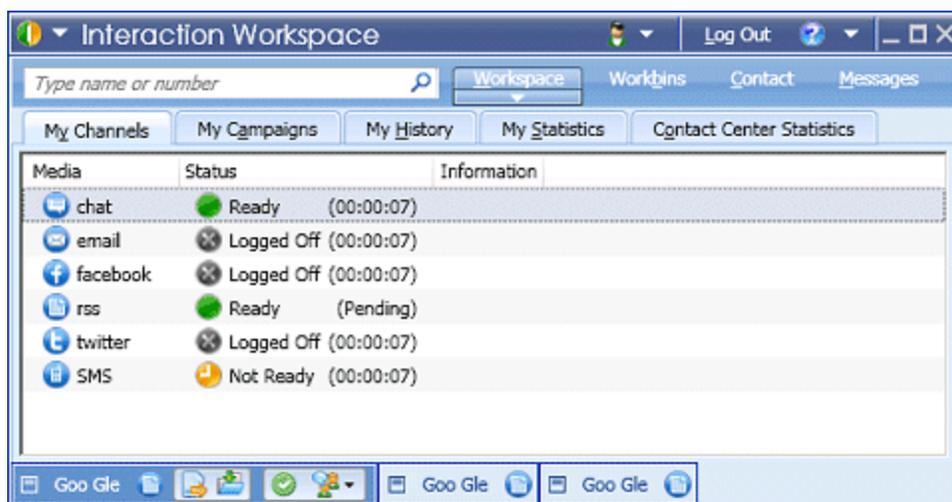
The Interaction Workspace atomic views are mapped to privileges. They enable you to perform single-step tasks, provide you with one or two functional options, and provide you with information that supports your current task. Atomic views are usually contained within a Composite view, but they might also be displayed in stand-alone windows or panels. Atomic views behave like mini-applications. You can hide or show them and expand them or collapse them by clicking buttons in the composite views in which they are contained. The following atomic views are included in Interaction Workspace; however, through customization, many more can be created:

- **Case Information**--Provides you with critical information about the active interaction. The information that is provided is configured by your system administrator.
- **Contact Summary**--Provides you with critical information about the contact who is involved in the active interaction.
- **Voice Media**--Enables you to control the active voice interaction or start a new interaction.
- **Voice Internal**--Enables you to control the active internal voice interaction or start a new internal interaction.
- **Case Toolbar**--Enables you to hold, connect, and end current interactions.
- **Dispositions**--Enables you to assign one or more codes to an ongoing or terminated interaction to qualify or characterize the outcome of the interaction, and a call result for outbound campaign interactions.
- **Notepad View**--Enables you to record information about the current interaction.
- **History List**--Enables you to view the history of interactions with the selected contact.
- **History Interaction Details**--Enables you to view the details of previous interactions with the selected contact.
- **Contact Record**--Enables you to view information about contacts that has been collected by your contact center.
- **Responses**--Enables you to access a database of pre-written standard responses for your interactions. You can insert these responses as replies into any e-mail or chat message, or you can read them to the contact during a phone interaction. You might be configured to use suggested responses that are rated according to their relevancy to the content of the inbound interaction.

- **Team Communicator**--Enables you to call an internal target or contact, start a conference, or transfer the current interaction.
- **Child Interaction Navigator**--Enables you to view and select any "child" interactions that you have initiated that relate to the current customer interaction (the parent interaction), such as an internal consultation call or a chat with another agent.
- **IM Media**--Enables you to initiate or receive Instant Messaging (IM) interactions.
- **My Status**--Enables you to monitor the status of your media channels.
- **My Messages**--Provides you with up-to-date information about the status of your contact-center, changes that are related to your activities, and business messages that your leads send to you.
- **Workbins**--Enables you to store e-mail and other interactions that are to be handled later. Interactions that are stored in a workbin can be accessed in any order. Items that are stored in a workbin are owned by the owner of the workbin.
- **Preferences**--Enables you to control the appearance of various Interaction Workspace interface components.
- **Recent Items**--Enables you to select a recent contact from a drop-down list.
- **My Campaigns**--Provides you with a list of all of your active Outbound Campaigns. If you are part of a pull-preview campaign, you can get a new campaign record.
- **My History**--Enables you to view a record of your recent activity.
- **My Statistics**--Enables you to view your Key Performance Indicators (KPIs).
- **Contact Center Statistics**--Enables you to view the statistics of your contact center.
- **Schedule a Callback**--Enables you to set a later date and/or time to callback a contact from a campaign list.

## Interaction Workspace Main Window

The Interaction Workspace Main Window (see the Interaction Workspace Main Window figure) is a module that enables you to manage your channels, status, KPIs, contacts, workbins, and campaigns. It can be used to initiate interactions, either directly or through a search of the contact database and interaction history. The Main Window supports simultaneous interactions on one or more channels and provides the interaction Preview interactive notification. You can use the Main Menu to set preferences, launch Help, switch to the Gadget, display the Statistics Gadget, and exit the application.



Interaction Workspace Main Window

For more information about the functions that are available in the Main Window, see the following lessons:

- **Go Ready**--[Manage Your Status](#)
- **Set a Forwarding Number**--[Forward Your Calls](#)
- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)
- **IM an Internal Target**--[Handle Internal Instant Messaging](#)
- **E-Mail a Contact**--[Handle An E-Mail Interaction](#)
- **Manage Workbins**--[Using Workbins](#)
- **Manage Contacts**--[Manage Contacts](#)
- **View Statistics**--[View KPIs And Statistics](#)
- **Receive Messages**--[Receive Business And System Messages](#)
- **Change the Appearance of Interface**--[Personalize Your Workspace](#)

## Interaction Workspace Gadget

The Interaction Workspace Gadget (see the Interaction Workspace Gadget figure) is a module that acts as a simplified version of the Interaction Workspace Main Window (see [Interaction Workspace Main Window](#)). It enables you to view the status of your channels and initiate a new interaction. It also enables you to use the Main Menu to set preferences, launch Help, change Place, change channels, toggle to the Main Window, and exit the application.



Interaction

## Workspace Gadget

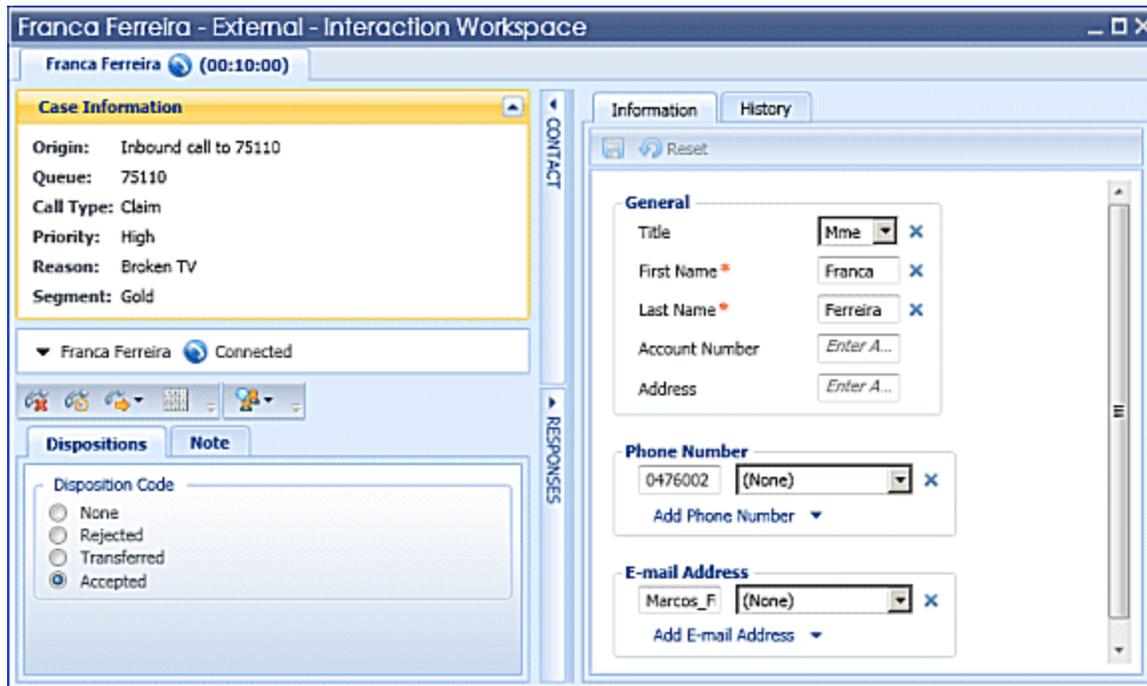
For more information about the functions that are available in the Gadget, see the following lessons:

- **Go Ready--Manage Your Status**
- **Set a Forwarding Number--Forward Your Calls**
- **Find an Internal Target or a Contact--Find A Contact Or An Internal Target**
- **Call an Internal Target or a Contact--Handle Voice Interactions**
- **IM an Internal Target--Handle Internal Instant Messaging**
- **E-Mail a Contact--Handle An E-Mail Interaction**
- **Manage Workbins--Using Workbins**
- **View Statistics--View KPIs And Statistics**
- **Receive Messages--Receive Business And System Messages**
- **Change the Appearance of Interface--Personalize Your Workspace**

## Interaction Workspace Voice Interaction Window

The Voice Interaction window (see the Interaction Workspace Voice Interaction window figure) and the Web Callback Interaction window enable you to view all of the information that is required to handle a voice interaction with a contact or an internal target. You can view call status, history, and case data. You can control the call, conference or transfer the call, enter notes about the call, and send DTMF. For more information about the functions that are available in the Voice Interaction window, see the following lessons:

- **Find an Internal Target or a Contact--Find A Contact Or An Internal Target**
- **Call an Internal Target or a Contact--Handle Voice Interactions**
- **Start a Voice or IM Consultation--Handle A Voice Consultation**
- **Transfer to an Internal Target or a Contact--Transfer A Voice Call**
- **Conference with an Internal Target or a Contact--Conference A Voice Call**
- **Transition an IM Consultation to a Voice Consultation--Blend Different Media Into A Single Conversation**
- **Record a Call--Record Interactions**
- **Set a Disposition Code--Apply Disposition Codes**
- **Manage Contacts, Contact Case History, and Set a Note--Manage Contacts**
- **Use Standard Responses--Using The Standard Response Library**

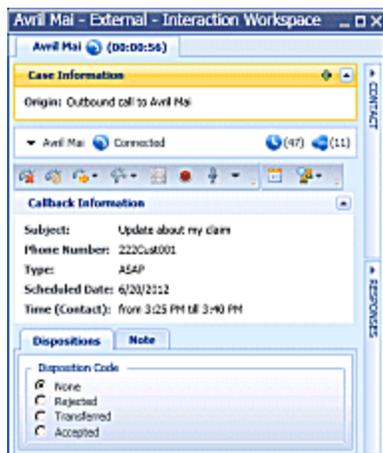


Interaction Workspace Voice Interaction window

## Interaction Workspace Web Callback Interaction Window

The Web Callback Interaction window enables you to view all of the information that is required to handle a web callback interaction with a contact (see the Interaction Workspace Voice Interaction window figure). You can view call status, history, and case data. You can control the call, conference or transfer the call, enter notes about the call, and send DTMF. For more information about the functions that are available in the Voice Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)
- **Handle a Web Callback interaction**--[Handle Web Callback Interactions](#)
- **Start a Voice or IM Consultation**--[Handle A Voice Consultation](#)
- **Transfer to an Internal Target or a Contact**--[Transfer A Voice Call](#)
- **Conference with an Internal Target or a Contact**--[Conference A Voice Call](#)
- **Transition an IM Consultation to a Voice Consultation**--[Blend Different Media Into A Single Conversation](#)
- **Record a Call**--[Record Interactions](#)
- **Set a Disposition Code**--[Apply Disposition Codes](#)
- **Manage Contacts, Contact Case History, and Set a Note**--[Manage Contacts](#)
- **Use Standard Responses**--[Using The Standard Response Library](#)

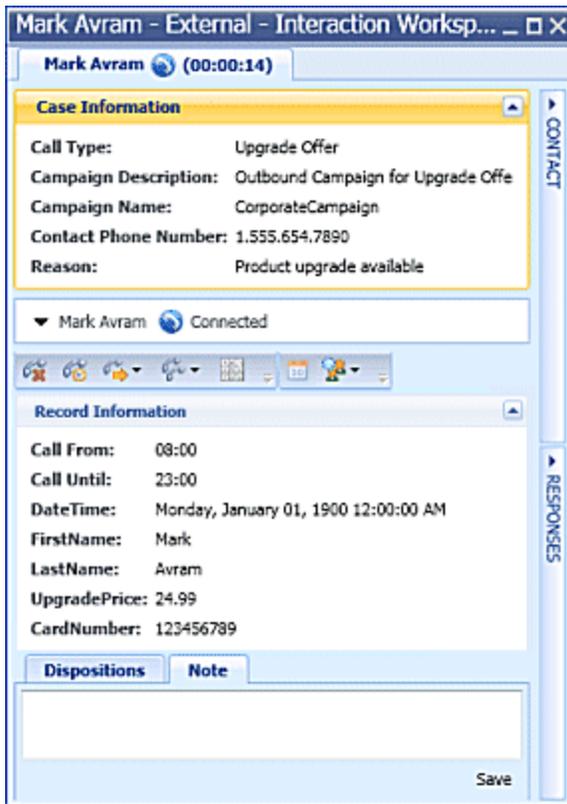


Interaction Workspace Voice  
Interaction window

## Interaction Workspace Outbound Campaign Voice Interaction Window

The Outbound Campaign Voice Interaction window (see the Interaction Workspace Outbound Campaign Voice Interaction window figure) enables you to view all of the information that is required to handle an Outbound Campaign voice interaction with a contact. You can view call status, history, case data, and record information. You can control the call, conference or transfer the call, enter notes about the call, and send DTMF. For more information about the functions that are available in the Outbound Campaign Voice Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)
- **Transfer to an Internal Target or a Contact**--[Transfer A Voice Call](#)
- **Conference with an Internal Target or a Contact**--[Conference A Voice Call](#)
- **Handle an Outbound Campaign Voice Interaction (including Rescheduling a call)**--[Handle Outbound-Campaign Voice Interactions](#)
- **Record a Call**--[Record Interactions](#)
- **Set a Disposition Code**--[Apply Disposition Codes](#)
- **Manage Contacts and Contact Case History**--[Manage Contacts](#)
- **Use Standard Responses**--[Using The Standard Response Library](#)

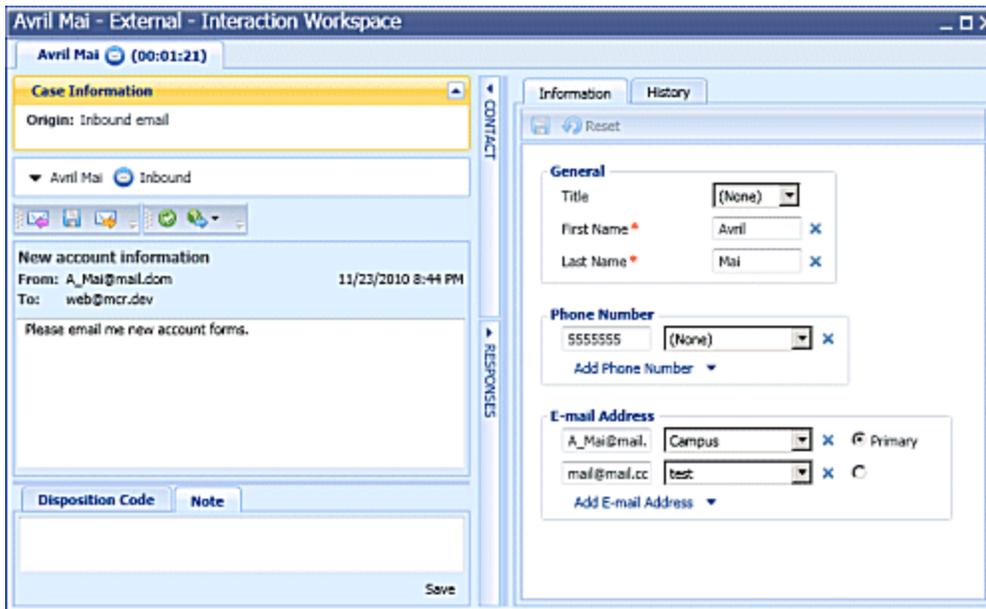


Interaction Workspace Outbound Campaign Voice Interaction window

## Interaction Workspace E-Mail Interaction Window

The E-Mail Interaction window (see the Interaction Workspace E-Mail Interaction window figure) enables you to view all of the information that is required to handle an e-mail interaction with a contact. You can view information about the e-mail, history, and case data. You can reply to the interaction, save to a workbin, transfer the interaction, start a conference, and enter notes about the interaction. For more information about the functions that are available in the E-Mail Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)
- **Start a Voice or IM Consultation**--[Handle A Voice Consultation](#)
- **Transfer to an Internal Target or a Contact**--[Transfer A Voice Call](#)
- **Transition an IM Consultation to a Voice Consultation**--[Blend Different Media Into A Single Conversation](#)
- **Set a Disposition Code**--[Apply Disposition Codes](#)
- **Manage Contacts and Contact Case History**--[Manage Contacts](#)
- **Use Standard Responses**--[Using The Standard Response Library](#)

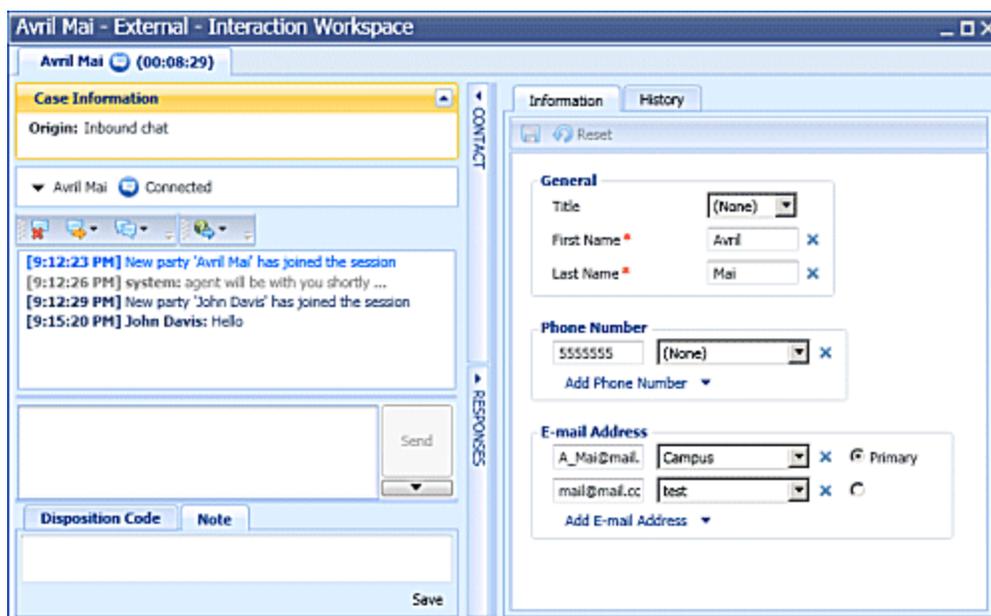


Interaction Workspace E-Mail Interaction window

## Interaction Workspace Chat Interaction Window

The Chat Interaction window (see the Interaction Workspace Chat Interaction window figure) enables you to view all of the information that is required to handle a chat interaction with a contact. You can view chat status, history, and case data. You can control the interaction, start a conference, transfer the interaction, and enter notes about the interaction. For more information about the functions that are available in the Chat Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)
- **Start a Voice or IM Consultation**--[Handle A Voice Consultation](#)
- **Transfer to an Internal Target or a Contact**--[Transfer A Voice Call](#)
- **Conference with an Internal Target or a Contact**--[Conference A Voice Call](#)
- **Transition an IM Consultation to a Voice Consultation**--[Blend Different Media Into A Single Conversation](#)
- **Set a Disposition Code**--[Apply Disposition Codes](#)
- **Manage Contacts and Contact Case History**--[Manage Contacts](#)
- **Use Standard Responses**--[Using The Standard Response Library](#)

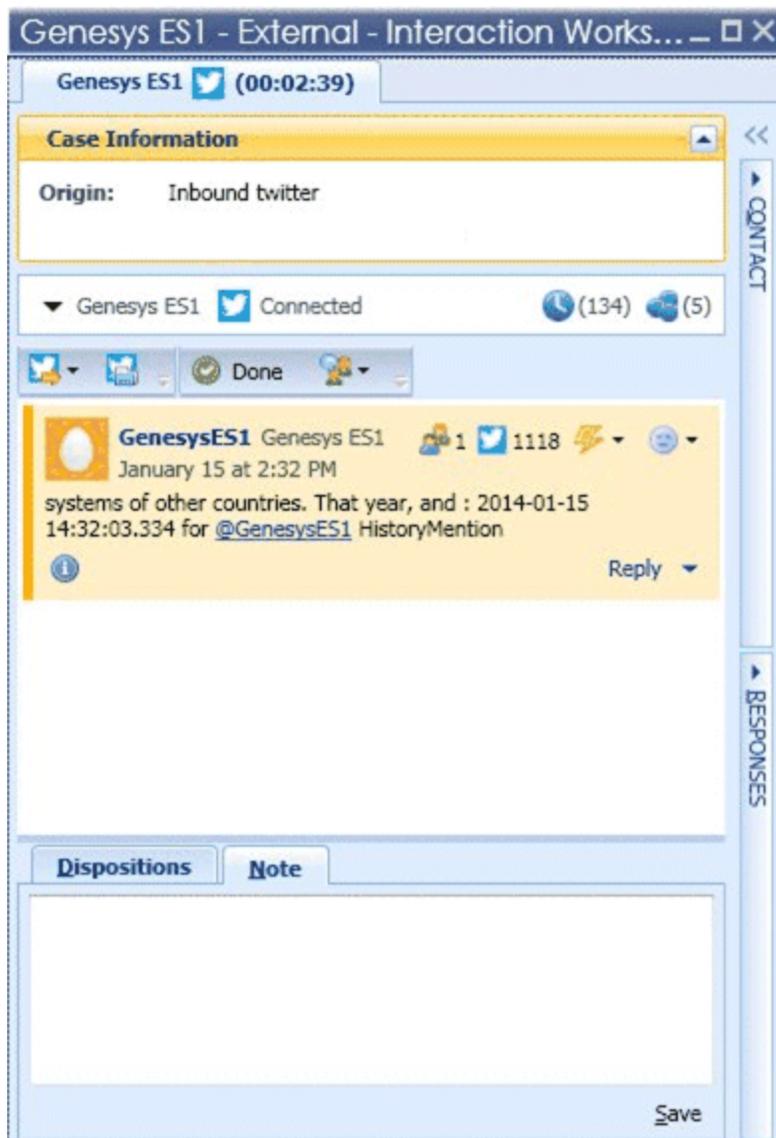


Interaction Workspace Chat Interaction window

## Interaction Workspace Twitter Interaction Window

The Twitter Interaction window (see the Interaction Workspace Twitter Interaction window figure) enables you to view all of the information that is required to handle a Twitter social media interaction (Tweet). You can view information about the interaction such as the user profile, history, and case data. You can reply to the interaction, transfer the interaction, start a conference, and enter notes about the interaction. For more information about the functions that are available in the Twitter Interaction window, see the following lessons:

- **Twitter-Specific Functionality**--[Handle A Twitter Interaction](#)
- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)
- **Reply to a Tweet Using Another Supported Media, such as Voice** ([Handle Voice Interactions](#)), E-mail ([Handle An E-Mail Interaction](#)), or SMS ([Handle An SMS Interaction](#)).
- **Start a Voice or IM Consultation**--[Handle A Voice Consultation](#)
- **Transfer to an Internal Target or a Contact**--[Transfer A Voice Call](#)
- **Set a Disposition Code**--[Apply Disposition Codes](#)
- **Manage Contacts and Contact Case History**--[Manage Contacts](#)
- **Use Standard Responses**--[Using The Standard Response Library](#)



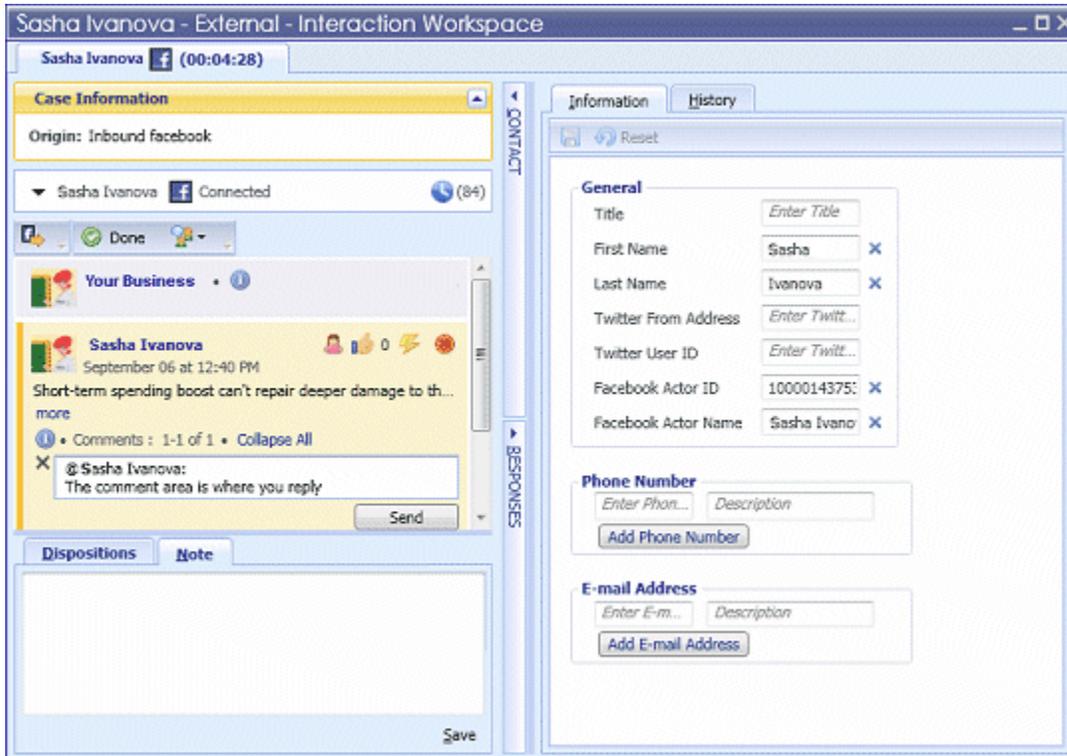
Interaction Workspace Twitter Interaction window

## Interaction Workspace Facebook Interaction Window

The Facebook Interaction window (see the Interaction Workspace Facebook Interaction window figure) enables you to view all of the information that is required to handle a Facebook social media interaction (post or comment). You can view information about the interaction such as the user profile, history, and case data. You can reply to the interaction, transfer the interaction, start a conference, and enter notes about the interaction. For more information about the functions that are available in the Facebook Interaction window, see the following lessons:

- **Facebook-Specific Functionality**--[Handle A Facebook Interaction](#)
- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)

- **Reply to a Facebook Post or Comment Using Another Supported Media, such as Voice** (Handle Voice Interactions), E-mail (Handle An E-Mail Interaction), or SMS (Handle An SMS Interaction).
- **Start a Voice or IM Consultation**--Handle A Voice Consultation
- **Transfer to an Internal Target or a Contact**--Transfer A Voice Call
- **Set a Disposition Code**--Apply Disposition Codes
- **Manage Contacts and Contact Case History**--Manage Contacts
- **Use Standard Responses**--Using The Standard Response Library



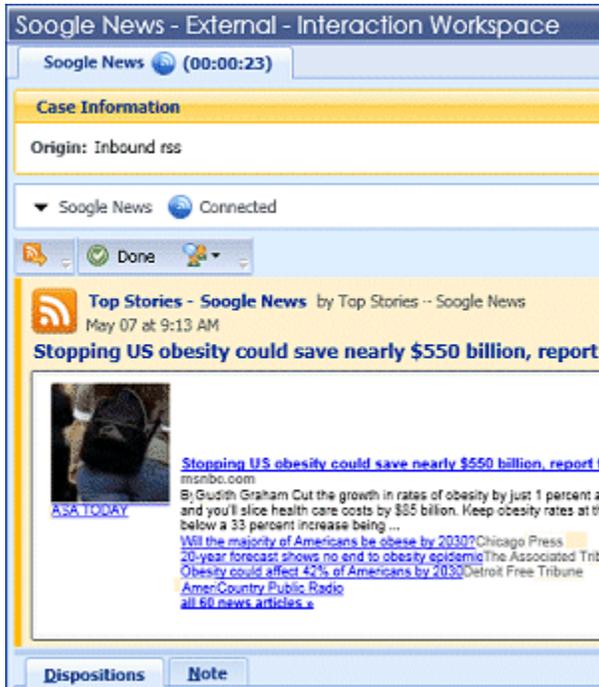
Interaction Workspace Facebook Interaction window

## Interaction Workspace RSS Interaction Window

The RSS Interaction window (see the Interaction Workspace RSS Interaction window figure) enables you to view all of the information that is required to handle an RSS web feed interaction. You can view information about the interaction such as the source of the web feed, the headline, content, history, and case data. You can transfer the interaction, start a consultation, and enter notes about the interaction. For more information about the functions that are available in the RSS Interaction window, see the following lessons:

- **RSS-Specific Functionality**--Handle An RSS Interaction
- **Find an Internal Target or a Contact**--Find A Contact Or An Internal Target
- **Call an Internal Target or a Contact**--Handle Voice Interactions
- **Start a Voice or IM Consultation**--Handle A Voice Consultation

- **Transfer to an Internal Target or a Contact**--[Transfer A Voice Call](#)
- **Set a Disposition Code**--[Apply Disposition Codes](#)
- **Manage Contacts and Contact Case History**--[Manage Contacts](#)

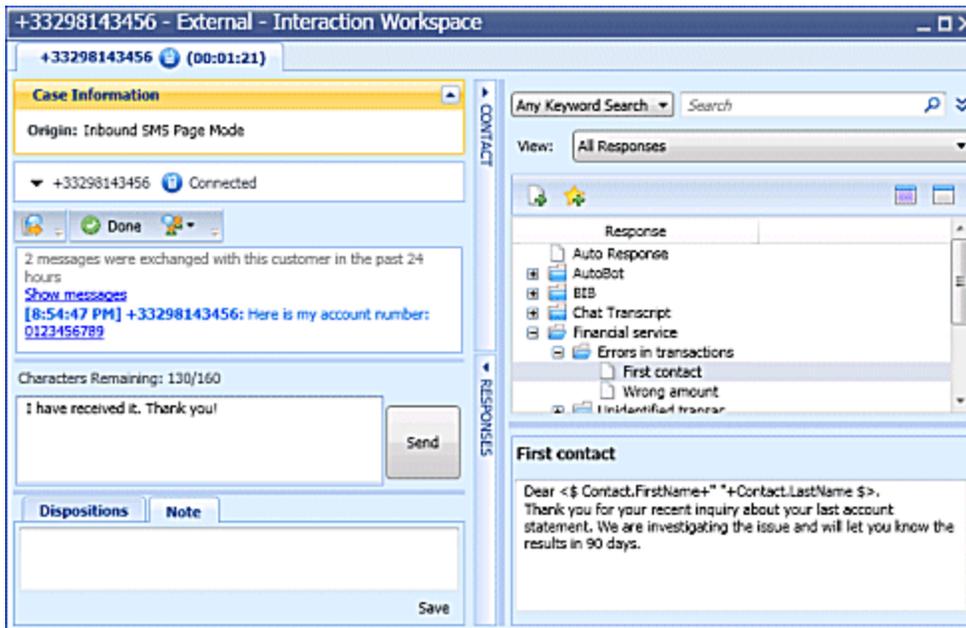


Interaction Workspace RSS Interaction window

## Interaction Workspace SMS Interaction Window

The SMS Interaction window (see the Interaction Workspace SMS Interaction window figure) enables you to view all of the information that is required to handle an SMS Page interaction or an SMS Session interaction with a contact. You can view SMS status, history, and case data. You can control the interaction, transfer the interaction, and enter notes about the interaction. For more information about the functions that are available in the SMS Interaction window, see the following lessons:

- **Find an Internal Target or a Contact**--[Find A Contact Or An Internal Target](#)
- **Call an Internal Target or a Contact**--[Handle Voice Interactions](#)
- **Handle An SMS Interaction**--[Handle An SMS Interaction](#)
- **Transfer to an Internal Target or a Contact**--[Transfer An SMS Interaction](#)
- **Set a Disposition Code**--[Apply Disposition Codes](#)
- **Manage Contacts and Contact Case History**--[Manage Contacts](#)
- **Use Standard Responses**--[Using The Standard Response Library](#)

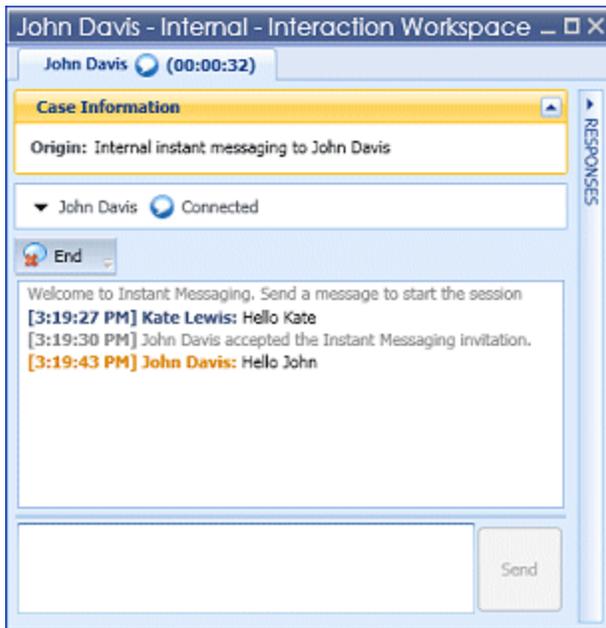


Interaction Workspace SMS Interaction window

## Interaction Workspace IM Interaction Window

The Instant Messaging (IM) Interaction window (see the Interaction Workspace Instant Messaging (IM) Interaction window figure) enables you to view all of the information that is required to handle an IM interaction with an internal target. You can send an IM to another agent (internal target) or receive an IM from an internal target. If you start the IM from an active Interaction, you can share contact information with the IM target. You can also transition from an IM consultation session to a voice consultation. For more information about the functions that are available in the IM Interaction window, see the following lessons:

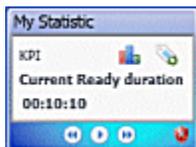
- **IM an Internal Target--Handle Internal Instant Messaging**
- **Transition an IM Consultation to a Voice Consultation--Blend Different Media Into A Single Conversation**



Interaction Workspace Instant Messaging (IM)  
Interaction window

## Statistics Gadget

Statistics can be viewed either in the Main Window by selecting the My Statistics tab or the Contact Center Statistics tab in your Workspace, or by using the Statistics Gadget (see the Statistics Gadget displaying Contact Center Statistics figure).



Statistics Gadget  
displaying  
Contact Center  
Statistics

The Statistics Gadget displays statistics in two ways:

- A statistics ticker
- A tagged-statistic view

The advantage of the Statistics Gadget is that you can view your KPIs and Contact Center Statistics continuously without having to open your Workspace and clicking back and forth between tabs. For more information about the functions that are available in the Statistics Gadget, see the following lesson:

- **View Statistics--View KPIs And Statistics**

## Team Communicator Overview

The Team Communicator feature is a universal lookup tool that searches all of the directories to which you are connected. Use the Team Communicator to find an internal target such as a team member, Routing Point or queue; or, if you are connected to the contact database, you can use it to find a contact. The Team Communicator can filter the results of your search or group the results into categories to help you to quickly find the internal target or contact for whom you are searching. Enter a name, telephone number, or e-mail address to find an internal target or contact, and then select the action that you want to perform, such as:

- Calling a contact
- Calling an internal target
- Sending an Instant Message (IM) to an internal target
- Adding a contact to your list of favorites
- Conferencing an interaction
- Transferring an interaction
- Starting a consultation
- Sending an e-mail message to a contact

## Finding Contacts, Internal Targets, and Interactions

Two different types of search routines are employed by Interaction Workspace to enable you to search for contacts and internal targets:

- Grid mode
- List mode

### Grid Mode

Grid mode performs a "starts-with" search that searches each field of the contact database for the phrase (name, phone number, e-mail address, or other criteria) that you provide in the search field. Results are returned in tabular form and are sorted according to the default search field, such as Last Name. The following views employ the grid-mode search:

- **Contact History view/My History view**--See:
  - [Lesson: Manage Contacts](#).

For more details on search results and the functionality in each window and view, see the *Interaction Workspace 8.1 Help*.

### List Mode

List mode performs a "keyword" search that searches each field of the contact database for the word or words (name, phone number, e-mail address, or other criteria) that you provide in the search field.

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Each field of the database is searched by using a "starts-with" search for the keyword(s) that you provide. Results are returned in a list that is sorted according to the rules of Lucene scoring. In most cases, you can refine the search results by using the filtering features of the list view. For example, you can filter your search results so that only contacts or favorites are displayed. The following views employ the list-mode search:

- **Main Window/Gadget**--See:
  - [Communicator Overview Team Communicator Overview](#).
  - [Finding an Internal Target or a Contact](#).
  - [Sending and Receiving Internal Instant Messages](#).
- **Voice Interaction Window**--See:
  - [Starting a Voice Conference](#).
  - [Transferring a Voice Call](#).
  - [Blending a voice consultation with an IM consultation](#).
- **E-Mail Interaction Window**--See:
  - [Starting a Voice Conference](#).
  - [Transferring a Voice Call](#).
  - [Blending a voice consultation with an IM consultation](#).
- **Chat Interaction Window**--See:
  - [Starting a Voice Conference](#).
  - [Transferring a Voice Call](#).
  - [Blending a voice consultation with an IM consultation](#).
- **Workitem Interaction Window**--See:
  - [Starting a Voice Conference](#).
  - [Transferring a Voice Call](#).
  - [Blending a voice consultation with an IM consultation](#).
- **Contact History view/My History view**--See:
  - [Lesson: Manage Contacts](#).

For more details on search results and the functionality in each window and view, see the *Interaction Workspace 8.1 Help*.

## Definition--Role-Based

The Genesys 8 suite of products implements role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which role privileges (see [Definition--Role Privilege](#)) you are enabled to perform based on privileges assigned to your role. Interaction Workspace comprises a set of Graphical User Interface (GUI) elements called views. The

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role that is assigned to you determines which Interaction Workspace views are enabled for you to use. The views enable you to complete your assigned tasks. For example, you might be configured for voice and chat but not e-mail; you might be configured to transfer interactions and consult with other agents, but not to initiate new outbound interactions. Examples of roles that might be enabled for some or all of the Interaction Workspace functionality include the following:

- Junior Agent
- Senior Agent
- Team Lead
- Supervisor
- Expert Agent

## Definition--Role Privilege

The Genesys 8 suite of products implement role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which tasks you are enabled to perform. A role privilege is a single functionality or set of functionalities that are required to complete a Use Case (see [Basic Use-Case Summary](#)). Interaction Workspace contains role privileges that are used to handle customer interactions, manage your status, view your KPIs, set personal preferences, and consult with team members. Role privileges are made available through views. Interaction Workspace is composed of both atomic views and composite views. Views contain the user-interface elements, such as buttons, menus, and text fields, that enable you to interact with Interaction Workspace. Atomic views typically perform single functions, such as setting preferences, viewing KPIs, or viewing the history of an interaction. Composite views contain atomic views that are grouped into a single composite interface.

## Basic Use-Case Summary

The purpose of this user's guide is to enable you to learn the *basic* functionality of Interaction Workspace. See the *Interaction Workspace 8.1 Help* for more details about each user-interface component. To access the context-sensitive Help from any window in the Interaction Workspace interface, open the Help menu, or press the F1 key on your keyboard. This section summarizes the *high-level* steps that you might follow to handle a voice interaction.

Warning: During your use of Interaction Workspace, you might be locked out of Interaction Workspace and have your status set to Not Ready if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Interaction Workspace, you must reauthenticate and reset your status to Ready to receive new interactions. For more information, see the Inactivity Timeout topic in the *Interaction Workspace 8.1 Help*.

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## Prerequisites

To begin these role privileges your system must meet the following requirements:

- The Interaction Workspace ClickOnce application is installed on your local web server.
- The Interaction Workspace ClickOnce application is installed on your workstation.
- You are configured as an agent.
- Your workstation operating system is Windows Vista. or Windows XP.

## Starting the Application and Handling an Inbound Interaction

Use a Microsoft Internet Explorer 6.0 or higher web browser to launch the Interaction Workspace bootstrap application. This bootstrap application enables you to login to your system and download the Interaction Workspace application.

1. Double-click the Interaction Workspace icon on your desktop to start the Interaction Workspace application.



Interaction  
Workspace

2. Log in to the system (see [Lesson: Logging in to Interaction Workspace](#)).
3. Enter your additional authentication information.
4. Enter a media channel, or select one from the list.
5. In the Main Window set your status to Ready (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).

Your default view might be the Gadget. Only basic communication and agent status functionalities of Interaction Workspace are available from the Gadget.

6. Accept inbound interactions that are routed to you. See:
  - [Lesson: Handling an inbound voice interaction](#)
  - [Lesson: Handling a web callback interaction](#)
  - [Lesson: Receiving an Instant Messaging session](#)
  - [Lesson: Handling an inbound e-mail interaction](#)
  - [Lesson: Handling an inbound chat interaction](#)
  - [Lesson: Handling an inbound SMS interaction](#)
  - [Lesson: Handling an inbound workitem interaction](#)
  - [Lesson: Handling a predictive or progressive Outbound-Campaign voice interaction](#)

Or, retrieve an interaction from a workbin. See:

- [Lesson: Accessing and handling interactions that are stored in a workbin](#)).

7. Handle each inbound interaction. This step can include any or all of the following functions:

- Start a voice, IM or chat consultation (see [voice conference Lesson: Starting a voice conference](#) or a [chat consultation Lesson: Starting a chat consultation](#)).
  - Transfer the call (see [Lesson: Starting a voice transfer](#)).
  - Conference the call (see [Lesson: Starting a voice conference](#)).
  - Update the Contact History (see [Managing Contact History](#)).
  - Update the Notepad (see [Managing Contact History](#)).
  - Send or receive an internal Instant Message (IM) (see [Instant Messaging Overview](#)).
  - Employ a Standard Response (see [Inserting a Standard Response into an E-Mail Interaction](#)).
8. Complete the interaction.
  9. If required, enter a disposition code (see [Assigning Disposition Codes](#)).
  10. Click Mark Done.
  11. Complete any required aftercall work.
  12. Click the close box to close the corresponding Interaction window.
  13. Set your status to Ready (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
  14. View your Key Performance Indicators (KPIs) or the KPI status of your group (see [Lesson: View KPIs And Statistics](#)).
  15. After you have completed all of your tasks for the day, select Log Out from the Main Menu.

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# Log In

In this lesson, you will learn how to launch the Interaction Workspace application from your workstation, provide authentication information, and log in to your system. This lesson contains the following section:

- [Started Getting Started](#)

## Getting Started

To begin accepting interactions, you first must be authenticated on your network, and then you must log in to your system. The following procedure describes how to start Interaction Workspace and authenticate yourself on the system.

### Lesson: Logging in to Interaction Workspace

- To authenticate yourself on the system and choose your channels.

#### Prerequisites

- Your workstation is running a supported operating system.
- Your workstation has a supported browser application installed.
- You are configured as an agent.
- The Interaction Workspace is installed on your workstation.

#### Start

1. (SIP only) Plug in your USB headset.

Note: Depending on the configuration of your environment, your volume settings from your previous session might be retained when you log out, and they are used when you log in.

2. Start the Interaction Workspace application by doing one of the following steps:

- Double-click the Interaction Workspace icon on your workstation desktop.



- Open the Start menu and choose Interaction Workspace from the Genesys Telecommunications Laboratories program group.
- Select the Interaction Workspace ClickOnce web link that was provided to you by your system

administrator.

3. In the Login view, enter your user name and password (see the Initial login view figure).

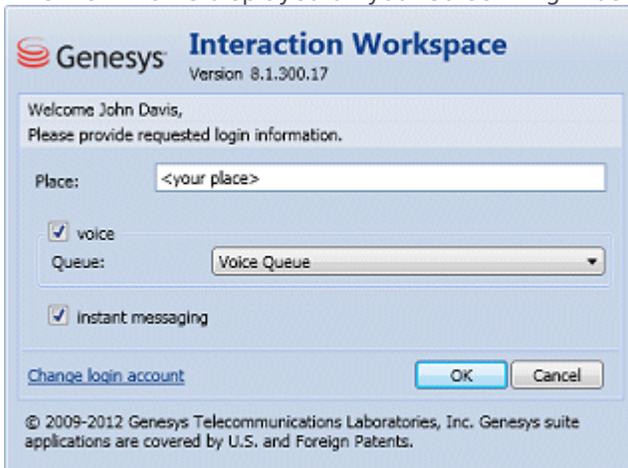


Initial login view

In some cases, you might be required to enter additional information about the application that you want to use and about the host and port from which the application is being served. For more information, see your system administrator and the *Interaction Workspace 8.1 Help*.

Note: Depending on the configuration of your environment, if you login to a SIP Voice channel without having your configured USB headset plugged in, you might be logged in to Interaction Workspace, but not to the SIP Voice channel. To complete logging in to the SIP Voice channel, plug in your USB headset.

4. Click **Log In** to log in, or click **Cancel** to stop logging in; this closes the Login view.
5. After you have successfully logged in, a new view opens in which you can specify additional information, based on the tasks that you want to perform. The contents of the view are defined by your administrator; they are specific to your role. Additional information that you might have to specify includes your Place, your queue, your agent login, your agent password, your phone number, and the media (such as Voice, Instant Messaging, or workitems, such as faxes) that you want to use. The "Example of the System Parameters login view" figure shows an example of a secondary login view. The view that is displayed on your screen might be different.



Example of the System Parameters login view. Your view might be different.

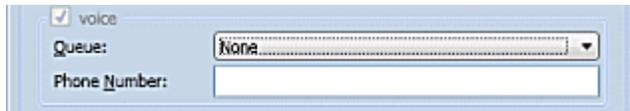
- You might be configured to check and uncheck eServices media channels, such as chat, SMS, e-mail, social media (for example, Facebook and Twitter), and workitems (such as fax). Upon login, unchecking media channels for which you are configured means that you will not be logged into

those channels when Interaction Workspace starts. You will have to login to those channels manually from the Workspace view in the Main Window or Gadget.

Note: If you are logging in to participate in an Outbound Campaign, you must unselect the Instant Messaging channel.

- If your company is using a SIP Server, you might be configured to log in by using a remote phone number at which you can be reached if you are not logged in from a phone that is on the internal phone system of your company (see the Remote phone number field in the System Parameters login view figure).

If you are logging in remotely, enter the remote phone number to which your calls will be routed in the Phone Number box in the System Parameters Login view.



Remote phone number field in the System Parameters login view

6. Click OK to submit your information. Click Cancel to stop logging in; this closes the Login view.
7. If authentication is successful, the Main Window view or Gadget is displayed. If your status is configured to be set to Ready by default, you are ready to receive interactions that are routed to you. Your system administrator specifies what your status is for each channel when you login. If you are configured to be Not Ready for one or more channels, your system administrator might specify a Not Ready Reason for the channel. To start receiving interactions on a Not Ready channel, you must change the status to Ready.

## End

## Next Steps

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

---

# Manage Your Status

In this lesson, you will learn how to manage your status in the Main Window. This lesson contains the following section:

- [Going Ready](#)

Note: You might be locked out of Interaction Workspace and have your status set to Not Ready if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Interaction Workspace, you must reauthenticate and reset your status to Ready to receive new interaction. For more information, see the Inactivity Timeout chapter in the *Interaction Workspace 8.1Help*.

## Going Ready

To begin accepting interactions, you must set your status to Ready. The following procedure describes how to set your status to Ready, so that you can receive interactions.

### Lesson: Going Ready in the Interaction Workspace Main window

- To set your status to Ready, so that you can receive interactions.

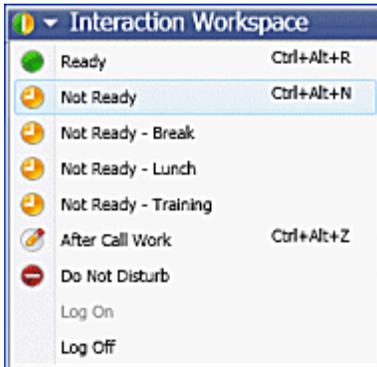
#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- (SIP only) Plug in your USB headset. If you login to a SIP Voice channel, Interaction Workspace checks to determine whether the USB headset that you are configured to use is plugged in. If it is not, you will be logged in to Interaction Workspace but not to the SIP Voice channel. Ensure that you plug in your USB Headset to use the SIP Voice channel.

Interaction Workspace detects when your USB headset is plugged in or unplugged and will set your status accordingly. If your USB headset is not plugged in a message will be displayed.

#### Start

1. If your status is configured to be set to Ready by default, you receive interactions that are routed to you as soon as you log in.
2. Otherwise, click the Status icon to change your status to Ready (see the Example of a Status menu figure), so that inbound interactions can be routed to you.



Example of a Status menu

You can also choose to set your status to a different Not Ready reason, such as:

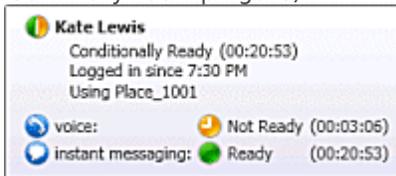
- Not Ready
- Not Ready - Lunch
- Not Ready - Break
- After Call Work

The Not Ready reasons that are displayed in your Ready Status menu depend on how this menu has been configured by your system administrator. In most cases, if you have set your status to one of the Not Ready states, inbound interactions cannot be routed to you.

Note: When you are handling an interaction, the system interrupts the display of the amount of time that you are in the current state.

Warning: If, while you are handling an interaction for a given channel, you set your status to either Not Ready, Not Ready - <reason>, or After Call Work (ACW), the system does not display the amount of time that you are in that state until the interaction is complete. This feature enables your break or ACW time to be displayed according to recorded statistics.

3. You can check your ready status by placing your mouse pointer over the Status icon (see the Status Summary ToolTip figure).

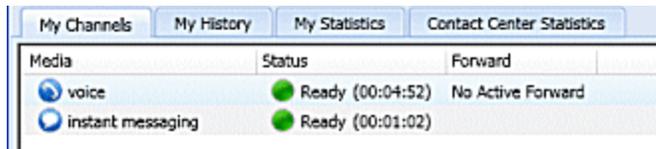


Status Summary ToolTip

The status summary includes your login name, Place, channels, and channel status. If you are logged in to more than one channel, detailed status for each channel is displayed; otherwise, only your ready status is displayed. If you are participating in an Outbound Campaign and are waiting for authorization to logout, you can check the status of your request in the Status Summary ToolTip.

4. If you are logged in to more than one channel, you can manage the ready status of each channel individually by using either the My Channels tab in the Workspace of the Main Window or the My Channels window, which is opened from the Gadget.
  - a. In the Main Window, click Workspace.
  - b. Click the My Channels tab (see the My Channels tab figure).

---



| Media             | Status           | Forward           |
|-------------------|------------------|-------------------|
| voice             | Ready (00:04:52) | No Active Forward |
| instant messaging | Ready (00:01:02) |                   |

My Channels tab

If you are participating in an Outbound Campaign and are waiting for authorization to logout, you can check the status of your request in the My Channels view.

- c. Right-click the channel that you want to update, and set your status by using the Status menu, as you did in Step 2.

**End**

# Forward Your Calls

In this lesson, you will learn how to forward your call by using the My Channels tab in the Main Window. This lesson contains the following section:

- [Forwarding Calls](#)

## Forwarding Calls

You can forward your calls to a different destination.

### Lesson: Forwarding your calls to a different destination

#### Purpose:

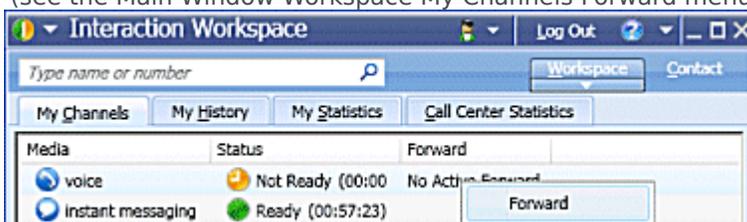
- To specify a different destination to which your calls are directed temporarily and to cancel a forward.

#### Prerequisites

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

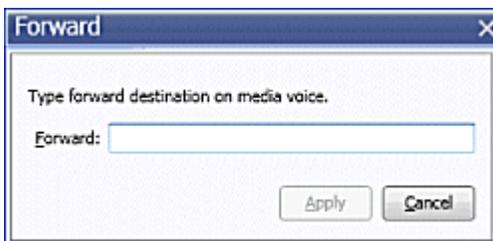
#### Start

1. To forward calls to a different destination, in the Main Window, click Workspace.
2. Click the My Channels tab.
3. On the media channel that you want to forward, right-click in the Forward column, and select Forward (see the Main Window Workspace My Channels Forward menu figure).



Main Window Workspace My Channels Forward menu

The Forward dialog box is displayed (see the Forward dialog box figure).

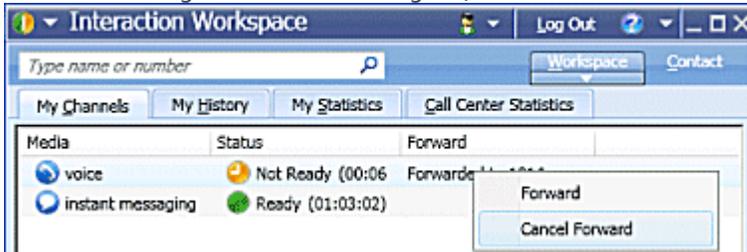


Forward dialog box

4. Enter the phone number to which you want to forward your calls.
5. Click **Apply** to set the forward. Click **Cancel** to return to the **My Channels** tab without forwarding your calls.

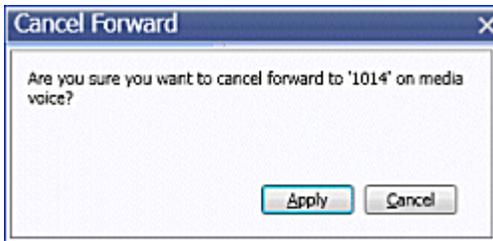
### Canceling Your Call Forward

6. If you have an active forward set and you want to disable it, in the **My Channels** tab, right-click in the **Forward** column and select **Cancel Forward** (see the Main Window Workspace **My Channels Forward** menu selecting **Cancel Forward** figure).



Main Window Workspace My Channels Forward menu selecting Cancel Forward

The **Cancel Forward** dialog box is displayed (see the **Cancel Forward** dialog box figure).



Cancel Forward dialog box

7. Click **Apply** to cancel the forward. To keep the forward active, click **Cancel**; this action removes the active forward and changes the **Forward** status to **No Active Forward**.

**End**

---

# Find A Contact Or An Internal Target

In this lesson, you will learn how to use the Team Communicator feature to find a contact or an internal target in your contact database or company directory. This lesson contains the following section:

- [Finding an Internal Target or a Contact](#)
- [Using Favorites](#)

## Finding an Internal Target or a Contact

If you want to find an internal target in your company directory, or if you want to find a contact in the contact database, use the Team Communicator feature of the Interaction Workspace Main Window or the Interaction Workspace Gadget. The Team Communicator feature enables you to find an internal target or a contact by entering basic information about that contact, such as name, phone number, or e-mail address. Use the filtering and sorting functions to quickly find the person that you want to contact. Save the contact as a favorite to find the contact even more quickly the next time that you want to contact them. The procedures in this lesson demonstrate using the Team Communicator to start a voice interaction; however, the procedures are applicable to any media that an agent is configured to use. This section contains the following procedures:

- [Lesson: Using the Team Communicator feature to find an internal target](#)
- [Lesson: Using the Team Communicator feature to find a contact](#)

These procedures focus on initiating voice interactions; however, you can use these same techniques to create a new e-mail, send an IM, or transfer any type of interaction.

## Lesson: Using the Team Communicator feature to find an internal target

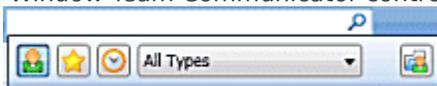
- To find an internal target in the corporate directory.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).

### Start

1. In the Main Window or in the Gadget, click in the Team Communicator Quick Search field (see the Main Window Team Communicator control and Quick Search field figure).



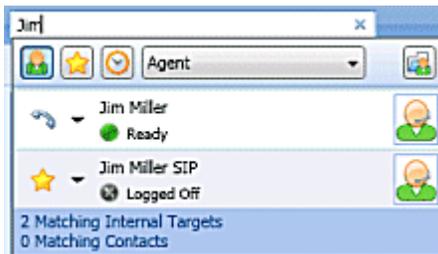
Main Window Team Communicator control and Quick Search field

The Quick Search field is a universal lookup tool. It might be configured to provide lookup in the Universal Contact Server or simply internal target lookup.

The Team Communicator is available in other windows, such as the Voice Interaction window and the E-Mail Interaction window, in which it can be used to find conference and transfer targets. The actions that are available to you depend upon which window you are using, which role you are assigned, and what information is available about the target.

2. Enter the name, telephone number, or other information about the team member or other internal target whom you want to find.

As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (see the Example of Team Communicator search results with agent filtering figure). A pop-up view lists potential contacts and indicates the status of each internal target. Click the X to clear the search field.



Example of Team Communicator search results with agent filtering

Below the Quick Search field are the following five controls (see the Main Window Team Communicator control and Quick Search field figure), from left to right:

- Search All--Click to select from all matching internal targets and contacts.
  - Show and Search My Favorites--Click to show in the list only contacts/internal targets that either you or your system administrator has flagged as favorites.
  - Show and Search My Recents--Click to select from the last 1 to 10 contacts/internal targets whom you have contacted directly.
  - Filter by Type--Click to search by type, including Agent, Agent Group, Contact, Queue, Routing Point, and Skill (see Step 3).
  - Sort Results by Type/Categories--Click to arrange the search results by type/category.
- Do one of the following to find an internal target:
    - Use the Filter Type drop-down list to filter the internal targets by type.



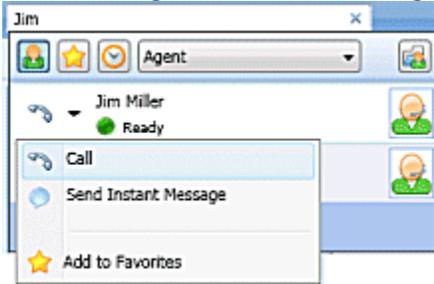
The filters that you see might include the following:

- All Types--Show all contacts and internal targets that contain the specified search criteria.
- Contact--Show contacts that contain the specified search criteria.
- Agent--Show only agents that contain the specified search criteria.
- Skill--Show only skills that contain the specified search criteria.
- Agent Group--Show only agent groups that contain the specified search criteria.

- Queue--Show only queues that contain the specified search criteria.
- Interaction Queue--Show only interaction queues that contain the specified search criteria.
- Routing Point--Show only Routing Points that contain the specified search criteria.
- Toggle sorting by type/category on or off by clicking the Sort Results by Type/Categories folder icon:



- Click the Action Menu drop-down list that is displayed next to the icon of the internal target for whom you are searching (see the Internal target Action menu figure).



Internal target Action menu

To perform an action, do one of the following:

- Select the type of internal interaction that you want to launch:
  - Voice interaction (see [Calling an internal target](#))
  - Instant Messaging (IM) interaction (see [Lesson: Handle Internal Instant Messaging](#))
- Select Add to Favorites to add the contact to your list of favorite contacts.
- Place your mouse pointer over the contact icon to view additional contact information.

## End

## Lesson: Using the Team Communicator feature to find a contact

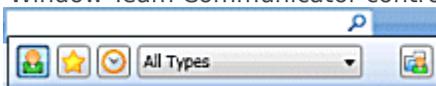
- To find a contact in the contact database.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have a connection to the contact database.
- You are configured for outbound communication.

### Start

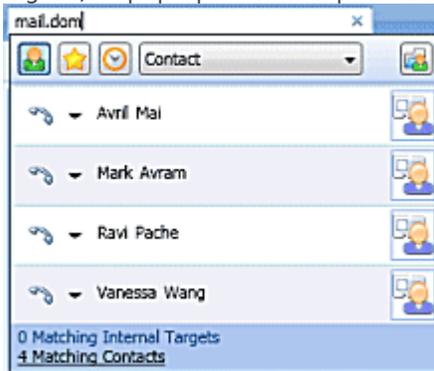
1. In the Main Window or in the Gadget, click the Team Communicator Quick Search field (see the Main Window Team Communicator control and Quick Search field figure).



Main Window Team Communicator control and Quick Search field

The Quick Search field is a universal lookup tool. You must be configured for outbound communication to use the Team Communicator for lookup in Universal Contact Server.

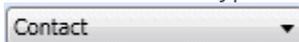
2. Enter the name, telephone number, or other information about the contact with whom you want to communicate. As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (see the Example of Team Communicator search results with Contacts filtering figure). A pop-up view lists potential contacts.



Example of Team Communicator search results with Contacts filtering

Below the Quick Search field are the following five controls (see the Main Window Team Communicator control and Quick Search field figure), from left to right:

- Search All--Click to select from all matching internal targets and contacts.
  - Show and Search My Favorites--Click to show in the list only contacts/internal targets that are flagged as favorites by either you or your system administrator.
  - Show and Search My Recents--Click to select from the last 1 to 10 contacts/internal targets whom you have contacted directly.
  - Filter by Type--Click to search by type, including Agent, Agent Group, Contact, Queue, Routing Point, and Skill (see Step 3).
  - Sort Results by Type/Categories--Click to arrange the search results by type/category.
3. Do one of the following to find the contact:
    - Use the Filter Type drop-down list to view only contacts by selecting Contact.



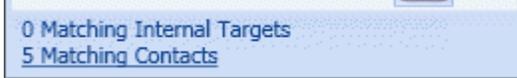
The filters that you see might include the following:

- All Types--Show all contacts and internal targets that contain the specified search criteria.
- Contact--Show contacts that contain the specified search criteria.
- Agent--Show only agents that contain the specified search criteria.
- Skill--Show only skills that contain the specified search criteria.
- Agent Group--Show only agent groups that contain the specified search criteria.
- Queue--Show only queues that contain the specified search criteria.
- Interaction Queue--Show only interaction queues that contain the specified search criteria.
- Routing Point--Show only Routing Points that contain the specified search criteria.

- Toggle sorting by type on or off by clicking the Sort by Types/Categories folder icon:

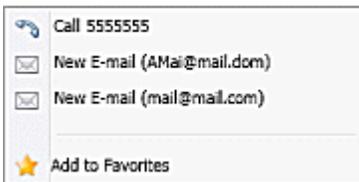


- View only contacts by clicking the Matching Contacts link:



4. Click the Action Menu drop-down list that is next to the contact for whom you are searching (see the Contact Action menu figure).

▾ Avril Mai



Contact Action menu

To perform an action, do one of the following:

- Select the telephone number to launch a Voice interaction (see [Lesson: Calling a contact](#)).
- Select the e-mail address to launch a new e-mail interaction (see [Lesson: Creating and sending a new e-mail interaction to a contact](#)).
- Select the SMS number to launch an SMS interaction (see [Lesson: Creating an outbound SMS interaction](#)).
- Select Add to Favorites to add the contact to your list of favorite contacts.
- Place your mouse pointer over the contact icon to view additional contact information.

## End

## Using Favorites

You can designate internal targets and contacts as "favorites" by using the Action Menu of the Team Communicator. A *favorite* is an internal target or contact whom you call frequently, or whom you want to be able to find quickly. When you designate an internal target or contact as a favorite, you might be configured to assign that contact to a favorite category. Favorite categories might be pre-defined by your administrator, or you might be configured to create your own categories. Corporate favorites are read-only. If you are using the Team Communicator in an interaction window, the corporate favorites that you see might be different from the corporate favorites that are displayed in the Team Communicator in the Main Window or the Gadget. Your administrator might configure your system to display corporate favorites that are related to the interaction.

### Lesson: Creating and using favorites in the Team Communicator

- To designate as a favorite a contact or an internal target whom you call frequently, or whom you want to be able to find quickly.

## Prerequisites

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

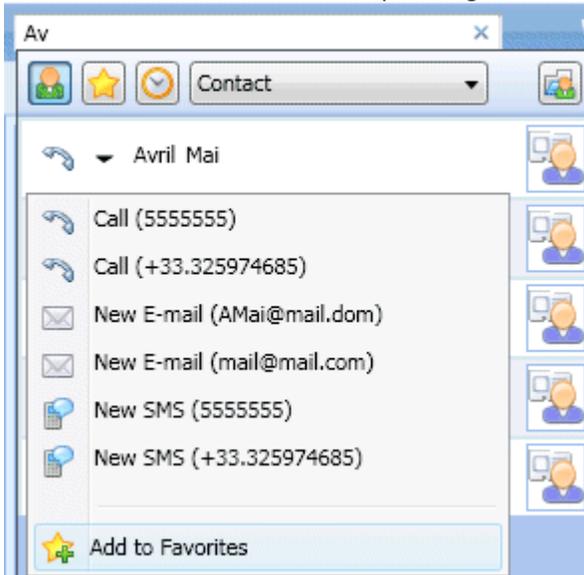
## Start

- Find an internal target or contact (refer to the Finding a contact by using Team Communicator figure) by using the Team Communicator (see [Lesson: Using the Team Communicator feature to find a contact](#)).



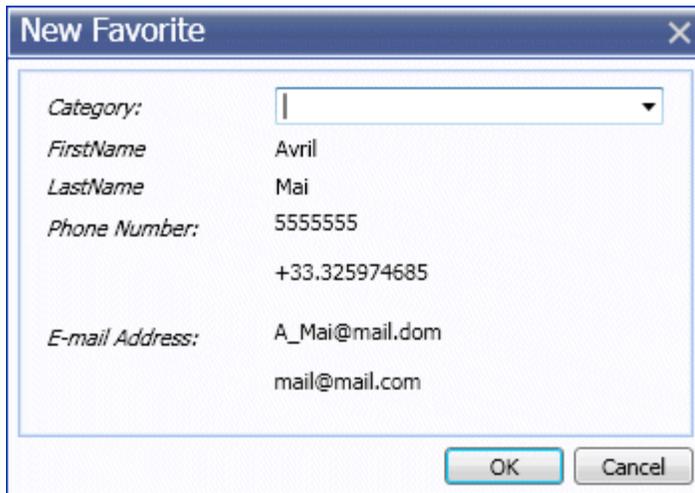
Finding a contact by using Team Communicator

- Open the internal target or contact Action Menu and select Add to Favorites (refer to the Contact Action Menu Add to Favorites option figure).



Contact Action Menu Add to Favorites option

The New Favorite dialog box is displayed (refer to the New Favorite dialog box figure).

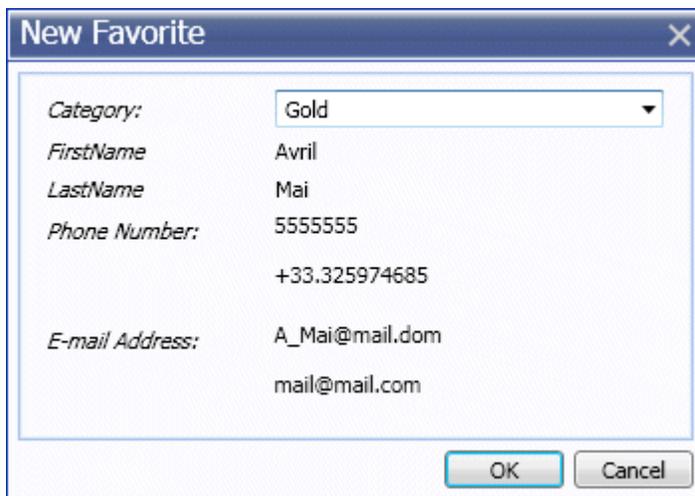


|                        |                                 |
|------------------------|---------------------------------|
| <i>Category:</i>       | <input type="text"/>            |
| <i>FirstName</i>       | Avril                           |
| <i>LastName</i>        | Mai                             |
| <i>Phone Number:</i>   | 5555555<br>+33.325974685        |
| <i>E-mail Address:</i> | A_Mai@mail.dom<br>mail@mail.com |

OK Cancel

New Favorite dialog box

- (Optional) The New Favorite dialog box enables you to specify a category for your new favorite. Do one of the following:
  - Select a pre-defined category from the Category drop-down list (refer to the Specifying a category in the New Favorite dialog box figure). Pre-defined categories might be defined by your administrator, or you might have created one previously.
  - Create a new favorite category. In the Category drop-down list (refer to the Specifying a category in the New Favorite dialog box figure), enter a new category name.



|                        |                                 |
|------------------------|---------------------------------|
| <i>Category:</i>       | Gold                            |
| <i>FirstName</i>       | Avril                           |
| <i>LastName</i>        | Mai                             |
| <i>Phone Number:</i>   | 5555555<br>+33.325974685        |
| <i>E-mail Address:</i> | A_Mai@mail.dom<br>mail@mail.com |

OK Cancel

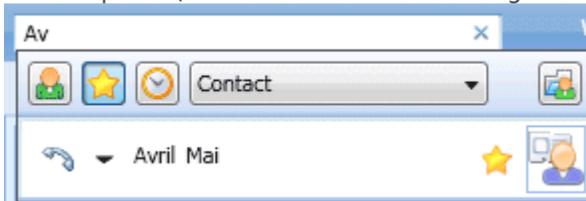
Specifying a category in the New Favorite dialog box

- Click OK to create a new favorite. Click Cancel to close the New Favorite dialog box without creating a new favorite. If you created a new favorite, she or he will be displayed with a gold star next to the name of the internal target or contact (refer to the Contact designated as a favorite in the Team Communicator figure).



Contact designated as a favorite in the Team Communicator

5. In the Team Communicator, to view only favorites whom you have specified (★) or who have been specified by your administrator (📁★) click the Favorites filter button (🌟) in the Team Communicator control panel (refer to the Favorite filtering in the Team Communicator figure).



Favorite filtering in the Team Communicator

6. To view your favorites by category, click both the Favorites filter button and the Categories button (📁). The favorites are sorted into the categories that either you or your administrator has defined (refer to the Favorites sorted by category in the Team Communicator figure).



Favorites sorted by category in the Team Communicator

**End**

# Handling Interactions

These lessons show you how to handle interactions of various types. Some types, such as Voice and Chat, enable you to transfer, conference, or consult with another target in your call center. The **Common Interaction Management** tasks enable you to use functionality that is common to many of the interaction types. Handling Interactions

- **Voice Interactions**
    - [Handle Voice Interactions](#)
    - [Handle A Voice Consultation](#)
    - [Transfer A Voice Call](#)
    - [Conference A Voice Call](#)
    - [Record Interactions](#)
  - **Web Callback**
    - [Handle Web Callback Interactions](#)
  - **Outbound Campaigns**
    - [Handle Outbound-Campaign Voice Interactions](#)
  - **IM Interactions**
    - [Handle Internal Instant Messaging](#)
  - **Chat Interactions**
    - [Handle A Chat Interaction](#)
    - [Handle A Chat Consultation](#)
    - [Transfer A Chat Interaction](#)
    - [Conference A Chat Interaction](#)
  - **E-mail Interactions**
    - [Handle An E-Mail Interaction](#)
  - **SMS Interactions**
    - [Handle An SMS Interaction](#)
    - [Transfer An SMS Interaction](#)
  - **Social Media Interactions**
    - [Handle A Twitter Interaction](#)
    - [Handle A Facebook Interaction](#)
    - [Handle An RSS Interaction](#)
  - **Workitems**
-

- [Handle A Workitem Interaction](#)
- **Advanced Media Blending**
  - [Blend Different Media Into A Single Conversation](#)
- **Common Interaction Management**
  - [Edit Case Information And Record Information](#)
  - [Using The Standard Response Library](#)
  - [Apply Disposition Codes](#)
  - [Using The Interaction Bar](#)

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# Handle A Voice Call

In this lesson, you will learn how to accept an inbound voice interaction by using Interaction Workspace. Also, you will learn how to use the Team Communicator feature to call a contact or an internal target. The Team Communicator enables you to find a contact or an internal target, send an Instant Message (IM) to an internal target, call a contact or an internal target, e-mail a contact, initiate a conference call, or transfer a call. This chapter contains the following sections:

- [Receiving a Voice Interaction](#)
- [Making a Voice Call](#)

Note: Refer to [Handle Outbound-Campaign Voice Interactions](#), to use the Voice interaction view to handle Outbound Campaign calls.

## Receiving a Voice Interaction

If you are the selected internal target for an inbound interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it (answer it), the interaction window is displayed. The interaction window contains information about the call and the controls that you need to complete the interaction.

### Lesson: Handling an inbound voice interaction

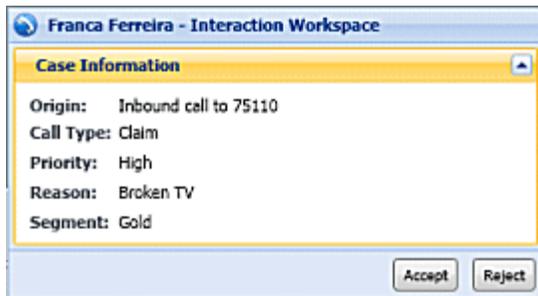
- To handle an inbound voice interaction properly.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- 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 inbound interaction.

#### Start

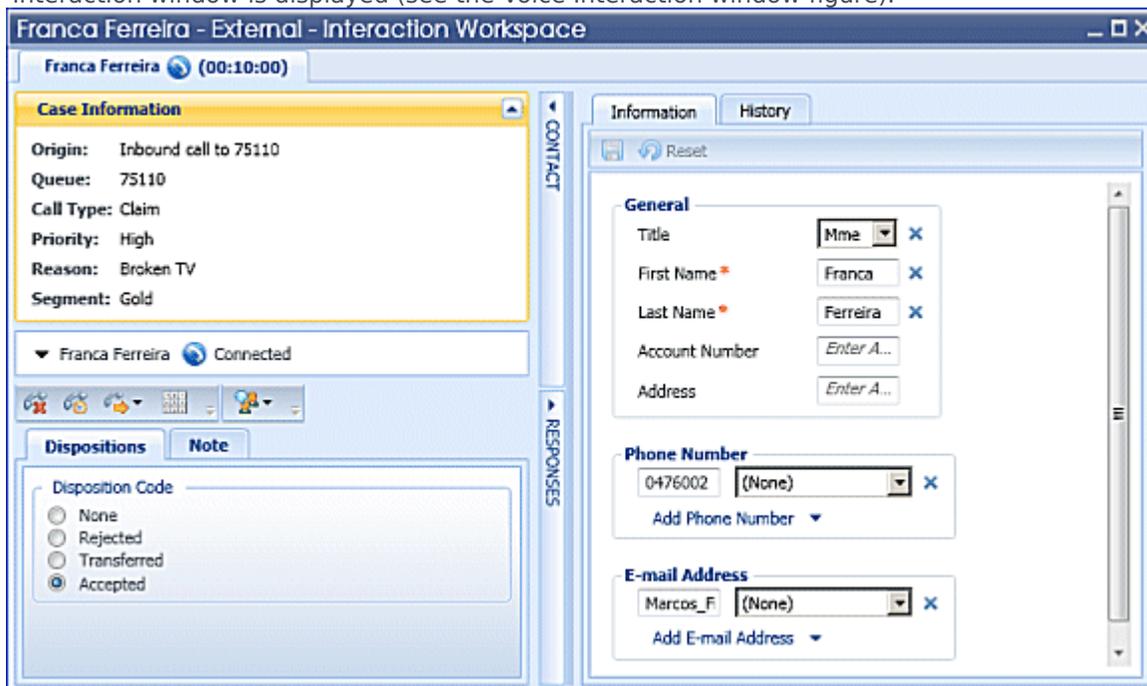
1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Voice Interaction Preview interactive notification figure).



Voice Interaction Preview interactive notification

The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call.

- You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to answer the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time-out and be redirected.
- If you accept the interaction, the call is answered in your hard phone or soft phone, and the Voice Interaction window is displayed (see the Voice Interaction window figure).

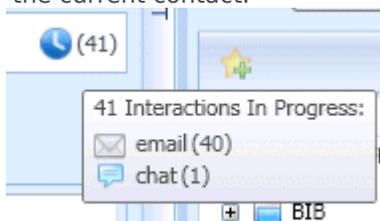


Voice Interaction window

- You can use the Voice Interaction window to do the following:
  - View contact records. See [Lesson: Finding and viewing an interaction in the contact database](#).
  - View contact history. See [Managing Contact History](#).
  - Launch the Team Communicator. See [Starting a Voice Conference](#), [Transferring a Voice Call](#), and

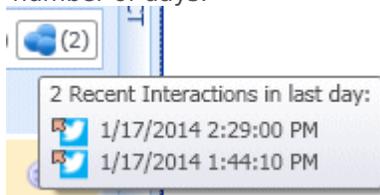
### Blending a voice consultation with an IM consultation.

- Set a disposition code. See [Assigning Disposition Codes](#).
  - Use the Notepad to add information about the interaction to the interaction history. See [Managing Contact History](#).
  - View and edit the case information for the interaction. See [Managing Contact History](#).
  - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
5. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

6. You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

7. If you connect with the contact successfully, you can do any of the following:
- Terminate the call (see Step 6).
  - Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
  - Use the keypad to send DTMF to the contact.
  - Start a voice or IM consultation.

- Conference the call (see [Starting a Voice Conference](#)).
- Transfer the call (see [Transferring a Voice Call](#)).
- View and read standard responses (see [Lesson: Using The Standard Response Library](#)).
- For SIP enabled agents, additional call actions are available:
- Record the call (see [Lesson: Record Interactions](#)).
- Mute and unmute the call.
- Adjust the microphone and speaker volumes.

**Note:** For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.

- When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the End Call button.
- If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the disposition code drop-down list or radio button list in the Disposition Code view (see [Disposition Codes Assigning Disposition Codes](#)).
- Click Mark Done.
- If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked Mark Done for each of the active interactions.
- Complete your after-call work.

## End

## Next Steps

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

## Lesson: Dealing with a stuck interaction

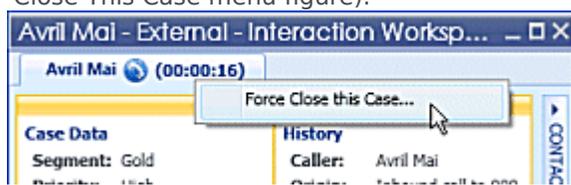
- To close the Interaction window if the interaction has become stuck in the system.

## Prerequisites

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- You are unable to close the Interaction window because the interaction has become stuck in the system

## Start

- If you are unable to close the Interaction window because the interaction has become stuck in the system, right-click the tab in the Interaction window that represents the interaction (see the Force Close This Case menu figure).



Force Close This Case menu

Select Force Close This Case from the pop-up menu.

2. In the Close Case dialog box, confirm that you want to force-close the interaction (see the Close Case dialog box figure):



Close Case dialog box

- Click Yes to force-close the case. The Interaction window closes. The status of the interaction remains as In Progress in the history until you mark it as Done.
  - Click No to cancel the action and return to the Interaction window.
3. Complete your after-call work.

## End

## Making a Voice Call

Interaction Workspace enables you to call either an internal target or a contact after you find the target/contact in your company directory by using the Team Communicator feature of the Interaction Workspace Main Window or the Interaction Workspace Gadget.

Note: Refer to [Handle Outbound-Campaign Voice Interactions](#) to use the Voice interaction view to handle Outbound Campaign calls.

This section contains the following lessons:

- [Lesson: Calling an internal target](#)
- [Lesson: Calling a contact](#)
- [Lesson: Directly dialing a contact](#)

### Lesson: Calling an internal target

- To make a voice interaction with an internal target.

The Voice Interaction window enables you to view all the information that is necessary to handle a voice interaction with an internal agent. The window contains tabs that enable you to handle more than one interaction simultaneously. The information that is displayed to you in this view depends on your assigned role and the case information that is available about the internal target.

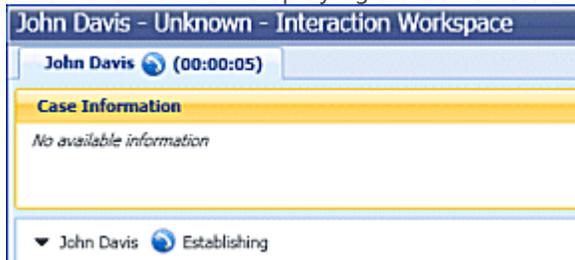
### Prerequisites

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

- You have found the internal target and have selected an Internal Voice Interaction (see [Lesson: Using the Team Communicator feature to find an internal target](#)).

## Start

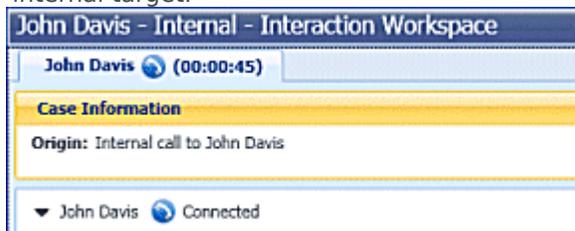
- When you choose to call an internal target (see [Lesson: Using the Team Communicator feature to find an internal target](#)), the Voice Interaction window opens. The status is Establishing (see the Voice Interaction window displaying status as Establishing figure)



Voice Interaction window displaying status as Establishing

Wait for the internal target to accept your invitation.

- If the internal target accepts your invitation, the status in the Interaction window changes to Connected (see the Voice Interaction window displaying status as Connected figure). You are now connected to the internal target.



Voice Interaction window displaying status as Connected

If the internal target rejects or fails to accept your invitation, then the call status changes to Ended. To try to call the internal target again or to call a different internal target, repeat Step 1.

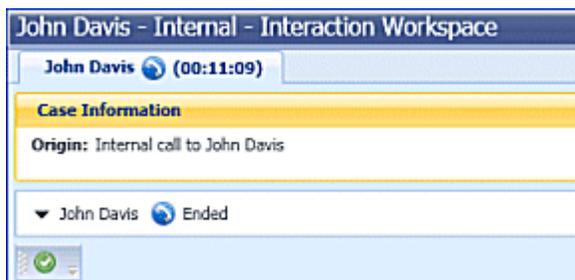
**Note:** You can click the Team Communicator My Recents button to try to call the internal target again. For more information, see the *Interaction Workspace 8.1 Help*.

- If you successfully connect with the internal target you can do one of the following:
  - Terminate the call (see Step 4).
  - Put the call on hold, and then resume the call. The call status changes to On Hold when you put the call on hold, and then back to Connected when you resume the call.
  - Use the keypad to send DTMF to the internal target.
  - Start a voice or IM consultation.
  - Conference the call (see [Starting a Voice Conference](#)).
  - Transfer the call (see [Transferring a Voice Call](#)).
  - For SIP-enabled agents, additional call actions are available:
    - Record the call (see [Lesson: Record Interactions](#)).
    - Mute and unmute the call
    - Adjust the microphone and speaker volumes

**Note:** For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.

- When you have finished speaking with the internal target you can terminate the call or wait for the internal target to terminate the call.

If you want to terminate the call, click the End Call button. The call status changes to Ended, and the call is released (see the Voice Interaction window displaying status as Ended figure).



Voice Interaction window displaying status as Ended

- After a call is released, one or more of the following actions might be available to you, depending on your assigned role or the configuration of your system:

- Click Mark Done to close the Interaction window.
- Select a disposition (call outcome).

**Note:** Your system might be configured so that you cannot click Mark Done until you have selected a disposition code. See [Assigning Disposition Codes](#) for more information about Disposition Codes. After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

## End

## Lesson: Calling a contact

- To make a voice interaction with a contact.

When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact. The information that is contained in this view depends on your assigned role and the case information that is available about the contact.

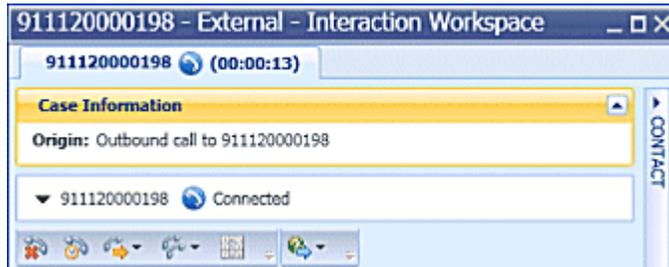
### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have found the contact and have selected an External Voice Interaction (see [Lesson: Using the Team Communicator feature to find a contact](#)).

### Start

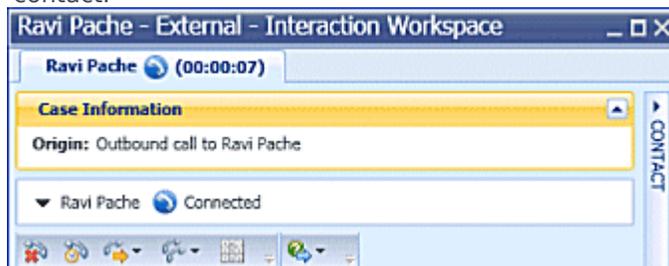
- When you choose to call a contact (see [Lesson: Using the Team Communicator feature to find a contact](#)), the Voice Interaction window is displayed. The Status is Establishing (see the Voice Interaction window displaying status as Establishing figure). Wait for the contact to accept your

invitation.



Voice Interaction window displaying status as Establishing

- If the contact accepts your invitation, the status in the Voice Interaction window changes to Connected (see the Voice Interaction window displaying status as Connected figure). You can now talk to the contact.



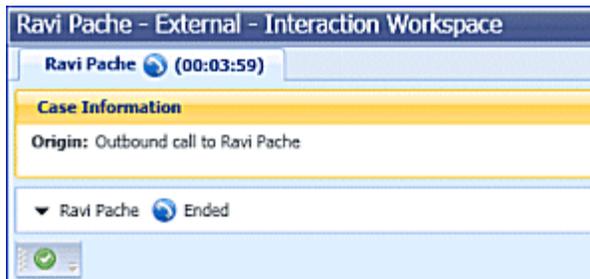
Voice Interaction window displaying status as Connected

If the contact rejects or fails to accept your invitation, the call status changes to Ended (see Step 1).

- If you connect with the contact successfully, you can do one of the following:
  - Terminate the call (see Step 4).
  - Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
  - Use the keypad to send DTMF to the contact.
  - Start a voice or IM consultation.
  - Conference the call (see [Starting a Voice Conference](#)).
  - Transfer the call (see [Transferring a Voice Call](#)).
  - For SIP-enabled agents, additional call actions are available:
    - Record the call (see [Lesson: Record Interactions](#)).
    - Mute and unmute the call.
    - Adjust the microphone and speaker volumes.

**Note:** For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.

- When you have finished talking to the contact you can terminate the call or wait for the contact to terminate the call. If you want to terminate the call, click the End Call button. The call status changes to Ended, and the call is released (see the Voice Interaction window displaying status as Ended figure).



Voice Interaction window displaying status as Ended

5. After a call is released, one or more of the following actions might be available to you, depending on your assigned role:
  - Click Mark Done to close the Interaction window.
  - Select a disposition (call outcome).

**Note:** Your system might be configured so that you cannot click Mark Done until you have selected a disposition code. See [Assigning Disposition Codes](#) for more information about Disposition Codes. After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

## End

## Lesson: Directly dialing a contact

- To make a voice interaction with a contact by directly dialing a phone number.

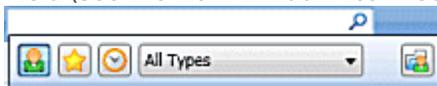
When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact. The information that is contained in this view depends on your assigned role and the case information that is available about the contact.

## Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have the number of the party that you want to call.
- You have found the contact and have selected an External Voice Interaction (see [Lesson: Using the Team Communicator feature to find a contact](#)).

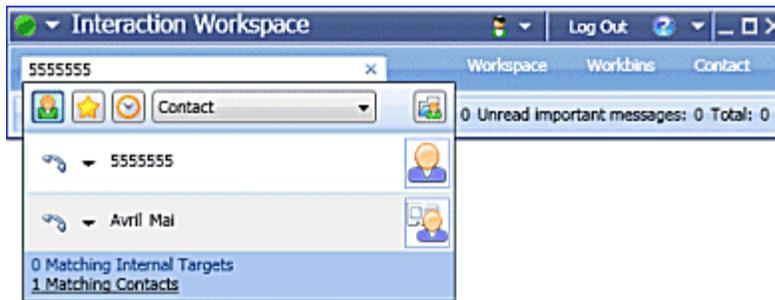
## Start

1. In the Main Window, Gadget, or an interaction window, click in the Team Communicator Quick Search field (see the Main Window Team Communicator control and Quick Search field figure).



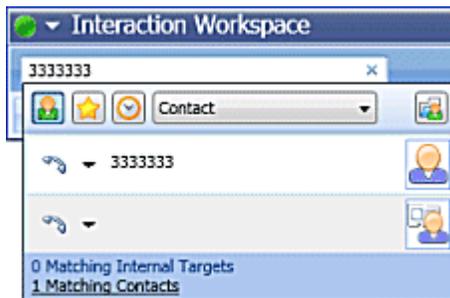
Main Window Team Communicator control and Quick Search field

2. Enter the telephone number that you want to directly dial (see the Team Communicator displaying a directly dialed number figure).



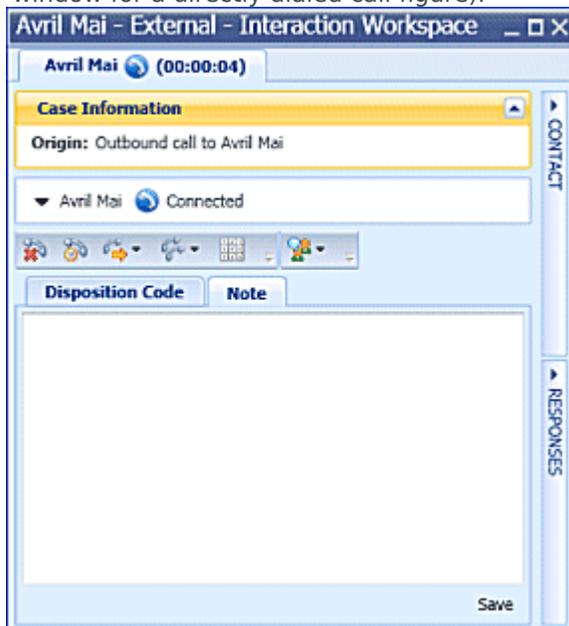
Team Communicator displaying a directly dialed number

As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (see the Team Communicator displaying an unknown directly dialed number figure).



Team Communicator displaying an unknown directly dialed number

- To dial the number, click the phone icon that is next to the number that you entered in the Action menu. If the party is reached, the Voice Interaction window is displayed (see the Voice Interaction window for a directly dialed call figure).



Voice Interaction window for a directly dialed call

- Handle and complete your call (see [Lesson: Calling a contact](#)).

**End**

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# Handle A Voice Consultation

In this lesson, you will learn how to use the Team Communicator feature to find an internal target (such as an agent, Routing Point, or queue) or a contact and start a voice consultation from an interaction window, such as voice, e-mail, and chat. You can also use the first procedure in this lesson to find a contact and start a voice consultation. The second section demonstrates how to handle a Voice Consultation request. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call an internal target or a contact, initiate a conference or consultation, or transfer a call. This lesson contains the following sections:

- [Starting a Voice Consultation](#)
- [Receiving a Voice Consultation](#)

## Starting a Voice Consultation

The Interaction Workspace Voice, E-Mail, and Chat Interaction windows enable you to start a voice, chat, or instant messaging consultation with an internal target or a contact about your current interaction (see [Lesson: Handle Voice Interactions](#)), e-mail interaction (see [Lesson: Handle An E-Mail Interaction](#)), or chat interaction (see [Lesson: Handle a Chat Interaction](#)). Interaction Workspace also enables you to instantly transfer or conference your call with an internal target or a contact. You can do this with or without first starting a consultation. For instant transfers, the call is transferred as soon as the other party accepts the interaction. For instant conferences, the conference starts as soon as the other party accepts the interaction.

### Lesson: Starting a voice consultation

#### **Purpose:**

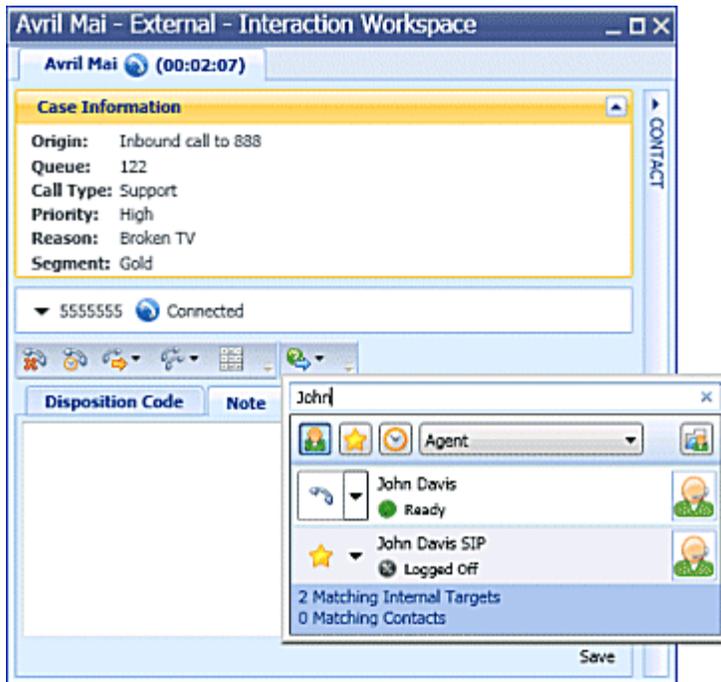
- To find an internal target (such as an agent, Routing Point, or queue), and then start a voice consultation.

#### **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](#)).

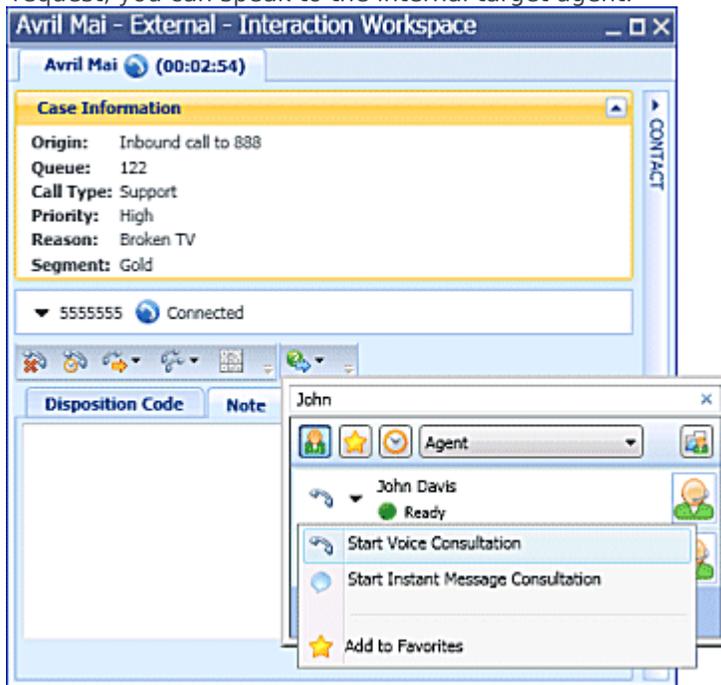
#### **Start**

1. In the active interaction window, click the Start Consultation button to open the Team Communicator (see the Finding an internal target for a voice consultation in the active Voice Interaction window figure for an example of a voice interaction).



Finding an internal target for a voice consultation in the active Voice Interaction window

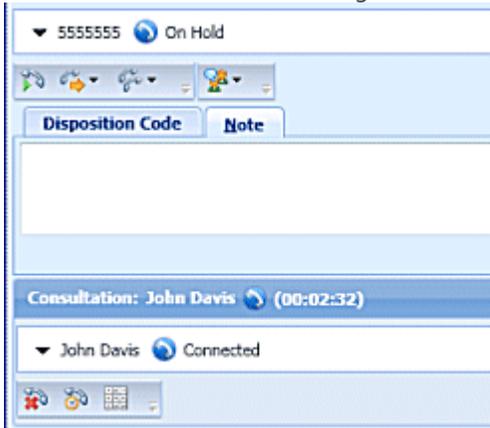
2. Use the Team Communicator to find the internal target with whom you want to start a consultation (see the [Lesson: Using the Team Communicator feature to find an internal target](#)).
3. Click the Action Menu drop-down list is displayed next to the name of the internal target with whom you want to consult, and then select Start Voice Consultation (see the Start Voice Consultation menu option figure). The contact is put on hold. When the internal target accepts the interaction request, you can speak to the internal target agent.



Start Voice Consultation menu option

If the consultation target does not accept your request, the consultation request is released, but your contact might still be on hold. You must click the Resume Call button to take your contact off hold.

- When you are connected to your consultation target, the internal target is added to the Interaction Workspace Interaction window (see the Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold figure).



Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold

- During your consultation, you can alternate between the contact and the consulting party by clicking the Resume Call button. Doing this puts the active party on hold and connects you to the other party. During your consultation, you can start a conference with your consultation target or another target (see [Starting a Voice Conference](#)).
- To end your consultation, click End Call. Your consultation target might also end the call.

## End

## Receiving a Voice Consultation

The Interaction Workspace Voice, E-Mail, and Chat Interaction windows enable you to receive a voice, chat, or instant messaging consultation with an internal target.

Interaction Workspace also enables agents to instantly transfer or conference calls to you. Agents can do this with or without first starting a consultation. For instant transfers, the call is transferred as soon as you accept the interaction. For instant conferences, the conference starts as soon as you accept the interaction.

### Lesson: Receiving a voice consultation request

#### Purpose:

- Receive an invitation to a consult about a voice interaction from another agent to provide assistance to that agent in completing an active interaction.

#### 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 voice consultation interaction.

**Start**

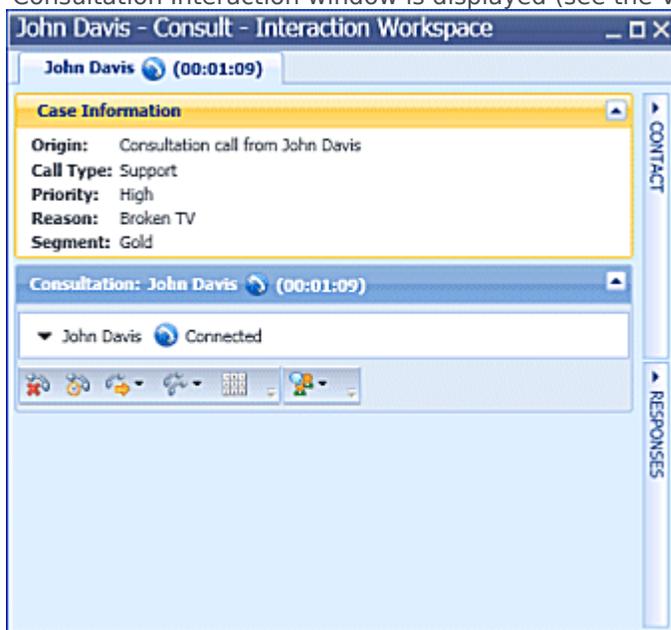
1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive notification window (see the Voice Interaction Consult Preview interactive notification figure).



Voice Interaction Consult Preview interactive notification

The Interaction Preview contains a summary of information about the call with the contact and the identity of the agent that is requesting consultation. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to answer the consultation interaction.
  - Do nothing. The interaction will time-out.
3. If you accept the interaction, the call is answered in your hard phone or soft phone, and the Voice Consultation Interaction window is displayed (see the Voice Consultation Interaction window figure).



Voice Consultation Interaction window

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You can use the Voice Consultation Interaction window to do the following:

- View contact records. See [Lesson: Finding and viewing an interaction in the contact database](#).
  - View contact history. See [Managing Contact History](#).
  - Launch the Team Communicator. See [Starting a Voice Conference](#), [Transferring a Voice Call](#), and [Blending a voice consultation with an IM consultation](#).
  - View the case data for the interaction. See [Managing Contact History](#).
  - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
4. If you connect successfully with the agent that is requesting a consultation, you can do any of the following:
- Terminate the call (see Step 5).
  - Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
  - Use the keypad to send DTMF to the contact.
  - Start a voice or IM consultation.
  - Conference the call (see [Starting a Voice Conference](#)).
  - Transfer the call (see [Transferring a Voice Call](#)).
  - View and read standard responses (see [Lesson: Using The Standard Response Library](#)).
  - For SIP enabled agents, additional call actions are available:
    - Record the call (see [Lesson: Record Interactions](#)).
    - Mute and unmute the call.
    - Adjust the microphone and speaker volumes.
5. When the interaction is complete, either you or the agent can end the call. If you want to terminate the call, click the End Call button.
6. The Voice Interaction window closes automatically. You do not have to click Mark Done or set a disposition for a consultation call that you have received.

## End

## Next Steps

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

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# Transfer A Voice Call

In this lesson, you will learn how to use the Team Communicator feature to transfer a voice call to an internal target or to a contact. 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:

- [Transferring a Voice Call](#)
- [Transferring an Interaction to an Active Consultation](#)

## Transferring a Voice Call

The Interaction Workspace Voice Interaction window enables you to transfer your current voice call to another party. In a consultation transfer, the current call is put on hold while you talk to the transfer target. In an instant transfer, the call is transferred as soon as the other party accepts the interaction. This section contains the following procedures:

- [Lesson: Starting a voice transfer](#)
- [Lesson: Receiving a transferred call](#)
- [Lesson: Transfer to an active consultation](#)

### Lesson: Starting a voice transfer

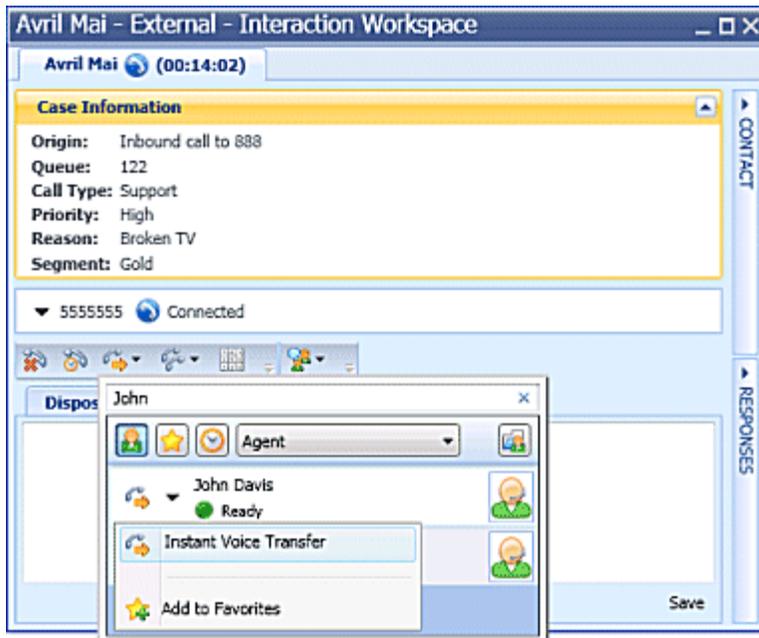
- To transfer your current interaction to an internal target or a contact.

#### 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](#)).

#### Start

1. In the active voice interaction, click the **Instant Voice Transfer** button to open the Team Communicator (see the Finding an internal target for a voice transfer in the active Voice Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the [Lesson: Using the Team Communicator feature to find an internal target](#)).



Finding an internal target for a voice transfer in the active Voice Interaction window

2. Click the Action Menu drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and select Instant Voice Transfer. The contact is put on hold. When the internal target accepts the interaction request, the interaction is instantly transferred to the transfer target. The interaction window on your desktop closes. If the transfer target does not accept your request, the transfer request is released, but your contact is still on hold. You must click the Resume Call button to take your contact off hold.
3. Complete your after-call work.
4. Set your status to Ready.

**End**

**Lesson: Receiving a transferred call**

- To receive an invitation to accept a transferred call from another agent, to provide assistance to that agent in completing an active interaction.

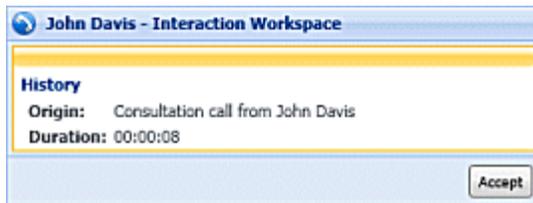
You might be invited to accept a one-step or two-step transfer.

**Prerequisites**

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

**Start**

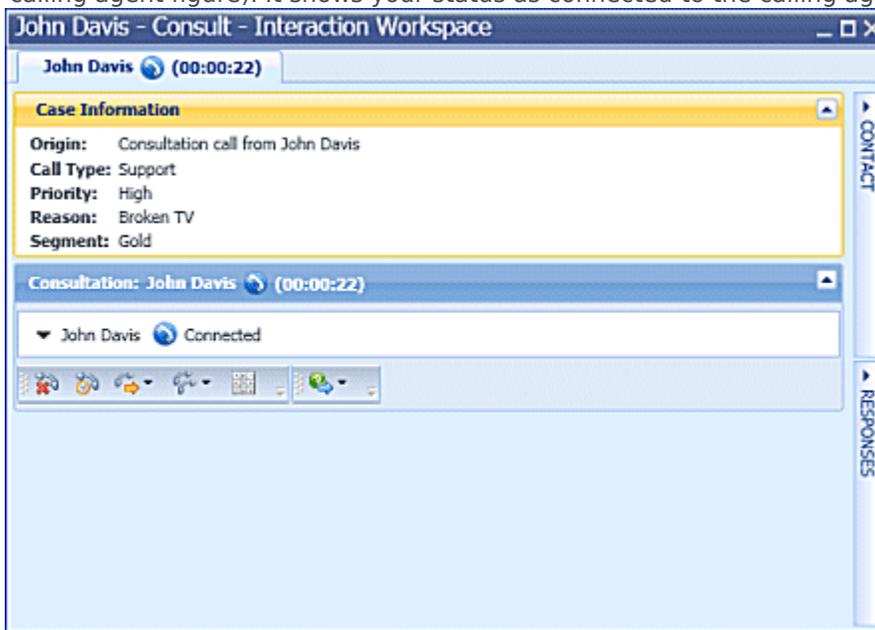
1. If another agent wants to transfer a voice interaction to you, they can choose between an instant transfer and a transfer from a consultation. You are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a transfer request figure).



Interaction Preview interactive notification, informing you of a transfer request

Click Accept to accept the transfer or to consult first with the calling agent:

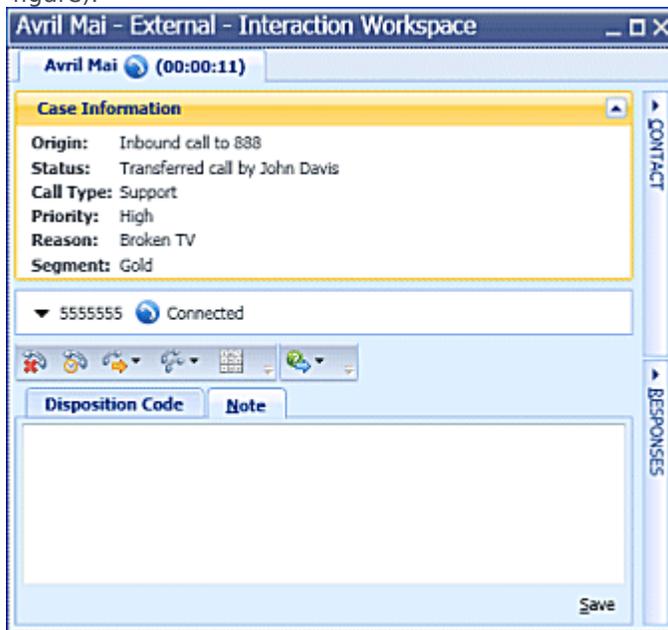
- If the calling agent initiated an instant transfer, the call is immediately transferred to you. Go to Step 3.
- If the calling agent initiated a consultation transfer, the Interaction Workspace Voice Interaction window is displayed (see the Voice Interaction window, displaying your status as connected to the calling agent figure). It shows your status as connected to the calling agent.



Voice Interaction window, displaying your status as connected to the calling agent

2. If the transferring agent used a consultation transfer, the Interaction Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, before you accept the transferred call:
  - Speak privately with the calling agent about the call, before the call is transferred to you.
  - End the call--This function ends your participation in the consultation call; the call is not transferred to you.
  - Put the call on hold and retrieve the call.
  - Send DTMF by using the keypad.
  - Conference the call.
  - Transfer the call.
  - For SIP enabled agents, additional call actions are available:

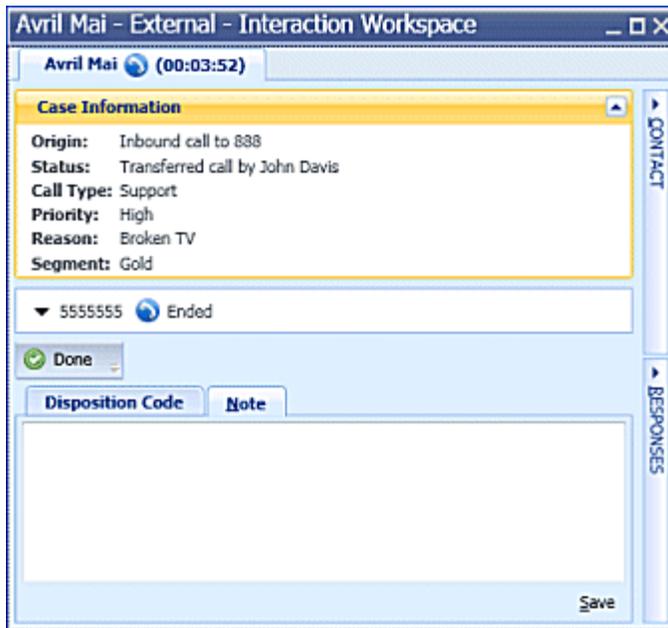
- Record the call (see [Lesson: Record Interactions](#)).
  - Mute and unmute the call.
  - Adjust the microphone and speaker volumes.  
For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
3. If the calling agent completes the transfer to you, the Interaction Workspace Voice Interaction window is updated to display the status of the party to whom you are talking. The status changes to Connected (see the Voice Interaction window, displaying your status as connected to the transferred contact figure).



Voice Interaction window, displaying your status as connected to the transferred contact

The Interaction Workspace Voice Interaction window enables you to use all the functionality of an inbound call (see Step 3 of [Lesson: Handling an inbound voice interaction](#)).

4. Click End Call to terminate your connection to the call. The Interaction Workspace Voice Interaction window is updated to display the status of the call as Ended (see the Voice Interaction window, displaying the status at the end of a conference call figure).



Voice Interaction window, displaying the status at the end of a conference call

If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the Disposition Code drop-down list or radio-button list in the Disposition Code view (see [Assigning Disposition Codes](#)).

5. Click Mark Done.
6. Close the Voice Interaction window.
7. Complete your after-call work.
8. Set your status to Ready.

## End

## Transferring an Interaction to an Active Consultation

You can transfer your current interaction to your consultation target. You can also transfer a voice interaction to other types of consultation, such as IM, by following the same steps that are presented in the following procedure, beginning at Step 2.

### Lesson: Transfer to an active consultation

- To transfer the current interaction to a party with whom you are already consulting.

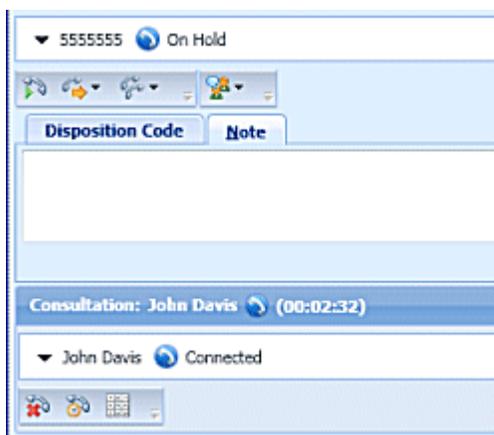
#### Prerequisites

- 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](#)).

- You have an active consultation with another party (see [Lesson: Starting a voice consultation](#)).

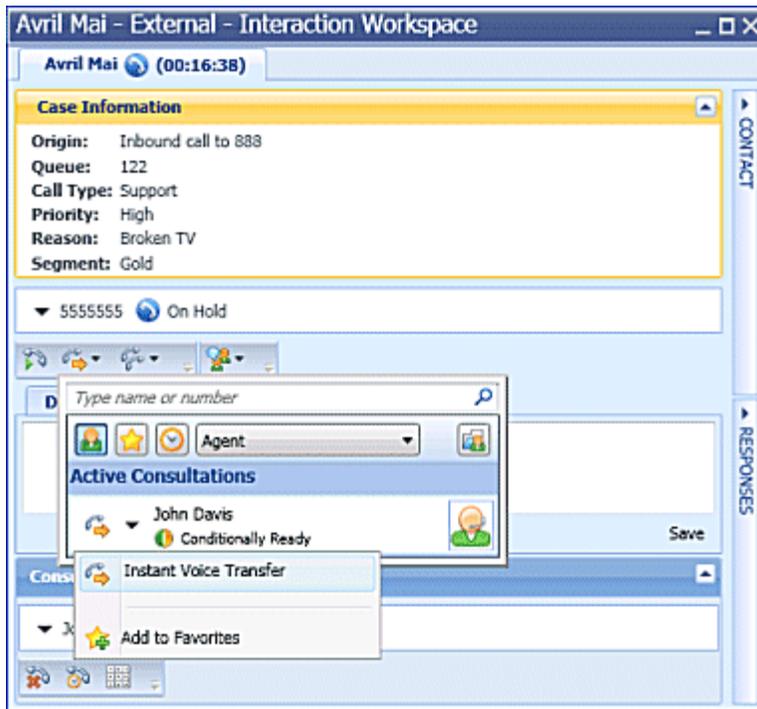
## Start

1. During your active consultation (see the Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold figure), you can perform any of the following functions by using the Voice Consult toolbar.
  - Alternate (toggle) between the contact and the internal target by clicking the Resume Call button alternately on the toolbar for the respective call. The other party is put on hold until you toggle back or complete the conference.
  - End the call to the internal target and resume the call with the contact.
  - Send DTMF to the internal target.
  - For SIP-enabled agents, additional call actions are available:
    - Record the call (see [Lesson: Record Interactions](#)).
    - Mute and unmute the call.
    - Adjust the microphone and speaker volumes.  
For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.



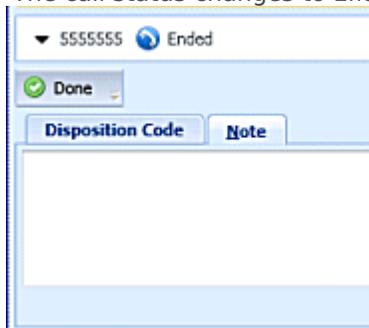
Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold

2. To transfer your active interaction to your consultation target, click the Instant Transfer button. The Team Communicator is displayed showing a list of your active consultations (see the Voice Interaction window, displaying an instant voice transfer from a consultation call figure).



Voice Interaction window, displaying an instant voice transfer from a consultation call

3. Complete the transfer by clicking the Instant Voice Transfer button that is beside the name of the target to whom you want to transfer the interaction. The contact is transferred to the consulting target. The call status changes to Ended (see the Voice Interaction window, displaying status as Ended).



Voice Interaction window, displaying status as Ended

4. After a call is released, one or more of the following actions might be available to you, depending on your assigned role:
  - Click Mark Done to close the Voice Interaction window.
  - Select a disposition (see [Assigning Disposition Codes](#)).  
**Note:** Your system might be configured so that you cannot click Mark Done until you have selected a disposition code.
5. Close the Voice Interaction window.
6. Complete your after-call work.
7. Set your status to Ready.

**End**

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# Conference A Voice Call

In this lesson, you will learn how to use the Team Communicator feature to find an internal target (such as an agent, Routing Point, or queue) or a contact and start a voice conference from an interaction window, such as voice, e-mail, and chat. You can also use the first procedure in this lesson to find a contact and start a voice conference. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call an internal target or a contact, initiate a conference or consultation, or transfer a call. This lesson contains the following sections:

- [Starting a Voice Conference](#)
- [Start a Conference with an Active Consultation](#)

## Starting a Voice Conference

The Interaction Workspace Voice, E-Mail, and Chat Interaction windows enable you to conference your current voice, chat, or instant messaging interaction with an internal target or a contact about your current interaction (see [Lesson: Handle Voice Interactions](#)), e-mail interaction (see [Lesson: Handle An E-Mail Interaction](#)), or chat interaction (see [Lesson: Handle a Chat Interaction](#)). Interaction Workspace also enables you to instantly transfer or conference your call with an internal target or a contact. You can do this with or without first starting a consultation. For instant conferences, the conference starts as soon as the other party accepts the interaction. This section contains the following procedures:

- [Lesson: Starting a voice conference](#)
- [Lesson: Receiving a conference call](#)
- [Lesson: Starting a Conference with an Consultation](#)

### Lesson: Starting a voice conference

#### **Purpose:**

- To find an internal target (such as an agent, Routing Point, or queue), and then start and complete a conference call with the internal target and the current contact.

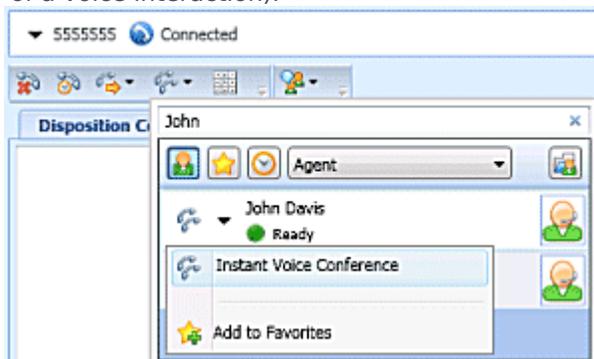
You can also call a contact to initiate a conference.

#### **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](#)).

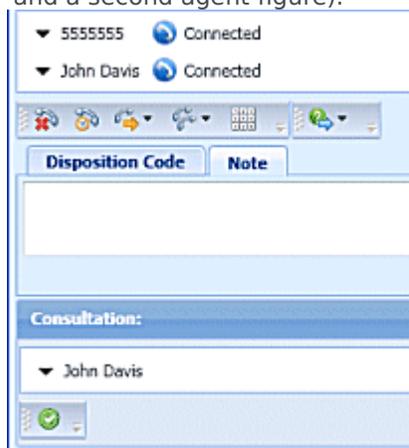
#### **Start**

1. In the active interaction window, click the Instant Voice Conference button to open the Team Communicator (see the Finding an internal target for a voice transfer in the active Voice Interaction window figure in [Transfer A Voice Call](#) lesson) to find the target to whom you want to conference with the current interaction (see the Initiating a conference from an active interaction figure for an example of a voice interaction).



Initiating a conference from an active interaction

2. Complete the conference by clicking the Instant Voice Conference button beside the name of the target, or open the Action menu and select Instant Voice Conference. The conference begins as soon as the internal target accepts the interaction request. Depending on the configuration of your system, this option might not be available. You, the contact, and the internal target agent are placed into a three-way conference (see the Voice Interaction window, displaying a conference with a contact and a second agent figure).



Voice Interaction window, displaying a conference with a contact and a second agent

During the conference call you can perform the following actions: Use the Conference Party Action Menu (next to the Party Status) to do one of the following:

- **Delete from Conference**--Terminate the connection to the party. This action ends the call to the party, but continues the call with the other party.
- **Prevent Listening**--Disable listening for the selected party. The party can still talk, but the party cannot hear what you and the other party say
- **Allow Listening**--Enable listening for that party. The party can hear what the other two parties are saying
- End the Call--Both lines are disconnected (go to Step 4).
- Put both parties on hold.

- Instantly transfer the call to another target.
- Instantly conference the call with another target.
- Send DTMF to the internal target.
- For SIP-enabled agents, additional call actions are available:
- Record the call (see [Lesson: Record Interactions](#)).
- Mute and unmute the call.
- Adjust the microphone and speaker volumes.  
For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.



Voice Interaction window displaying an ended conference with a contact and a second agent

3. The internal target agent can choose to release the call. If this happens, the internal target agent is disconnected, but you remain connected to the contact. You can complete your call with the contact, transfer the contact, or start a new conference call.
4. If you have completed your call and the internal target agent is still connected, when you click the End Call button, the call is transferred automatically to the internal target agent. Go to Step of the [Lesson: Calling a contact](#). If you have completed your call and the internal target agent has already disconnected from the conference, go to Step 4 of the [Lesson: Calling a contact](#).
5. During your consultation, you can transfer the call to your consultation target, or to another target. You can also start a conference with your consultation target or another target.

## End

## Lesson: Receiving a conference call

### Purpose:

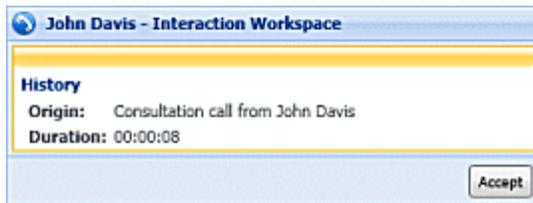
- Receive an invitation to a conference call from another agent to provide assistance to that agent in completing an active interaction.

### 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](#)).

### Start

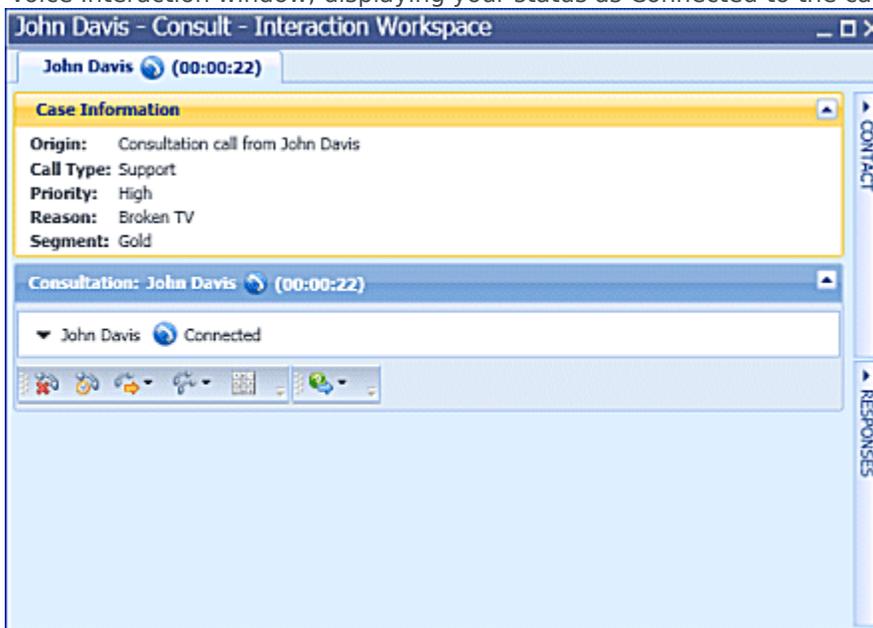
1. If another agent wants to conference with you and a contact about their current interaction the agent can initiate a voice conference. If the other agent is handling a voice interaction and initiates a voice conference request, you are notified of the request by the Interaction Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a conference request figure).



Interaction Preview interactive notification, informing you of a conference request

Click Accept to connect to the conference:

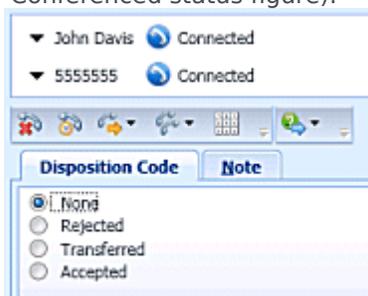
- If the calling agent initiated an instant conference, you are immediately in the conference with the contact. Go to [Remaining Connected After the Conferencing Agent Disconnects](#).
- If the calling agent initiated a voice consultation conference, the Interaction Workspace Voice Interaction window is displayed and shows your status as connected to the calling agent (see the Voice Interaction window, displaying your status as Connected to the calling agent figure).



Voice Interaction window, displaying your status as Connected to the calling agent

2. The Interaction Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, prior to joining the conference call:
  - Speak privately with the calling agent about the conference prior to joining the conference.
  - End the call--This function ends your participation in the consultation call; you are not joined to the conference.
  - Put the call on hold and resume the call.
  - Send DTMF by using the keypad.
  - Start a conference call.
  - Transfer the call to a different internal target.
  - For SIP-enabled agents, additional call actions are available:
  - Record the call (see [Lesson: Record Interactions](#)).

- Mute and unmute the call.
  - Adjust the microphone and speaker volumes.  
For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
3. If the calling agent joins you to the conference, all three parties can hear and speak to one another. The Interaction Workspace Voice Interaction window is updated to display the status of the parties to whom you are talking. The status changes to Connected (see the Voice Interaction window, displaying Conferenced status figure).



Voice Interaction window, displaying Conferenced status

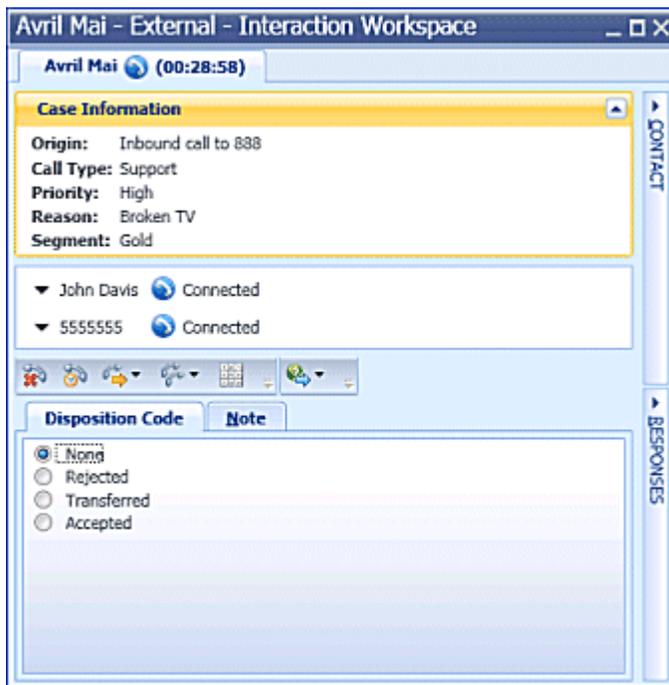
When you are in a conference call, you can perform the following functions:

- Use the Conference Party Action Menu (adjacent to the Party Status) to do the following:
  - **Delete From Conference**--Terminate the connection to the party.
  - **Prevent Listening**--Disable listening for the selected party. The party can still talk, but the party cannot hear what you and the other party say.
  - **Allow Listening**--Enable listening for that party. The party can now hear what the other two parties are saying.
- For SIP-enabled agents, additional call actions are available:
  - Record the call (see [Lesson: Record Interactions](#)).
  - Mute and unmute the call.
  - Adjust the microphone and speaker volumes.  
For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
- End the call Terminates your connection to the conference. The calling agent remains connected to the contact.
- Set a disposition code for the call.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

### Remaining Connected After the Conferencing Agent Disconnects

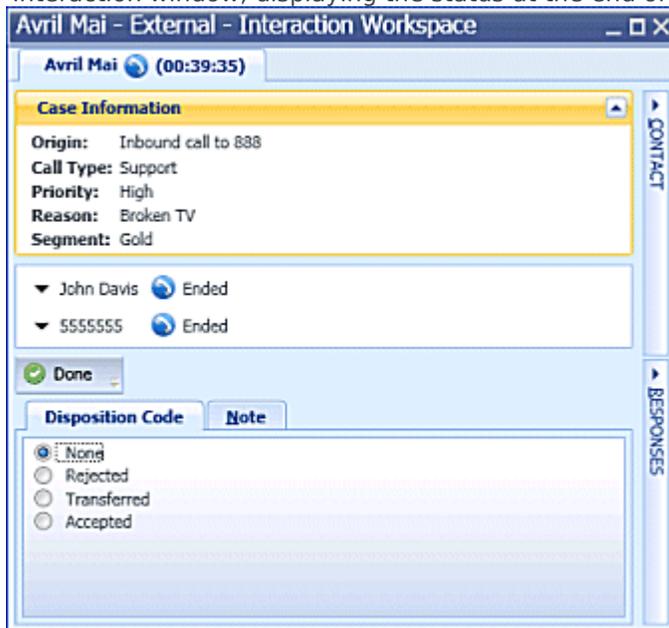
If the calling agent releases the call, the calling agent is disconnected, but you remain connected to the contact (see the Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact figure). You can complete your call with the

contact, transfer the contact, or start a new conference call.



Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

4. Click End Call to terminate your connection to the call or conference. The Interaction Workspace Voice Interaction window is updated to display the status of the conference as Ended (see the Voice Interaction window, displaying the status at the end of a conference call figure).



Voice Interaction window, displaying the status at the end of a conference call

If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the **Disposition Code** drop-down list or radio-button list in the **Disposition Code** view (see [Assigning Disposition Codes](#)).

5. Click **Mark Done**.
6. Close the **Voice Interaction** window.
7. Complete your after-call work.
8. Set your status to **Ready**.

**End**

## Start a Conference with an Active Consultation

You can add your consultation target to your current interaction by starting a conference with the target. The following procedure demonstrates how to start a voice conference with a party that you are in a voice consultation; however, it is also possible to start a voice conference from other types of consultation, such as IM, by following the same steps that are presented in the procedure.

### Lesson: Starting a Conference with an Consultation

**Purpose:**

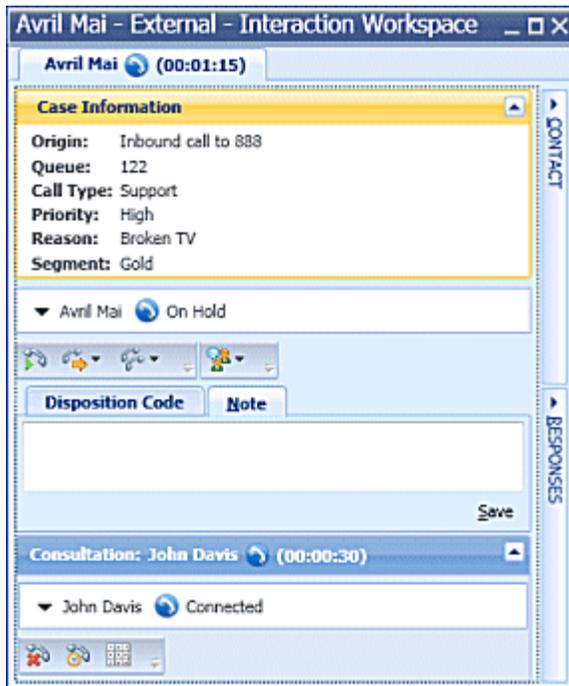
- Transition your consultation call to a conference call by adding the consultation target to your call.

**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](#)).
- You have an active consultation with an internal target (see [Lesson: Starting a voice consultation](#) or [Lesson: Receiving a voice consultation request](#)).

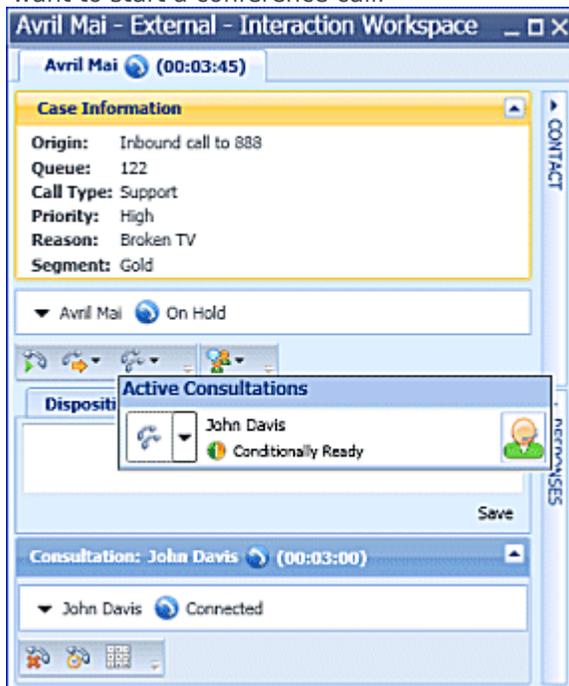
**Start**

1. To transition an active consultation to a conference, click the **Instant Call Conference** button on the main interaction toolbar (see the Interaction window displaying an active interaction and an active voice consultation figure).



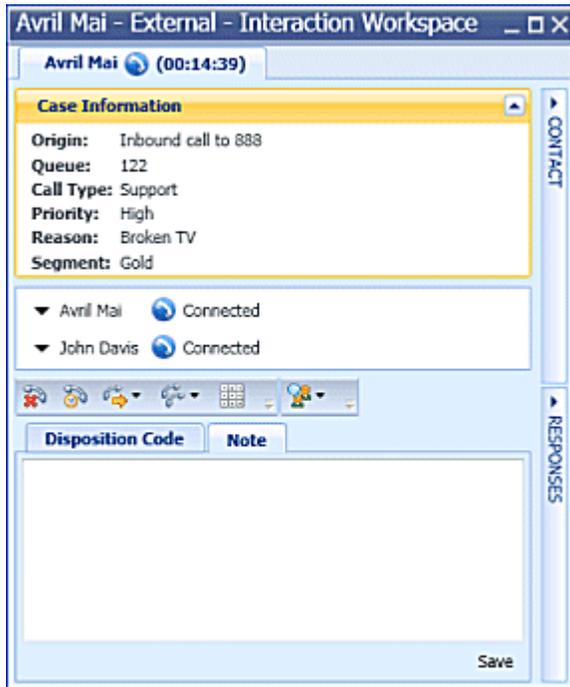
Interaction window displaying an active interaction and an active voice consultation

- The Team Communicator opens and displays your active consultations (see the Team Communicator in the active interaction window, displaying the Active Consultations figure). Click the Instant Call Conference button in the Action menu that is next to the name of the consult party with whom you want to start a conference call.



Team Communicator in the active interaction window, displaying the Active Consultations

The consultation interaction is closed and the consultation target is added to the conference call (see the Interaction window displaying a conference call with two parties figure).



Interaction window displaying a conference call with two parties.

3. Complete the conference call by following [Lesson: Starting a voice conference](#).

**End**

---

# Record Interactions

In this lesson, you will learn how to use the call recording functionality of Interaction Workspace. This lesson contains the following section:

- [Recording a Voice Interaction](#)

## Recording a Voice Interaction

The Voice Recording functionality (for VoIP-/SIP-enabled agents only) enables you to record the current voice interaction with a contact or an internal target. You can start a recording, pause a recording, resume a recording, and end a recording. You might also be configured for automatic or system-guided recording. If this is the case, you receive a notification that recording is in progress.

### Lesson: Recording a voice interaction

#### Purpose:

- To record a voice interaction to be reviewed later by your administrator or supervisor.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are handling a voice interaction (see [Lesson: Handle Voice Interactions](#)).

#### Start

1. To start the current voice interaction with a contact or an internal target, click **Record the Call** on the toolbar in the Voice Interaction window or in the Interaction Bar on the Main Window.



When you are recording a call, the color of the call icon in the connected-parties area changes to red:



2. To control the recording of the call, use the call-recording control buttons and drop-down menu:
  - To pause the recording of the call, click **Pause Recording the call**  
A small icon representing the 'Pause Recording the call' function, showing a red microphone with a red vertical bar.
  - To resume the recording of the call after you have paused, click **Resume Recording the Call**



3. To stop the recording the call, open the call-recording control menu and select Stop.



Call recording stops and the color of the call icon in the Call Status area changes back to blue. The file that contains the contents of the recording of the session is stored on your system network.

**End**

# Handle Web Callback Interactions

In this lesson, you will learn how to accept a web callback voice interaction by using Interaction Workspace. This lesson contains the following sections:

- [Receiving a Web Callback Interaction](#)

## Receiving a Web Callback Interaction

A web callback interaction is initiated when a contact visits your company's web site and submits a request for an agent to telephone the contact at a time that the contact specifies. If you are the selected internal target for a web callback interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it (answer it), the interaction window is displayed. The interaction window contains information about the call and the controls that you need to complete the interaction. The Web Callback Interaction window is similar to the Voice Interaction window (refer to [Receiving a Voice Interaction](#)). It enables you to view all the information that is necessary to handle a web callback interaction with a contact who has requested a callback from your company web page.

### Lesson: Handling a web callback interaction

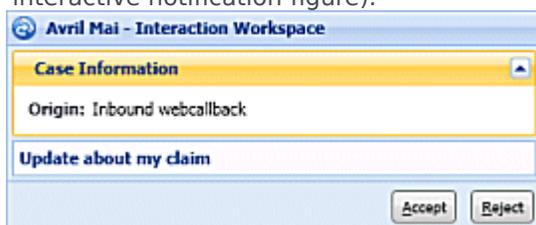
- To handle a web callback voice interaction properly.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the web callback-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target for the inbound interaction.

#### Start

1. Your hard phone or soft phone rings, and a preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Web callback Interaction Preview interactive notification figure).

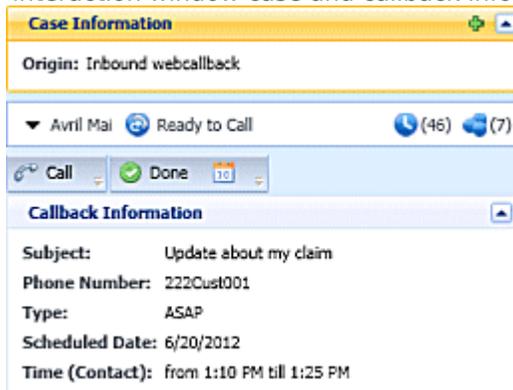


Web callback Interaction Preview interactive notification

The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data

regarding the call. The case data might include information that the contact entered in a form on your company's web page.

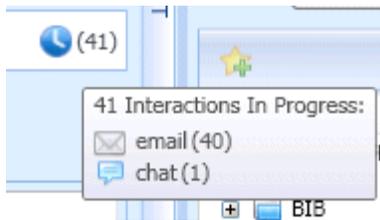
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to answer the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will timeout and be redirected.
3. If you accept the interaction, the Web Callback interaction window is displayed on your desktop. The window contains Case Information, call controls, and Callback Information (see the Web Callback interaction window case and callback information figure).



Web Callback interaction window case and callback information.

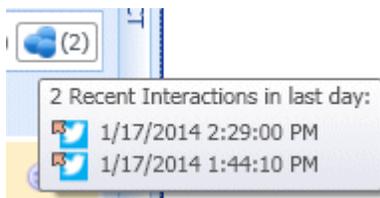
Callback Information provides you with the subject of the call, the number provided by the contact, and the scheduled date and time for the call. The status of the call is Ready to Call. In this state, you can review the Case Information and the Callback Information before you connect the call to the contact. You can use the Web Callback Interaction window to do the following:

- View contact records. See [Lesson: Finding and viewing an interaction in the contact database](#).
- View contact history. See [Managing Contact History](#).
- Launch the Team Communicator. See [Starting a Voice Conference](#), [Transferring a Voice Call](#), and [Blending a voice consultation with an IM consultation](#).
- Schedule a different callback time. See the [Lesson: Scheduling a callback](#).
- Set a disposition code. See [Disposition Codes Assigning Disposition Codes](#).
- Use the Notepad to add information about the interaction to the interaction history. See [Managing Contact History](#).
- View and edit the case information for the interaction. See [Managing Contact History](#).
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact figure). Place your mouse pointer over the icon to display the number and type of interactions in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

4. Click **Call** to connect with the contact. The call status changes to **Establishing** until the contact answers the call. If the call times out because the line is busy or the contact does not answer, the status returns to **Ready to Call**.
5. If you connect with the contact successfully, the call status changes to **Connected**. You can do any of the following:
  - Terminate the call (see Step 6).
  - Put the call on hold and retrieve the call. The call status changes to **On Hold**, and then back to **Connected** when you retrieve the call.
  - Use the keypad to send DTMF to the contact.
  - Start a voice or IM consultation.
  - Conference the call (see [Starting a Voice Conference](#)).
  - Transfer the call (see [Transferring a Voice Call](#)).
  - View and read standard responses (see [Lesson: Using The Standard Response Library](#)).
  - For SIP-enabled agents, additional call actions are available:
    - Record the call (see [Lesson: Record Interactions](#)).
    - Mute and unmute the call.
    - Adjust the microphone and speaker volumes.
 

**Note:** For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
6. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the **End Call** button. The call status returns to **Ready to Call**.
7. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the **disposition code** drop-down list or radio button list in the

Disposition Code view (see [Assigning Disposition Codes](#)).

8. Click Done.
9. If the Web Callback Interaction window does not close automatically, close the Web Callback Interaction window after you have clicked Done for each of the active interactions.
10. Complete your after-call work.

**End****Next Steps**

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

---

# Handle Outbound-Campaign Voice Interactions

In this lesson, you will learn how to handle an outbound-campaign voice interaction by using Interaction Workspace. This lesson contains the following sections:

- [Outbound Campaigns](#)
- [Handling an Outbound-Campaign Voice Interaction](#)

## Outbound Campaigns

As an agent, you might be working on calling campaigns (for example: collections, telemarketing, or fund raising) in which the contact interactions are outbound voice calls that are based on calling a predetermined list of contacts.

Note: To participate in Outbound Campaigns, you must *not* be logged in to the Instant Messaging Channel.

There are two delivery modes of outbound calls, manual and automatic. Your supervisor determines in which mode you will work. In manual mode, you make outbound calls by requesting an interaction from a preset calling list. Manual delivery has one dialing mode:

- **Preview**--The system displays contact-related data to you, and then you make the call to the contact.

In automatic mode, outbound calls are directed to your desktop. Automatic delivery has three dialing modes:

- **Push Preview**--The system displays contact-related data to you, and then you make the call to the contact.
- **Progressive**--The system dials customer numbers automatically and transfers a call to you only if the connection was successfully established.
- **Predictive**--The system estimates the number of free agents on the basis of current statistics, and might start to dial before any agents are free.

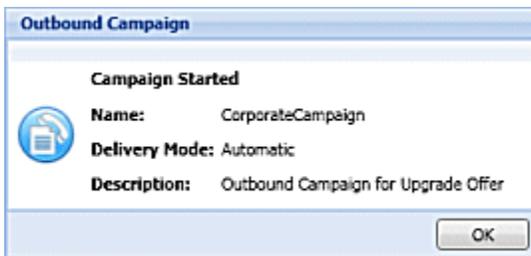
## Starting and Stopping an Outbound Campaign

If your supervisor or someone else at your company loads into Genesys Outbound Contact Manager an Outbound Campaign to which you are assigned, you will receive a warning message that informs you that a specific campaign has begun and that you are assigned to that campaign (see the Outbound Campaign Loaded message box figure).



Outbound Campaign Loaded message box

The message box contains information about the Outbound Campaign. Your administrator determines the content of the message box and the information that is provided to you. Click OK to close the message box. When the Outbound Campaign begins and outbound interactions are going to be directed to your desktop (or made available to you in the case of Preview campaigns), the Campaign Started message is displayed on your desktop (see the Outbound Campaign Started message box figure).



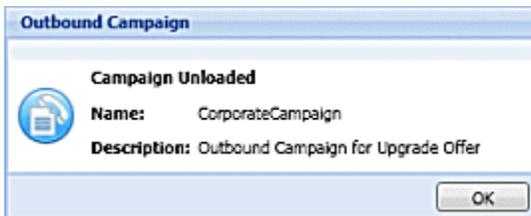
Outbound Campaign Started message box

Click OK to close the message box. When the Outbound Campaign ends and no more outbound interactions are going to be directed to your desktop, the Campaign Stopped message is displayed on your desktop (see the Outbound Campaign Stopped message box figure).



Outbound Campaign Stopped message box

Click OK to close the message box. When your administrator unloads the Outbound Campaign from Genesys Outbound Contact Manager, the Campaign Unloaded message box is displayed (see the Outbound Campaign Unloaded message box figure). You will no longer receive interactions from the unloaded campaign unless it is loaded and started again.



Outbound Campaign Unloaded message box

Click OK to close the message box.

## Handling an Outbound-Campaign Voice Interaction

This section shows you how to handle interactions for the four types of Outbound Campaign that are supported by Interaction Workspace. The agent workflow for Predictive and Progressive campaigns are identical; only the timing of the arrival of the interaction on your desktop and the connection to the contact are different. In Preview interactions (also called pull-preview), you must request the next contact record. In push-preview interactions you are given the opportunity to view the Outbound Campaign interaction and connect manually to the contact or send the record back to the calling list. This section contains the following procedures:

- [Lesson: Handling a predictive or progressive Outbound-Campaign voice interaction](#)
- [Lesson: Handling an ASM predictive or progressive Outbound-Campaign voice interaction](#)
- [Lesson: Handling a preview Outbound-Campaign voice interaction](#)
- [Lesson: Handling a push-preview Outbound-Campaign voice interaction](#)
- [Lesson: Scheduling a callback](#)

### Lesson: Handling a predictive or progressive Outbound-Campaign voice interaction

#### **Purpose:**

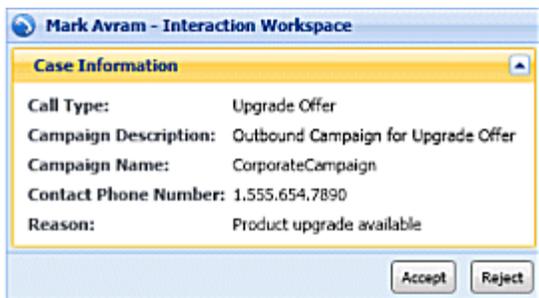
- To handle a predictive or progressive Outbound Campaign voice interaction properly.

#### **Prerequisites**

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- You are *not* logged in to the Instant Messaging channel.
- Your status is Ready for the voice-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are part of a predictive or progressive Outbound Campaign.
- You have been notified that the campaign is loaded and running (see [Starting and Stopping an Outbound Campaign](#)).

#### **Start**

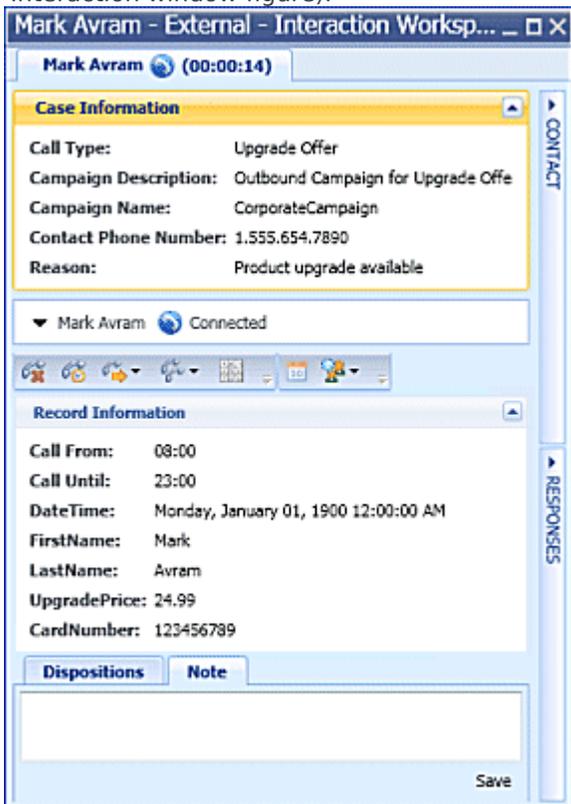
1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Outbound Predictive/Progressive Voice Interaction Preview interactive notification figure).



Outbound Predictive/Progressive Voice Interaction Preview interactive notification

The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to call the contact.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time out and be redirected.
  
3. If you accept the interaction, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Predictive/Progressive Outbound Campaign Voice Interaction window figure).



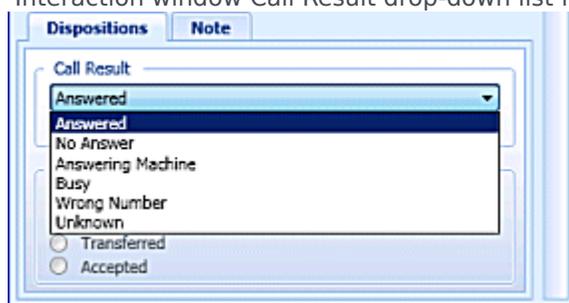
Predictive/Progressive Outbound Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

- View contact records (see [Lesson: Finding and viewing an interaction in the contact database](#)).
- View contact history (see [Managing Contact History](#)).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 5).
- Use the Notepad to add information about the interaction to the interaction history (see [Managing Contact History](#)).
- View and edit the Case Information--Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information--Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see [Lesson: Using The Standard Response Library](#)).
- Terminate the call (see Step 4).
- Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see [a Voice Consultation Starting a Voice Consultation](#)).
- Transfer the call (see [Transferring a Voice Call](#)).  
**Note:** When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the Outbound Campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.
- Schedule a callback (see [Lesson: Scheduling a callback](#)).  
**Note:** For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
- When the interaction is complete, either you or the contact can end the call.

If you want to terminate the call, click the End Call button.

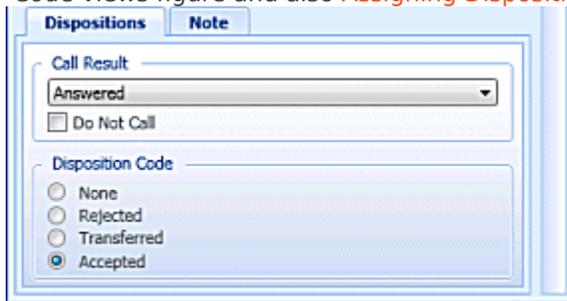
4. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.
  - a. Click the Dispositions tab to make it active.
  - b. (Optional) In the Call Result drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

- c. (Optional) Select an outcome from the Disposition Code drop-down list or radio-button list in the

Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also [Assigning Disposition Codes](#)).



Outbound Campaign Interaction window Call Result and Disposition Code views

- d. (Optional) If the contact requests to be put on the Do Not Call list, select Do Not Call in the Call Result view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).
- e. Click Mark Done. This step might be performed for you automatically when you end the call or set a disposition code.
- f. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked Mark Done for each of the active interactions.
- g. Complete your after-call work.
- h. Set your status on the Voice channel to Ready to receive the next call.

## End

## Next Steps

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

## Lesson: Handling an ASM predictive or progressive Outbound-Campaign voice interaction

### Purpose:

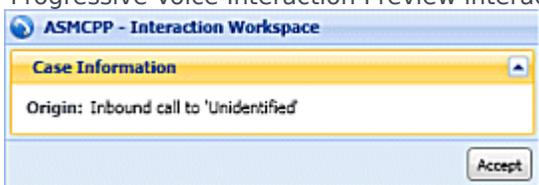
- To handle an ASM predictive or progressive Outbound Campaign voice interaction properly.

### Prerequisites

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- You are *not* logged in to the Instant Messaging channel.
- Your status is Ready for the voice-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are part of an ASM predictive or progressive Outbound Campaign.
- You have been notified that the campaign is loaded and running (see [Starting and Stopping an Outbound Campaign](#)).

### Start

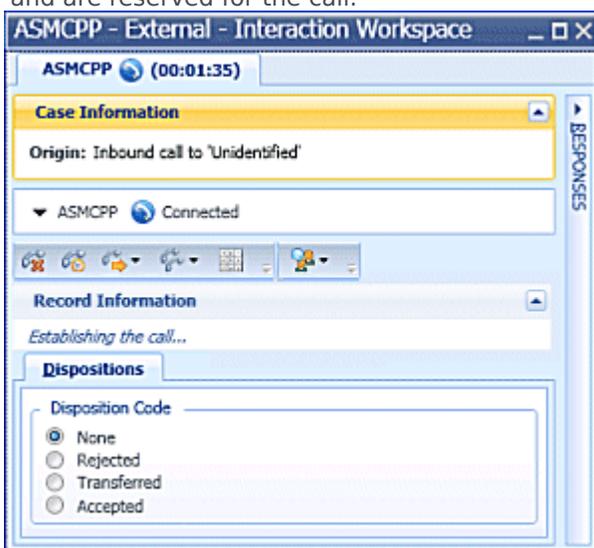
1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Outbound ASM mode Predictive/ Progressive Voice Interaction Preview interactive notification figure).



Outbound ASM mode Predictive/Progressive Voice Interaction Preview interactive notification

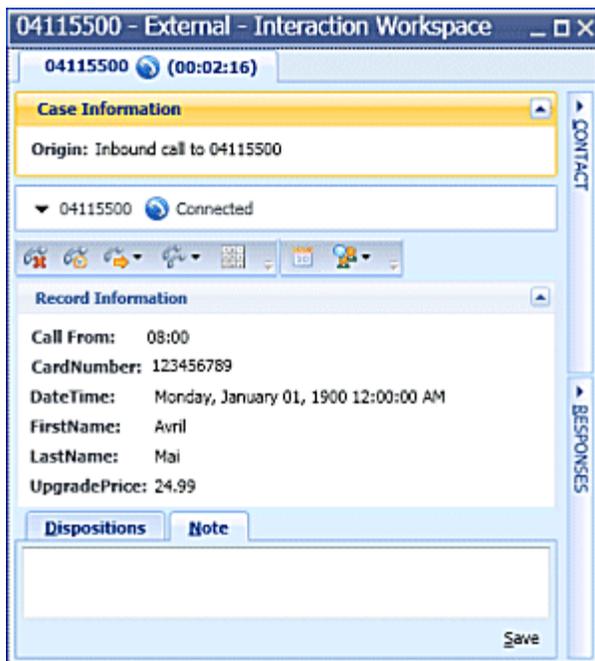
The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

2. You can choose to accept or redirect the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to call the contact.
  - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the Outbound ASM voice-interaction window is displayed (see the Outbound ASM Voice Interaction Window in Establishing state figure). The call is in Establishing state, which means that the call is not yet connected to the contact. However, you are connected to the call and are reserved for the call.



Outbound ASM Voice Interaction Window in Establishing state

4. As soon as the contact answers you are connected to the contact. The call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Predictive/ Progressive Outbound ASM Campaign Voice Interaction window figure).



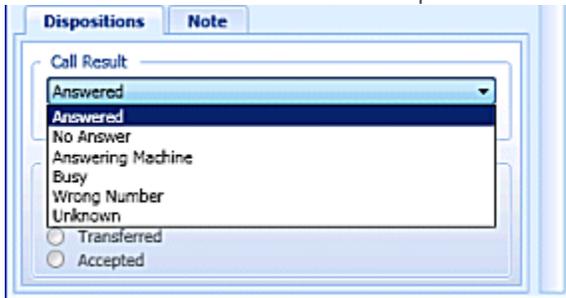
Predictive/Progressive Outbound ASM Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

- View contact records (see [Lesson: Finding and viewing an interaction in the contact database](#)).
- View contact history (see [Managing Contact History](#)).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 5).
- Use the Notepad to add information about the interaction to the interaction history (see [Managing Contact History](#)).
- View and edit the Case Information--Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information--Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see [Lesson: Using The Standard Response Library](#)).
- Terminate the call (see Step 4).
- Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see [Starting a Voice Consultation](#)).
- Transfer the call (see [Transferring a Voice Call](#)).  
**Note:** When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.
- Schedule a callback (see [Lesson: Scheduling a callback](#)).  
**Note:** For information about how to use the functionality in the interaction window, see the

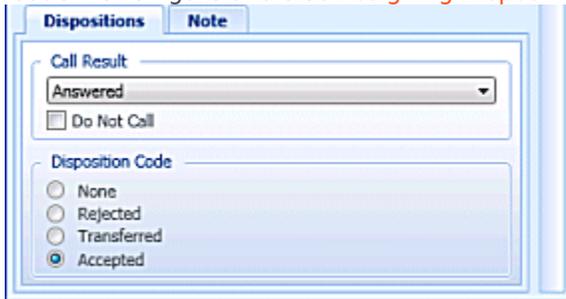
*Interaction Workspace 8.1 Help.*

5. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the End Call button.
6. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.
  - a. Click the Dispositions tab to make it active.
  - b. (Optional) In the Call Result drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

- c. (Optional) Select an outcome from the Disposition Code drop-down list or radio-button list in the Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also [Assigning Disposition Codes](#)).



Outbound Campaign Interaction window Call Result and Disposition Code views

- d. (Optional) If the contact requests to be put on the Do Not Call list, select Do Not Call in the Call Result view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).
7. Click Mark Done. This step might be performed for you automatically when you end the call or set a disposition code.
8. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked Mark Done for each of the active interactions.
9. Complete your after-call work.
10. Set your status on the Voice channel to Ready to receive the next call.

**End**

**Lesson: Handling a preview Outbound-Campaign voice interaction**

**Purpose:**

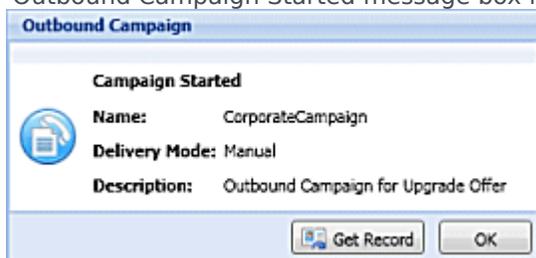
- To handle a preview Outbound-Campaign voice interaction properly.

## Prerequisites

- You are logged in to Interaction Workspace (see [[LogIn#Getting\_Started|Getting Started]]).
- You are *not* logged in to the Instant Messaging channel.
- You are part of a preview Outbound Campaign.
- You have been notified that the campaign is loaded and running (see [Starting and Stopping an Outbound Campaign](#)).

## Start

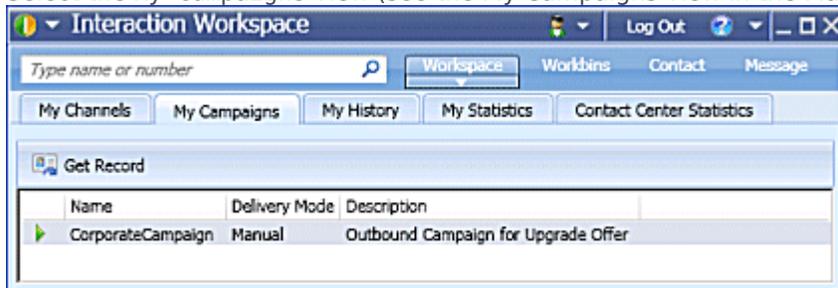
1. When a Preview Outbound Campaign is started, you are notified by an interactive message (see the Outbound Campaign Started message box for Preview mode campaigns figure).



Outbound Campaign Started message box for Preview mode campaigns

Perform one of the following steps:

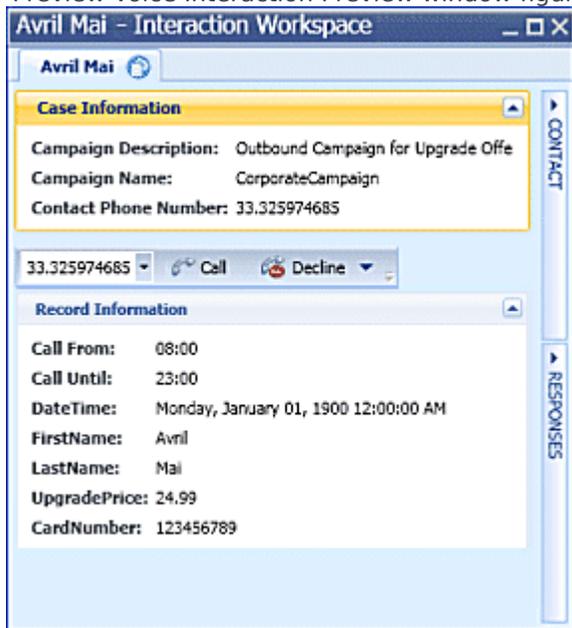
- Click Get Record to retrieve and preview the next available campaign record (see Step 6).
  - Click OK to close the message box (see Step 2).
  - Do nothing. The message box closes after a specified time interval (see Step 2).
2. When you are ready to get a contact record, open your Workspace view (refer to the *Interaction Workspace Help* to learn about how to display your Workspace view from the Main Window or the Gadget).
  3. Select the My Campaigns view (see the My Campaigns view in the Main Window figure).



My Campaigns view in the Main Window

4. Select the Preview campaign to which you are assigned (see the My Campaigns view in the Main Window figure).
5. Click Get Record.

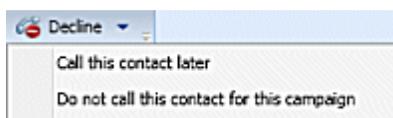
6. A preview of the outbound interaction is displayed on your workstation desktop (see the Outbound Preview Voice Interaction Preview window figure).



Outbound Preview Voice Interaction Preview window

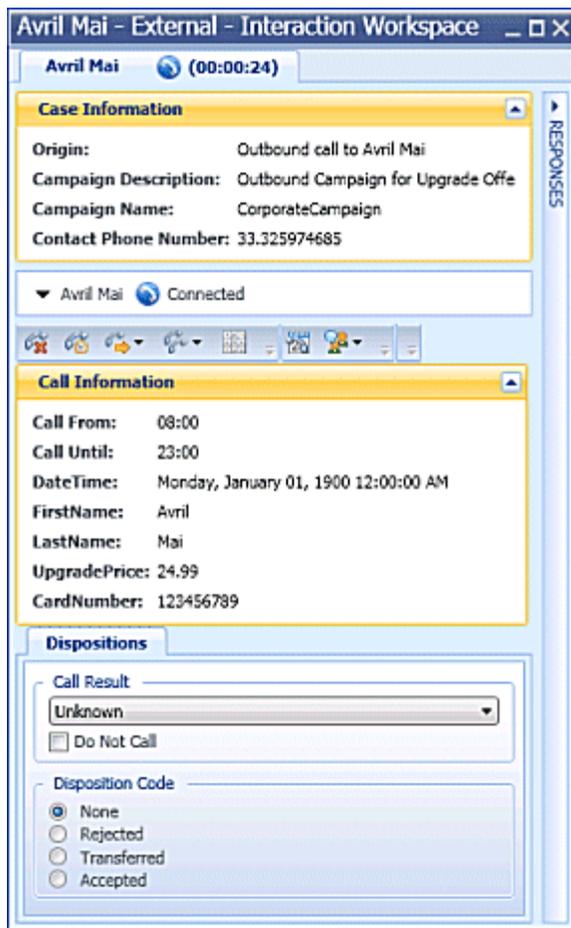
The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

7. You can choose to do any of the following:
- Change the contact phone number--Click the phone number, and select a new one from the drop-down list.
  - Call the contact--Click Call to display the Outbound Campaign Voice Interaction window (see Step 8).
  - Decline the call--Click the Decline button and choose either to send the record back into the queue by selecting Call this contact later or to cancel the record by selecting Do not call this contact for this campaign.



Click Done to get the next record from the campaign calling list. Click Done and Stop to stop receiving new records.

8. If you choose to call the contact, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Outbound Campaign Voice Interaction window figure).



Outbound Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

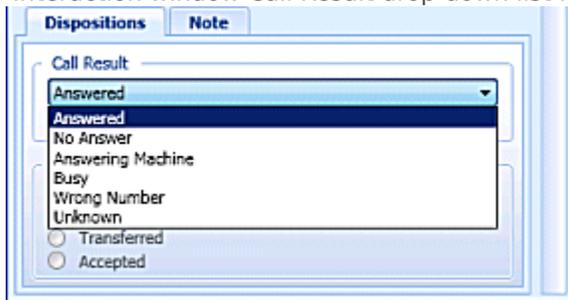
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 10).
  - View and edit the Case Information--Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
  - View and edit the Record Information--Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
  - View and read responses (see [Lesson: Using The Standard Response Library](#)).
  - Terminate the call (see Step 9).
  - Put the call on hold and retrieve the call. The call status changes to On Hold, and then back to Connected when you retrieve the call.
  - Use the keypad to send DTMF to the contact.
  - Start a voice consultation (see [Starting a Voice Consultation](#)).
  - Transfer the call (see [Transferring a Voice Call](#)).
- Note:** When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.

- Conference the call (see [Starting a Voice Conference](#)).
- Schedule a callback (see [Lesson: Scheduling a callback](#)).  
**Note:** For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.

9. When the interaction is complete, either you or the contact can end the call. If you want to terminate the call, click the End Call button.

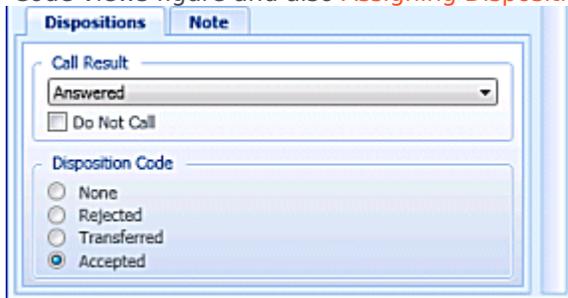
10. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.

- a. Click the Dispositions tab to make it active.
- b. (Optional) In the Call Result drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

- c. (Optional) Select an outcome from the Disposition Code drop-down list or radio-button list in the Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also [Assigning Disposition Codes](#)).

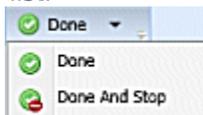


Outbound Campaign Interaction window Call Result and Disposition Code views

- d. (Optional) If the contact requests to be put on the Do Not Call list, select Do Not Call in the Call Result view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).

5. Click Mark Done. This step might be performed for you automatically when you end the call or set a disposition code. The Done button contains a drop-down list that you can use to do the following:

- Click Done to mark the interaction as Done, and to get the next record from the campaign calling list.



- Click Done and Stop to mark the interaction as Done, and not have another record open

automatically. To get a new record, see Step 2.

6. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked Mark Done for each of the active interactions.
7. Complete your after-call work.

## End

## Next Steps

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

## Lesson: Handling a push-preview Outbound-Campaign voice interaction

### Purpose:

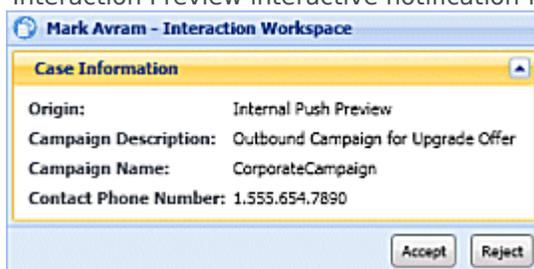
- To handle a push-preview Outbound Campaign voice interaction properly.

### Prerequisites

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- You are *not* logged in to the Instant Messaging channel.
- Your status is Ready for the voice-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are part of a push-preview Outbound Campaign.
- You have been notified that the campaign is loaded and running (see [Starting and Stopping an Outbound Campaign](#)).

### Start

1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Outbound Push-Preview Voice Interaction Preview interactive notification figure).

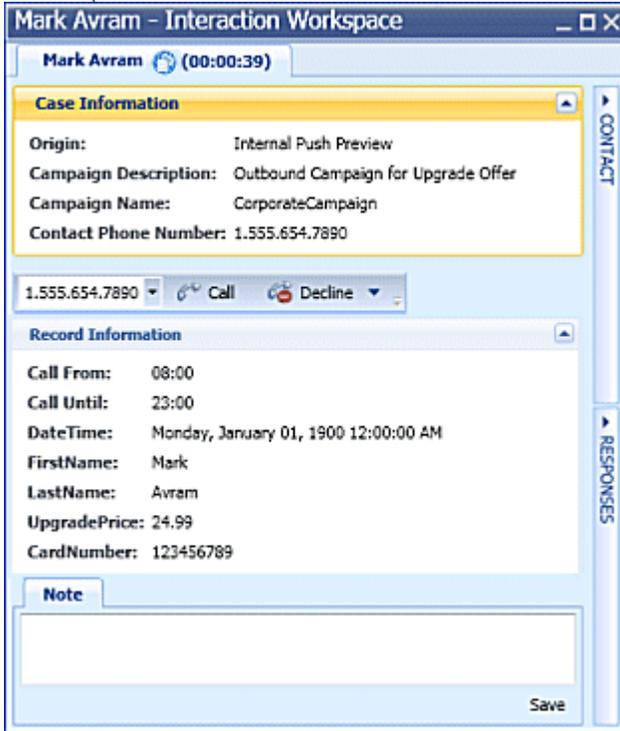


Outbound Push-Preview Voice Interaction Preview interactive notification

The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to call the contact.

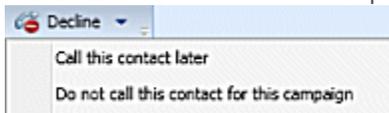
- Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, a preview of the outbound interaction is displayed on your workstation desktop (see the Outbound Preview Voice Interaction Push-Preview window figure).



Outbound Preview Voice Interaction Push-Preview window

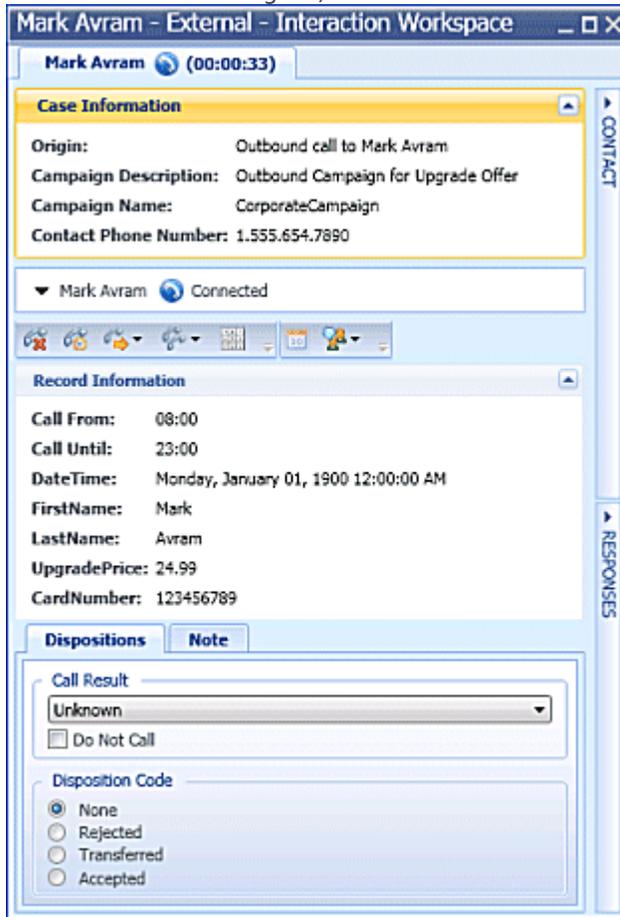
The Interaction Preview contains a summary of call and campaign information. The Interaction Preview might also contain Case Information, which is part of the case data related to the call. Contact your system administrator for more information about the contents of this window.

4. You can choose to do any of the following:
- Change the contact phone number--Click the phone number and select a new one from the drop-down list.
  - Call the contact--Click Call to display the Outbound Campaign Voice Interaction window (see Step 5).
  - Decline the record--Click the Decline button and choose either to send the record back into the queue by selecting Call this contact later or to cancel the record by selecting Do not call this contact for this campaign.



5. Click Done to get the next record from the campaign calling list.
- View contact records (see [Lesson: Finding and viewing an interaction in the contact database](#)).
  - View contact history (see [Managing Contact History](#)).

6. If you choose to call the contact, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see the Push-Preview Outbound Campaign Voice Interaction window figure).



Push-Preview Outbound Campaign Voice Interaction window

You can use the Outbound Campaign Voice Interaction window to do the following:

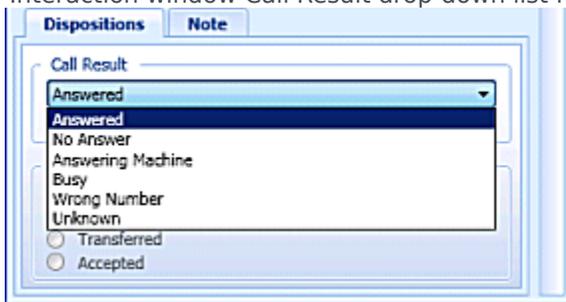
- View contact records (see [Lesson: Finding and viewing an interaction in the contact database](#)).
- View contact history (see [Managing Contact History](#)).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 7).
- Use the Notepad to add information about the interaction to the interaction history (see [Managing Contact History](#)).
- View and edit the Case Information--Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information--Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see [Lesson: Using The Standard Response Library](#)).
- Terminate the call (see Step 6).
- Put the call on hold and retrieve the call. The call status changes to On Hold and then back to

Connected when you retrieve the call.

- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see [Starting a Voice Consultation](#)).
- Transfer the call (see [Transferring a Voice Call](#)).  
**Note:** When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.
- Conference the call (see [Starting a Voice Conference](#)).
- Schedule a callback (see [Lesson: Scheduling a callback](#)).  
**Note:** For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
- When the interaction is complete, either you or the contact can end the call.

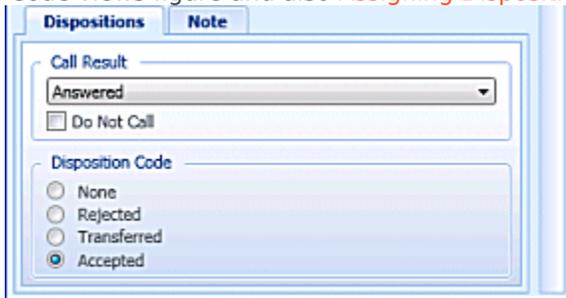
If you want to terminate the call, click the End Call button.

7. If required by your configuration, specify a call result and/or a disposition code that qualifies the outcome of the interaction.
  - a. Click the Dispositions tab to make it active.
  - b. (Optional) In the Call Result drop-down list, select a call result (see the Outbound Campaign Interaction window Call Result drop-down list figure).



Outbound Campaign Interaction window Call Result drop-down list

- c. (Optional) Select an outcome from the Disposition Code drop-down list or radio-button list in the Disposition Code view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure and also [Assigning Disposition Codes](#)).



Outbound Campaign Interaction window Call Result and Disposition Code views

- d. (Optional) If the contact requests to be put on the Do Not Call list, select Do Not Call in the Call Result view (see the Outbound Campaign Interaction window Call Result and Disposition Code views figure).
8. Click Mark Done. This step might be performed for you automatically when you end the call or set a

disposition code.

9. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked Mark Done for each of the active interactions.
10. Complete your after-call work.
11. Set your status on the Voice channel to Ready to receive the next call.

## End Next Steps

- Set your status to Ready. See [Lesson: Going Ready in the Interaction Workspace Main window](#).

## Lesson: Scheduling a callback

### Purpose:

- To reschedule an Outbound-Campaign voice interaction for a different date and/or time and/or phone number.

Note: Refer to the *Interaction Workspace Help* for detailed information on all of the features of the Reschedule view.

### Prerequisites

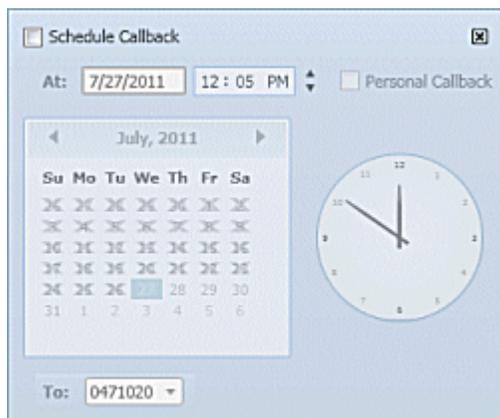
- You have an active Outbound Campaign interaction that you want to reschedule for a different date and/or time.

### Start

1. You can reschedule an Outbound-Campaign call (for example, if the contact is too busy to respond now) to a different date and/or time by using the Schedule a Callback function. In the Outbound Campaign voice interaction window, in the call-action toolbar, click Schedule a Callback.



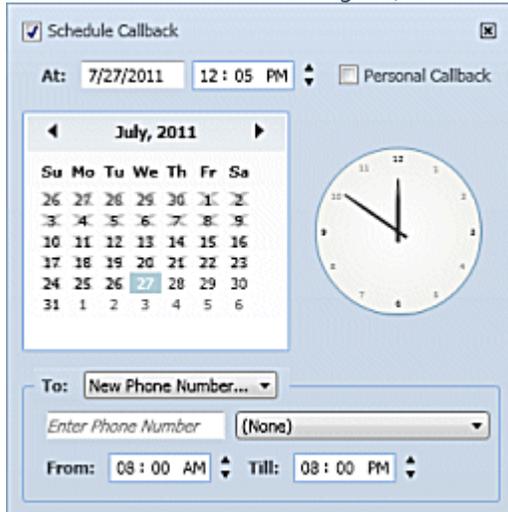
The Schedule a Callback view is displayed (see the Schedule a Callback view figure).



Schedule a Callback view

2. Click the Schedule Callback check box to reschedule the call.

3. To set a new date, perform one of the following steps:
  - Enter a new date in the date field.
  - Click a new day in the calendar view. Use the left and right arrow buttons to change the month and year.
4. To set a new time, perform one of the following steps:
  - Enter a new time in the time field.
  - Click an hour in the clock view and a minute in the clock view. The clock view enables you to set minutes in 5-minute increments.
5. To reschedule the call from you personally, click Personal Callback. Leave the Personal Callback check box clear to send the interaction back to the calling queue.
6. To select a new number for the contact, click the Phone drop-down list and choose a different number.
7. To add a new number that is to be used for the callback call, click the To drop-down list and select New phone number. The New Phone Number view is displayed (see the New phone number controls in the Schedule a Callback view figure).



New phone number controls in the Schedule a Callback view

8. Enter a new number in the Number field.
9. Select a type of number from the Type drop-down list.
10. Specify a From time and an Until time in the respective From and Till drop-down lists. These drop-down lists constrain the time during which the new number is available to accept a callback.
11. After you have specified a new date and/or time and, if necessary, a new number, the Schedule a Callback button changes to the Callback Scheduled button.



Click End Call to disconnect the call.

12. Click Mark Done to schedule the callback.

**End**

---

# Handle Internal Instant Messaging

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:

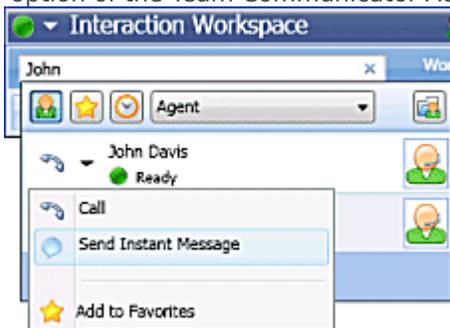
- To find an internal target (such as an agent, Routing Point, queue), and begin a text-based message-exchange session.

### Prerequisites

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

### Start

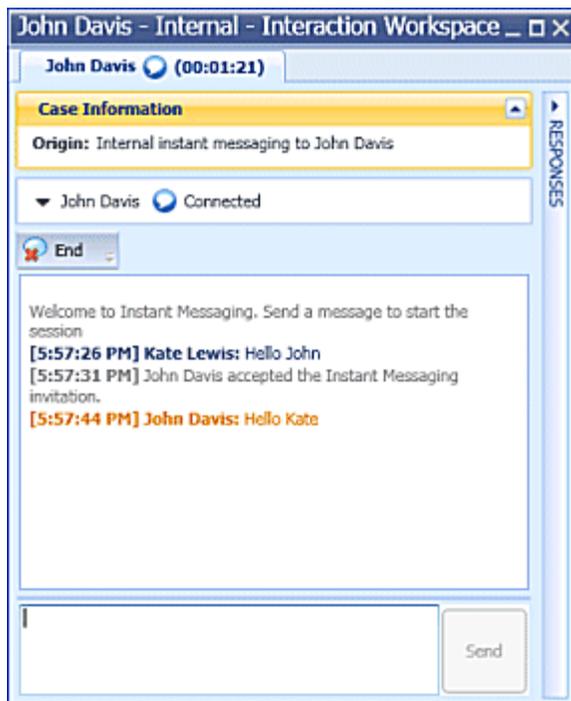
1. Use the Team Communicator in your Main Window view or in your Gadget to find the internal target with whom you want to start an IM session (see [Find A Contact Or An Internal Target](#)).
2. Select Send an Instant Message from the Action Menu drop-down list next to the name of the internal target 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:

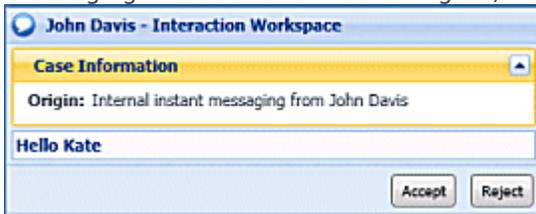
- To receive an invitation to a join a text-based message-exchange session with another agent.

### Prerequisites

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

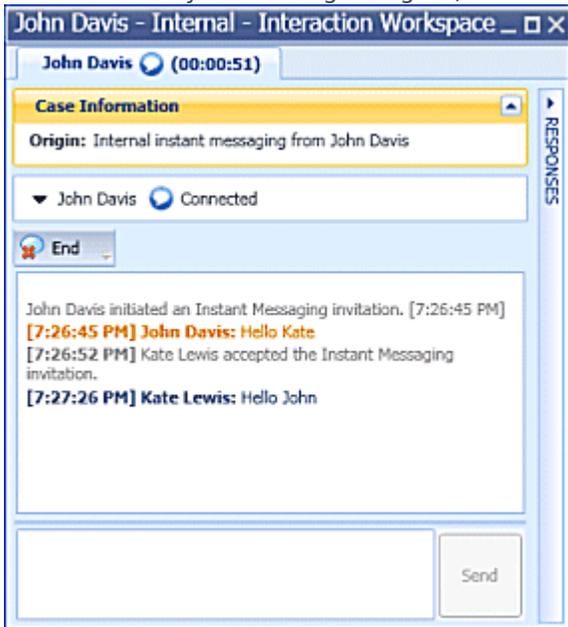
### Start

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:

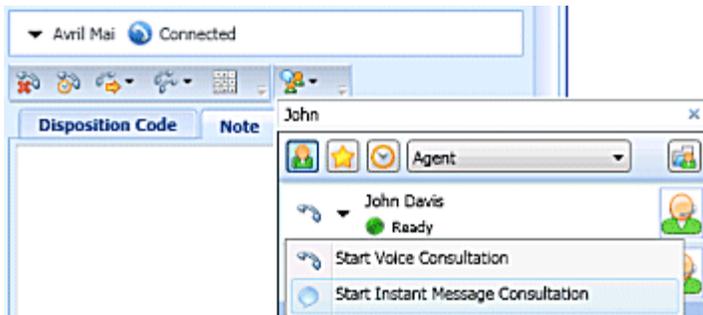
- To start a Consultation IM session from an active interaction.

#### 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](#)).

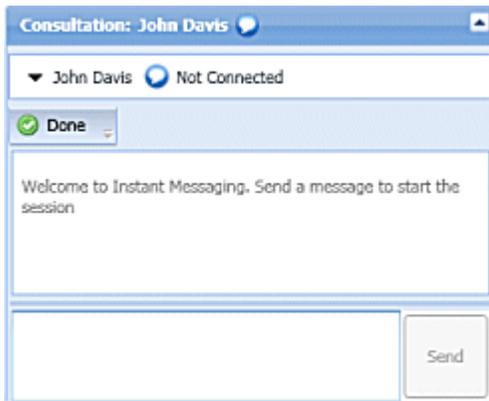
#### Start

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).



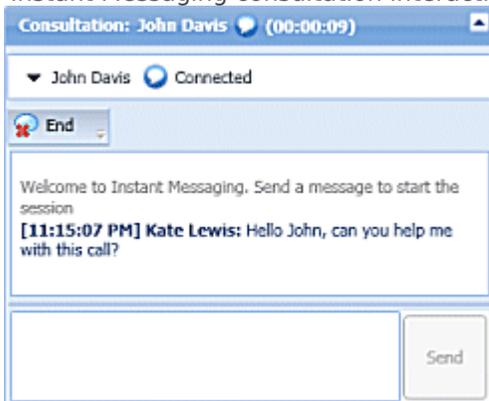
Start Consultation Team Communicator in an active interaction

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.



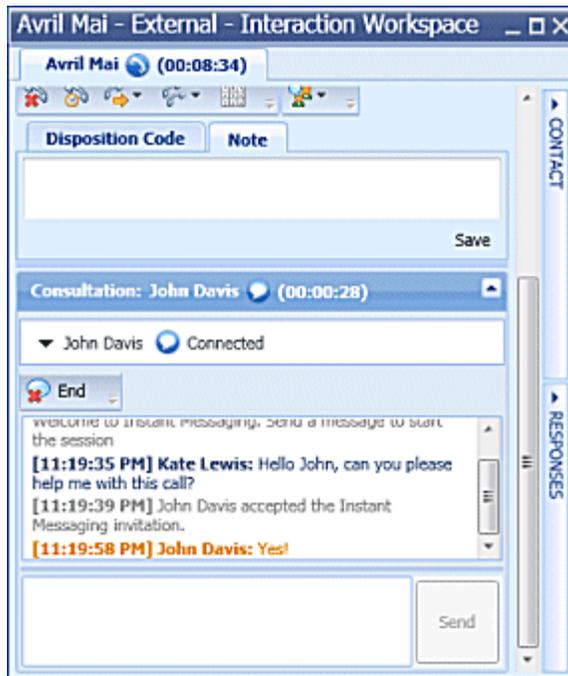
Internal IM message view in an active interaction window

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:

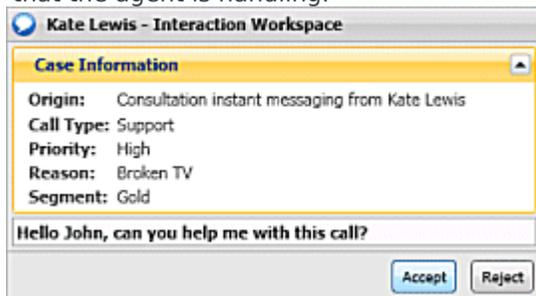
- To handle an IM consultation request and handle a request to transition to a Voice Consultation.

### 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.

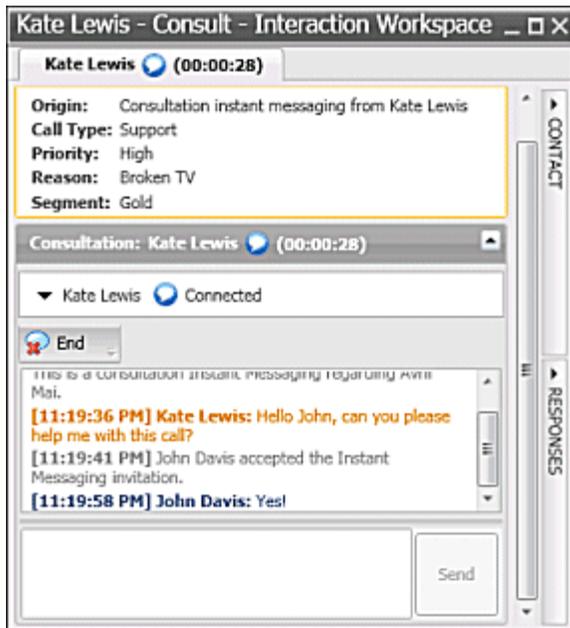
## Start

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

# Handle A Chat Interaction

In this lesson, you will learn how to handle inbound chat interactions, and how to check the spelling of your chat messages before you send them. This lesson contains the following sections:

- [Receiving and Handling an Inbound Chat Interaction](#)
- [Spelling Check](#)

## Receiving and Handling an Inbound Chat Interaction

If you are the selected internal target for an inbound chat interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Chat Interaction window is displayed. The Chat Interaction window contains information about the interaction and the controls that you need to complete the interaction.

### Lesson: Handling an inbound chat interaction

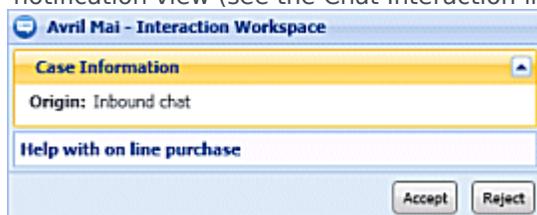
- To handle an inbound chat interaction properly.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the chat-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target for the inbound interaction.

#### Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Chat Interaction interactive notification figure).



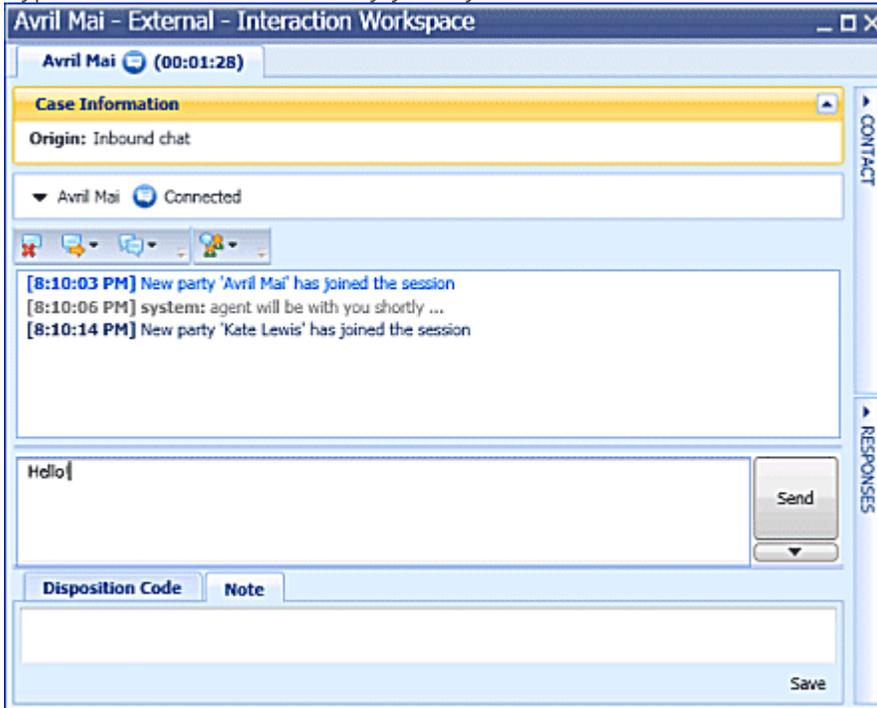
Chat Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and interaction-type. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:

- Click Accept to display the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the inbound Chat Interaction window is displayed (see the Chat Interaction window figure). The Inbound Chat Interaction window provides the following functionality:
- Compose a message/response.
  - Check the spelling of your message/response (see [Lesson: Using Spelling Check to find potentially misspelled words in a chat message](#)).
  - Send a message/response.
  - Select, verify, and send a URL (see the *Interaction Workspace 8.1 Help*).

The message-transcript area of the Chat Interaction window contains color-coded, time-stamped message lines from your company's system, as well as the messages that are sent by the contact and your replies (see the Chat Interaction window figure). A different color is designated for each message type. The colors are defined by your system administrator.



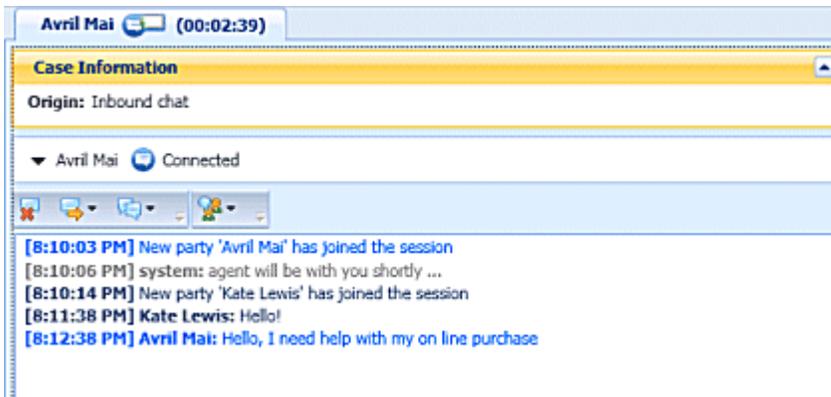
Chat Interaction window

4. To begin interacting with your contact, enter a message in the message area, and then click Send. Your message is displayed to the contact in the chat interface that the contact is using to communicate with you. Your message is also added to the transcript area of the Chat Interaction window. Your system administrator configures how your name appears to your contacts. It might be your real name, your user name, or a nickname.
5. Messages that are sent by your contact are displayed together with your messages in the message transcript area (see the Chat Interaction window progress bar and message area figure). When you receive a message from the contact, a small progress bar is displayed near the top of the Chat Interaction window, on the Chat icon. The progress bar expands from left to right. It begins as green, changes to yellow, and finally changes to red, to indicate that a response is expected from you. See the

*Interaction Workspace 8.1 Help* for more information about the behavior of the Chat Interaction window.

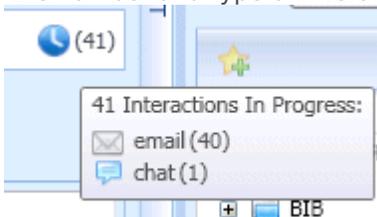
While you are interacting with your contact, you can use the following functionality in the Chat Interaction window:

- Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
- View and edit Case Information for the current interaction.
- View and manage contact history. See [Managing Contact History](#).
- View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#).
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- View the Standard Response Library if you decide to call the sender instead of replying to the e-mail. See [Inserting a Standard Response into an E-Mail Interaction](#)
- Call the sender by clicking the Action menu drop-down list that is displayed next to the contact name.



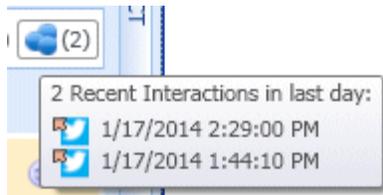
Chat Interaction window progress bar and message area

6. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

7. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant Transfer the chat to another internal target. See [Transferring a Chat Interaction](#)).
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See [Lesson: Initiating an Instant Messaging session](#).
  - Start a Voice consultation. See [Starting a Voice Conference](#).
  - Start a Chat Consultation. See [Starting or Receiving a Chat Consultation](#).
8. When you are finished interacting with your contact, click End Chat to stop the current chat interaction. After you or the contact has ended the chat session, you can perform the following functions:
  - Select Mark Done for the current interaction. The transcript is saved in the contact history and the Chat Interaction window is closed.
  - Set a disposition code. See [Assigning Disposition Codes](#).

## End

## Spelling Check

You might be enabled to use the Spelling Check functionality. The Chat Interaction window has automatic spelling check capabilities that enable you to correct misspelled words or add words to your personal dictionary.

## Lesson: Using Spelling Check to find potentially misspelled words in a chat message

- To verify the spelling of the content of an outbound chat message.

## Prerequisites

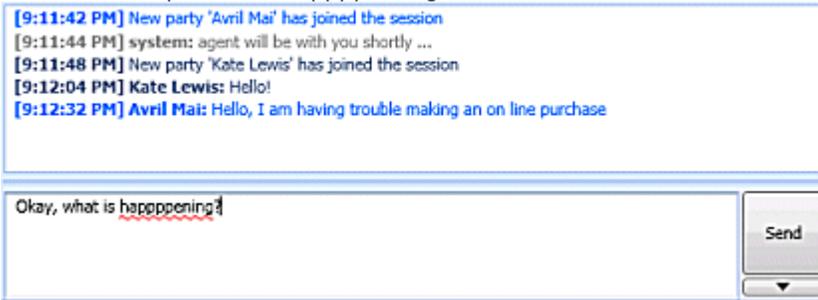
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active Chat interaction (see [Receiving and Handling an Inbound Chat Interaction](#)).

## Start

1. Begin entering text in the message area of a Chat Interaction window (see [Lesson: Handling an inbound chat interaction](#)). You can enter text by typing at the insertion point, pasting content from another

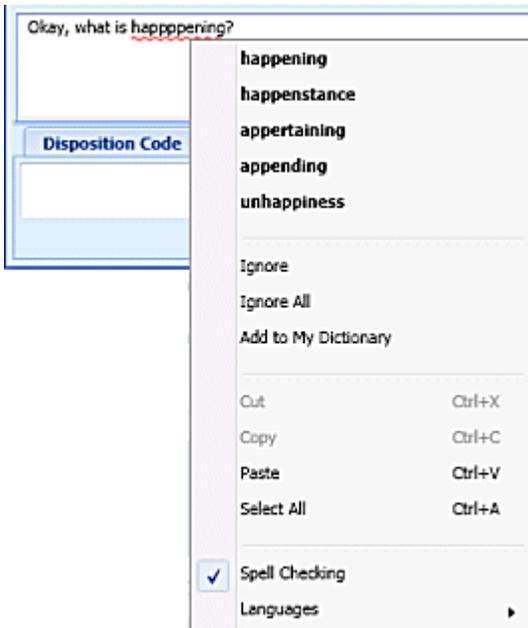
document, or inserting a standard response ([Lesson: Using The Standard Response Library](#)).

- When Spelling Check is on, words in the message area that are not in the specified dictionary are underlined by a red, wavy line. The Chat message composition area, displaying a misspelled word that is underlined in red figure shows a chat message that contains a word that is not in the English (United States) dictionary (the default dictionary for this user). The misspelled word is happening, which is misspelled as happppening.



Chat message composition area, displaying a misspelled word that is underlined in red

- You can correct the spelling by using one of two methods:
  - Edit the word(s) manually.
  - Right-click the word to display the Spelling Check menu.



Chat Interaction window Spelling Check menu

- If you right-clicked the misspelled word to display the Spelling Check menu, you can do one of the following:
  - Select the correct spelling from the list of suggestion (bold text).
  - Ignore--Select to ignore this instance of the word that is not in the specified language dictionary.
  - Ignore All--Select to ignore all instances of the word that is not in the specified language dictionary for this interaction only.
  - Add to My Dictionary--Select to add the spelling to your personal dictionary (not your corporate

dictionary).

- Spell Checking--Select to turn the Spelling Check functionality off or on.
- Languages--Select to open the list of available language dictionaries. You can select a different language dictionary.

**End**

# Handle A Chat Consultation

In this lesson, you will learn how to use the Team Communicator feature to find an internal agent and start a chat consultation. A chat conference enables an internal target to participate in the current chat session with you and your contact. A chat consultation enables an internal target to view the chat transcript between you and your contact, and to chat with you privately in a second chat session in the same Chat Interaction window. The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call an internal target or a contact, initiate a conference, or transfer a call. This lesson contains the following section:

- [Starting or Receiving a Chat Consultation](#)

## Starting or Receiving a Chat Consultation

The Interaction Workspace Chat Interaction window enables you to consult with an internal target about your current chat interaction. Your internal target can see the messages that you exchange with your contact, but the contact does not see the messages that you exchange with your internal target. Chat consultation is only available from an active Chat interaction. A chat consultation between two agents is ended if the chat with the contact is ended. This section contains the following procedures:

- [Lesson: Starting a chat consultation](#)
- [Lesson: Receiving a chat consultation request](#)

### Lesson: Starting a chat consultation

#### **Purpose:**

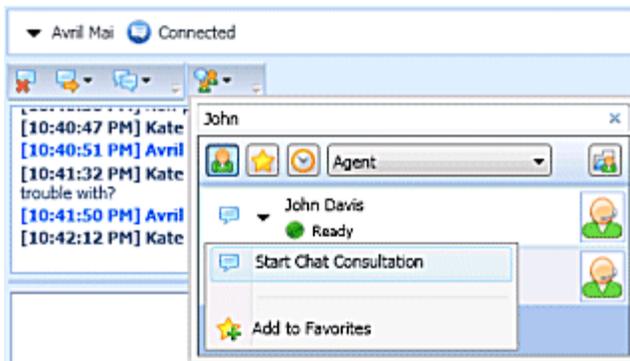
- To find an internal target (such as an agent or Routing Point), and then start and complete a chat consultation with the internal target, without the current contact seeing the messages that you exchange with the internal target.

#### **Prerequisites**

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active Chat interaction with a contact (see [Lesson: Handling an inbound chat interaction](#)).

#### **Start**

1. In the active Chat Interaction window, click the Start Consultation button and then use the Team Communicator (see the Finding an internal target for a chat consultation in the active Chat Interaction window figure) to find the internal target with whom you want to start a consultation (see the [the Team Communicator feature to find an internal target Lesson: Using the Team Communicator feature to find an internal target](#)).



Finding an internal target for a chat consultation in the active Chat Interaction window

2. Click the Action menu drop-down list that is displayed next to the name of the internal target with whom you want to consult, and then select Start Chat Consultation. An interaction notification is displayed on the desktop of your target.  
When the internal target accepts the consultation request, you can chat with the internal target agent without the contact reading the messages that you exchange.  
If the consultation target does not accept your request, the consultation request is released.
3. When you are connected to your consultation target, the chat interaction with the internal target is added to the Chat Interaction window below the interaction with your contact (see the Chat Interaction window, displaying a consultation chat with an internal target below the chat interaction with the contact figure).



Chat Interaction window, displaying a consultation chat with an internal target below the chat interaction with the contact

You can perform any of the following functions by using the Chat Consult toolbar and interface:

- End the consultation.
  - Call the internal target by using the Action menu drop-down list next to the party name.
  - IM the internal target by using the Action menu drop-down list next to the party name.
  - Mark Done the chat consultation.
- The transcript of your interaction with the contact, and any notes you might have recorded, are displayed in the Chat Interaction window on the desktop of your consultation target. However, the consultation target cannot interact with your contact (see the Chat Consultation Interaction window figure).
  - The internal target agent can choose to release the consultation. If this happens, the internal target agent is

disconnected, but you remain connected to the contact.

- If you click the End button and the internal target agent is still connected, the session is transferred automatically to the internal target agent. If you have completed your chat interaction and the internal target agent has already disconnected from the conference, go to Step 8 of the [Lesson: Handling an inbound chat interaction](#).

## End

## Lesson: Receiving a chat consultation request

### Purpose:

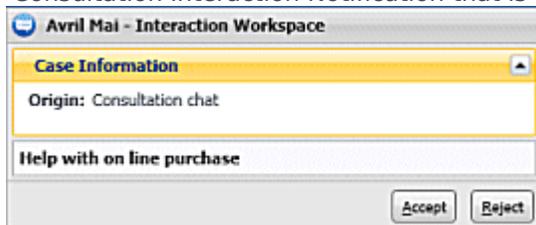
- Receive an invitation to a consult about a chat interaction from another agent to provide assistance to that agent in completing an active interaction.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the chat media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).

### Start

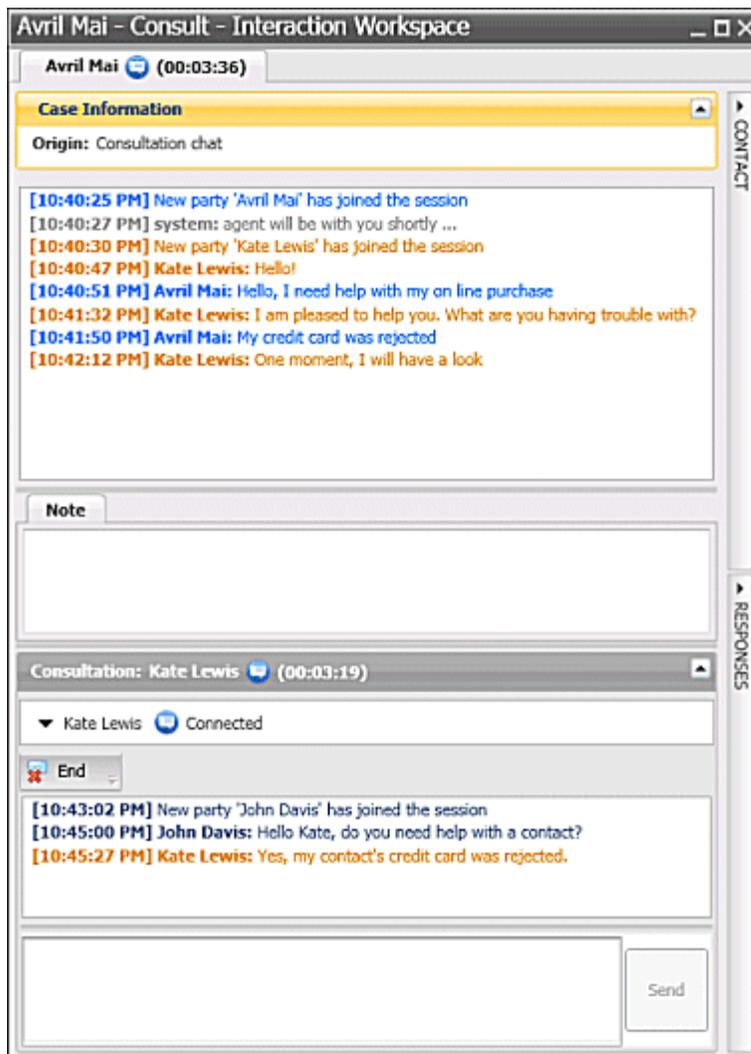
1. If another agent wants to consult with you about a chat interaction, they will initiate a chat consultation. You are notified of the consultation request by the Interaction Workspace Interaction Preview (see the Consultation Interaction Notification that is displayed on your desktop figure).



Consultation Interaction Notification that is displayed on your desktop

Click Accept to connect to the chat interaction.

2. The Interaction Workspace Chat Consultation Interaction window (see the Chat Consultation Interaction window figure) enables you to perform the following functions while you are chatting with the agent who initiated the consultation:
  - View the transcript of the chat session between the contact and the agent who initiated the consultation.
  - Send messages to the agent who initiated the consultation.
  - Receive messages from the agent who initiated the consultation.
  - End the consultation.
  - Call the agent who initiated the consultation.
  - Mark Done the chat consultation.



Chat Consultation Interaction window

## End

# Transfer A Chat Interaction

In this lesson, you will learn how to transfer chat interactions to an internal target. This lesson contains the following section:

- [Transferring a Chat Interaction](#)
- [Starting a Chat Transfer to an Active Consultation](#)

## Transferring a Chat Interaction

The Interaction Workspace Chat Interaction window enables you to transfer your current chat interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer a chat interaction to 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 chat conference, or transfer chat interaction. This section contains the following procedure:

- [Lesson: Starting an instant chat transfer](#)
- [Lesson: Receiving a transferred chat](#)
- [Lesson: Starting a chat transfer to an active consultation](#)

### Lesson:

#### Starting an instant chat transfer

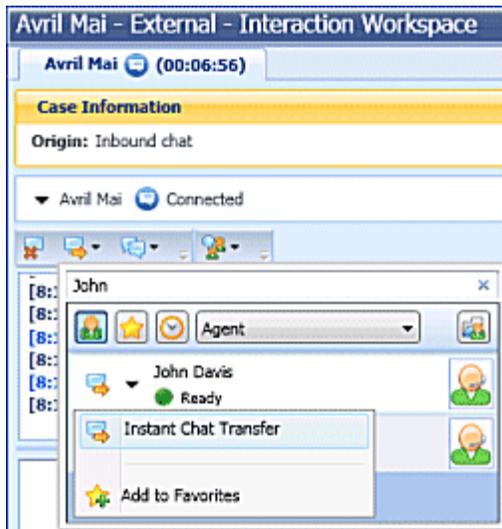
- To find an internal target (such as an agent, Routing Point, or queue), and then transfer the chat to the internal target.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active interaction with a contact (see [Lesson: Handling an inbound chat interaction](#)).

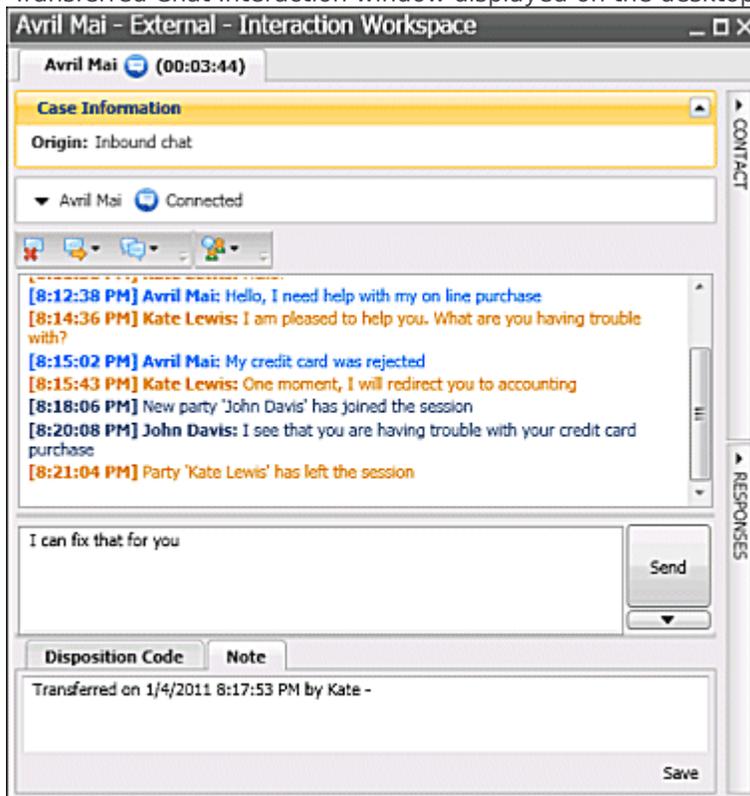
#### Start

1. In the active Chat Interaction window, click Transfer to open the Team Communicator (see the Finding an internal target for a chat transfer in the active Chat Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the [Lesson: Using the Team Communicator feature to find an internal target](#)).



Finding an internal target for a chat transfer in the active Chat Interaction window

2. Click the Action Menu drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and then select Instant Chat Transfer. An invitation is sent to the target to accept the chat transfer. If the target accepts the interaction transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target (see the Transferred Chat Interaction window displayed on the desktop to the transfer target figure).



Transferred Chat Interaction window displayed on the desktop to the transfer target

If the target does not accept the interaction transfer request, the Chat Interaction window remains displayed on your desktop and an error is displayed both at the top of the window and in the

Interaction Workspace My Messages interactive notification.

## End

## Lesson: Receiving a transferred chat

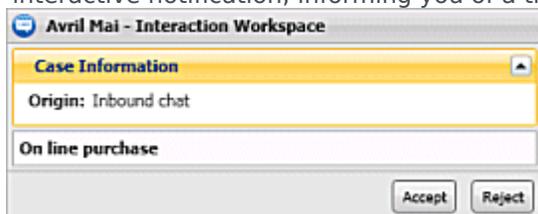
- To receive a transferred chat interaction from another agent.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the chat media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).

### Start

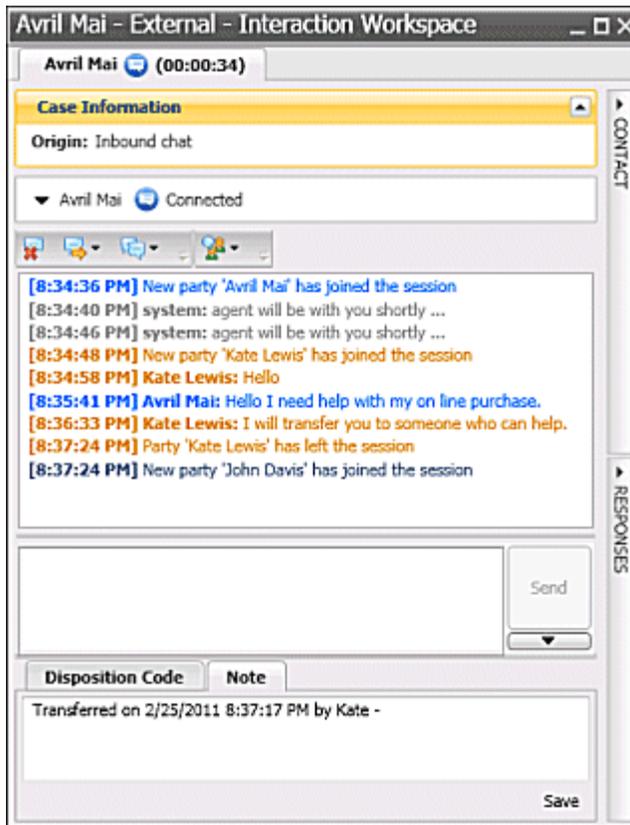
1. If another agent wants to transfer a chat interaction to you, they can choose between an instant transfer and a transfer from a consultation. You are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a transfer request figure).



Interaction Preview interactive notification, informing you of a transfer request

Click Accept to accept the transfer or to consult first with the calling agent:

- If the calling agent initiated an instant transfer, the call is immediately transferred to you. Go to Step 3 of the [Lesson: Handling an inbound chat interaction](#).
- If the calling agent initiated a consultation transfer, the Interaction Workspace Chat Interaction window is displayed. It shows your status as connected to the calling agent.



Chat Interaction window, displaying your status as connected to the chat party

- You are now the owner of the chat interaction. Refer to Step 3 of [Lesson: Handling an inbound chat interaction](#), for information about handling a chat interaction.

## End

## Starting a Chat Transfer to an Active Consultation

The following procedure demonstrates how to transfer a chat interaction to a party with whom you are in a chat consultation; however, it is also possible to transfer from other types of consultations, such as voice, by following the same steps that are presented in the procedure.

### Lesson: Starting a chat transfer to an active consultation

- To transfer the chat to an internal target with whom you are currently engaged in an active consultation.

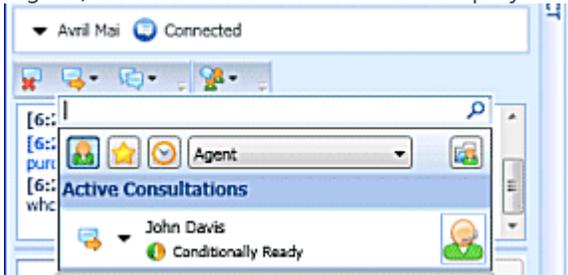
#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active interaction with a contact (see [Lesson: Handling an inbound chat interaction](#)).

- You have an active consultation with an internal target (see [Lesson: Starting a chat consultation](#)).

## Start

1. In the active Chat Interaction window, click Instant Chat Transfer to open the Team Communicator (see the Team communicator displaying current consultation party as default for Instant Transfer figure). The Team Communicator is displayed showing a list of your active consultations.



Team communicator displaying current consultation party as default for Instant Transfer

2. Complete the transfer by clicking the Instant Chat Transfer button that is beside the name of the target to whom you want to transfer the interaction. The interaction is transferred to the target. The interaction window closes.

## End

# Conference A Chat Interaction

In this lesson, you will learn how to transfer chat interactions. This lesson contains the following sections:

- [Starting a Chat Conference](#)
- [Starting a Chat Conference with an Active Consultation](#)

## Starting a Chat Conference

The Interaction Workspace Chat Interaction window enables you to instant-conference your current chat interaction with an internal target. In an instant conference, the conference starts as soon as the other party accepts the interaction. This section contains the following procedure:

- [Lesson: Starting an instant chat conference](#)
- [Lesson: Receiving a chat conference](#)
- [Lesson: Starting a chat conference with an active consultation](#)

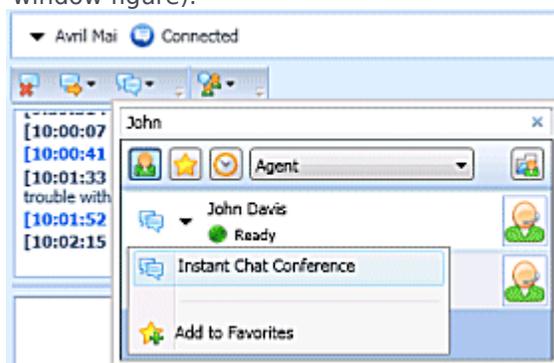
## Lesson: Starting an instant chat conference

### Purpose:

- To find an internal target (such as an agent, Routing Point, or queue), and then start and complete a chat conference with the internal target and the current contact.

### Start

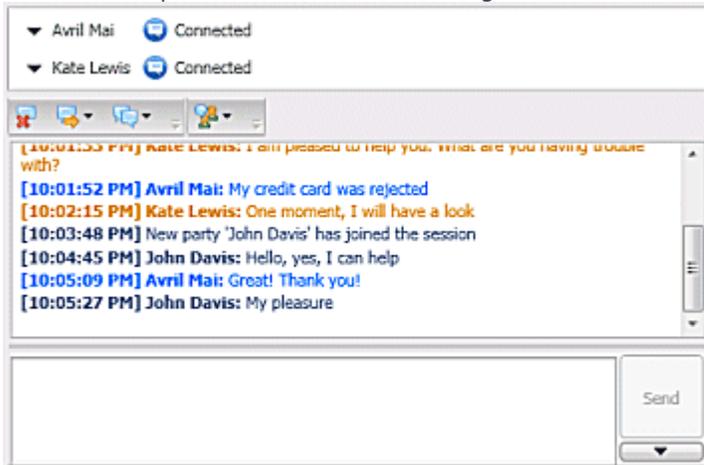
1. In the active Chat Interaction window, click the Instant Conference button to open the Team Communicator (see the Finding an internal target for a chat conference in the active Chat Interaction window figure).



Finding an internal target for a chat conference in the active Chat Interaction window

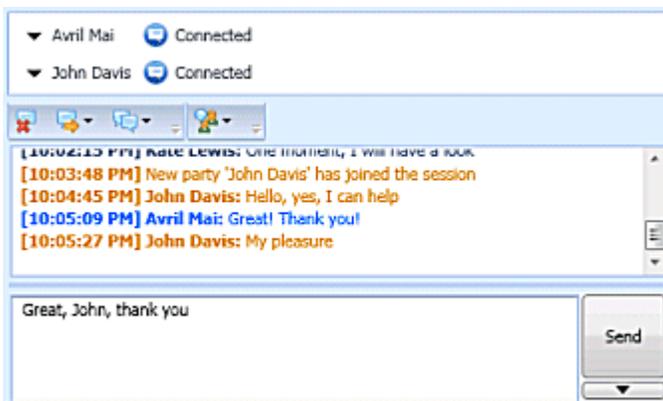
2. Click the Action Menu drop-down list that is displayed next to the name of the internal target with

whom you want to conference, and then select Instant Chat Conference. When the internal target accepts the interaction request, a Chat Interaction window opens on the desktop of the conference target. The Chat Interaction window displays the entire transcript of the chat session between you and the contact (see the Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status figure).



Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status

The internal target is added to the chat session in your Chat Interaction window. You, the contact, and the internal target can each see what is sent by the others (see the Chat Interaction window displaying the chat transcript and connection status of your conference figure).



Chat Interaction window displaying the chat transcript and connection status of your conference

If the conference target does not accept your request, the conference request is released.

3. If you click the End button and the internal target agent is still connected, the session is transferred automatically to the internal target agent. If you have completed your chat interaction and the internal target agent has already disconnected from the conference, go to Step 8 of the [Lesson: Handling an inbound chat interaction](#).

**End**

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## Lesson: Receiving a chat conference

### Purpose:

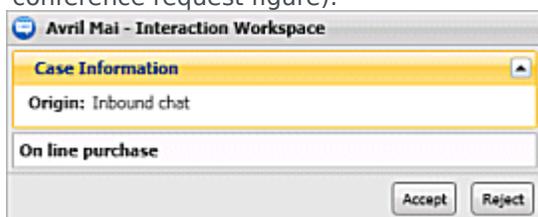
- To receive and join a conference chat interaction with another agent and their active chat interaction party.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the chat media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).

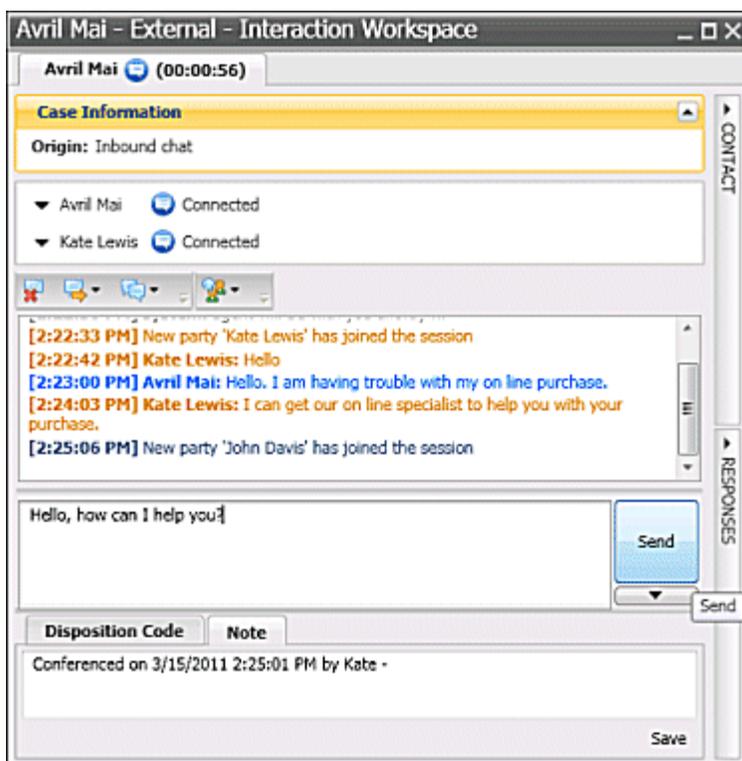
### Start

1. If another agent wants to chat conference with you and a contact about their current interaction, the agent can start a chat conference. If the other agent is handling a chat interaction and initiates a chat conference request, you are notified of the request by the Interaction Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a conference request figure).



Interaction Preview interactive notification, informing you of a conference request

Click Accept to connect to the conference. The Chat Interaction window is displayed (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure).



Chat Interaction window, displaying your status as Connected to the conferencing agent

2. The Interaction Workspace Chat Interaction window enables you to perform the following functions while you are chatting with the conferencing agent and the contact:
  - End the connection--This function ends your participation in the consultation call; you are not added to the conference.
  - Start a conference.
  - Transfer the chat to a different internal target.

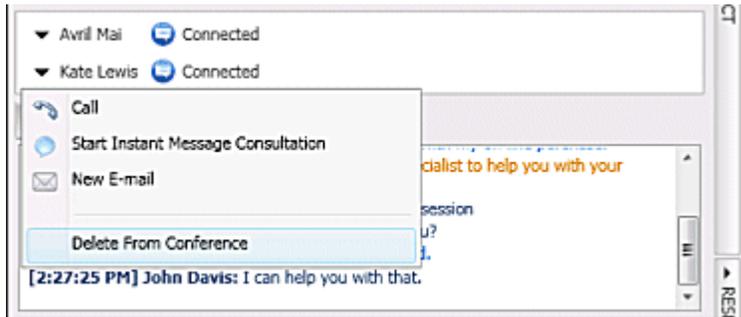
For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*. When you join the conference, all three parties will see any text that you enter into the Chat Interaction window. Your status is Connected (see the Chat Interaction window, displaying your status as Connected to the conferencing agent figure). When you are in a chat conference, you can perform the following functions:

- Use the Conference Party Action Menu (adjacent to the Party Status--see the Conference Party Action Menu figure) to do the following:
  - **Call**--Start a voice call to the party.
  - **Start Instant Message Consultation**--Start an IM consultation with the party.
  - **New E-mail**--Terminate the connection to the party.
  - **Delete From Conference**--Terminate the connection to the party.

For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.

- End the chat--Terminates your connection to the conference. The conferencing agent remains connected to the contact.

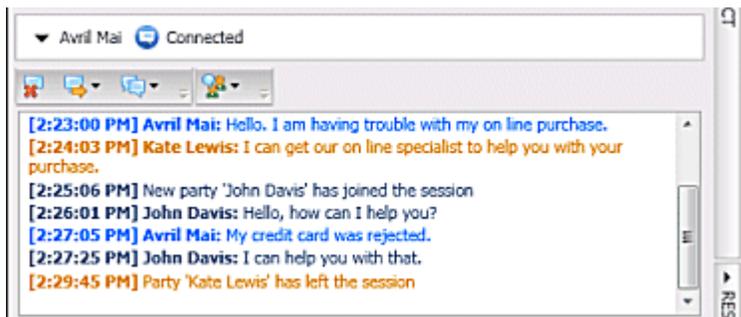
- Set a Disposition Code for the chat.



Conference Party Action Menu

### Remaining Connected After the Conferencing Agent Disconnects

If the conferencing agent releases the chat, the conferencing agent is disconnected, but you remain connected to the contact (see the Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact figure). You can complete your interaction with the contact, transfer the contact, or start a new conference.



Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

3. Click End the Chat to terminate your connection to the conference. The Interaction Workspace Chat Interaction window is updated to display the status of the conference as Ended. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the Disposition Code drop-down list or radio-button list in the Disposition Code view (see [Assigning Disposition Codes](#)).
4. Click Done.
5. Close the Chat Interaction window.
6. Complete your after-call work.
7. Set your status to Ready.

### End

## Starting a Chat Conference with an Active Consultation

The following procedure demonstrates how to conference a chat interaction to a party with whom you are in a chat consultation; however, it is also possible to conference from other types of consultations, such as voice, by following the same steps that are presented in the procedure.

## Lesson: Starting a chat conference with an active consultation

### Purpose:

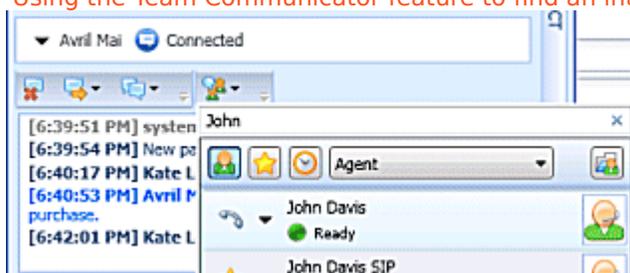
- To conference the chat with an internal target with whom you are currently engaged in an active consultation.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active interaction with a contact (see [Lesson: Handling an inbound chat interaction](#)).

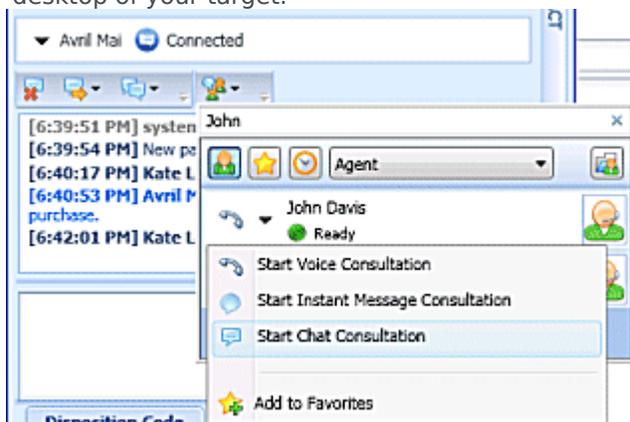
### Start

- In the active Chat Interaction window, click the Start Consultation button and then use the Team Communicator (see the Finding an internal target for a chat consultation in the active Chat Interaction window figure) to find the internal target with whom you want to start a consultation (see the [Lesson: Using the Team Communicator feature to find an internal target](#)).



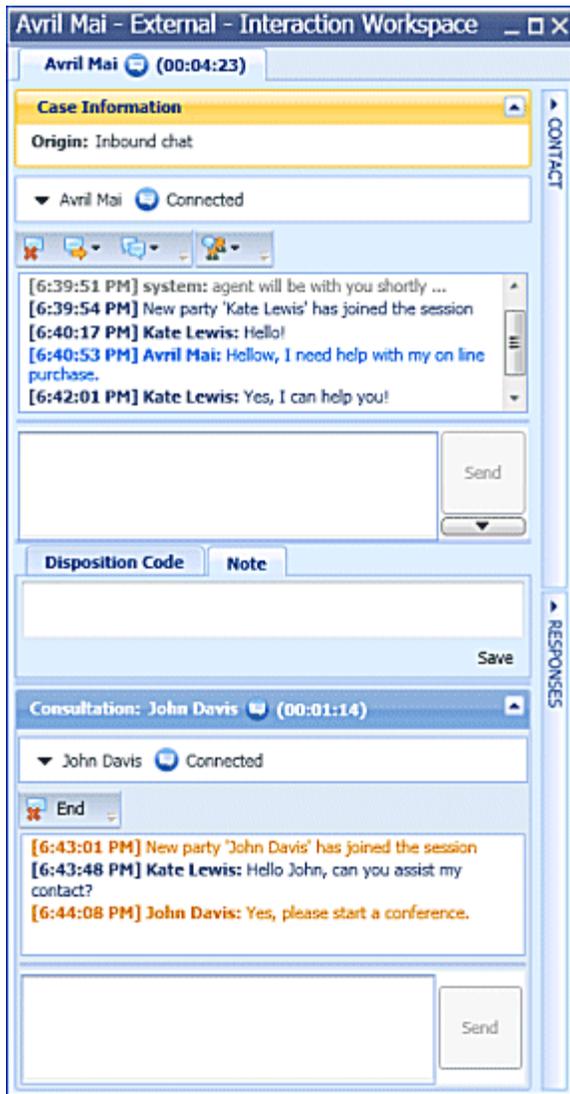
Finding an internal target for a chat consultation in the active Chat Interaction window

- Click the Action menu drop-down list that is displayed next to the name of the internal target with whom you want to consult, and then select Start Chat Consultation (see the Team Communicator displaying a list of available consultation media figure). An interaction notification is displayed on the desktop of your target.



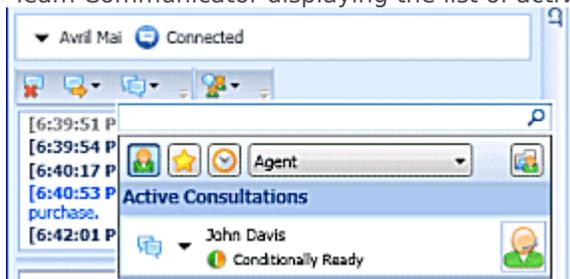
Team Communicator displaying a list of available consultation media

The chat consultation interaction is added to your active chat interaction window (see the Chat Interaction window displaying an active chat interaction and a chat consultation figure).



Chat Interaction window displaying an active chat interaction and a chat consultation

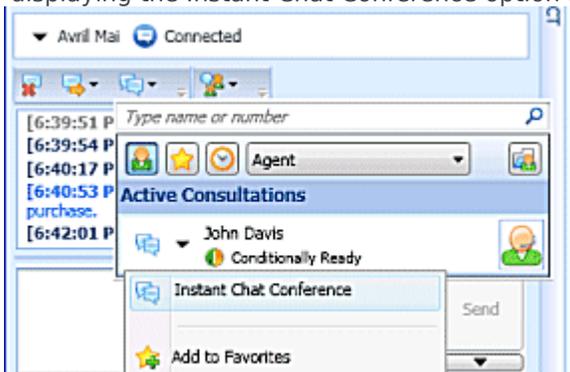
3. To transition your active chat consultation to a chat conference, click the Instant Chat Conference button on the main interaction toolbar (see the Team Communicator displaying the list of active consultations figure). The Team Communicator opens and displays your active consultations (see the Team Communicator displaying the list of active consultations figure).



Team Communicator displaying the list of active consultations

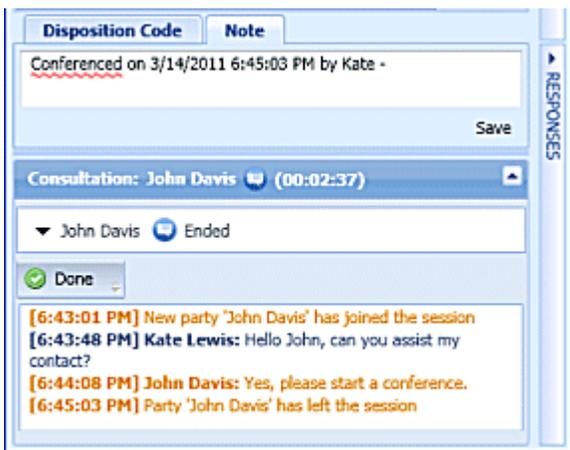
4. Click the Instant Chat Conference button in the Action menu that is next to the name of the consult

party with whom you want to conference with your chat interaction (see the Team Communicator displaying the Instant Chat Conference option figure).

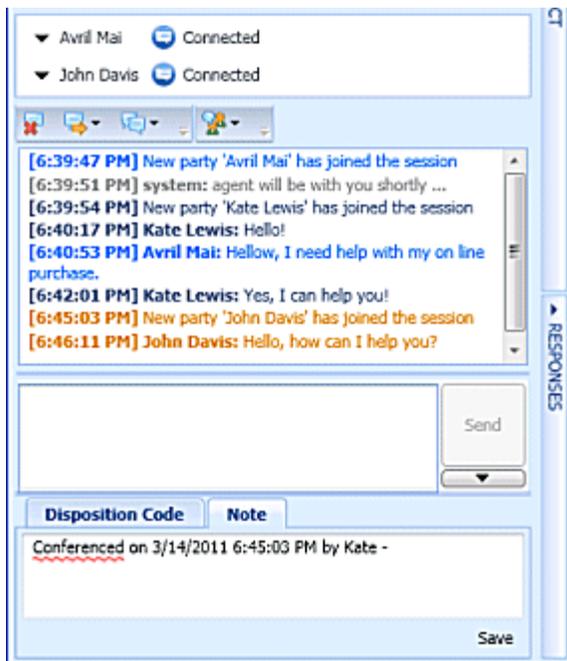


Team Communicator displaying the Instant Chat Conference option

An invitation to join the chat is sent to your conference target. If the target accepts the invitation, the consultation chat ends (see the Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction figure) and the target is conferenced with you and your contact (see the Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction figure).



Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction



The Chat Interaction window displaying an active chat interaction with a conferenced party that was transitioned from a chat consultation.

5. Complete your chat conference (see [Lesson: Starting an instant chat conference](#)).

**End**

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# Handle An E-Mail Interaction

In this lesson, you will learn how to handle inbound e-mail interactions and launch outbound e-mail interactions. This lesson contains the following sections:

- [Receiving and Handling an Inbound E-Mail Interaction](#)
- [Creating and Handling a New or Reply E-Mail Interaction](#)
- [Transferring or Forwarding an E-Mail Interaction](#)
- [Resending a Previously Sent E-mail Interaction](#)
- [Spelling Check](#)
- [Printing and Print Preview](#)
- [E-Mail Quality Assurance \(QA\) Review](#)

## Receiving and Handling an Inbound E-Mail Interaction

If you are the selected internal target for an inbound e-mail interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Interaction window is displayed. The E-Mail Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Note: You might be configured to have your outbound e-mail interactions sent to your team lead or supervisor for a Quality Assurance (QA) review prior to sending the e-mail interaction to your contact. Refer to [E-Mail Quality Assurance \(QA\) Review](#).

### Lesson: Handling an inbound e-mail interaction=

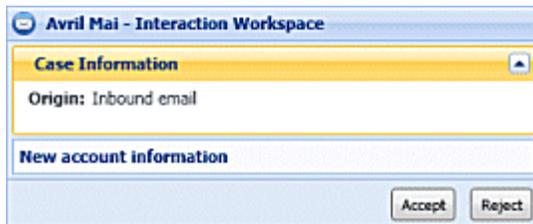
- To handle an inbound e-mail interaction properly.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the e-mail-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target for the inbound interaction.

#### Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the E-Mail Interaction interactive notification figure).

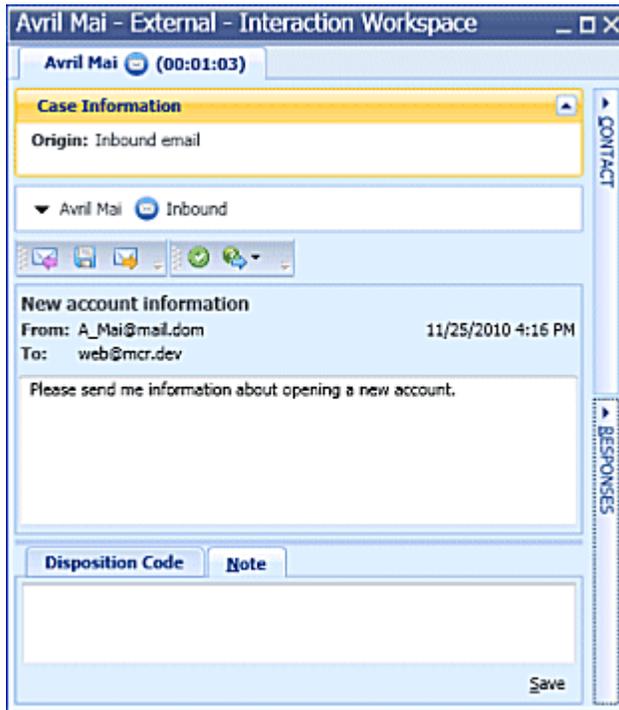


E-Mail Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and interaction type. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

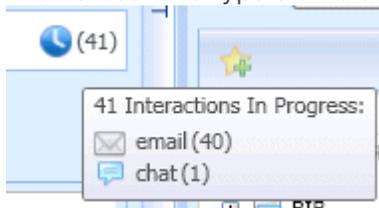
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to display the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound E-Mail Interaction window is displayed (see the Inbound E-Mail Interaction window figure). The Inbound E-Mail Interaction window provides the following functionality:
  - Reply or Reply All to the sender of the e-mail message and other recipients. See [Lesson: Replying to a inbound e-mail interaction](#).
  - Save the e-mail in the In Progress workbin and close the E-Mail Interaction window. See [Managing Contact History](#).
  - Transfer the e-mail message to another internal target or forward it to an external resource. See [Transferring or Forwarding an E-Mail Interaction](#).
  - Select Mark Done for the current interaction, save the e-mail message in the contact history and close the E-Mail Interaction window; the processing of the corresponding e-mail thread with the contact is complete.
  - Consult with an internal target or with a contact. See [Starting a Voice Conference](#) or [Lesson: Initiating an Instant Messaging session](#).
  - Set a disposition code. See [Assigning Disposition Codes](#).
  - Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
  - View and edit Case Information for the current interaction. Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
  - Call the sender by clicking the Action menu that is displayed next to the contact name. See [Making a Voice Call](#)
  - View and manage contact history. See [Managing Contact History](#)
  - View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#)
  - View the Standard Response Library if you decide to call the sender instead of replying to the e-mail. See [Inserting a Standard Response into an E-Mail Interaction](#).

- Print the e-mail message. See [Printing and Print Preview](#).



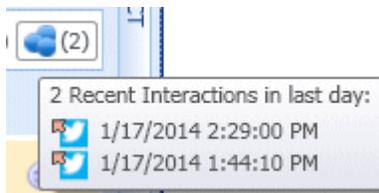
Inbound E-Mail Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

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**End**

## Creating and Handling a New or Reply E-Mail Interaction

You can create new e-mail interactions in two ways by replying to an inbound e-mail interaction (see [Lesson: Handling an inbound e-mail interaction](#)) and by using the Team Communicator (see [Lesson: Using the Team Communicator feature to find a contact](#)) or Contact Directory (see [Lesson: Finding and viewing your interactions in the contact database](#)) to find a contact and select the contact as the target of a new outbound e-mail interaction.

### Lesson: Replying to a inbound e-mail interaction=

- To send a reply to e-mail interactions that have been directed to you.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have accepted the inbound or transferred e-mail interaction.
- You have clicked Reply or Reply All in the inbound E-Mail Interaction window (see [Lesson: Receiving and Handling an Inbound E-Mail Interaction](#)).

#### Start

1. If you clicked Reply or Reply All in the inbound E-Mail Interaction window, the outbound E-Mail Interaction window is displayed (see the Outbound E-Mail Interaction window, displaying text content type figure).

You might be configured to have signatures inserted automatically into new or reply e-mail interactions based on the sender that you select. The signature will be placed automatically below the text insertion point and above any text that is quoted from the e-mail message to which you are replying.

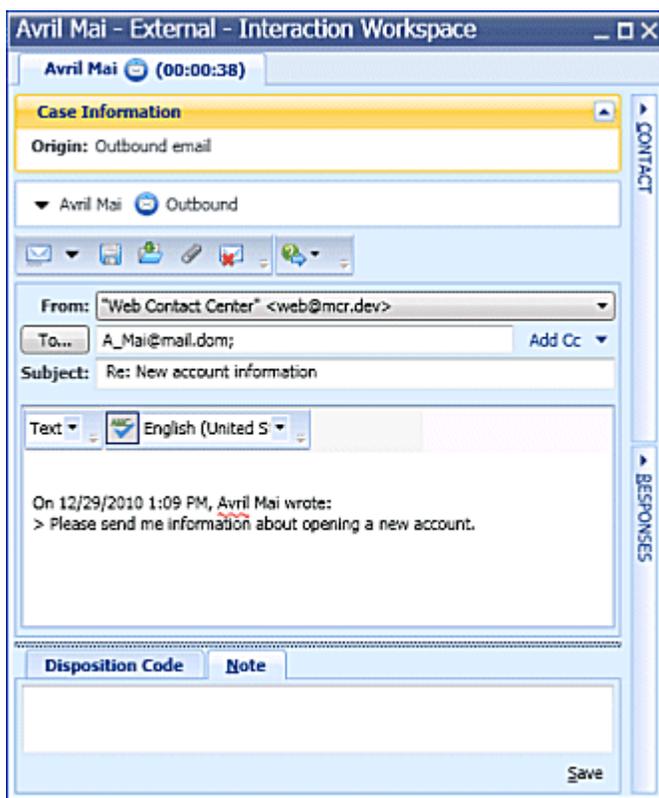
You might be configured to have the contents of the original e-mail included in the body of the reply e-mail.

The outbound E-Mail Interaction window provides the following functionality:

- **Send**--Sends your response to the sender and other recipients, and saves a copy in the Contact History. The corresponding inbound interaction is marked done automatically.
- **Send Interim**--Sends your response, closes the outbound E-Mail Interaction window. The inbound e-mail interaction is reopened in the same window. You can create a second reply e-mail message, or you can consult about the reply with another party. If you close the inbound E-Mail Window, you can re-open it from the In-Progress workbin (see [Using Workbins to Access Stored Interactions](#)).
- **Save**--Store what you have written so far.
- **Save in Draft Workbin**--Store what you have written in the Draft workbin (see [Using Workbins to](#)

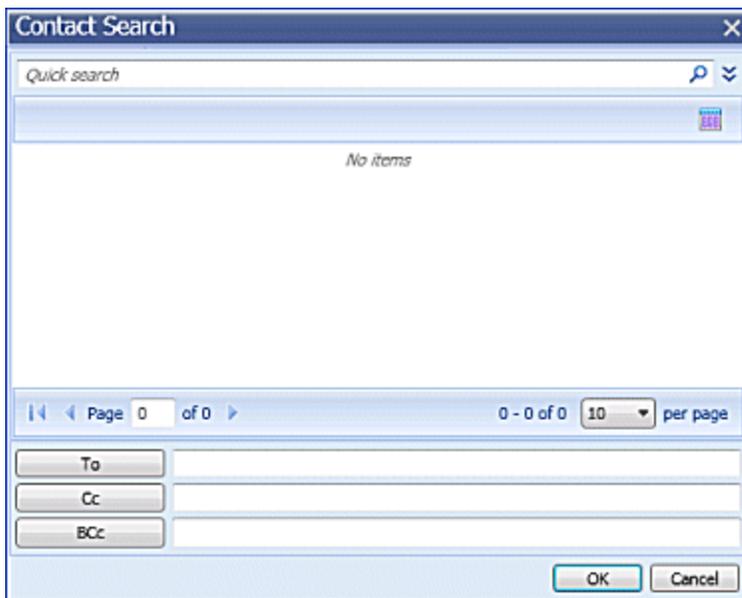
[Access Stored Interactions](#)) and close the outbound E-Mail Interaction window.

- Add Attachments--Open an Explorer window and navigate to a file that is to be sent with the outbound e-mail.
- Delete--Discard the outbound reply without saving a copy in the Contact History or the In-Progress workbin. The inbound E-Mail Interaction window is displayed again on your desktop. The interaction is not marked done.
- Consultation (Voice/IM)--Launches a consultation session with another party. Use the Team Communicator to start a voice or IM session with another party (see [Starting a Voice Conference](#) or [Lesson: Initiating an Instant Messaging session](#)). The consultation interaction is displayed at the bottom of the outbound E-Mail Interaction window.
- Print the e-mail message. See [Printing and Print Preview](#).



Outbound E-Mail Interaction window, displaying text content type

2. You can edit any of the outbound e-mail parameters before you send the e-mail.
  - To change the name of the sender, click the From drop-down menu and select an alternate sender.
  - To change the target of the outbound e-mail, click the To button. The Contact Search dialog box is displayed (see the Contact Search dialog box figure).



Contact Search dialog box

- i. Enter the name, phone number, or e-mail address of a target and then click the magnifying glass.
  - ii. Select the target in the results table. For more information about contact search, see [Lesson: Finding and viewing your interactions in the contact database](#).
  - iii. Click To, Cc, or Bcc to specify that the target is the primary recipient, a copied recipient, or a blind copied recipient.
  - iv. When you have finished adding recipients, click OK. Click Cancel to return to the outbound E-Mail Interaction window without changing the recipient(s).
- You can also add carbon copy (Cc) and blind copy (Bcc) recipients by clicking the Add Cc drop-down menu and selecting Add Cc or Add Bcc respectively. A new Cc or Bcc field is added in the recipient area. Click in the text field to open the Team Communicator and select a recipient, or click Cc or Bcc to open the Contact Search dialog box (see [the Contact Search dialog box figure](#)). You can remove Cc and Bcc fields by clicking the X that is displayed next to the field. You can edit the To, Cc, and Bcc fields by typing directly into the fields. The Team Communicator is displayed to enable you to select a recipient from the contact database.
  - You can edit the default subject of the e-mail. By default, the subject of the inbound e-mail is used.
- You can add content to the e-mail in three ways:
    - Enter your text at the insertion point.
    - Paste text into the text field from another document.
    - Insert a standard response (see [Lesson: Using The Standard Response Library](#)).
  - You can check the spelling of the content of your reply by using the Spelling Check functionality (see [Lesson: Using Spelling Check to find potentially misspelled words in an outbound e-mail message](#)).
  - You can choose to send your reply as plain text or as HTML-formatted text. To change between plain text and HTML, in the e-mail content area, select either Text or HTML in the format toolbar. If you switch from HTML to text, all formatting—including paragraph alignment (left, right, centered, indented, numbered, and

bulleted), fonts, faces (bold, italic, and underlined), font size, and font color--is lost.

- If you are using HTML formatting, you can specify the following parameters:
  - Font--Select one of your installed fonts from the Font drop-down list.
  - Font size--Select the point size of your text. Available font size depends on the font that is selected.
  - Face--Click the Bold, Italic, and Underlined buttons to select and un-select any combination of these faces.
  - Color--Click the color box to open the color picker, and select a color.
  - Paragraph type--Click the numbered or bulleted button to change paragraphs to a numbered list or a bulleted list, respectively. Click the button again to revert to standard paragraphs.
  - Paragraph alignment--Click the paragraph alignment buttons to align paragraphs left, right, centered, or justified.

Formatting is applied to either selected text, or any text that you enter or paste at the insertion point after you have set formatting parameters.

- You can call (see [Making a Voice Call](#)) or send a new e-mail (see [Lesson: Creating and sending a new e-mail interaction to a contact](#)) to the sender by clicking the Action menu drop-down list that is displayed next to the contact name.
- You can set a disposition code. See [Assigning Disposition Codes](#).
- You can use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
- When you have completed composing, formatting (optional), and checking the spelling of your response, click the Send drop-down menu and select Send or Send Interim to send the reply e-mail message to the recipient(s).

## End

## Lesson: Creating and sending a new e-mail interaction to a contact=

- To create a new e-mail interaction and send it to a selected recipient or recipients.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your role enables you to send new e-mail.

### Start

1. There are multiple ways to create a new e-mail interaction:
  - From the Team Communicator, find a contact (see [Lesson: Using the Team Communicator feature to find a contact](#)), and select New E-Mail from the Action menu.
  - From an open interaction (voice, e-mail, chat, or workitem), select New E-Mail from the Action menu drop-down list that is displayed next to the contact name (see the New E-Mail option in the Action menu drop-down list that is displayed next to an active contact name figure).

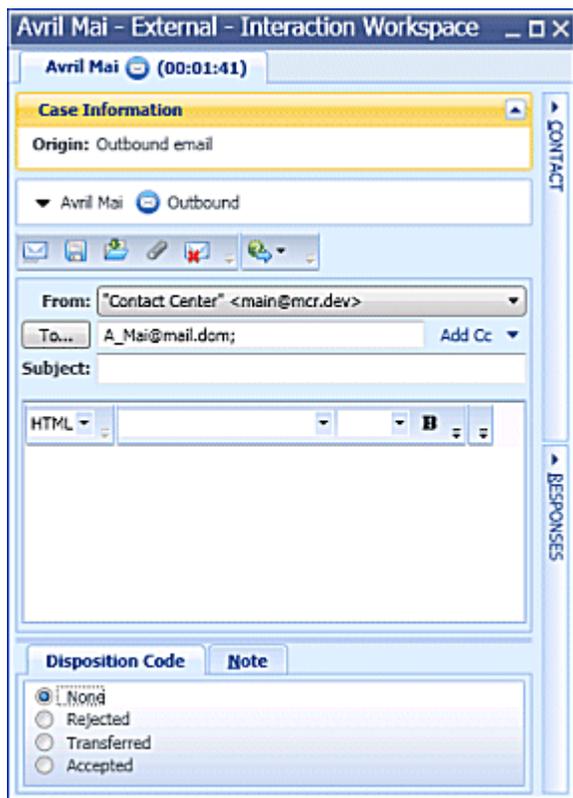


New E-Mail option in the Action menu drop-down list that is displayed next to an active contact name

- From the Contact Directory, find a contact, and select New E-Mail from the E-Mail Action menu or from the More Actions menu.  
A new E-Mail Interaction window is displayed on your desktop (see the New E-Mail Interaction window figure). The name of the contact is specified in the To field, and your default sender address that is displayed in the From drop-down list.

Note: You might be configured to have signatures inserted automatically into new or reply e-mail interactions based on the sender that you select. The signature will be placed automatically below the text insertion point and above any text that is quoted from the e-mail message to which you are replying.

The new E-Mail Interaction window has the same functionality as the reply E-Mail Interaction window (see [Lesson: Replying to a inbound e-mail interaction](#)), except that the Notepad tab is not available.



Procedure: Replying to a inbound e-mail interaction

- When you have completed composing, formatting (optional), and checking the spelling (see [Lesson:](#)

Using [Spelling Check to find potentially misspelled words in an outbound e-mail message](#)) of your new e-mail, click the Send button to send the new e-mail to the recipient(s).

**End**

## Transferring or Forwarding an E-Mail Interaction

The Interaction Workspace E-Mail Interaction window enables you to transfer or forward your current e-mail message interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer an e-mail interaction to an internal target or to a contact or to forward an e-mail to an external resource that is configured in your corporate directory. 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 section contains the following procedures:

- [Lesson: Initiating an e-mail transfer](#)
- [Lesson: Initiating an e-mail forward to an external resource](#)

### Lesson: Initiating an e-mail transfer=

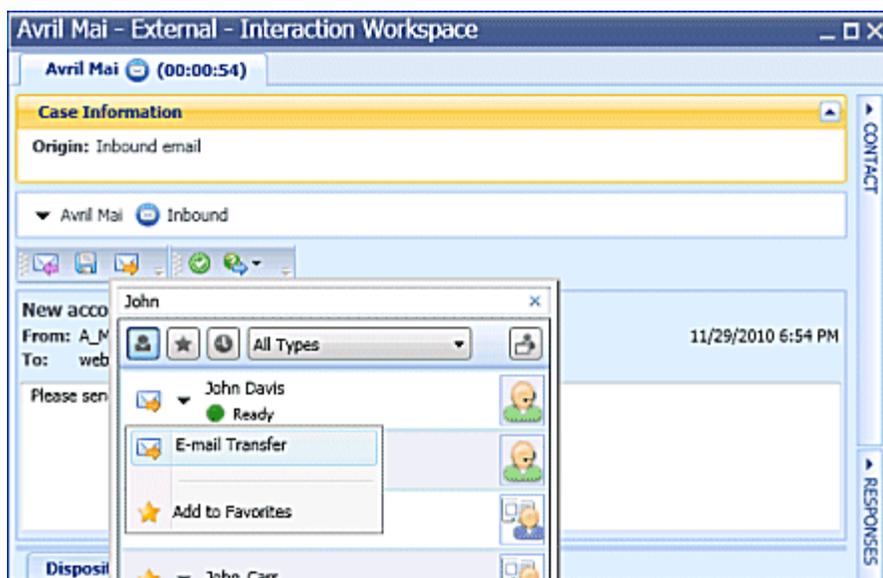
- To find an internal target (such as an agent, Routing Point, or queue) and then transfer the e-mail message to the target.

**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 and Handling an Inbound E-Mail Interaction](#)).

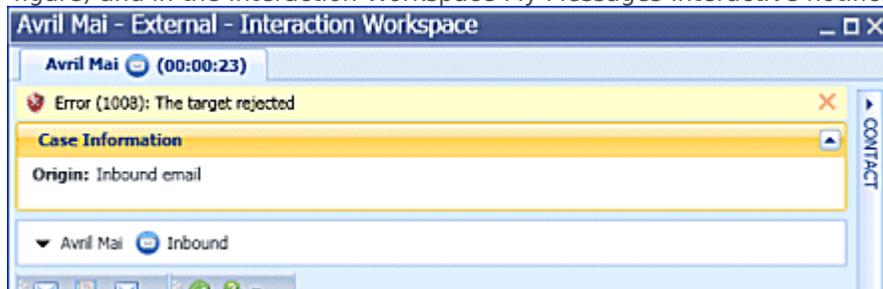
**Start**

1. To transfer the e-mail message, in the active E-Mail Interaction window, click Transfer to open the Team Communicator (see the Finding an internal target for an e-mail transfer in the active E-Mail Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see [Lesson: Using the Team Communicator feature to find an internal target](#)).



Finding an internal target for an e-mail transfer in the active E-Mail Interaction window

- Click the Action Menu drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction, and then select E-Mail Transfer. An invitation is sent to the target to accept the e-mail transfer. If the target accepts the interaction transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target. If the target does not accept the interaction transfer request, the E-Mail Interaction window remains displayed on your desktop and an error is displayed both at the top of the window (see the Interaction Workspace E-Mail Interaction window displaying a message that the transfer target rejected the transfer request figure) and in the Interaction Workspace My Messages interactive notification.



Interaction Workspace E-Mail Interaction window displaying a message that the transfer target rejected the transfer request

**End**

## Lesson: Initiating an e-mail forward to an external resource

- To find an external resource, and then forward the e-mail message to the target.

### 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 and Handling an Inbound E-Mail Interaction](#)).

Note: Depending on how the Forward to External Resource Business Process is designed by your administrator, the Notes tab might be used to contain instructions to generate the e-mail interaction that is sent to the external resource.

### Start

1. To forward the e-mail message to an external resource, click **Forward the email to External Resource** on the active inbound e-mail window toolbar to open the Team Communicator.  

2. Enter the valid e-mail address or find a contact to which the e-mail message is to be forwarded.
3. Click the **Action Menu** drop-down list that is displayed next to the name of the external resource to whom you want to forward the interaction, and then select **E-Mail Forward to External Resource**. The interaction window closes on your desktop and the e-mail message is forwarded to the in-box of the external resource.

### End

## Resending a Previously Sent E-mail Interaction

You can use the **Contact History** view (refer to [Managing Contact History](#)) to resend a previously sent outbound e-mail to the original contact to follow-up with the contact about the interaction. The status of the outbound interaction must be **Done**. You can edit the contents of the e-mail interaction before you send it.

### Lesson: Resending a previously sent e-mail interaction=

- To resend an e-mail interaction that has been marked **Done** to the same recipient.

### Prerequisites

- You are logged in to **Interaction Workspace** (see [Lesson: Logging in to Interaction Workspace](#)).
- There is an outbound e-mail interaction in the **Contact History** that has already been sent to the contact and is now marked as **Done**. The e-mail interaction might be a new outbound e-mail interaction, or it might be a reply e-mail interaction.

### Start

1. In the **Main Window** or **Gadget**, or in the **Contact Directory** of an active interaction window, open the **Contact History** (refer to [Lesson: Finding and viewing an interaction in the contact database](#)).
2. Find the e-mail interaction that you want to resend and select it.
3. Click **Resend**.  


The **E-mail Interaction** window is displayed. The message text of the original outbound e-mail interaction and any attachments are copied to the new interaction. The **To**, **From**, and **CC** fields are

copied from the original outbound e-mail interaction.

4. Add the new message text (your follow-up message) in the e-mail text field. You can add content to the e-mail in three ways:
  - Enter your text at the insertion point.
  - Paste text into the text field from another document.
  - Insert a standard response (see [Lesson: Using The Standard Response Library](#)). Refer to [Lesson: Replying to a inbound e-mail interaction](#) and [Lesson: Creating and sending a new e-mail interaction to a contact](#) for information about the options that are available in the outbound E-mail Interaction window.
5. You can check the spelling of the content of your follow-up message by using the Spelling Check functionality (see [Lesson: Using Spelling Check to find potentially misspelled words in an outbound e-mail message](#)).
6. When you have completed composing, formatting (optional), and checking the spelling of your e-mail interaction, click the Send button to send the e-mail interaction to the recipient(s).

## End

## Spelling Check

You might be enabled to use the Spelling Check functionality. The outbound E-Mail Interaction window has automatic spelling-check capabilities that enable you to correct misspelled words or add words to your personal dictionary.

### Lesson: Using Spelling Check to find potentially misspelled words in an outbound e-mail message

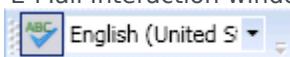
- To verify the spelling of the content of an outbound e-mail message.

#### Prerequisites

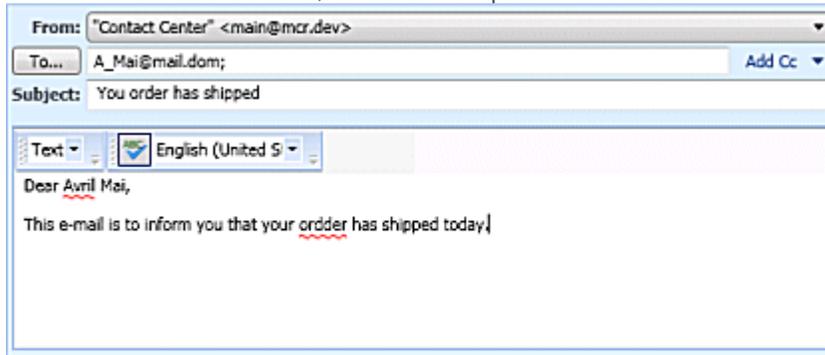
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active e-mail interaction (see [Receiving and Handling an Inbound E-Mail Interaction](#) or [Creating and Handling a New or Reply E-Mail Interaction](#)).

#### Start

1. Begin entering text in the composition area of a new ([Lesson: Creating and sending a new e-mail interaction to a contact](#)) or a reply ([Lesson: Replying to a inbound e-mail interaction](#)) outbound e-mail message. You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response ([Lesson: Using The Standard Response Library](#)).
2. The Spelling Check functionality is controlled by the Spell Check toolbar (you might have to expand the E-Mail Interaction window to see the toolbar).



- Click the Spell Check button to turn Spelling Check functionality on and off.
  - From the Language drop-down list, select the spelling dictionary (language) that you want to use.
3. When the Spelling Check functionality is on, words in the text composition area that are not in the specified dictionary are underlined by a wavy, red line. The mail composition area displaying a misspelled word that is underlined in red figure shows an e-mail message that contains two words that are not in the English (United States) dictionary. The first is the name of the contact and the second is the word order, which is misspelled as ordder.



E-mail composition area displaying a misspelled word that is underlined in red

4. You can correct the spelling by using one of two methods:
- Edit the word(s) manually.
  - Right-click the word to display the Spelling Check menu.
5. If you right-clicked the misspelled word to display the Spelling Check menu, you can do one of the following:
- Select the correct spelling from the list of suggestion (bold text).
  - Ignore--Select to ignore this instance of the word that is not in the specified language dictionary.
  - Ignore All--Select to ignore all instances of the word that is not in the specified language dictionary for this interaction only.
  - Add to My Dictionary--Select to add the spelling to your personal dictionary (not your corporate dictionary).
  - Spell Checking--Select to turn the Spelling Check functionality off or on.
  - Languages--Select to open the list of available language dictionaries. You can select a different language dictionary.

**End**

## Printing and Print Preview

You can use the Print Preview window to specify the format of e-mail interactions before you print them.

## Lesson: Formatting and printing e-mail interactions

- To preview, format, and print an e-mail interaction.

### Start

1. From an active E-Mail Interaction window, click Print. The Print Preview window is displayed.
2. The Print Preview window contains controls for designing your print layout, and it contains the Print Layout view. You can preview your printout in the Print Layout view. The Print Layout view contains the following controls:
  - Zoom in/out--Change the magnification of the view to see more or less detail.
  - View at 100%--View the layout at the full printed page size.
  - Fit the page into the view by page width--Make the view fit the of the layout fit the width of the window.
  - Fit the whole page into the view--Make the entire page fit the window.
  - View pages as front and back pairs side-by-side--For two-sided printing, view front and back pages side-by-side.

You can change these view settings at any time while you have the Print Preview window displayed.

3. From the Destination drop-down list, select a destination printer from the list of available printers on your network.
4. Specify which pages to print:
  - All--Click All to print the entire e-mail interaction.
  - Page Range--Enter one or both of the following in the Page Range text field:
    - A range of page numbers, for example: 2-6
    - Individual page numbers that are separated by commas., for example: 1,3,4.
5. Specify the number of copies to print in the Copies field.
6. Specify a Portrait or Landscape layout.
7. Specify the page margins:
  - Select Uniform Margins to make all the margins match the value that you specify for the top margin.
  - To specify different margins for the top, left, right, and bottom margins, de-select Uniform Margins. Margin units are determined by your local settings.
8. Select Add Page Numbers to add page numbers to the printout.
9. Print the e-mail interaction by applying the layout that you specify:
  - Click Print to print the specified layout.
  - Click Cancel to close the Print Preview window.

Otherwise, click Print using the System Print dialog box to open the System Print dialog box.

### End

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## E-Mail Quality Assurance (QA) Review

You might be configured to have your outbound e-mail interactions sent to your team lead or supervisor for a QA review prior to sending the e-mail interaction to your contact (refer to [Receiving QA Feedback](#)), or you might be configured to be a QA reviewer (refer to the [Lesson: QA Review of E-Mail Interactions](#)).

### Receiving QA Feedback

Your QA reviewer might return the e-mail interaction to you to be updated, or the reviewer might accept the e-mail and allow it to be sent. The review process might require more than one iteration. E-mail interactions that are sent for review might be directed to the reviewer or it might be stored in a workbin that is specifically for reviews. The reviewed e-mail interaction might be returned to you directly or it might be stored in a workbin that is specifically for e-mail interactions that are to be updated or reworked. The status of the review is displayed in the Case Information view for the interaction so that you know whether you have to update the e-mail interaction content or not. If the status is Rejected (or some other disposition that is defined by your system administrator), then the e-mail interaction was not sent to the contact. The reviewer might update the content of the e-mail or the reviewer might add instructions for you in the Notepad view. After you have completed the updates to the e-mail interaction, click Send to deliver the e-mail interaction back to the reviewer for approval or rejection. Refer to [Receiving and Handling an Inbound E-Mail Interaction](#), [Creating and Handling a New or Reply E-Mail Interaction](#), and the *Interaction Workspace 8.1 Help* for information about using the E-Mail Interaction window.

### Providing E-Mail QA Feedback

You might be configured to review outbound e-mail interactions created by agents that you supervise, lead, or review, for Quality Assurance (QA) purposes. If you are a reviewer, outbound e-mails are directed to you prior to being sent to a contact. As a reviewer, you might be configured to receive e-mail interactions for review by an interaction preview or you might be configured to retrieve outbound e-mail interactions from a workbin (refer to [Lesson: Using Workbins](#)).

## Lesson: QA Review of E-Mail Interactions

- To review outbound e-mail interactions from an agent and provide feedback to the agent before sending the e-mail interaction to the recipient.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the e-mail-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target for the outbound interaction.

### Start

1. When an e-mail interaction for review is directed to you, an interaction preview is displayed on your desktop.
-

- 
- Click Accept to display the interaction
  - Click Reject to return the interaction to the queue.  
The Interaction Preview window displays the Case Information view:
    - The Origin field specifies the sender of the interaction and indicates that it is for review.
    - The QA Review Status field is editable. It contains attached data that specifies the status of the review. When you first receive it, the status might be Unknown or For Review, depending on how your administrator has configured your system. There might be other information about the priority of the interaction or the business area to which it belongs.
2. If you accept the e-mail interaction for review, the Review E-mail Interaction window is displayed on your desktop:
- The Case Information view is displayed in the Interaction window.
  - The Origin field specifies the sender of the interaction and indicates that it is for review.
  - The QA Review Status field is editable. It contains attached data that specifies the status of the review.
  - The Party Action menu displays the e-mail monitoring icon to indicate that the agent is under review.  

  - The Interim Send button is not available for review e-mail interactions.

Review the interaction and provide feedback to the agent who originated the outbound e-mail interaction.

Depending on the policy at your company, you might provide feedback by directly editing the content of the e-mail interaction, or you might add notes for the agent in the Notepad view, or you might discuss the content with the agent verbally.

3. In the Review E-mail Interaction window, you can do the following tasks:
- Update the Review Status in the Case Information view
  - Edit the content of the e-mail interaction
  - Set a disposition
  - Add text to the Note tab
  - Use other standard E-mail Interaction window functions (refer to [Receiving and Handling an Inbound E-Mail Interaction](#))
4. When your review is complete, set the status to one of the following states:
- Accepted--The e-mail interaction is sent to the contact when you click Send.
  - Rejected--The e-mail interaction is sent back to the agent or to a workbin that contains reviewed interactions when you click Send. The QA Review Status in the Case Information is updated to Rejected.
  - Unknown--The e-mail interaction is sent back to the review queue or to a review workbin when you click Send.
5. Click Send.

**End**

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# Handle An SMS Interaction

In this lesson, you will learn how to handle inbound Short Message Service (SMS) interactions and how to check the spelling of your SMS messages before you send your message. This lesson contains the following sections:

- [Receiving and Handling an Inbound SMS Interaction](#)
- [Creating an Outbound SMS Interaction](#)
- [Spelling Check](#)

SMS is a text-messaging component of voice and internet communication. SMS enables the exchange of text messages between you and a contact through your computer. Typically, a contact will send you SMS from a mobile device, a web interface, or an e-mail client. By definition, SMS are *short* messages. Interaction Workspace supports 160 characters per message. If you attempt to send a message that is longer than the character limit, additional messages, each up to 160 characters, will be sent so as to accommodate your entire message. Interaction Workspace supports two SMS modes:

- **Page**--You receive a single inbound SMS to which you can send a response or handle in other ways.
- **Session**--You receive an inbound SMS that starts a chat session with a contact. SMS Session is non-real-time two-way communication between you and your contact through your computer.

## Receiving and Handling an Inbound SMS Interaction

If you are the selected internal target of an inbound SMS interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the SMS Interaction window is displayed. The SMS Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Lesson:

### Handling an inbound SMS interaction

- To handle an inbound SMS interaction properly.

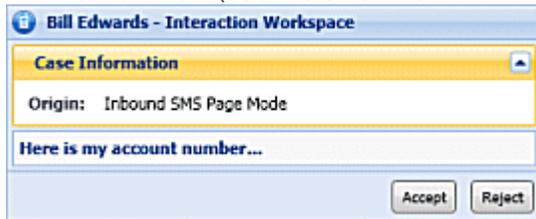
### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the SMS-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target of the inbound interaction.

### Start

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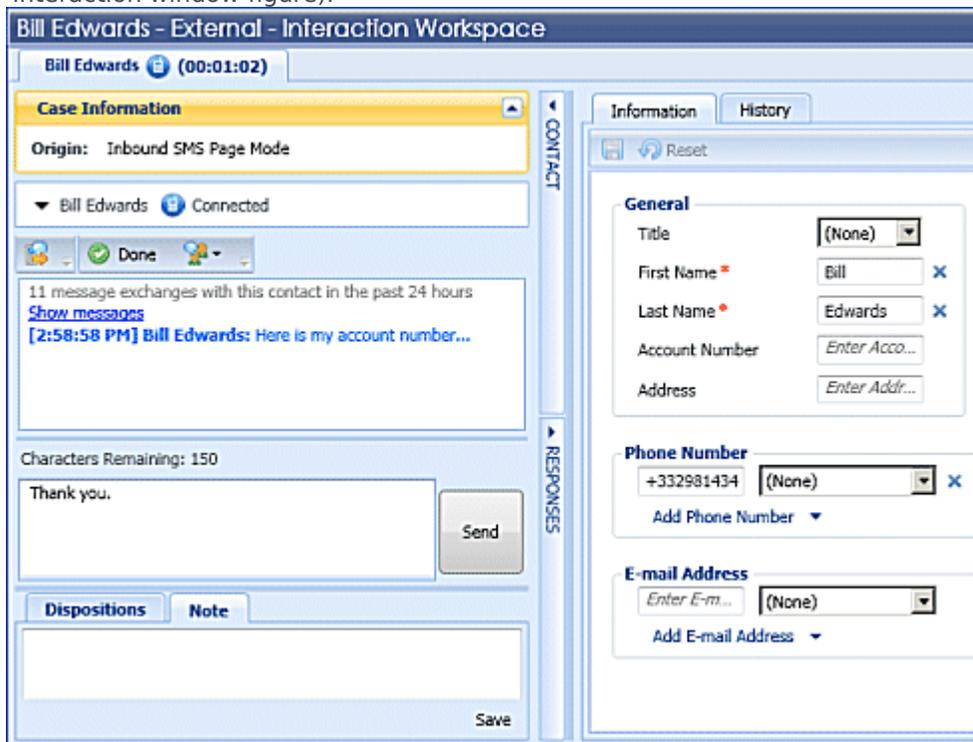
1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the SMS Interaction interactive notification figure).



SMS Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction. The Interaction Preview informs you of whether the SMS was sent in Page Mode or in Session Mode:

- In Page Mode, you can reply to the message, transfer it, contact an internal target or contact to discuss it, or mark it as Done.
  - In Session Mode, if you reply to the interaction, a chat session is started that uses the SMS channel to exchange non-real-time messages.
2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
    - Click Accept to display the interaction.
    - Click Reject to return the interaction to the queue.
    - Do nothing. The interaction will time out and be redirected.
  3. If you accept the interaction, the inbound SMS Interaction window is displayed (see the SMS Page Mode Interaction window figure).



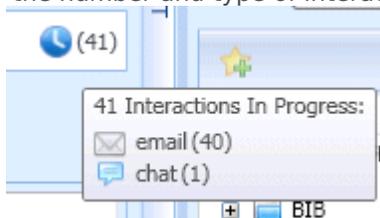
SMS Page Mode Interaction window

The Inbound SMS Interaction window provides the following functionality:

- Compose a message/response.
- Check the spelling of your message/response (see [Lesson: Using Spelling Check to find potentially misspelled words in an SMS message](#)).
- Send a message/response.
- Call or e-mail the contact if the relevant information is available in the contact database.
- Transfer the interaction (see Step 7).
- Mark the interaction as Done.
- Set a disposition code for the interaction.
- Add a note to the interaction.
- View and edit Case Information for the current interaction.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- View and manage contact history. See [Managing Contact History](#).
- View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#).

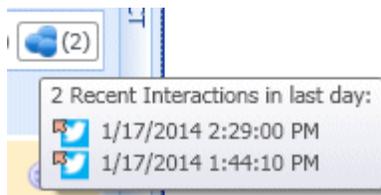
The message-transcript area of the SMS Interaction window contains color-coded, time-stamped message lines from your company's system, as well as the messages that are sent by the contact (see the SMS Page Mode Interaction window figure). If the interaction is in Session Mode, your replies are also displayed. A different color is designated for each message type. The colors are defined by your system administrator.

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



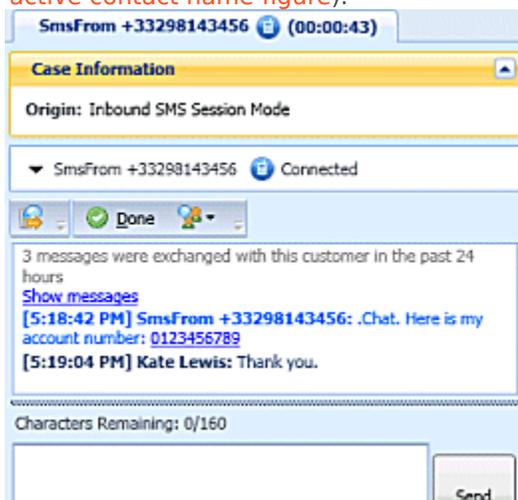
Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

5. To reply to your contact, enter a message in the message area, and then click Send. Your message is displayed to the contact on the SMS device that the contact is using to communicate with you. If the interaction is in **Page Mode**, after you click Send, the interaction window is closed and the interaction is automatically marked as Done, unless you are configured to set a disposition code before you close an interaction window (see [Assigning Disposition Codes](#)). Go to Step 8. If the interaction is in **Session Mode**, your message is also added to the transcript area of the SMS Interaction window. After you click Send, the SMS Interaction window is minimized. You can restore the window in two ways:
  - By selecting the interaction from the Microsoft Windows taskbar
  - By clicking it in the Interaction Bar at the bottom of the Main Window (refer to [Lesson: Using The Interaction Bar](#) for information about using the Interaction Bar)
6. In SMS Session Mode, messages that are sent by your contact are displayed together with your messages in the message-transcript area (see the SMS Interaction window Case Information, Contact Action area, toolbar, and message area figure). While you are interacting with your contact, you can use the following functionality in the SMS Interaction window:
  - Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
  - View and edit Case Information for the current interaction.
  - View and manage contact history. See [Managing Contact History](#)
  - View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#)
  - View the Standard Response Library if you decide to call the sender instead of replying to the e-mail. See [Inserting a Standard Response into an E-Mail Interaction](#).
  - Call the sender by clicking the Action menu drop-down list that is displayed next to the contact name (see [the New E-Mail option in the Action menu drop-down list that is displayed next to an active contact name figure](#)).



SMS Interaction window Case Information, Contact Action area, toolbar, and message area

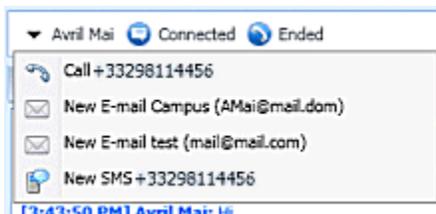
7. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the SMS to another internal target. See [Lesson: Starting an instant SMS transfer](#)).
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See [Lesson: Initiating an Instant Messaging session](#).
  - Start a Voice consultation. See [Starting a Voice Conference](#).
8. When you are finished interacting with your contact, click Done to stop the current SMS interaction.
  - The transcript is saved in the contact history and the SMS Interaction window is closed.
  - Set a disposition code. See [Assigning Disposition Codes](#).

Warning: SMS sessions are configured to expire if no messages are sent or received within a certain interval that is defined by your administrator. Click Done to close the SMS Interaction window after time out occurs.

## End

## Creating an Outbound SMS Interaction

Interaction Workspace enables you to send an SMS to any device or system that is capable of receiving an interaction in this format. You can use the Contact Action menu of the Contact Directory or an active interaction to open the SMS Interaction window and create a new SMS interaction (see the Contact Action menu in an active-interaction window figure).



Contact Action menu in an active-interaction window

Unlike inbound SMS interactions, outbound SMS interactions support only Page Mode interactions. In Page Mode, you send a single outbound SMS to your contact.

## Lesson:

### Creating an outbound SMS interaction

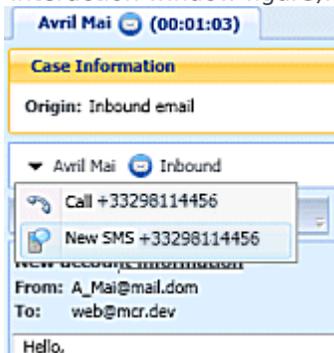
- To create an outbound SMS interaction properly.

## Prerequisites

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

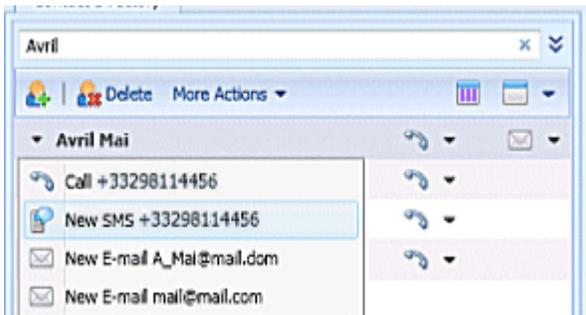
## Start

- From an active interaction, open the Contact Action menu (see the Contact Action menu in an active-interaction window figure).



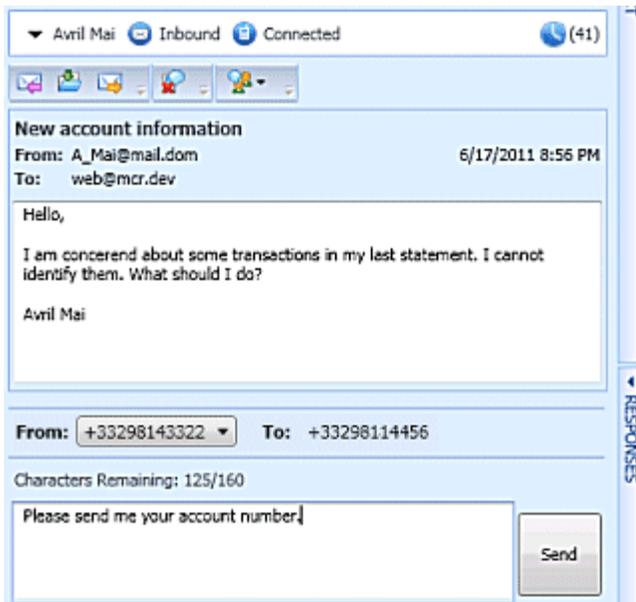
Contact Action menu in an active-interaction window

Alternately, from the Contact Directory, find a contact ([Lesson: Using the Team Communicator feature to find a contact](#)), and then open the Contact Action menu (see the Contact Action menu in the Contact Directory figure).



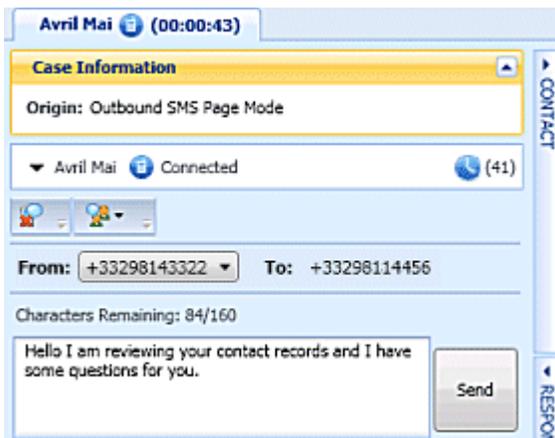
Lesson: Using the Team Communicator feature to find a contact

- Select New SMS.
- If you started a new SMS from an active interaction, the SMS view is displayed in the interaction window that is displayed below the active interaction (see the An SMS interaction, blended into an active e-mail interaction figure).



An SMS interaction, blended into an active e-mail interaction

If you started a new SMS from the Contact Directory, a new SMS Interaction window is displayed (see the New SMS Interaction window figure).



New SMS Interaction window

- To send an SMS interaction (Page Mode), in the SMS text area, enter your message and then click Send. The message is sent to your contact and the SMS view or SMS Interaction window is closed.

## End

## Spelling Check

You might be enabled to use the Spelling Check functionality. The SMS Interaction window has automatic spelling-check capabilities that enable you to correct misspelled words or add words to your personal dictionary.

## Lesson:

### Using Spelling Check to find potentially misspelled words in an SMS message

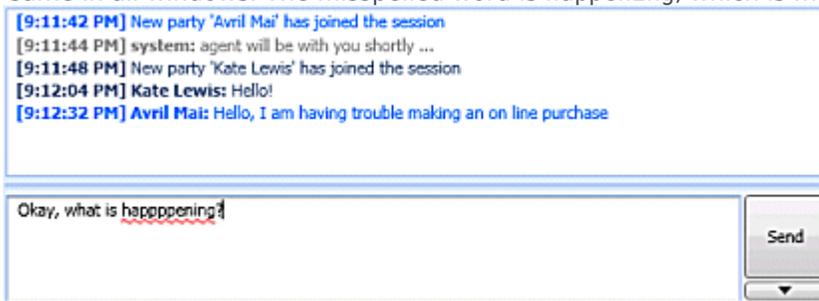
- To verify the spelling of the content of an outbound SMS message.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active SMS interaction (see [Receiving and Handling an Inbound SMS Interaction](#) or [Creating an Outbound SMS Interaction](#)).

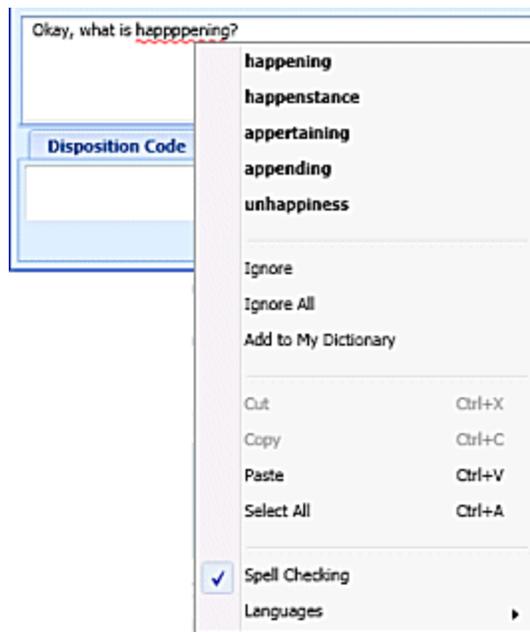
#### Start

1. Begin to enter text in the message area of an SMS Interaction window (see [Lesson: Handling an inbound SMS interaction](#) or [Lesson: Creating an outbound SMS interaction](#)). You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response ([Lesson: Using The Standard Response Library](#)).
2. When Spelling Check is on, words in the message area that are not in the specified dictionary are underlined by a red, wavy line. The Chat message composition area, displaying a misspelled word that is underlined in red figure shows a chat message that contains a word that is not in the English (United States) dictionary (the default dictionary for this user). The behavior of Spelling Check is the same in all windows. The misspelled word is happening, which is misspelled as happppening.



Chat message composition area, displaying a misspelled word that is underlined in red

3. You can correct the spelling by using one of two methods:
  - Edit the word(s) manually.
  - Right-click the word to display the Spelling Check menu.



Chat Interaction window Spelling Check menu

4. If you right-clicked the misspelled word to display the Spelling Check menu, you can do one of the following:
  - Select the correct spelling from the list of suggestion (bold text).
  - Ignore--Select to ignore this instance of the word that is not in the specified language dictionary.
  - Ignore All--Select to ignore all instances of the word that is not in the specified language dictionary for this interaction only.
  - Add to My Dictionary--Select to add the spelling to your personal dictionary (not your corporate dictionary).
  - Spell Checking--Select to turn the Spelling Check functionality off or on.
  - Languages--Select to open the list of available language dictionaries. You can select a different language dictionary.

**End**

# Transfer An SMS Interaction

In this lesson, you will learn how to transfer SMS interactions to an internal target. This lesson contains the following section:

- [Transferring an SMS Interaction](#)

## Transferring an SMS Interaction

The Interaction Workspace SMS Interaction window enables you to transfer your current SMS interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer an SMS interaction to an internal target. This section contains the following procedures:

- [Lesson: Starting an instant SMS transfer](#)
- [Lesson: Receiving a transferred SMS](#)

### Lesson:

#### Starting an instant SMS transfer

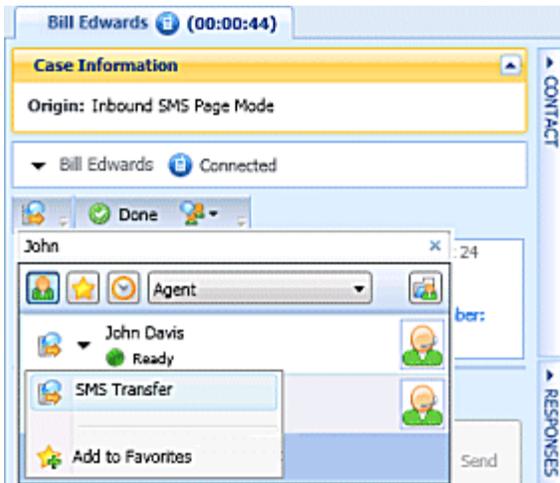
- To find an internal target (such as an agent, Routing Point, or queue), and transfer the SMS to the internal target.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have an active interaction with a contact (see [Lesson: Handling an inbound SMS interaction](#)).

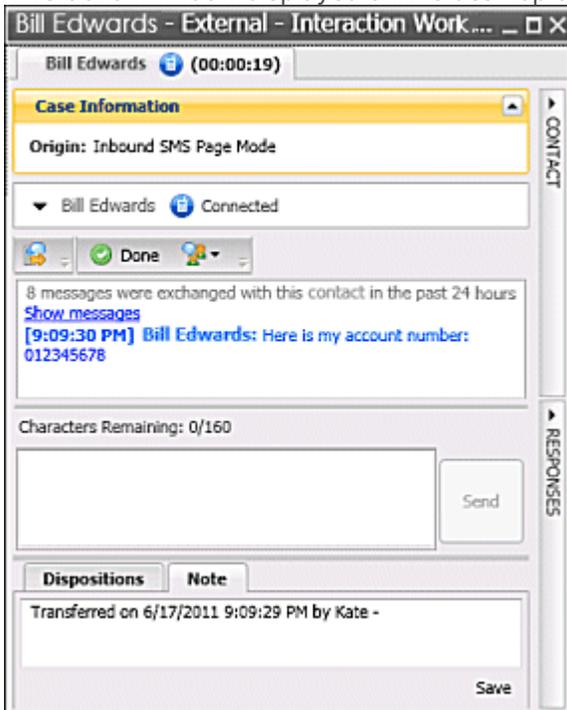
#### Start

1. In the active SMS Interaction window, click Transfer to open the Team Communicator (see the Finding an internal target of an SMS transfer in the active SMS Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the [Lesson: Using the Team Communicator feature to find an internal target](#)).



Finding an internal target of an SMS transfer in the active SMS Interaction window

2. Click the Action Menu drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and then select SMS Transfer. An invitation is sent to the target to accept the SMS transfer. If the target accepts the interaction-transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target (see the Transferred SMS Interaction window displayed on the desktop of the transfer target figure).



Transferred SMS Interaction window displayed on the desktop of the transfer target

If the target does not accept the interaction-transfer request, the SMS Interaction window remains displayed on your desktop and an error is displayed both at the top of the window and in the Interaction Workspace My

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Messages interactive notification.

## End

Lesson:

## Receiving a transferred SMS

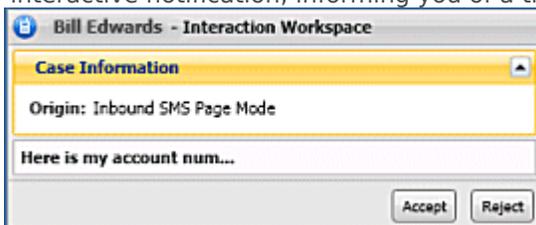
- To receive a transferred SMS interaction from another agent.

## Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the SMS media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).

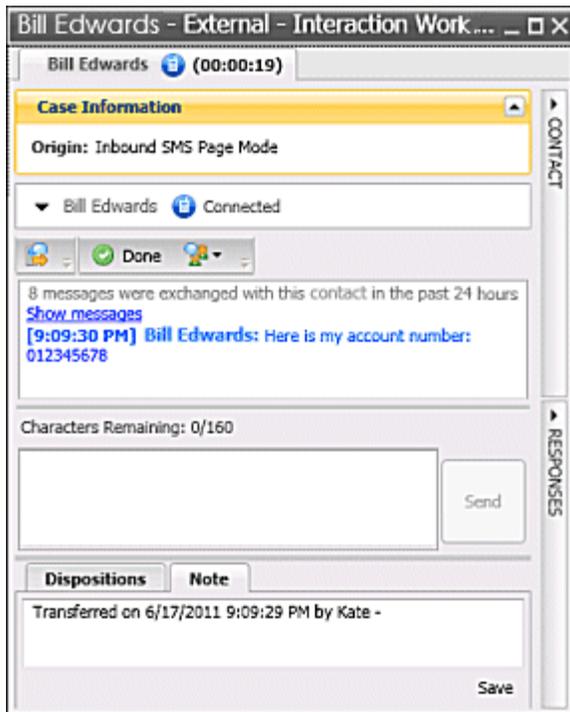
## Start

1. If another agent wants to transfer an SMS interaction to you, you are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (see the Interaction Preview interactive notification, informing you of a transfer request figure).



Interaction Preview interactive notification, informing you of a transfer request

Click Accept to accept the transfer. The interaction is transferred to you immediately.



SMS Interaction window, displaying your status as connected to the SMS party

2. You are now the owner of the SMS interaction. Refer to Step 3 of the [Lesson: Handling an inbound SMS interaction](#), for information about how to handle an SMS interaction.

**End**

# Handle A Twitter Interaction

In this lesson, you will learn how to handle inbound Twitter interactions (Tweets), how to check the spelling of your messages before you send, and other Twitter-specific functionality. This lesson contains the following sections:

- [Receiving and Handling an Inbound Twitter Interaction](#)
- [Twitter-Specific Functionality](#)
- [Interaction Workspace Functionality](#)

## About Twitter

Twitter is an online social networking service and micro-blogging service that enables its users to send and read text-based posts of up to 140 characters, known as Tweets. It has been described as "the SMS of the Internet." These messages are posted to the user's Twitter profile or their blog, sent to their followers, and are searchable on Twitter search. Twitter also has a suite of advertising products to help brands and businesses promote their content within the Twitter experience. Businesses can use Tweets to reach users while they search for their interests on Twitter.

## Receiving and Handling an Inbound Twitter Interaction

If you are the selected internal target of an inbound Twitter interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Twitter Interaction window is displayed. The Twitter Interaction window contains information about the interaction and the controls that you need to complete the interaction.

### Lesson:

#### Handling an inbound Twitter interaction

- To handle an inbound Twitter interaction properly.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the Twitter-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target of the inbound interaction.

#### Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-
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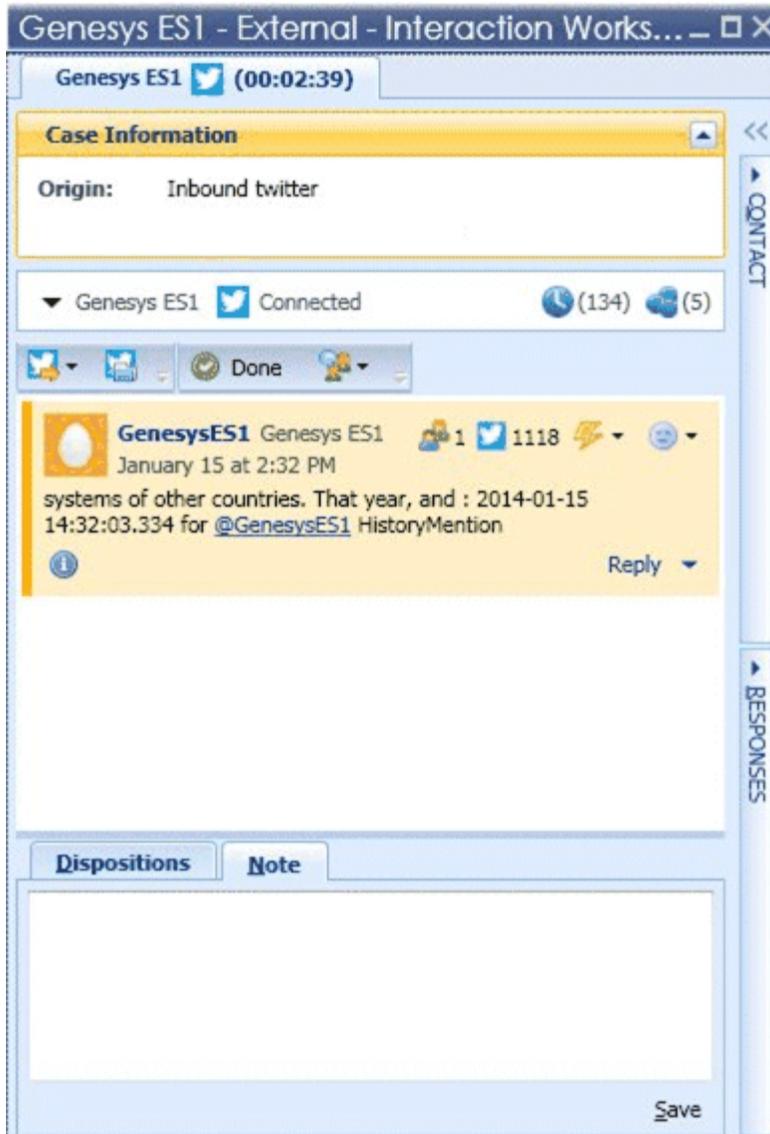
notification view (see Figure - **Twitter Interaction notification**).



Twitter Interaction notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to display the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound Twitter Interaction window is displayed. The **Twitter Interaction window** figure shows the window after clicking the down arrow to reply.



Twitter Interaction window

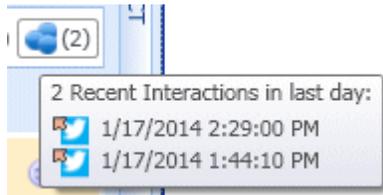
4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure - **Dynamic Contact History Matrix**). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Figure - **Recent interactions matrix**). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions

during the last-specified number of days.



Recent interactions matrix

The original-routed Tweet appears in the left margin under the Twitter interaction toolbar.

5. To reply to the Tweet, just click on Reply, or click the down arrow after Reply. A drop-down menu is displayed.
6. Select one of the following:
  - Reply--Reply to a Tweet by using the @username prefix, which is automatically inserted
  - Reply to All--Reply with a status Tweet that includes mentions. Reply to multiple persons by using @username prefix
  - Send Direct Message--When the Twitter message author is a follower, you can send a direct message to the author as a form of reply
  - Retweet--Re-post someone else's Tweet without comments
  - Retweet with Comments--Re-post someone else's Tweet with comments
7. Enter your reply or retweet. You can copy and paste selected text.
8. When through, click Send. Your message is displayed to the contact on Twitter. Your message is also added to the transcript area of the Twitter Interaction window.

## End

## Next Steps

- You may wish to use some of the [Twitter-Specific Functionality](#) described below. For example, you may wish to update the Twitter classification or follow/unfollow the Twitter-user. You may also wish to use some of the features in described in [Interaction Workspace Functionality](#). When you are finished, click Done to stop the current interaction. The information is saved in the contact history and the Twitter Interaction window is closed.

## Twitter-Specific Functionality

The Twitter Interaction window provides some Twitter-specific functionality.



Buttons and Icons for Twitter-Specific Functionality

You can:

- Display Twitter-user profile information. Click the Show Info button to display the user profile information. You can also click the user name to open the Twitter page that contains user profile information (see the Buttons and Icons for Twitter-Specific Functionality figure).
- Display the number of Twitter-user Tweets. The number after the Statuses Count icon indicates the number of user Tweets (see the Buttons and Icons for Twitter-Specific Functionality figure).
- Display the Actionability and Sentiment of the Twitter interaction. When a Twitter interaction arrives, you can view Actionability and Sentiment icons (see the Buttons and Icons for Twitter-Specific Functionality figure), which could have one of the following values or be undeclared:
  - Actionability--Can be actionable, not actionable, or undeclared.
  - Sentiment--Can be Positive, Negative, Neutral, or undeclared.

Actionable Tweets are colored yellow and non-actionable Tweets are colored in gray. Actionability and Sentiment are based on the classification and screening results that are described in the *eServices 8.1 User's Guide*.

- Update the Actionability and Sentiment of the Twitter interaction. While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.
- Display the Followers Count. The number after the Follower Count icon (see the Buttons and Icons for Twitter-Specific Functionality figure) indicates the number of Twitter users following this account.
- Display the designation that the user is a Follower. The Follower icon (see the Buttons and Icons for Twitter-Specific Functionality figure) indicates that the user is a Twitter follower.
- Follow/Unfollow a Twitter user. You can become or stop being a follower of an author of the Twitter message. Click the Followed button to unfollow this account (see the Buttons and Icons for Twitter-Specific Functionality figure). A menu appears where you can select Unfollow. The button changes to Not Followed (see the Buttons and Icons for Twitter-Specific Functionality figure). Or, in case you change your mind, click the Not Followed button. The menu re-appears where you can select Follow.
- Automatic insertion of mentions. An @ sign and mention are automatically inserted into replies. The @ sign is used to call out usernames in Tweets, like this: Hello @JoeBelow! When a user name is preceded by the @ sign, it becomes a link to a Twitter-user profile.
- Reply to all participants in the current Tweet thread. Click Reply, or click the down arrow after Reply. A drop-down menu is displayed. Select Reply to All.
- Send a direct message to an author of a Tweet message. When the Twitter message author is a follower,

you can send a direct message to the author as a form of reply.

- Retweet. Click the down arrow after Reply, select Retweet from the menu, and enter your Retweet. Right-click, select Spell Checking from the menu, correct any spelling errors, and then click Send.
- Retweet with comments. You can make a new Tweet, including the text of current message, and add additional comments. A Retweet indicator (RT) is automatically inserted at the start of the message text. Click down arrow after Reply, select Retweet with Comments, enter the comment text (you can copy and paste selected text), and click Send Retweet with Comments.
- Open a clickable shortened URL. Twitter messages are limited to 140 characters. If you enter a URL in a Twitter message, a lot of the available characters for your reply are already taken. To overcome this problem, Twitter, in its web interface for creating messages, converts very long URLs into short URLs. In a short URL, the long URL is replaced by a shorter URL in the form of an automatically generated combination of letters and digits. Interaction Workspace supports shortened URLs.
- Open a Twitter user profile page by using clickable mentions. The @ sign is used to call out user names in Tweets, like this: Hello @JoeBelow! Click a user name preceded by the @ sign to link to a Twitter user profile.
- Perform a search in Twitter by using a clickable *#hashtag*. Twitter uses the # symbol, called a hashtag, to mark keywords or topics in a Tweet. Hashtags help you to find Tweets of interest. You can use the hashtag symbol # before relevant keywords in Tweets to categorize those Tweets to display more prominently in a Twitter Search. Clicking on a hashtagged word in any message shows you all other Tweets in that category. Hashtags can occur anywhere in the Tweet.
- Display In-Reply to Tweet. If the delivered Tweet interaction is a reply to another Tweet, Interaction Workspace enables you to view the original Tweet by clicking on the user name located after "In Reply to". A new browser window opens to display the parent Tweet in Twitter.

## Interaction Workspace Functionality

While you are interacting with your Twitter contact, you can use the general Interaction Workspace functionality in the Twitter Interaction window.

Warning: Some of the procedures and tasks below are media-specific, but you can apply the information when working with Twitter interactions.

- Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
- View Case Information for the current interaction.
- View and manage contact history. See [Managing Contact History](#)
- View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#).
- Use the Standard Response Library for pre-written text for replies and comments. Click the vertical Responses button in the [Using The Standard Response Library](#) lesson.
- Cross over into another media channel. If, as an agent, you learn other contact information (not Twitter-specific), such as a contact's phone number or e-mail address, you can manually enter this information on the Information tab. The corresponding choice for other media channels is then displayed when you click the Party Action menu that is next to the name of the contact. You can then reply by using a voice call, an e-mail, an SMS message, or any other supported media channel for a Twitter contact. Interaction Workspace displays a drop-down list of available channels to access a contact.

- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See [Lesson: Starting an instant SMS transfer](#), which is similar to the Twitter procedure.
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See [Lesson: Initiating an Instant Messaging session](#).
  - Start a Voice consultation. See [Starting a Voice Consultation](#).
- When you are finished interacting with your contact, click Done to stop the current interaction.
- The information is saved in the contact history and the Twitter Interaction window is closed.
- Set a disposition code. See [Assigning Disposition Codes](#).

# Handle A Facebook Interaction

In this lesson, you will learn how to handle inbound Facebook interactions, how to check the spelling of your messages before you send, and other Facebook-specific functionality. This lesson contains the following sections:

- [Receiving and Handling an Inbound Facebook Interaction](#)
- [Facebook-Specific Functionality](#)
- [Interaction Workspace Functionality](#)

## About Facebook

Facebook is a social networking service and website. Users must register before using the site, after which they may create a personal profile, add other users as friends, and exchange messages, including automatic notifications, when they update their profile. Businesses can use Facebook to reach their target customers, and choose their audience by location, age and interests. Businesses can also promote their Facebook page or website, use Facebook's "Like" button to increase their advertising influence, and build a community around their business. A plug-in for Interaction Workspace enables it to handle Facebook social media interactions. This lesson contains information about how to handle Facebook interactions.

## Receiving and Handling an Inbound Facebook Interaction

If you are the selected internal target of an inbound Facebook interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Facebook Interaction window is displayed. The Facebook Interaction window contains information about the interaction and the controls that you need to complete the interaction.

Lesson:

### Handling an inbound Facebook interaction

- To handle an inbound Facebook interaction properly.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the Facebook-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target of the inbound interaction.

### Start

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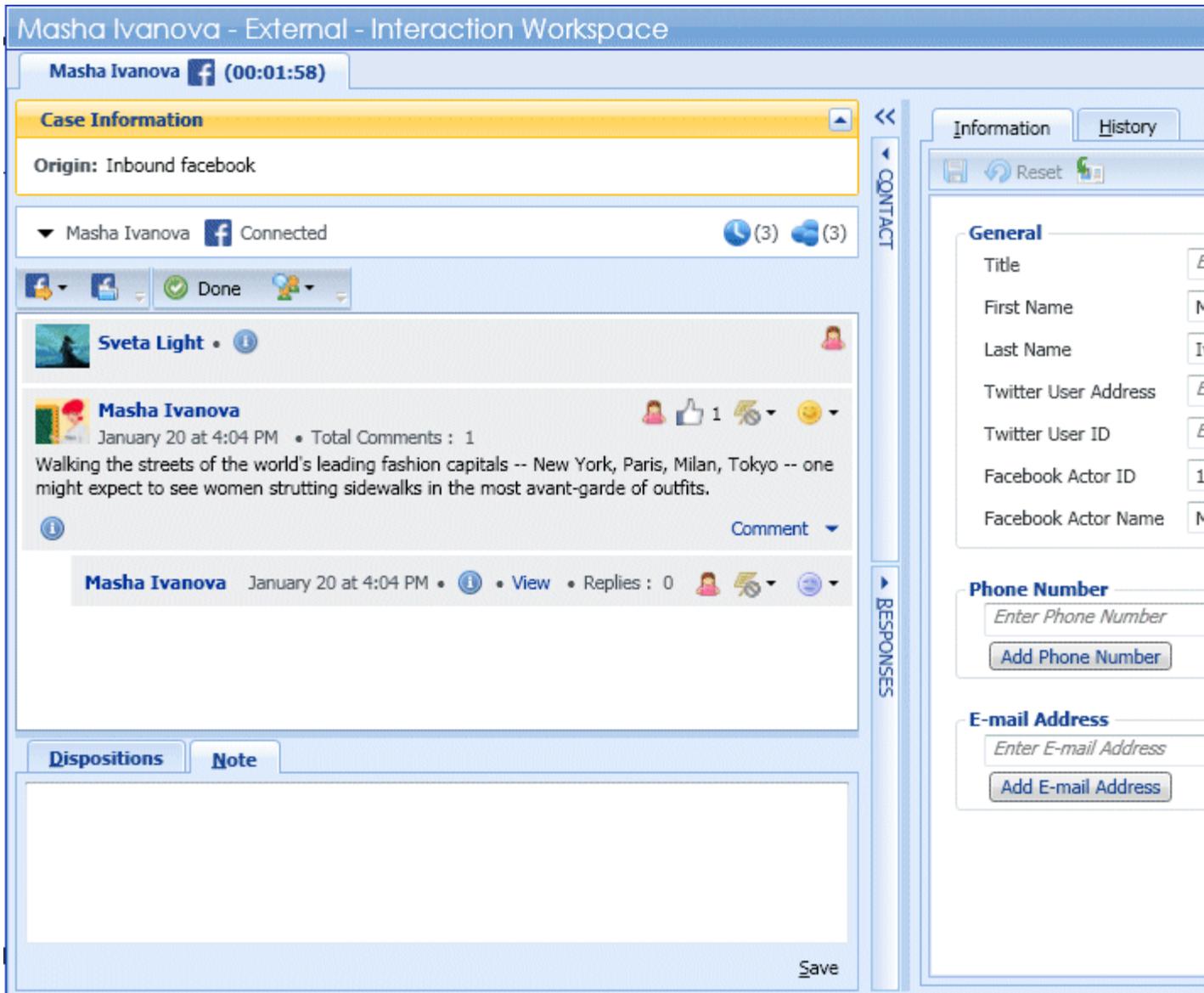
1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Facebook Interaction interactive notification figure).



Facebook Interaction interactive notification

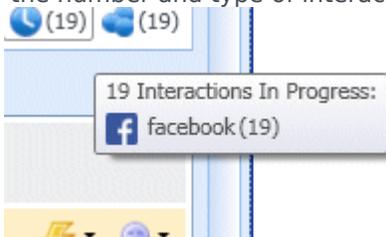
The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to display the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound Facebook Interaction window is displayed. The Facebook Interaction window figure shows the window after clicking the information button to display a user profile.



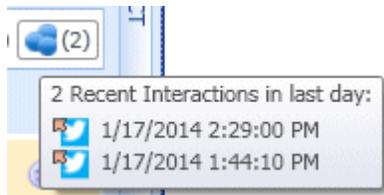
Facebook Interaction window

- 4. If there are interactions in progress for the current contact, the number of interactions is displayed next to the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interactions in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interaction(s) for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

The original-routed post is on the left margin under the Facebook interaction toolbar. Subsequent comments are indented underneath the original post.

5. To reply to an original post, click **Comment** on the right of the post. A text box drops down.
6. Enter your comment. You can also copy and paste selected text.
7. Right-click and select **Spell checking**. Correct any spelling errors.
8. When through, click **Send**. Interaction Workspace associates your comment with the post. Your message is displayed to the contact on Facebook.

## End

## Next Steps

- You may wish to use some of the **Facebook-Specific Functionality** described below. For example, you may wish to update the Facebook classification. You may also wish to use some of the features in described in **Interaction Workspace Functionality**. When you are finished, click **Done** to stop the current interaction. The information is saved in the contact history and the Facebook Interaction window is closed.

## Facebook-Specific Functionality

The Facebook Interaction window provides some Facebook-specific functionality.



Buttons and Icons for Facebook-Specific Functionality

You can:

- Display Facebook-user profile information. Click **Show Info** to open a user profile tab. You can also click the user name to open the Facebook page with user profile information. The author's gender appears in the user profile and also displays as an icon (see the Buttons and Icons for Facebook-Specific Functionality figure).
- Display the number of Facebook *likes*. The number next to the thumbs-up icon indicates the number of

likes.

- Expand or collapse the Comments view. You can expand the comments by clicking **View**. After clicking **View**, **Hide** appears so you can close up the comment. You can also select **Expand All** or **Collapse All** in the Comments view to view/hide all comments at once.
- View the total number of comments and show more comments. Click the **Show Info** button to open the user profile then click the **Post** tab to view the total comments count. Total comments also appears above the original post. Your administrator configures the number of comments to display per page. If the number of comments exceeds the configured number, **Show more** appears. Click **Show more** to view additional comments.
- Display the Actionability and Sentiment of the Facebook interaction. When an Facebook interaction arrives, you can view Actionability and Sentiment icons (see the Buttons and Icons for Facebook-Specific Functionality figure), which could have one of the following values or be undeclared:
  - Actionability--Can be actionable, not actionable, or undeclared
  - Sentiment--Can be Positive, Negative, Neutral or undeclared

Actionable Facebook posts are colored yellow and non-actionable posts are colored gray. Facebook comments are automatically expanded and colored yellow if they are actionable, and collapsed and colored gray if they are non-actionable. Each Facebook comment has its own Actionability and Sentiment icon, which can be updated if necessary. Actionability and Sentiment are based on the classification and screening results as described in the *eServices 8.1 User's Guide*.

- Update the Actionability and Sentiment of the Facebook classification. While you are processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.
- Reply to the original routed Facebook post including checking the spelling (see [Lesson: Handling an inbound Facebook interaction](#)).
- Reply to a Facebook comment. Subsequent comments are indented underneath the original post. Click the applicable comment, enter your reply (you can cut and paste text), have your reply spell-checked, and click **Send**.
- Automatic Insertion of *mentions*. You can use Facebook's mention feature. You can have an @ sign and a mention (examples: @facebook\_name or @company\_name) inserted into a reply when you click **Comment**.
- To delete a comment, click the down arrow after **Comment** and select **Delete** from the drop-down list. The comment can be deleted if this action is allowed by the author of the post.

Warning: A comment can be deleted if this action is allowed by the author of the post. Click the **Show Info** button to open the user profile then click the **Post** tab. If your administrator has set **Can remove comments** to **true**, you can delete comments.

## Interaction Workspace Functionality

While you are interacting with your contact, you can use the following general Interaction Workspace functionality in the Facebook Interaction window:

Warning: Some of the procedures and tasks below are media-specific, but you can apply the information when working with Facebook interactions.

- Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
- View Case Information for the current interaction.
- View and manage contact history. See [Managing Contact History](#)
- View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#).
- Use the Standard Response Library for pre-written text for replies and comments. Click the vertical Responses button in the middle of the window to open the library. You can search by keywords or open folders and view response text. When you click Comment, an additional icon with a plus sign is displayed. Click this icon to add the standard response content to the reply message. Also see [Lesson: Using The Standard Response Library](#).
- Cross over into another media channel. If, as an agent, you learn other contact information (not Facebook-specific), such as a contact's phone number or e-mail address, you can manually enter this on the Information tab. The corresponding choice for other media channels is then available when you click the Party Action menu that is next to the name of the contact. You can reply using a voice call, an e-mail, an SMS or any other supported media channel for a Facebook contact. If a channel is not configured or if the contact information for this channel is absent, No possible action is displayed.
- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See [an instant SMS transfer Lesson: Starting an instant SMS transfer](#)), which is similar to the procedure for Facebook.
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See [Lesson: Initiating an Instant Messaging session](#).
  - Start a Voice consultation. See [Starting a Voice Consultation](#).
  - Set a disposition code. See [Assigning Disposition Codes](#).
- When you are finished interacting with your contact, click Done to stop the current interaction. The transcript is saved in the contact history and the Facebook Interaction window is closed.

# Handle An RSS Interaction

In this lesson, you will learn how to handle inbound RSS interactions fed from the web, how to view the web feed source, headline, and content; how to display channel and item category information; and how to display/update Actionability and Sentiment. This lesson contains the following sections:

- [Receiving and Handling an Inbound RSS Interaction](#)
- [RSS-Specific Functionality](#)
- [Interaction Workspace Functionality](#)

## About RSS

RSS is a family of web feed formats used to publish frequently updated works"such as news headlines, content, and blog entries"in a standardized format. An RSS source or document, (which is called a "feed" or "channel") includes full or summarized text, plus metadata such as publishing dates and authorship.

Genesys software allows business users to avoid manually inspecting all of the web feeds they are interested in, and instead subscribe to websites such that all new content is sent to Interaction Workspace when it becomes available.

A plug-in for Interaction Workspace enables it to handle RSS social media interactions. This lesson contains information about how to RSS interactions.

## Receiving and Handling an Inbound RSS Interaction

If you are the selected internal target of an inbound RSS interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the RSS Interaction window is displayed. The RSS Interaction window contains information about the interaction and the controls that you need to complete the interaction.

### Lesson:

#### Handling an inbound RSS interaction

- To handle an inbound RSS interaction properly.

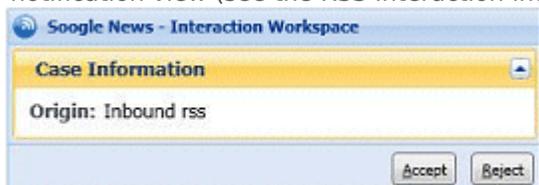
#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- Your status is Ready for the RSS-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).

- You are the internal target of the inbound interaction.

**Start**

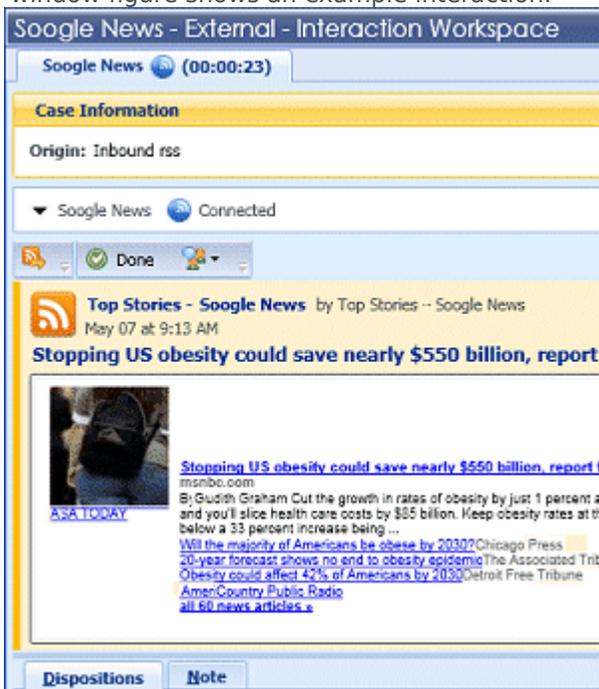
1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the RSS Interaction interactive notification figure).



RSS Interaction interactive notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to display the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound RSS Interaction window is displayed. The RSS Interaction window figure shows an example interaction.

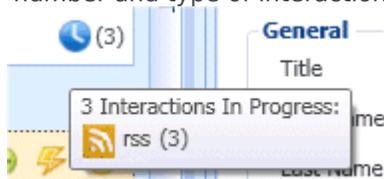


RSS Interaction window

The original-routed RSS interaction appears in the left pane under the RSS interaction toolbar (see the RSS Interaction window figure).

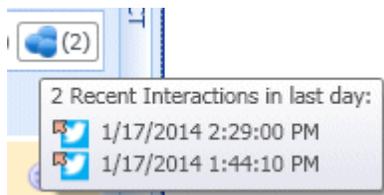
4. If there are interactions in progress for the current contact, the number of interactions is displayed

beside the connection status of the interaction (see the Dynamic Contact History Matrix displaying the number and type of interactions in progress figure).



Dynamic Contact History Matrix displaying the number and type of interactions in progress

Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact. You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

5. You can then view the source of the RSS interaction, the headline, and content (see the RSS Interaction window figure).

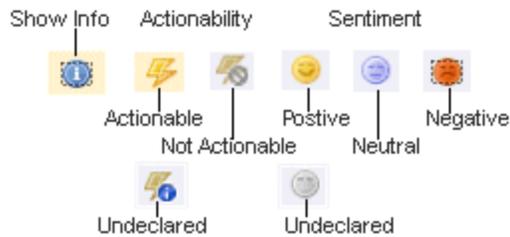
## End

## Next Steps

- You may wish to use some of the [RSS-Specific Functionality](#) described below. You may also wish to use some of the features in described in [Interaction Workspace Functionality](#). When you are finished, click Done to stop the current interaction. The information is saved in the contact history and the RSS Interaction window is closed.

## RSS-Specific Functionality

The RSS Interaction window provides some RSS-specific functionality.



### Buttons and Icons for RSS-Specific Functionality

You can:

1. View RSS Web Feed Source, Headline, and Content. The RSS interaction window lets you view the source of the web feed, the headline, and content. Click on the headline to go directly to the associated page on the website.
2. View Channel and Item Category information. Click the Show Info button (see the Buttons and Icons for RSS-Specific Functionality figure) to view the channel copyright, language, published date, and item category.
3. View the Actionability and Sentiment of the RSS interaction. When an RSS interaction arrives, you can view Actionability and Sentiment icons (see the Buttons and Icons for RSS-Specific Functionality figure), which could have one of the following values or be undeclared:
  - Actionability--Can be actionable, not actionable, or undeclared
  - Sentiment--Can be Positive, Negative, Neutral, or undeclared

Actionable RSS interactions are colored yellow and non-actionable RSS interactions are colored in gray. Actionability and Sentiment are based on the classification and screening results that are described in the *eServices 8.1 User's Guide*.

4. Update the Actionability and Sentiment of the RSS Interaction. While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.

## Interaction Workspace Functionality

While you are interacting with your RSS interaction, you can use the general Interaction Workspace functionality in the RSS Interaction window.

Warning: Some of the procedures and tasks below are media-specific, but you can apply the information when working with RSS interactions.

- Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#).
- View Case Information for the current interaction.
- View and manage contact history. See [Managing Contact History](#)
- View and manage contact (web feed source) information. See [Lesson: Finding and viewing an interaction in the contact database](#).

- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See [Lesson: Starting an instant SMS transfer](#), which is similar to the RSS procedure.
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See [Lesson: Initiating an Instant Messaging session](#).
  - Start a Voice consultation. See [Starting a Voice Consultation](#).
- When you are finished interacting with the item, click Done to stop the current interaction.
- The information is saved in the contact history and the RSS Interaction window is closed.
- Set a disposition code. See [Assigning Disposition Codes](#).

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# Handle A Workitem Interaction

In this lesson, you will learn how to handle inbound workitem interactions. Workitems are documents that might be directed to you for handling. They include numerous non-interactive media types, such as faxes, that you might have to view while you are handling interactions of another type, such as e-mail. This lesson contains the following sections:

- [Receiving and Handling an Inbound Workitem Interaction](#)
- [Transferring a Workitem Interaction](#)

## Receiving and Handling an Inbound Workitem Interaction

If you are the selected internal target for an inbound workitem interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the Workitem Interaction window is displayed. The Workitem Interaction window contains information about the interaction and the controls that you need to complete the interaction. This section contains the following procedure:

- [Lesson: Handling an inbound workitem interaction](#)

### Lesson:

#### Handling an inbound workitem interaction

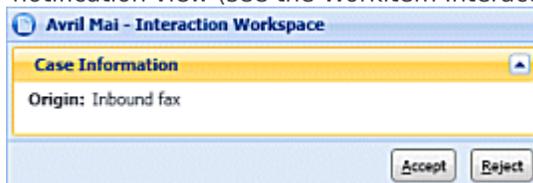
- To handle an inbound workitem interaction properly.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- Your status is Ready for the workitem-media channel (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You are the internal target for the inbound interaction.

#### Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see the Workitem Interaction (in this case, a fax) interactive notification figure).

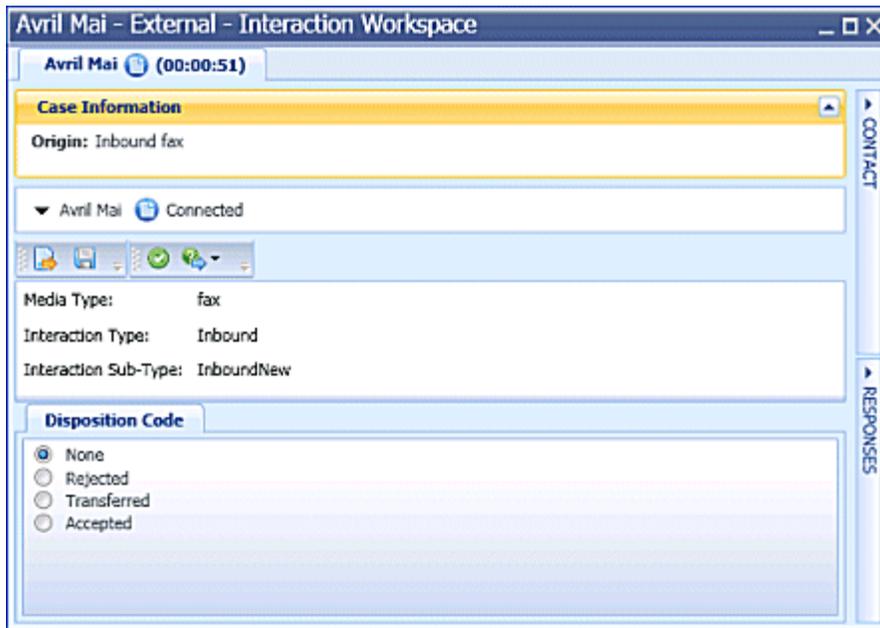


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Workitem Interaction (in this case, a fax) interactive notification

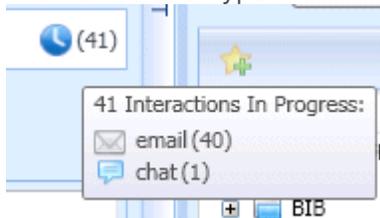
The Interaction Notification contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Notification might also contain Case Information, which is part of the case data about the interaction.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
  - Click Accept to display the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the inbound Workitem Interaction window is displayed (see the Inbound Workitem Interaction window figure). The Inbound Workitem Interaction window provides the following functionality:
  - Transfer (forward) the workitem to another internal target. See [Transferring a Workitem Interaction](#).
  - Save the workitem in a workbin and close the Workitem Interaction window. See [Using Workbins to Access Stored Interactions](#).
  - Select Mark Done for the current interaction to save the workitem in the contact history and close the Workitem Interaction window. See [Managing Contact History](#).
  - Start a voice or IM consultation with an internal target or with a contact. See [Starting a Voice Conference](#) or [Lesson: Initiating an Instant Messaging session](#).
  - Set a disposition code. See [Assigning Disposition Codes](#).
  - View and edit Case Information for the current interaction
  - Initiate a voice consultation. See [Starting a Voice Conference](#).
  - Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
  - Call (or e-mail) the sender by clicking the Action menu that is displayed next to the contact name. See [a Voice Call Making a Voice Call](#).
  - View and manage contact history. See [Managing Contact History](#).
  - View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#).
  - View the Standard Response Library if you decide to call the sender. See [Inserting a Standard Response into an E-Mail Interaction](#).



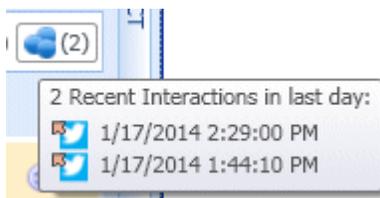
Inbound Workitem Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see the Dynamic Contact History Matrix, displaying the number and type of interactions in progress figure). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.



Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see the Recent interactions matrix displaying the list of interactions with the current contact within the last day figure). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.



Recent interactions matrix displaying the list of interactions with the current contact within the last day

**End**

## Transferring a Workitem Interaction

The Interaction Workspace Workitem Interaction window enables you to transfer your current workitem interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer a workitem interaction to an internal target or to a contact. 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 section contains the following procedure:

- [Lesson: Initiating a workitem transfer](#)

### Lesson:

#### Initiating a workitem transfer

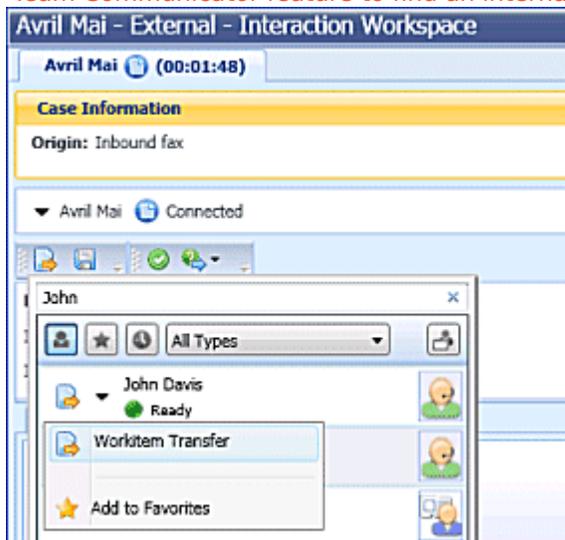
- To find an internal target (such as an agent, Routing Point, or queue), and then transfer the workitem to the internal target.

#### 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 and Handling an Inbound Workitem Interaction](#)).

#### Start

1. In the active Workitem Interaction window, click Transfer to open the Team Communicator (see the Finding an internal target for workitem transfer in the active Workitem Interaction window figure) to find the internal target to whom you want to transfer the current interaction (see the [Lesson: Using the Team Communicator feature to find an internal target](#)).



Finding an internal target for workitem transfer in the active Workitem Interaction window

2. Click the Action Menu drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and select Workitem Transfer. An invitation is sent to the target to accept the workitem transfer. If the target accepts the interaction transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target. If the target does not accept the interaction transfer request, the Workitem Interaction window remains displayed on your desktop and an error is displayed both at the top of the window and in the Interaction Workspace My Messages interactive notification.

**End**

# Blend Different Media Into A Single Conversation

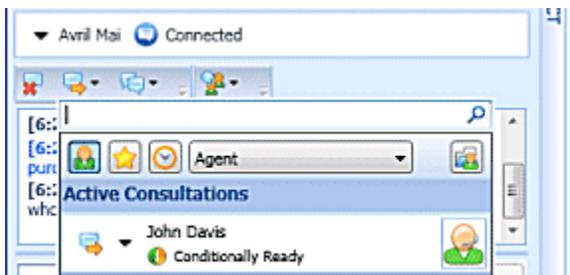
In this lesson, you will learn how to use the Interaction window to manage a conversation with a contact or other party by using different media types simultaneously. Interaction Workspace enables you to blend more than one media type into your conversation. You can chat with a contact online, while simultaneously speaking together on the phone and composing an e-mail message to send information in writing. You can also manage a conference call with a contact and an internal party, while simultaneously conducting an IM session with the internal party. You can receive a phone number or e-mail address in an e-mail, chat, or SMS interaction, and then click it to launch a new interaction. Interaction Workspace provides many ways to blend interaction media simultaneously. The following sections provide some examples of what you can do:

- [Media Blending Overview](#)
- [Blending One Media with Another](#)
- [Blending an E-Mail Interaction with a Voice Interaction](#)
- [Blending a Voice Interaction with a Chat Interaction](#)
- [Blending Internal Voice Interactions and Internal IM Interactions](#)
- [Click to Blend](#)

The procedures in this lesson demonstrate the principles of media blending; they do not show all the possible media-blending combinations.

## Media Blending Overview

Interaction Workspace enables you to handle multiple, related interactions in a single window, and transition from one media type to another within the same window. For example, if you are handling a chat interaction with a contact, you can start an IM consultation in the same window, and then you can add an e-mail interaction while you add a voice consultation. When you are engaged in one or more consultations with another party, such as another agent or other internal target, Interaction Workspace displays a list of your active consultations (see the Team Communicator displaying active consultations figure) whenever you display the Team Communicator by clicking the Instant Transfer, Instant Conference, and Start Consultation buttons in the active interaction.



Team Communicator displaying active consultations

The table **Some of the available media blending by type of interaction** lists some of the media blending combinations that are available from each media channel, including consultations. The table **Available consultation types and blending consultation types by interaction-type** lists the media blending combinations that are available for each consultation media-type.

**Some of the available media blending by type of interaction**

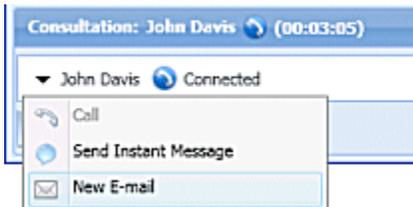
| Interaction                   | Media blending and consultation |
|-------------------------------|---------------------------------|
| Voice (Contact)               | E-mail                          |
|                               | SMS                             |
|                               | Voice consultation              |
|                               | IM consultation                 |
| Voice (Internal target)       | IM                              |
|                               | Voice consultation              |
|                               | IM consultation                 |
| IM (Internal target)          | Voice (Internal target)         |
| E-mail (inbound from contact) | Voice                           |
|                               | SMS                             |
|                               | Voice consultation              |
|                               | IM consultation                 |
| E-mail (outbound to contact)  | Voice                           |
|                               | SMS                             |
|                               | Voice consultation              |
|                               | IM consultation                 |
| Chat                          | Voice                           |
|                               | E-mail                          |
|                               | SMS                             |
|                               | Voice consultation              |
|                               | IM consultation                 |
|                               | Chat consultation               |
| SMS                           | Voice                           |
|                               | E-mail                          |
| Workitem                      | SMS                             |

**Available consultation types and blending consultation types by interaction-type**

| Interaction | 1st consult   | 1st transition consult | 2nd transition consult |
|-------------|---------------|------------------------|------------------------|
| Voice       | Voice consult | IM consult             | X                      |
| E-mail      | Voice consult | IM consult             | X                      |
|             | IM consult    | Voice consult          | X                      |
| Chat        | Voice consult | IM consult             | Chat consult           |
|             |               | Chat consult           | IM consult             |
|             | IM consult    | Voice consult          | Chat consult           |
|             |               | Chat consult           | X                      |
|             | Chat consult  | Voice consult          | IM consult             |
|             |               | IM consult             | Voice consult          |

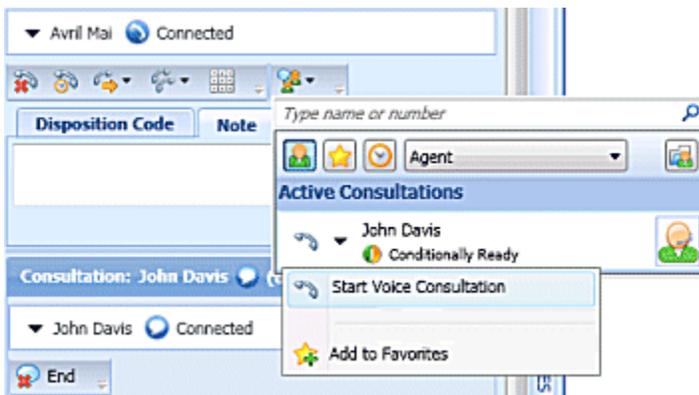
### Blending One Media with Another

From an active interaction, to add a new media-type to a conversation, click on the Action menu that is next to the name of the party (see the Active party Action menu displaying available media figure).



Active party Action menu displaying available media

The Action menu displays the media channels that are available for blending. The media that are available depends on several factors, including which media are available in your environment, what contact information is available, and to which media channels you are logged in. The Team Communicator also displays the Action menu for each party with whom you have an active consultation when you click the Start Consultation button.



Active Consultations Action menu in Team Communicator

## Blending an E-Mail Interaction with a Voice Interaction

You can e-mail a contact or other party with whom you are engaged in a voice interaction. The opposite scenario is also possible; you can call a contact from an active E-Mail Interaction window.

Lesson:

### Blending an E-Mail interaction with a current Voice interaction

#### Purpose:

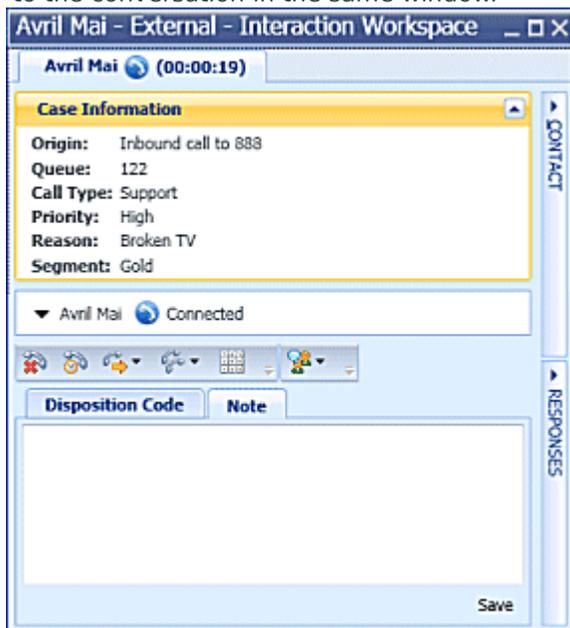
- To add a different type of media to an existing interaction.

#### 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](#)).

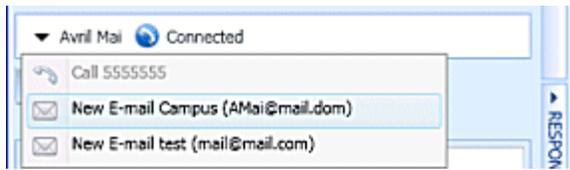
#### Start

1. During a call with a contact you might want to send an e-mail message to the contact. The Voice Interaction window (see the Voice Interaction Window figure) enables you to add an e-mail interaction to the conversation in the same window.



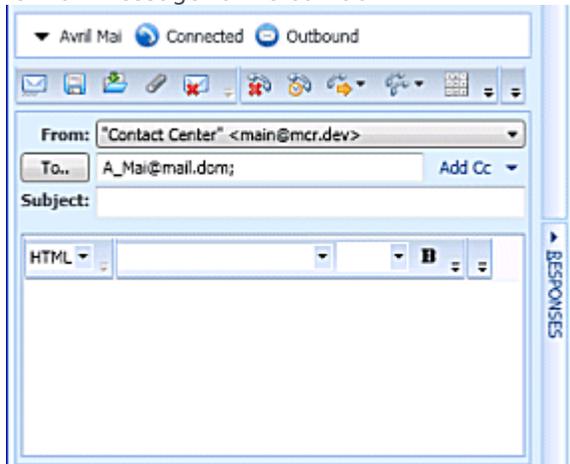
Voice Interaction Window

To open the list of available media for the contact, in the interaction window, click on the Party Action menu that is next to the name of the contact (see the Interaction window Party Action menu figure).



Interaction window Party Action menu

2. Select the e-mail address to which you want to send the e-mail message (see the Interaction window Party Action menu figure). The E-Mail Interaction view is added to the Voice Interaction window (see the Voice interaction and e-mail interaction blended in the same window figure). You can now compose an e-mail message to the contact.



Voice interaction and e-mail interaction blended in the same window

3. Complete the e-mail ([Lesson: Creating and sending a new e-mail interaction to a contact](#)) and voice ([Lesson: Handling an inbound voice interaction](#)) interactions.

## End

## Blending a Voice Interaction with a Chat Interaction

You can call a contact or other party with whom you are engaged in a chat interaction. The opposite scenario is not possible; you cannot start a chat interaction from an active Voice Interaction window.

### Lesson:

#### Blending a voice interaction with a current chat interaction

##### Purpose:

- To add different media-types to an existing interaction.

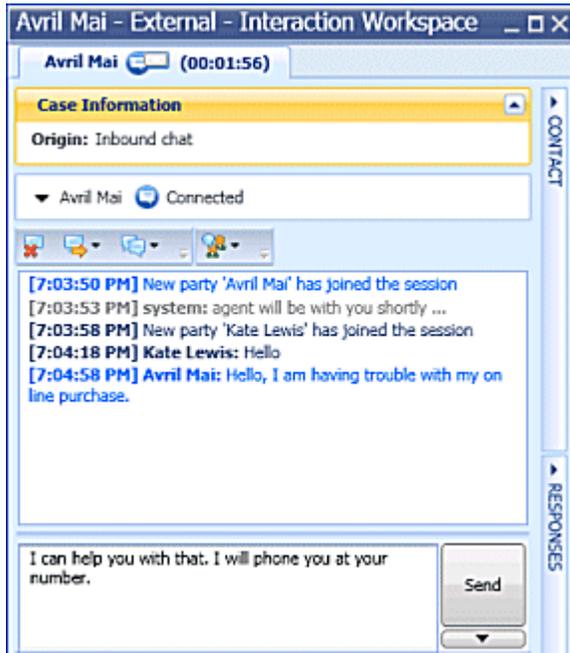
##### Prerequisites

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

- You have an active interaction with a contact (see [Lesson: Handling an inbound chat interaction](#)).

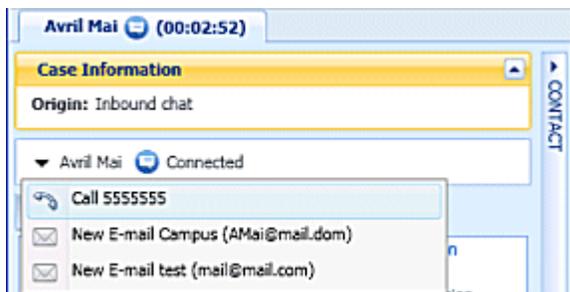
**Start**

1. During a chat with a contact you might want to call the contact. The Chat Interaction window (see the Chat Interaction Window figure) enables you to add an voice interaction to the conversation in the same window.



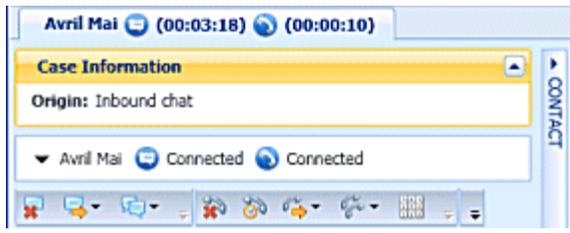
Chat Interaction Window

To open the list of available media for the contact, in the interaction window, click on the Party Action menu that is next to the name of the contact (see the Interaction window Party Action menu figure).



Interaction window Party Action menu

2. Select the phone number that you want to call (see the Interaction window Party Action menu figure). The Voice Interaction view is added to the Chat Interaction window (see the Chat interaction and voice interaction blended in the same window figure). Both interactions have the Connected status. You can now speak with the contact.



Chat interaction and voice interaction blended in the same window

3. Complete the chat ([Lesson: Handling an inbound chat interaction](#)) and voice ([Lesson: Handling an inbound voice interaction](#)) interactions.

## End

## Blending Internal Voice Interactions and Internal IM Interactions

Interaction Workspace enables you to blend media during internal interactions, whether you are calling agent-to-agent, or are consulting with another party while you are handling an interaction with a contact, you can add different media to your internal interactions. This section contains the following procedures:

- [Lesson: Blending an internal IM with an active internal voice interaction](#)
- [Lesson: Blending an internal IM consultation with an active internal voice consultation.](#)
- [Lesson: Blending a voice consultation with an IM consultation.](#)

## Lesson:

### Blending an internal IM with an active internal voice interaction

#### Purpose:

- To add an internal IM interaction to an active internal voice interaction and handle both in the same window.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You have an active call with an internal target (see [Lesson: Calling an internal target](#)).

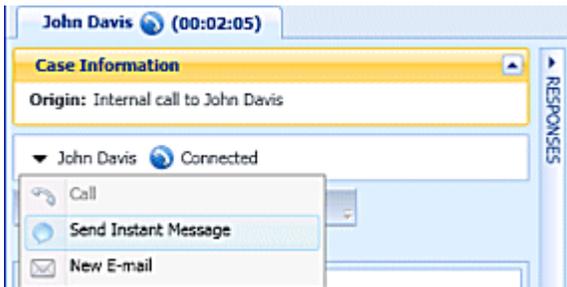
#### Start

1. During a call with an internal target, you might want to blend an IM interaction into your conversation. The Voice Interaction window (see the Active voice interaction, with an internal target figure) enables you to add multiple conversations in the same window.



Active voice interaction, with an internal target

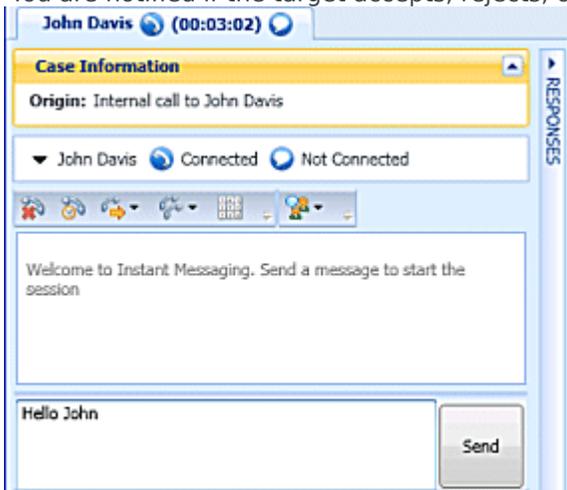
To add an IM interaction to your conversation, click the Party Action menu next to the name of your internal target and select Send Instant Message (see the Party menu in the active Voice Interaction window figure).



Party menu in the active Voice Interaction window

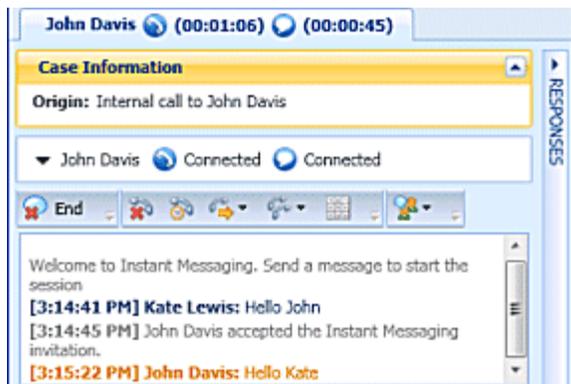
The IM interaction view is displayed in the active Voice Interaction window (see the Starting an IM interaction in the active interaction window figure).

2. Enter a message to your target. The session starts in the interaction window (see the Starting an IM interaction in the active 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.



Starting an IM interaction in the active interaction window

3. 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 (see the Starting an IM interaction in the active interaction window figure). The transcript of your conversation is displayed in the message transcript area (see the Message-transcript area of the IM interaction view figure).



Message-transcript area of the IM interaction view

4. Complete your voice interaction by following [Lesson: Calling an internal target](#). Complete your IM interaction by following [Lesson: Initiating an Instant Messaging session](#). You can end either of the interactions while keeping the other active.

## End

Lesson:

## Blending an internal IM consultation with an active internal voice consultation

### Purpose:

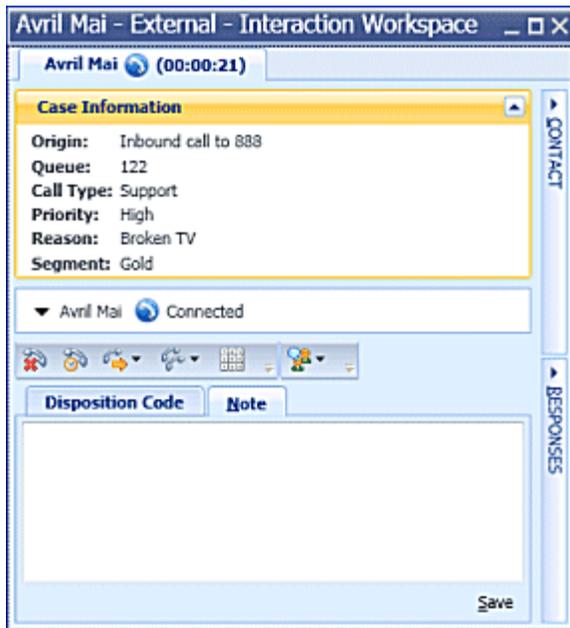
- To add an internal IM consultation to an active internal voice consultation and handle both in the same window.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You have an active interaction with a contact (see [Receiving a Voice Interaction](#)).

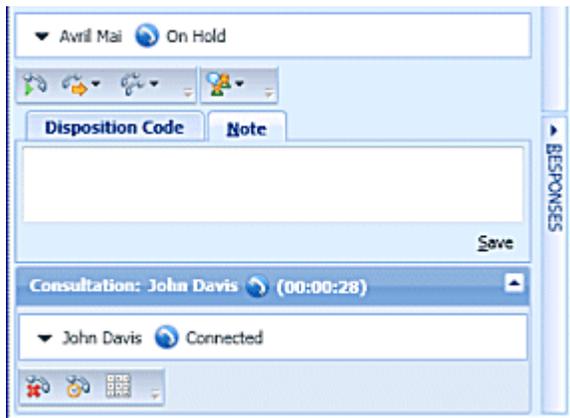
### Start

1. During a call with a contact you might want to start a voice consultation and then blend in an IM consultation. The Voice Interaction window (see the Voice Interaction Window figure) enables you to add multiple consultation conversations in the same window.



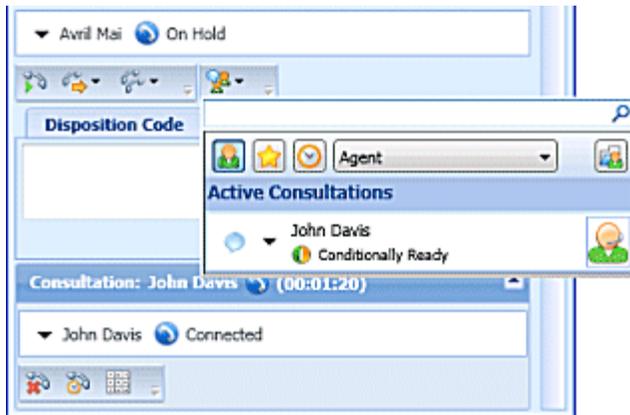
Voice Interaction Window

Start a consultation call with an internal target or other party by using the following [Lesson: Starting a voice consultation](#). The consultation is added to the current interaction window (see the Voice Interaction window, with an added voice consultation figure).



Lesson: Starting a voice consultation

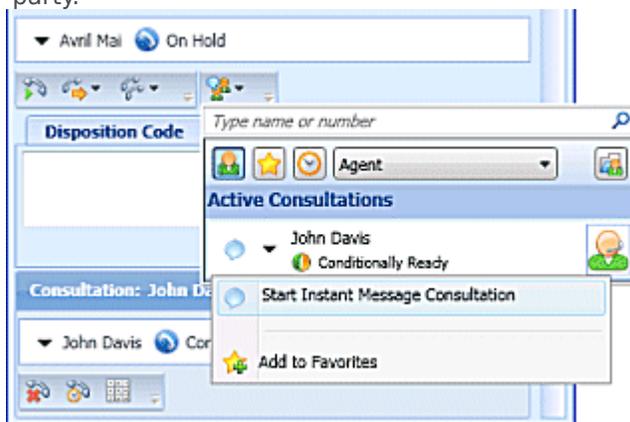
- To add an IM consultation an active voice consultation, click the Start Consultation button on the main interaction toolbar (see the Team Communicator, displaying active consultations figure).



Team Communicator, displaying active consultations

The Team Communicator is displayed. It displays a list of your active consultations (see the Team Communicator, displaying active consultations figure).

- Click the Action menu that is next to the name of the party with whom you want to start an IM consultation (see the Active Consultation Action menu figure) to display a list of available media for the party.



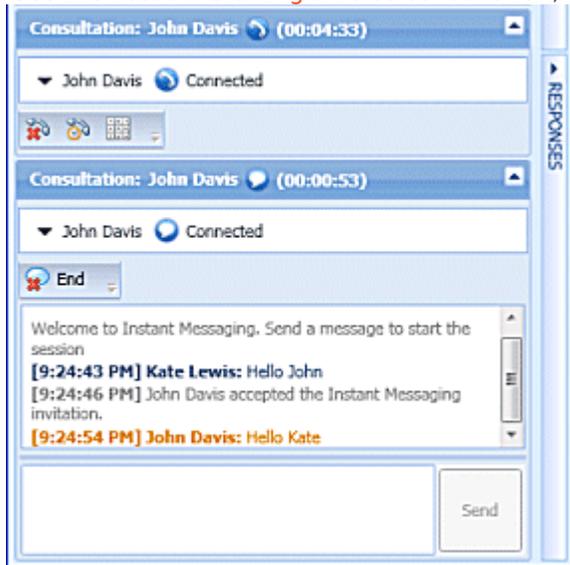
Active Consultation Action menu

- Click Start Instant Message Consultation (see the Active Consultation Action menu figure). The IM interaction view is displayed in the active interaction window beneath your active voice consultation view (see the An Instant Messaging consultation added to the current voice consultation figure).



An Instant Messaging consultation added to the current voice consultation

5. Enter a message to your target. The session starts in the Interaction window (see the An Instant Messaging consultation added to the current voice consultation 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.
6. 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 (see the An Instant Messaging consultation added to a voice consultation in the Interaction window figure). See the [Lesson: Starting a Consultation IM session from an active interaction](#), for information on how to handle an IM interaction. See the [Lesson: Starting a voice consultation](#), for information on how to handle a voice consultation.



Lesson: Starting a voice consultation

**End**

## Lesson:

### Blending a voice consultation with an IM consultation

#### Purpose:

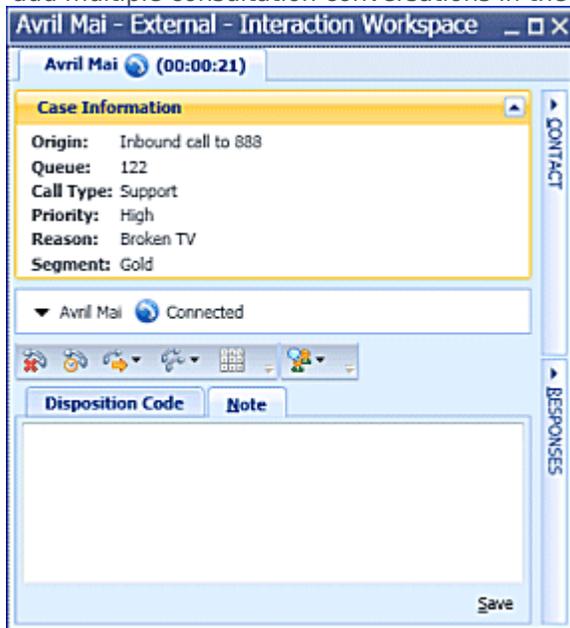
- To add an internal voice interaction to an active internal IM interaction and handle both in the same window.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You have an active interaction with a contact (see [Receiving a Voice Interaction](#)).

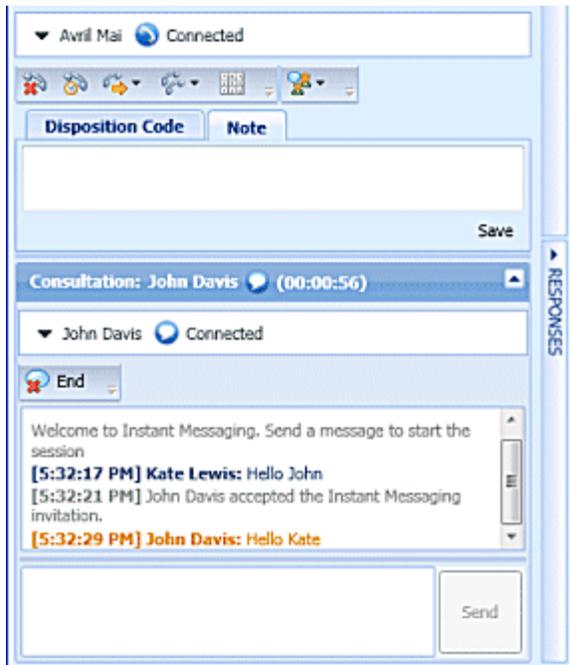
#### Start

1. During a call with a contact you might want to start an IM consultation and then blend in a voice consultation. The Voice Interaction window (see the Voice Interaction Window figure) enables you to add multiple consultation conversations in the same window.



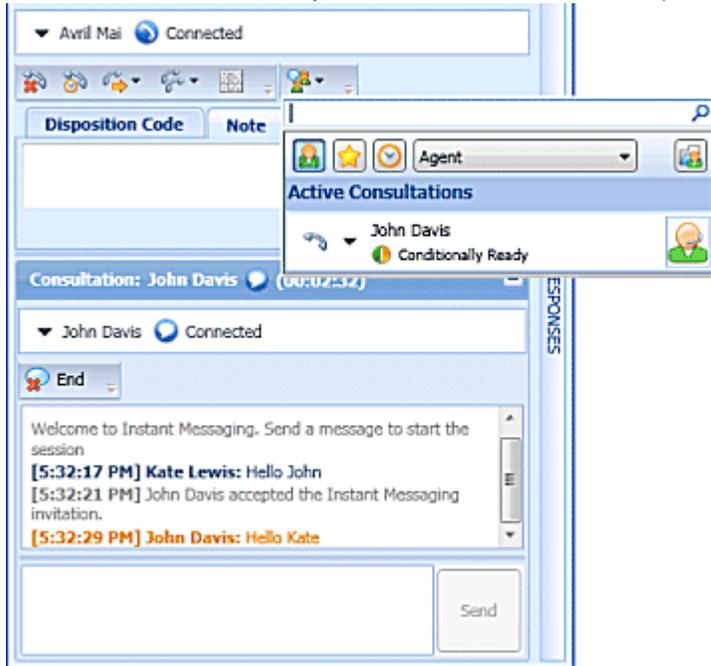
Voice Interaction Window

Start a consultation IM with an internal target or other party by using the following [Lesson: Starting a Consultation IM session from an active interaction](#). The consultation is added to the current interaction window (see the Voice Interaction window, with an added IM consultation figure).



Lesson: Starting a Consultation IM session from an active interaction

2. To add a voice consultation to an active voice consultation, click the Start Consultation button on the main interaction toolbar (see the Team Communicator, displaying active consultations figure).

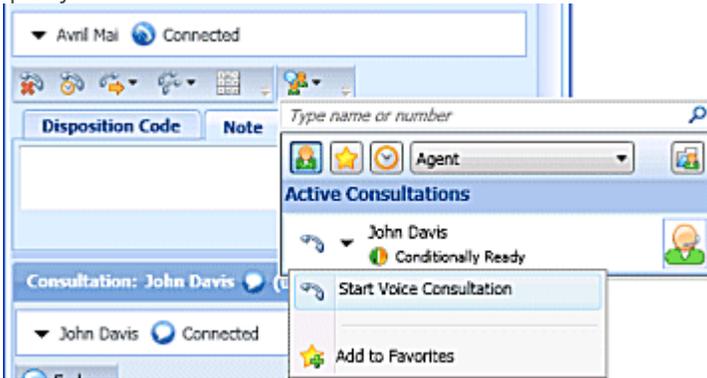


Team Communicator, displaying active consultations

The Team Communicator is displayed. It displays a list of your active consultations (see the Team Communicator, displaying active consultations figure).

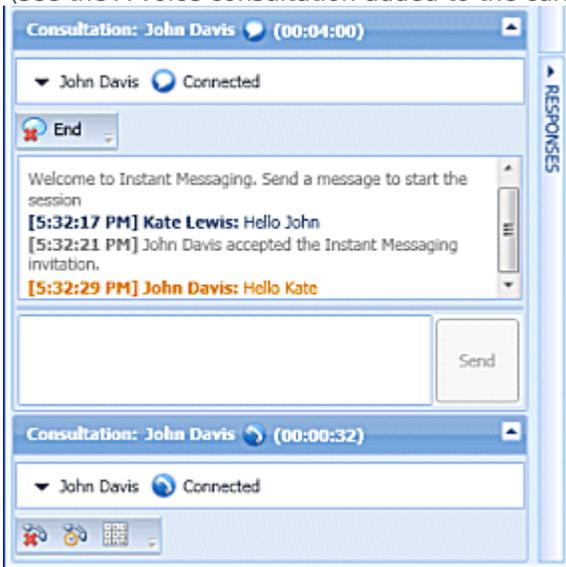
3. Click the Action menu that is next to the name of the party with whom you want to start a voice consultation (see the Active Consultation Action menu figure) to display a list of available media for the

party.



Active Consultation Action menu

- 4. Click Start Voice Consultation (see the Active Consultation Action menu figure). The voice interaction view is displayed in the active interaction window beneath your active IM consultation view (see the A voice consultation added to the current IM consultation figure).



A voice consultation added to the current IM consultation

The target is presented with an interactive notification that enables the target to accept or reject your invitation to engage in a voice consultation. You are notified if the target accepts, rejects, or lets your invitation time-out.

- 5. If your target accepts your invitation, you can speak with your voice consultation target. See the [Lesson: Starting a voice consultation](#), for information on how to handle a voice consultation. See the [Lesson: Starting a Consultation IM session from an active interaction](#), for information on how to handle an IM interaction.

**End**

### Click to Blend

Interaction Workspace can recognize phone numbers and e-mail addresses in e-mail, chat, and SMS

interactions. When Interaction Workspace recognizes an e-mail address or phone number in an interaction, it converts the information into a link. When you click a link, it can launch a new interaction.

Lesson:

## Creating a new e-mail interaction by clicking an e-mail address link in a chat interaction

### Purpose:

- To create a new e-mail interaction by clicking an e-mail address link in another interaction.

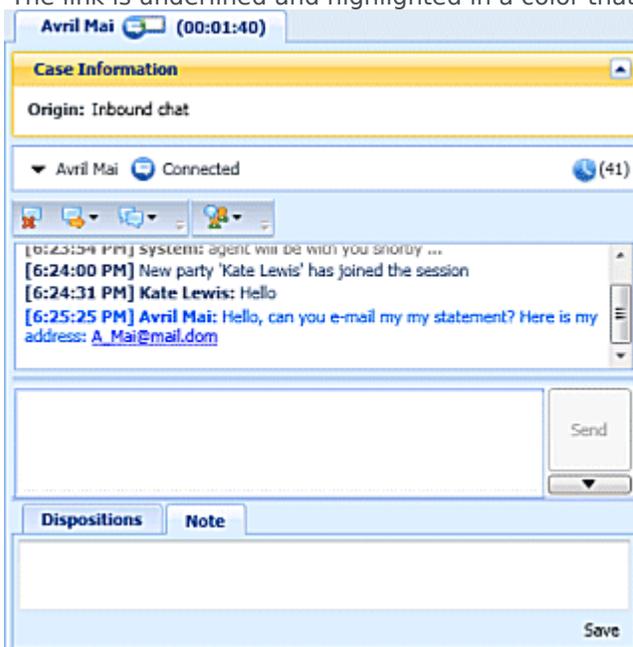
The principles of this procedure are applicable to e-mail links in chat, e-mail, and SMS interactions.

### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You have an active chat, e-mail, or SMS interaction.

### Start

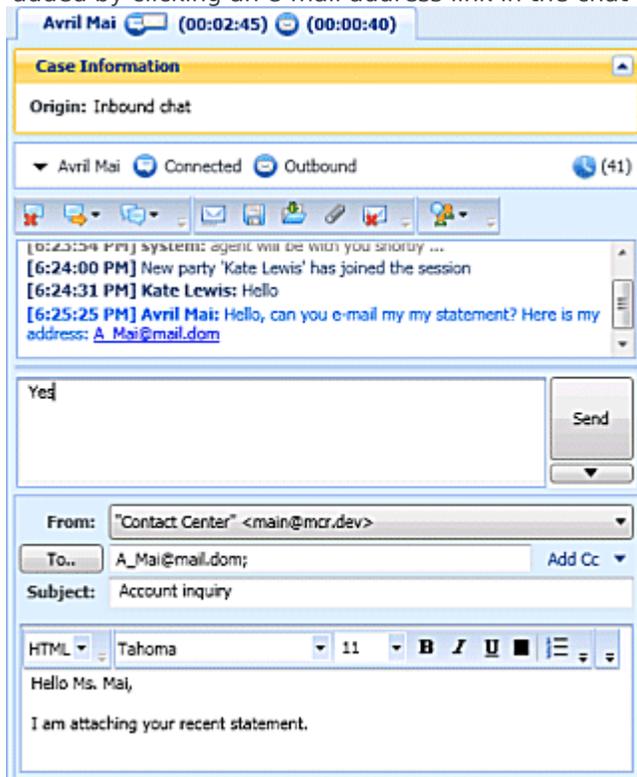
1. If you are handling a chat interaction (see [Lesson: Handling an inbound chat interaction](#)), and your contact sends you an e-mail address in their message, Interaction Workspace will convert the e-mail address to an address link (see the Chat interaction with a clickable e-mail link from the contact figure). The link is underlined and highlighted in a color that is distinct from the other text.



Chat interaction with a clickable e-mail link from the contact

2. To create an e-mail interaction, click the link. The E-Mail Interaction view is displayed within the Chat

Interaction window (see the Chat Interaction window containing an E-Mail Interaction view that was added by clicking an e-mail address link in the chat transcript figure).



Chat Interaction window containing an E-Mail Interaction view that was added by clicking an e-mail address link in the chat transcript

3. Compose an e-mail message to the recipient ([Lesson: Creating and sending a new e-mail interaction to a contact](#)). The controls for the e-mail interaction are displayed next to the chat controls (see the Chat Interaction window containing an E-Mail Interaction view that was added by clicking an e-mail address link in the chat transcript figure).
4. Click Send to send the e-mail interaction to the address that you clicked. You can also click Save, Save In Draft workbin, Add Attachment, or Delete"see [Creating and Handling a New or Reply E-Mail Interaction](#).
5. Complete the chat interaction (see [Lesson: Handling an inbound chat interaction](#)).

**End**

Lesson:

Creating a new voice interaction by clicking an phone number link in an SMS interaction

**Purpose:**

- To create a new voice interaction by clicking a phone number link in another interaction.

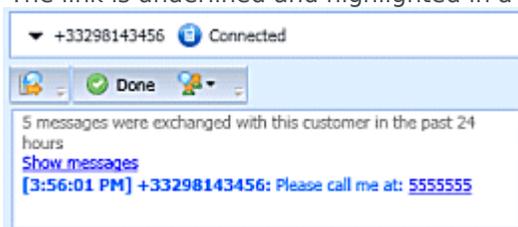
The principles of this procedure are applicable to phone number links in chat and SMS interactions.

## Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Going Ready in the Interaction Workspace Main window](#)).
- You have an active chat or SMS interaction.

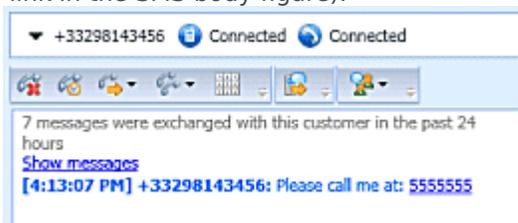
## Start

1. If you are handling an SMS interaction (see [Lesson: Handling an inbound SMS interaction](#)), and your contact sends you a phone number in their message, Interaction Workspace will convert the phone number to a link (see the SMS interaction with a clickable phone number link from the contact figure). The link is underlined and highlighted in a color that is distinct from the other text.



SMS interaction with a clickable phone number link from the contact

2. To create a voice interaction, click the link. The Voice Interaction controls are displayed within the SMS Interaction window and the connection status is added to the interaction-status view (see the SMS Interaction window containing Voice Interaction controls that were added by clicking a phone number link in the SMS body figure).



SMS Interaction window containing Voice Interaction controls that were added by clicking a phone number link in the SMS body

3. Complete the voice interaction (see [Lesson: Calling a contact](#)).
4. Complete the SMS interaction (see [Lesson: Handling an inbound SMS interaction](#)).

## End

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# Edit Case Information And Record Information

In this lesson, you will learn how to edit the Case Information of your interactions and the Record Information of your outbound campaign voice interactions. Sometimes when you receive an interaction, there might be errors in the Case Information. For example, a contact might have given erroneous or incomplete information to the IVR, or selected the wrong language preference. Interaction Workspace enables agents who are configured to edit Case Information to make changes to specified fields in the Case Information and Record Information views (refer to the *Interaction Workspace Help* for more information on these views). You can correct fields while you manage the interaction, or you can update fields to reroute the interaction to a different agent or queue. This lesson contains the following section:

- [Editing Case Information](#)

## Editing Case Information

You can edit the case information of active interactions if you are configured with this privilege. There are four types of Case Data that you can update:

- Text (string)
- Check boxes (Boolean)
- Dates (date)
- Numbers (integer and enum)

### Lesson:

#### Modifying case information

##### **Purpose:**

- To specify a different value for a Case-Information field that is configured to be editable.

Warning: You can also use this procedure to edit the Record Information of your outbound campaign voice interactions.

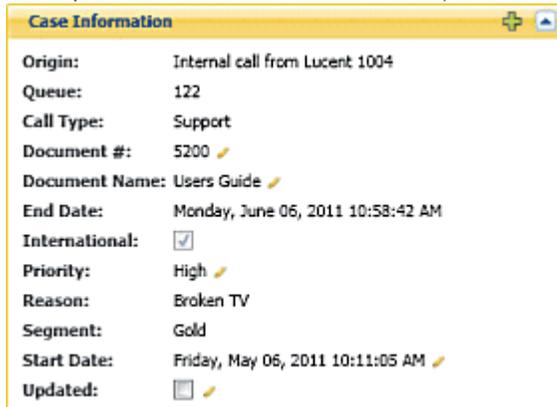
##### **Prerequisites**

- You are configured to edit case information.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

- You have accepted an interaction that contains case data.

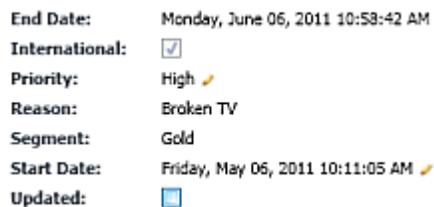
## Start

- When the interaction is displayed on your desktop, view the Case Information view. Move your mouse pointer over the view to see which fields are editable. Editable fields are indicated by a small pencil icon (see the Case Information view, with both editable and non-editable fields figure).



Case Information view, with both editable and non-editable fields

Editable check boxes appear as active, while non-editable check boxes appear as inactive (that is, dimmed--see the Case Information, with both editable and non-editable check boxes figure).



Case Information, with both editable and non-editable check boxes

Sometimes, not all of the case data is available. There might be fields missing. If you are configured to add missing fields, the Add Field button is displayed in the Case Information toolbar.



- Click Add Field to display a drop-down list of fields.
- Select a missing field to display the field in the Case Information view.

Click X to remove the field.

- Enter the missing Case Data.
- Press Enter to add the Case Data to the case information for the interaction.

- Click an editable check box to select it (see the Case Information with an editable check box selected figure); click it again to de-select it (see the Case Information, with both editable and non-editable check boxes figure).

**End Date:** Monday, June 06, 2011 10:58:42 AM  
**International:**   
**Priority:** High   
**Reason:** Broken TV  
**Segment:** Gold  
**Start Date:** Friday, May 06, 2011 10:11:05 AM   
**Updated:**

Case Information with an editable check box selected

- Click an editable data-time field to edit it. A calendar and time-picker view is displayed (see the Case Information date and time editor figure).

Case Information date and time editor

To set a new date, use the arrows to move the month and year forward and backward, respectively. Click a day to select it.

To set a new time, click an hour, minute, or second, and then use the up and down arrows to increase or decrease the value respectively, or use your keyboard to enter a new value.

- Click an editable drop-down list to change its value (see the Case Information drop-down list editor figure).

**Priority:** High  
**Reason:** Low  
**Segment:** High  
**Start Date:** Friday, May 06, 2011 10:11:05 AM

Case Information drop-down list editor

- To edit a text value, click the value to open the text-edit field. Modify the value and press Enter (see the Case Information editable text field figure).

**Document #:**   
**Document Name:** User Guide

Case Information editable text field

**End**

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# Using The Standard Response Library

In this lesson, you will learn how to access a database of prewritten standard responses for your interactions.

Warning: You can insert responses as replies into any e-mail message, chat message, or SMS message, or you can read them to the contact during a voice interaction or Outbound Campaign call.

This lesson contains the following section:

- [Inserting a Standard Response into an E-Mail Interaction](#)

## Inserting a Standard Response into an E-Mail Interaction

Your contact center might have a database of standard responses that you can access to compose prewritten replies to the e-mail, chat, and SMS interactions of a contact. You can find and insert standard responses manually, or use suggested responses that are based on relevancy. Your administrator defines the standard responses to which you have access. The responses to which you have access might be restricted by business area, language, or other criteria that is specific to your business or role. This section contains the following procedures:

- [Finding and inserting a standard response into an e-mail interaction](#)
- [Searching the Standard Response Library for a standard response](#)
- [Searching the Standard Response Library for a suggested response](#)

Lesson:

### Finding and inserting a standard response into an e-mail interaction=

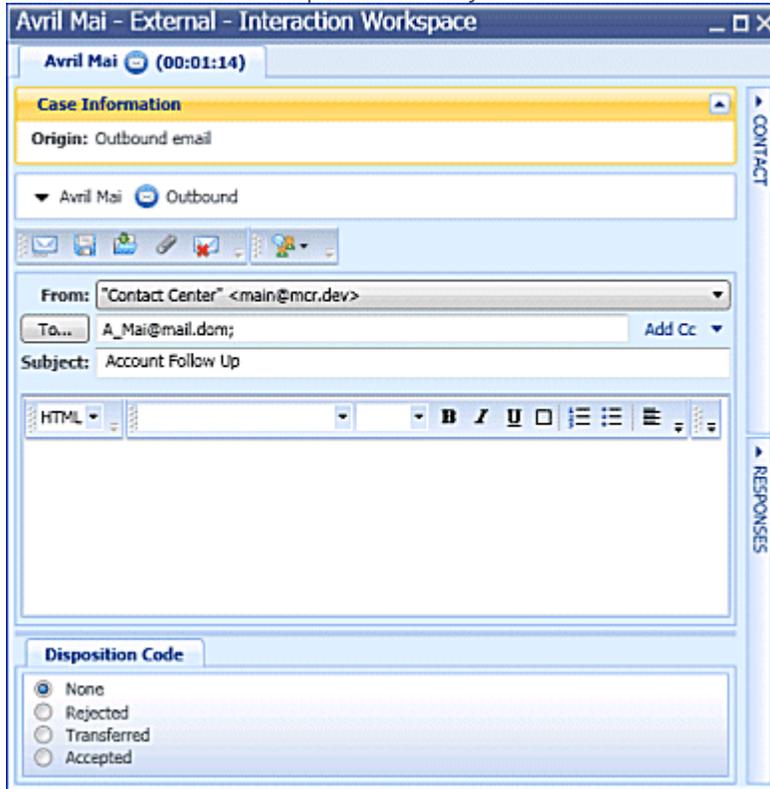
- To send a pre-written response to a customer interaction (e-mail, chat, or SMS).

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have accepted the inbound or transferred e-mail interaction or created a new interaction (see [Lesson: Handling an inbound e-mail interaction](#) or [Lesson: Creating and sending a new e-mail interaction to a contact](#)).
- If you are handling an inbound e-mail interaction, you have clicked Reply or Reply All in the inbound E-Mail Interaction window (see [Lesson: Replying to a inbound e-mail interaction](#)).

### Start

1. If you are configured to use standard responses, all Interaction Workspace interaction windows, such as the E-Mail Interaction window (see the Blank outbound E-Mail Interaction window figure), enable you to access the Standard Responses Library.

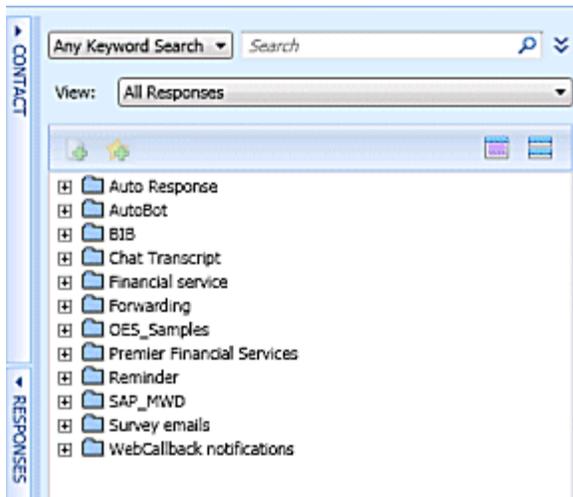


Blank outbound E-Mail Interaction window

To open the Responses view in *any* interaction window, including e-mail, chat, and voice, click the Responses button, which is located on the left-hand side of the interaction window and below the Contact button.

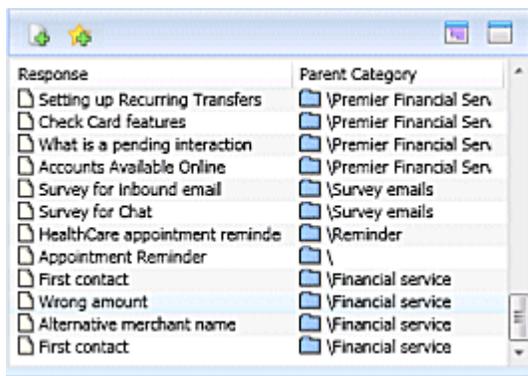


2. The Responses view is displayed. The Responses view has two view modes: tree mode (see the Responses tree-mode view of an interaction window figure) and list mode (see the Responses list-mode view of an interaction window figure).



Responses tree-mode view of an interaction window

Similar to the tree view of Microsoft Windows Explorer, the tree view enables you to explore folders of responses by category. The list mode enables you to view the response documents in a table view that is sortable by document name or folder name.

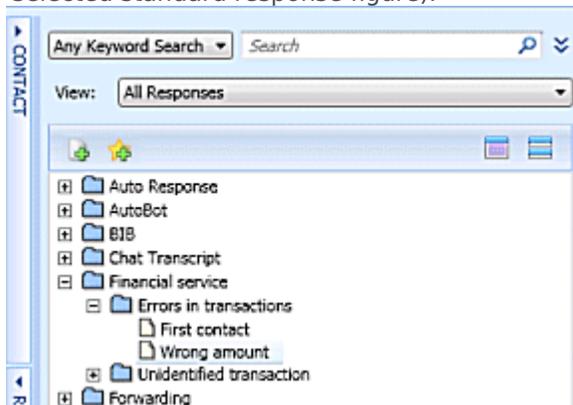


Responses list-mode view of an interaction window

Click folders in the tree view to open them and view sub-folders and documents.

You can also search for a specific response by title or content by using the search functionality (see [Lesson: Searching the Standard Response Library for a standard response](#)).

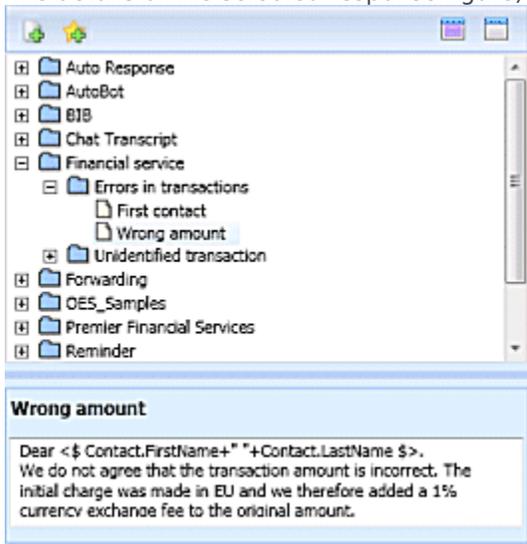
3. To view or use a standard response, click the document in either mode (see the Responses view, with a selected standard response figure).



Responses view, with a selected standard response

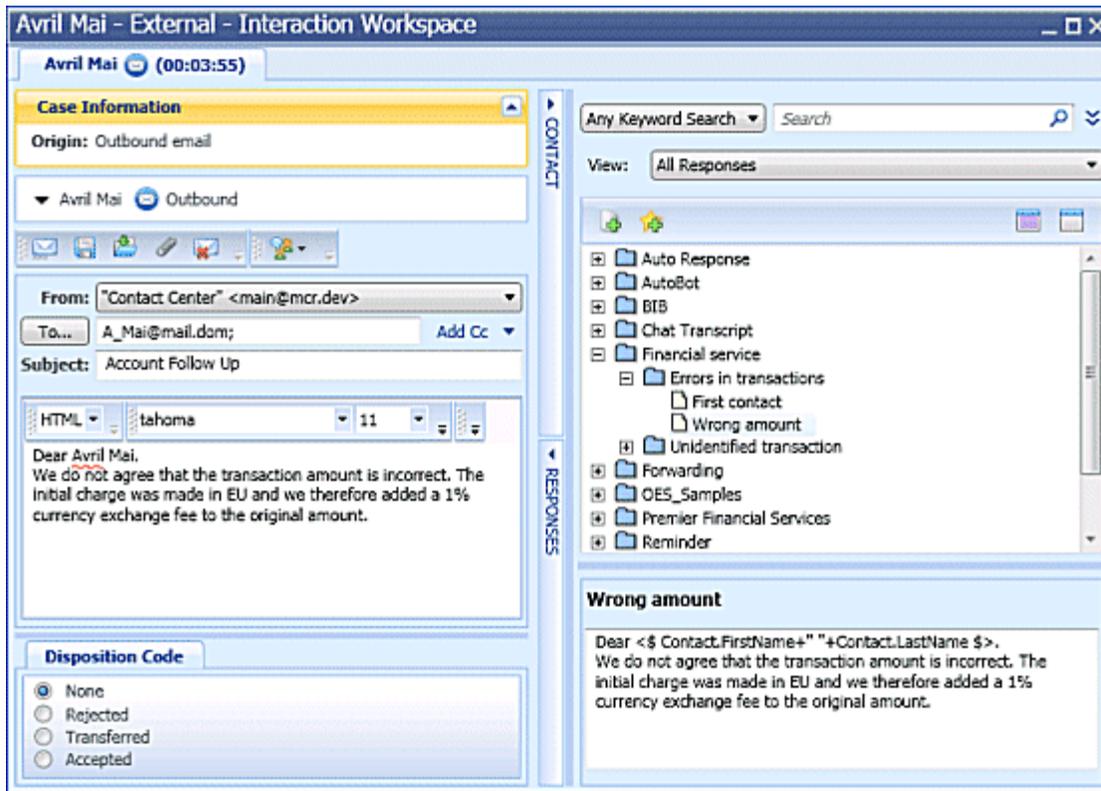
When a document is highlighted, you can perform the following actions:

- Preview the contents of the response by clicking Show Detail (see the Responses view, displaying the details of the selected response figure).



Responses view, displaying the details of the selected response

- Insert the response into your interaction at the insertion point by clicking Insert Standard Response Text.
- Add the document to your list of favorite responses by clicking Add Standard Response into Favorite Responses. You can then filter the tree mode or list mode to show only your favorites by clicking the View drop-down list and then selecting Favorite Responses instead of All Responses. The A standard response inserted into an outbound e-mail interaction figure shows a selected response in the tree-mode view, the associated Details view, and inserted into the e-mail interaction text composition area. You can add multiple responses in the same interaction.



A standard response inserted into an outbound e-mail interaction

4. Complete and send or transfer the interaction (see [Lesson: Replying to a inbound e-mail interaction](#) or [Lesson: Creating and sending a new e-mail interaction to a contact](#)).

**End**

**Lesson:**

**Searching the Standard Response Library for a standard response=**

- To use search tools to find a response in the Standard Response Library.

Warning: If you are configured to use responses, the Responses view is available for the E-Mail, Chat, SMS, and Voice Interaction windows.

**Prerequisites**

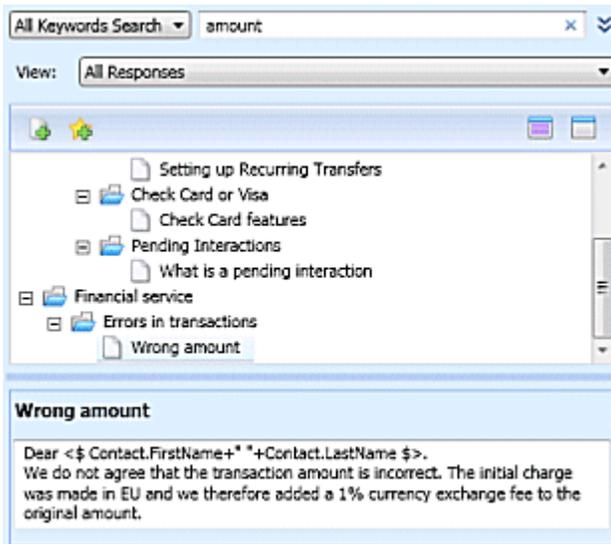
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have accepted the inbound or transferred interaction or created a new interaction.

**Start**

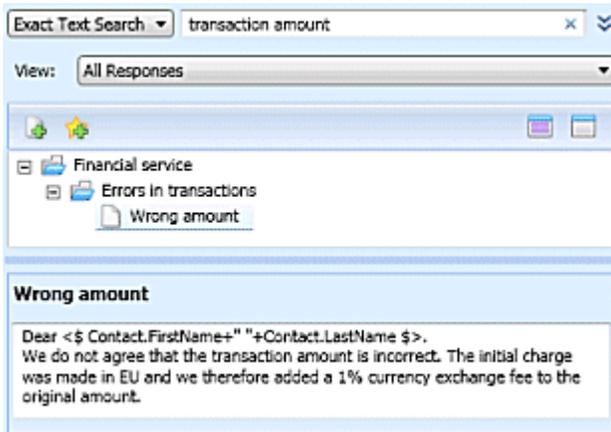
1. You can use either the tree mode or list mode to search manually through the list of standard responses

(see [Lesson: Finding and inserting a standard response into an e-mail interaction](#)), or you can use keyword searches to identify quickly the responses that contain the information that you want to send to your contact. In the responses view, type a word or words into the search field and then click the magnifying glass or press Enter to return all documents that meet the criteria that you specify (see the Responses All Keyword Search figure and the Responses Exact Text Search figure). The Responses search function enables you to perform three standard searches:

- Any Keyword Search--Find all responses that contain at least one of the specified keywords
- All Keyword Search--Find all responses that contain all of the specified keywords
- Exact Text Search--Find all responses that contain the specified keywords in the order in which they are specified.

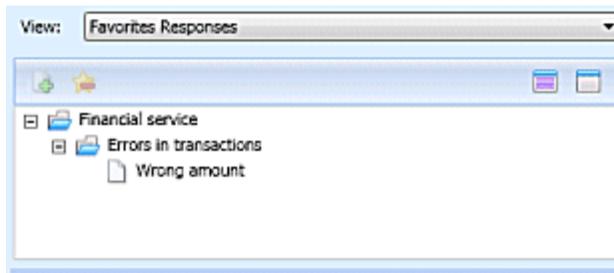


Responses All Keyword Search



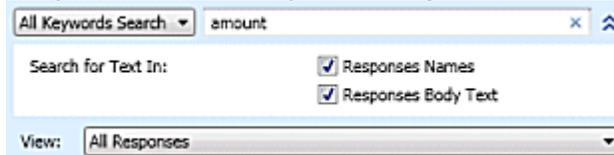
Responses Exact Text Search

2. Use the View menu to search through All Responses or your Favorite Responses (see the Favorite Responses filter figure).



Favorite Responses filter

- Click the Show Advanced Search Options button (two downward pointing chevrons) to display the advanced filtering options. The advanced filtering options enable you to specify whether to search in Responses Names, Responses Body Text, or both (see the Advanced response filtering options figure).



Advanced response filtering options

- When you have found the responses for which you are searching, you can insert it into your interaction at the insertion point (go to Step 3 of [Lesson: Finding and inserting a standard response into an e-mail interaction](#)) or you can read it to a contact on a voice call.

## End

## Lesson:

### Searching the Standard Response Library for a suggested response=

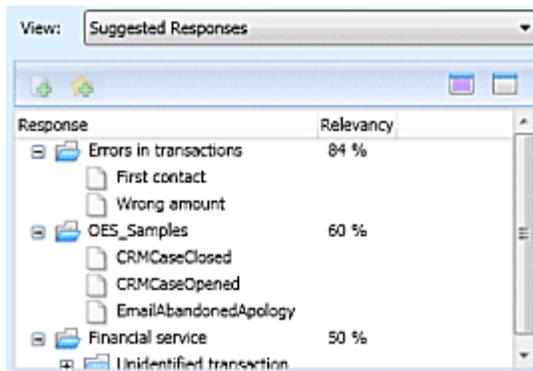
- To use a suggested response from the Standard Response Library.

## Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have accepted the inbound or transferred e-mail interaction.

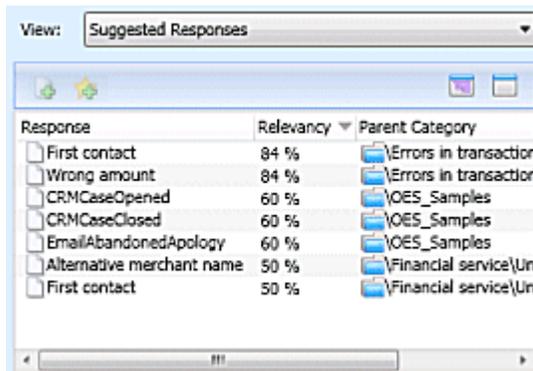
## Start

- In the Responses view, from the View menu, select Suggested Responses (see the Tree view of Suggested Responses in the Responses view of a reply e-mail interaction window figure).



Tree view of Suggested Responses in the Responses view of a reply e-mail interaction window

Suggested responses are displayed in either list view or tree view. In list view (see the List view of the Suggested Responses view figure), you can sort by column. Click a column heading to sort by that field; click the same column head to reverse the sort order. In tree view (see the Tree view of Suggested Responses in the Responses view of a reply e-mail interaction window figure), the responses are sorted by relevancy to the inbound interaction to which you are replying.



List view of the Suggested Responses view

- To search through the Suggested Responses list, you can use either the tree mode or list mode to search manually through the list of standard responses (see [Lesson: Finding and inserting a standard response into an e-mail interaction](#)), or you can use keyword searches to identify quickly the responses that contain the information that you want to send to your contact (see [Lesson: Finding and inserting a standard response into an e-mail interaction](#)).
- When you have found the response for which you are searching, you can insert it into your interaction at the insertion point (go to Step 3 of [Lesson: Finding and inserting a standard response into an e-mail interaction](#)) or you can read it to a contact on a voice call.

**End**

---

# Apply Disposition Codes

The Interaction Workspace Disposition Code view enables you to assign to an ongoing or terminated interaction one or more codes that qualify or specify the outcome of the interaction. The Disposition Code view is part of the Interaction window. It contains a checklist of options that you can click to specify the outcome of the interaction. Your system might be configured so that you cannot click **Mark Done** until you have selected a disposition code. Your system might be configured so that the Disposition Code view is not displayed. This lesson contains the following section:

- [Assigning Disposition Codes](#)

## Assigning Disposition Codes

Many contact-centers attach data to interactions that specifies the outcome of each interaction. The outcomes are defined by the contact-center administrators. Each outcome is assigned a disposition code that enables contact-center personnel or systems to determine whether an interaction was successful, transferred, or whether a follow-up interaction is required. Interaction Workspace employs a simple radio-button interface to enable you to assign a disposition code to your interaction quickly and easily.

Warning: In some Outbound Campaign interactions, the Disposition Code view has additional features. See [Lesson: Handle Outbound-Campaign Voice Interactions](#).

### Lesson:

#### Applying a disposition code to a voice interaction

##### **Purpose:**

- To attach information about the outcome of the current or selected interaction.

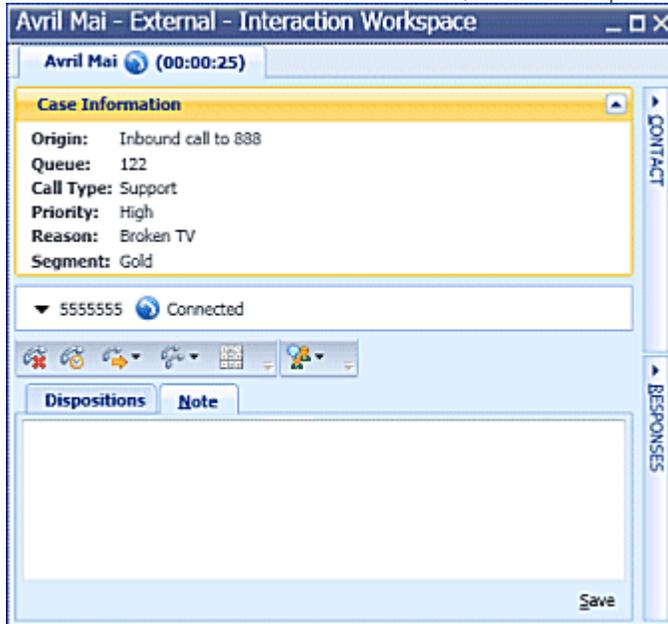
A disposition code can be set at different times depending on the configuration of your system. Your system might require you to set the disposition code before you click **Mark Done** to complete an interaction. Your system might require you to set the disposition code before you transfer or conference the interaction. The following procedure assumes that you must set the disposition code before you click **Mark Done**.

##### **Prerequisites**

- You are logged in to Interaction Workspace (see [Getting Started](#)).
- You have an open Voice Media interaction (see [Receiving a Voice Interaction](#)).
- Your assigned role requires you to assign disposition codes to interactions.

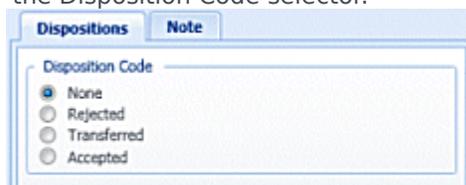
## Start

1. If the customer has not ended the call, but you are ready to hang up, in the active Voice Interaction window (see [Receiving a Voice Interaction](#)), click End Call (the phone-set button that has a red X; see the Inbound Voice Interaction window, with no disposition code set figure).



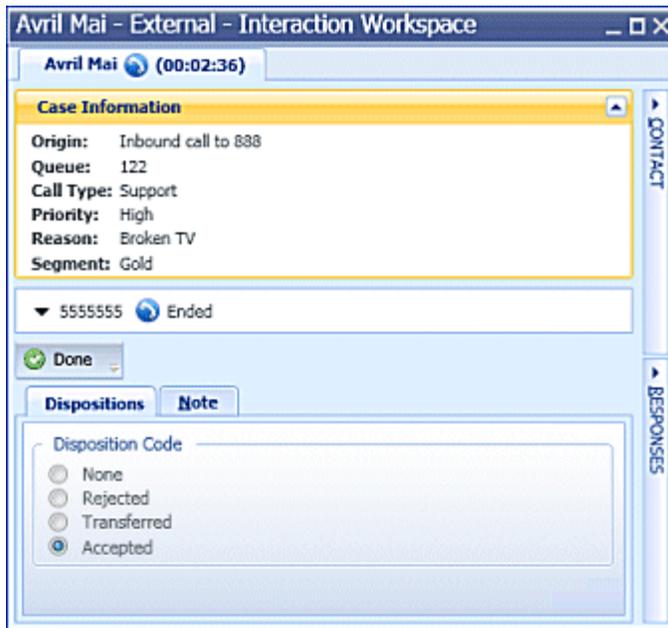
Inbound Voice Interaction window, with no disposition code set

2. Click the Dispositions tab (see the Dispositions view, with no disposition code set figure) to display the Disposition Code selector.



Dispositions view, with no disposition code set

3. Click the Disposition Code radio button to specify the outcome of the call. The available options are configured by your system administrator, and might not be the same values that are shown in the Dispositions view, with no disposition code set figure and the Voice Interaction window, with disposition code set figure.



Voice Interaction window, with disposition code set

4. Click Mark Done.
5. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked Mark Done for each of the active interactions.
6. Complete your after-call work.

**End**

---

# Using The Interaction Bar

In this lesson, you will learn how to use the Interaction Bar in the Main Window to manage one or more interactions. This lesson contains the following section:

- [Managing Interactions](#)

## Managing Interactions

The Interaction Bar enables you to use a simplified control set to handle one or more interactions without having to make the interaction window active. It also enables you to restore, or bring to the front, any active interaction window.

Lesson:

### Managing multiple interactions by using the Interaction Bar

#### Purpose:

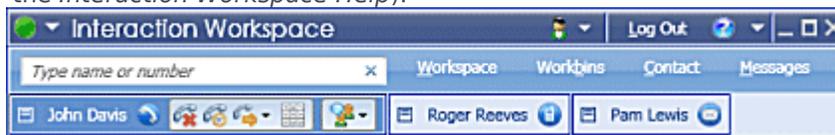
- To manage interaction windows and interaction functionality from the Main Window.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You are handling one or more interactions.
- You are using the Main Window view.

#### Start

1. If you have one or more active interactions, the Interaction Bar is displayed at the bottom of the Main Window (see the Main Window displaying the Interaction Bar at the bottom figure). Interactions are "docked" in the Interaction Bar. The interactions appear as boxes that are identified by a name, number, or other contact information, as well as an icon that represents the interaction type (refer to the *Interaction Workspace Help*).



Main Window displaying the Interaction Bar at the bottom

You can minimize interaction windows or cover them with other windows and then access them quickly and easily by clicking the interaction box in the Interaction Bar. If you place your mouse pointer over an interaction in the Interaction Bar, a ToolTip is displayed that summarizes the content or the attached data for the interaction. The ToolTip also includes a summary of all the interactions that are involved in this thread, as well as any consultation interactions that are related to the interaction.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your

immediate attention. Chat, SMS Session, and IM interactions flash when a new message is received.

2. If you click another interaction box, it becomes active and changes color, and controls are displayed (see the Main Window, displaying an active SMS interaction in the Interaction Bar figure).



Main Window, displaying an active SMS interaction in the Interaction Bar

The controls are a subset of the controls that are available in the interaction window for the interaction.

3. To open an interaction window from the Interaction Bar, click the box icon on the left-hand side of the interaction box (see the Main Window, displaying an active SMS interaction in the Interaction Bar figure).
4. To control the interaction from the Interaction Bar, click on the interaction box, and then use the controls. Different controls are available for different interaction types (see the Interaction Bar interaction boxes by type table). Refer to the interaction-specific chapters of the *Interaction Workspace User's Guide* and the *Interaction Workspace Help* for information about the functionality of each control.

**Interaction Bar interaction boxes by type**

| Interaction Type | Interface |
|------------------|-----------|
| Chat             |           |
| E-Mail           |           |
| Instant Message  |           |
| SMS              |           |
| Voice            |           |

**End**

# Contact Management

These lessons introduce you to Interaction Workspace contact management. The Interaction Workspace Contact History view enables you to view and manage previous interactions with a contact. Contact Management

- [Manage Contacts](#)

# Manage Contacts

The Interaction Workspace Contact History view enables you to view and manage previous interactions with a contact. This lesson contains the following sections:

- [Managing Contact History](#)
- [Managing Your History](#)
- [Managing Contacts and Contact Information](#)

## Managing Contact History

The Contact History view enables you to view and manage previous interactions with a contact. You can find and select previous interactions by using the following views:

- Contact Directory (see [Lesson: Finding and viewing an interaction in the contact database](#))
- Information view of the current voice interaction (see [Lesson: Handle Voice Interactions](#))

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- Perform the following actions on selected interactions:
  - Mark open interactions as done
  - Merge interactions
  - Unmerge interactions
- View information about selected interactions

This section contains the following procedures:

- [Lesson: Finding and viewing an interaction in the contact database](#)
- [Lesson: Finding and viewing an interaction in the contact view of the Interaction window](#)
- [Lesson: Using the History tab Quick Search to find an interaction](#)
- [Lesson: Using the History tab Advanced Search to find an interaction](#)

## Lesson:

### Finding and viewing an interaction in the contact database

#### Purpose:

- To find and view or modify existing interactions for a contact in the contact database.

#### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

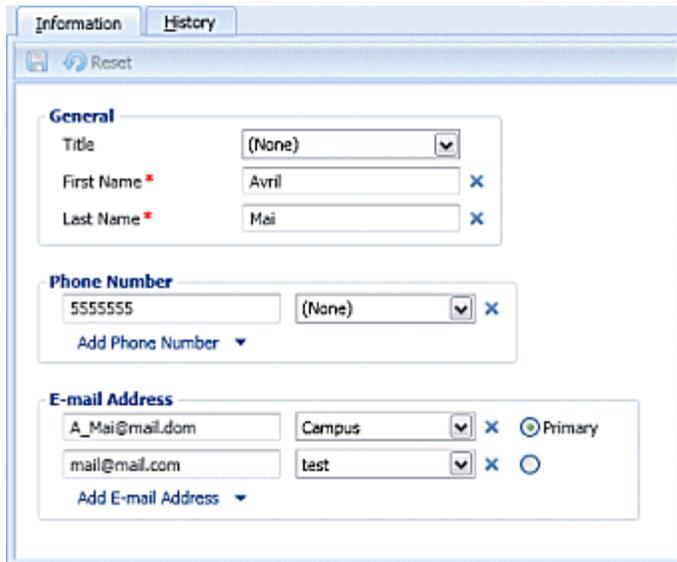
#### Start

1. On the Interaction Workspace Main Window, click **Contact** to display the **Contact Directory** tab.



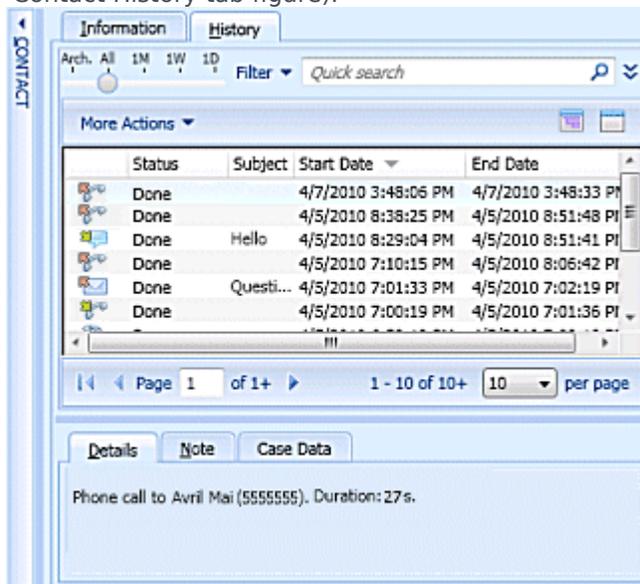
Contact Directory tab

2. Click in the **Quick Search** field and enter the name of the contact for whom you are searching to find the contact in the contact database.
3. Click the magnifying-glass icon, or press **Enter**, to begin the search.
4. Click the name of the contact in the search-results table or list.
5. In the **Show Details Panel** drop-down list, display the **Details** panel (see the **Contact Details** view, displaying the **Contact Information** tab figure).



Contact Details view, displaying the Contact Information tab

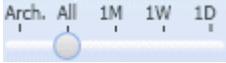
- Click the History tab to display the contact History view (see the Contact Details view, displaying the Contact History tab figure).



Contact Details view, displaying the Contact History tab

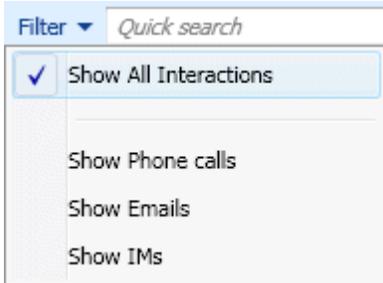
- Find the interaction that you want to view by using one of the following search types:
  - Quick Search**--Enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of 2 or find all interactions that are related to the subject of billing. See [Lesson: Using the History tab Quick Search to find an interaction](#).
  - Advanced Search**--Enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as Status, Start Date, and Subject. It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See [Lesson: Using the History tab Advanced Search to find an interaction](#).
- If more than one interaction matches your search criteria, specify the time interval that is to be used to

filter your search results by using the ChronoLogy slider.



The slider has five positions that represent different time intervals:

- **Arch.**--Search the database for messages that have been archived.
  - **All**--Search the entire database from the most recent interaction, back to the earliest interaction.
  - **1M**--Search the database from the most recent interaction, back to one month ago.
  - **1W**--Search the database from the most recent interaction, back to one week ago.
  - **1D**--Search the database from the most recent interaction, back to one day ago.
9. If more than one type of interaction matches your search criteria, use the Type filters to search only for interactions of a specific type. Select the filter type from the drop-down list to turn the filters on and off. When a filter is on, a check mark appears beside its name in the menu.



The interaction filters might include the following types:

- Show All Interactions
- Show Voice Interactions
- Show E-mail Interactions
- Show Chat/Instant Message Interactions
- Show SMS Interactions
- Show Other Media Interactions--Includes workitems and social-media interactions

Your administrator might also include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.

- If more than one interaction matches your search criteria, you can sort the contents of the search-results table by an attribute. The attributes are defined by your system administrator. To sort the interactions by one of the attributes, click the column headings that match the attribute that you want to use to sort the results (see the History View for the current or selected contact figure). Your available search criteria might include one of the following:
  - **Status**--The disposition code that was assigned to the interaction, if any
  - **Subject**--For e-mail interactions only
  - **Start Date**--The date and timestamp when the interaction was first received

- 
- **End Date**--The date and timestamp when the interaction was marked Done.
  - Interaction Workspace enables you to view contact interactions either by attributes or as threads. Click the Show Interactions in Grid View/Show Interactions in Tree View button (  /  ) to specify how the Contact History panel is displayed. Grid View displays interactions by attribute and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (e-mail replies, multichannel conversations, social-media threads, and so on).
  - Click an interaction to select it. The Details panel displays information about interactions on the Details tab, the Notepad tab, and the Case Data tab (see the History View for the current or selected contact figure). If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the Details tab. If the status of an e-mail interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the Open button (  ) is displayed (if the e-mail is in a queue, a workbin, or in routing"including outbound in-progress e-mails).
    - a. Click Open to open the e-mail interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the e-mail from the Main Window or Gadget Contact History view.
    - b. After you open the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction (refer to [Lesson: Replying to a inbound e-mail interaction](#) and [Lesson: Creating and sending a new e-mail interaction to a contact](#)). You can also click Put back in original location (  ) to return the e-mail interaction back to the In-Progress workbin or into a queue.
    - c. If you are configured to manage contact data, open the Actions menu and then choose one of the following actions:
      - **Mark Done**--Displayed only if an interaction is still in progress. If you complete an interaction, select it in the interactions table, and then click Mark Done. The status of the interaction will be changed to Done.
      - **Change Contact**--Assign a different contact for the selected interaction.
  - When you have finished working on the selected interaction in the Main Window, clear the search results by clicking the X button beside the search field. When you have finished working on the selected interaction in the Interaction window, close the Information view by clicking the Contact button on the right-hand side of the current interaction.

## End

## Lesson:

## Finding and viewing an interaction in the contact view of the Interaction window

### Purpose:

- To find and view or modify existing interactions for a contact in the contact database from an active interaction.

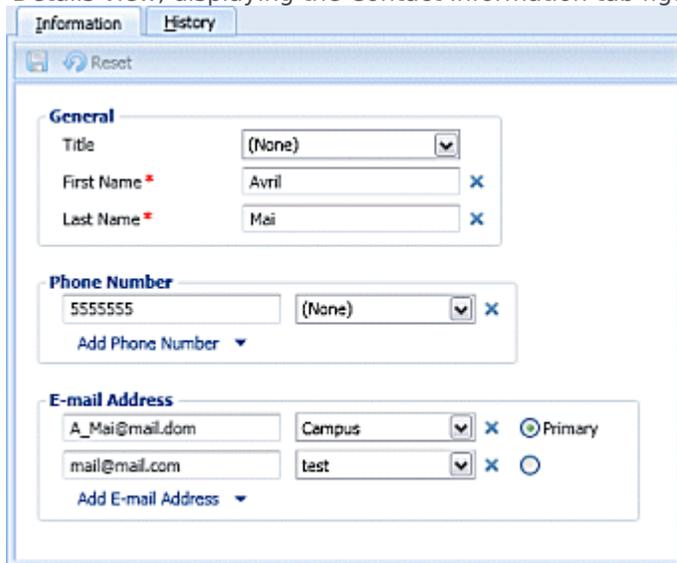
### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

- You have an active interaction.

**Start**

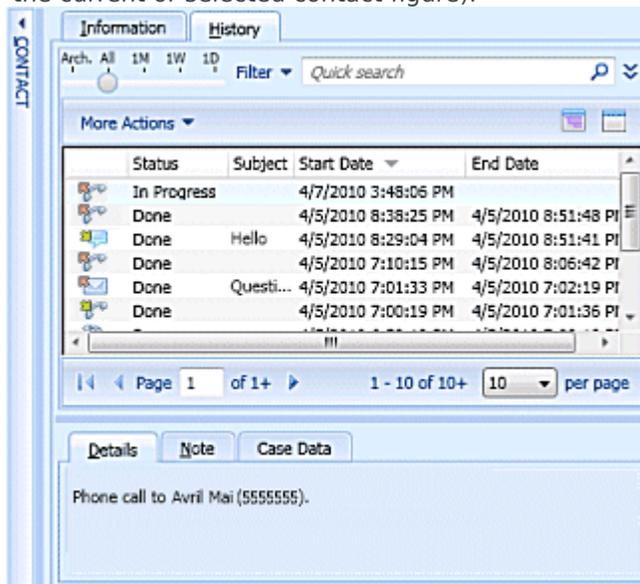
1. In the active interaction window, click Contact to display the Contact Directory tab (see the Contact Details view, displaying the Contact Information tab figure).



Contact Details view displaying the Contact Information tab

The Information tab displays information about the current contact.

2. Click the History tab to display the list of interactions for the current contact (see the History View for the current or selected contact figure).

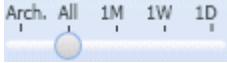


History View for the current or selected contact

3. Find the interaction that you want to view by using one of the following search types:
  - **Quick Search**--Enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of 2 or find all interactions that are related to

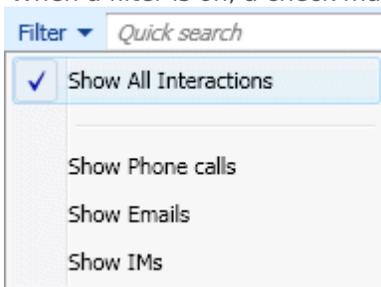
the subject of billing. See [Lesson: Using the History tab Quick Search to find an interaction.](#)

- **Advanced Search**--Enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as Status, Start Date, and Subject. It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See [Lesson: Using the History tab Advanced Search to find an interaction.](#)
4. If more than one interaction matches your search criteria, specify the time interval that is to be used to filter your search results by using the ChronoLogy slider.



The slider has five positions that represent different time intervals:

- **Arch.**--Search the database for messages that have been archived.
  - **All**--Search the entire database from the most recent interaction back to the earliest interaction.
  - **1M**--Search the database from the most recent interaction back to one month ago.
  - **1W**--Search the database from the most recent interaction, back to one week ago.
  - **1D**--Search the database from the most recent interaction, back to one day ago.
5. If more than one type of interaction matches your search criteria, use the Type filters to search only for interactions of a specific type. Select the filter type from the drop-down list to turn the filters on and off. When a filter is on, a check mark appears beside its name in the menu.



The interaction filters might include the following types:

- Show All Interactions
- Show Voice Interactions
- Show E-mail Interactions
- Show Chat/Instant Message Interactions
- Show SMS Interactions
- Show Other Media Interactions--Includes workitems and social-media interactions

Your administrator might also include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.

6. If more than one interaction matches your search criteria, you can sort the contents of the search-results table by an attribute. The attributes are defined by your system administrator. To sort the interactions by one of the attributes, click the column headings that match the attribute that you want to use to sort the results (see the History View for the current or selected contact figure). Your available search criteria might include one of the following:
- **Status**--The disposition code that was assigned to the interaction, if any.

- **Subject**--For e-mail interactions only.
  - **Start Date**--The date and timestamp when the interaction was first received.
  - **End Date**--The date and timestamp when the interaction was marked Done.
7. Interaction Workspace enables you to view contact interactions either by attributes or as threads. Click the Show Interactions in Grid View/Show Interactions in Tree View button (/) to specify how the Contact History panel is displayed. Grid View displays interactions by attribute, and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (e-mail replies, multichannel conversations, social-media threads, and so on).
  8. Click an interaction to select it. The Details panel displays information about interactions on the Details tab, the Notepad tab, and the Case Data tab (see the History View for the current or selected contact figure). If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the Details tab. If the status of an e-mail interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the Pull button () is displayed (if the e-mail is in a queue, a workbin, or in routing"including outbound in-progress e-mails).
    - a. Click Pull to open the e-mail interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the e-mail from the Main Window or Gadget Contact History view.
    - b. After you pull the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction (refer to [Lesson: Replying to a inbound e-mail interaction](#) and [Lesson: Creating and sending a new e-mail interaction to a contact](#)). You can also click Put back in original location () to return the e-mail interaction back to the In-Progress workbin or into a queue.
  9. If you are configured to manage contact data, open the Actions menu and then choose one of the following actions:
    - **Mark Done**--Displayed only if an interaction is still in progress. If you complete an interaction, select it in the interactions table, and then click Mark Done. The status of the interaction will be changed to Done.
    - **Change Contact**--Assign a different contact for the selected interaction.

When you have finished working on the selected interaction in the Main Window, clear the search results by clicking the X button beside the search field. When you have finished working on the selected interaction in the Interaction window, close the Information view by clicking the Contact button on the right side of the current interaction.

## End

## Lesson:

### Using the History tab Quick Search to find an interaction

#### Purpose:

- To search for any interaction by status, end date, and start date.

#### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have completed Step 1 of [Lesson: Finding and viewing an interaction in the contact database](#).

## Start

1. To search the contact history, in the History tab, type in the Quick Search field (see the Contact History view Quick Search tool figure) the attribute value for which you are searching. You can use the standard Windows wildcard characters--such as ?, \*, \_, and %"to expand your search.



Contact History view Quick Search tool

Warning: Quick Search is a *contains* search.

2. Click the magnifying-glass icon, or press Enter, to search for the criteria that you have entered. Your search results are displayed in the Search Results table (see [Lesson: Finding and viewing an interaction in the contact database](#)).
3. Click the X to clear the Quick Search field and the Search Results table.

## End

## Lesson:

### Using the History tab Advanced Search to find an interaction

#### Purpose:

- To enter multiple interaction criteria to refine your search of the contact database. The Advanced Search pane contains drop-down lists of search criteria, such as Status, Start Date, End Date, and Subject. It also contains drop-down lists with modifiers that determine how the criteria will affect the search.

#### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have completed Step 1 of [Lesson: Finding and viewing an interaction in the contact database](#).

## Start

1. To search the contact history, in the History tab, enter in the Advanced Search view (see the Contact History view Advanced Search tool figure) the attribute value or values that you want to find. You can use the standard Windows wildcard characters to expand your search.

Contact History view Advanced Search tool

- From the column of search attributes on the left, choose the attribute within which you want to search from the drop-down lists.
- From the column of search modifiers to the right of the attribute column, choose how the search string should be considered. Menus for predefined fields, such as Status, contain the predefined field names from the database--for example: All, Done, and In progress.

Menus for date fields contain the following choices:

- **On**--The exact date.
- **On or after**--The specified date or any date after.
- **Before**--Before the specified date.

Menus for text fields contain the following choices:

- **Contains**--The specified text string occurs anywhere in the selected criterion.
- **Begins With**--The specified text string occurs at the beginning of the selected criterion.
- **Is**--The specified text string exactly matches the criterion.

Enter the search value in the text field on the right-hand side. If your criterion is a start date or end date, use the calendar pop-up window to specify the date, then select a Match Conditions option to specify whether All or Any of the search conditions that you have specified are applied.

2. Click the magnifying-glass icon, or press Enter, to search for the values that you have entered. Your search results are displayed in the Search Results table (see [Lesson: Finding and viewing an interaction in the contact database](#)).
3. Click the X to clear the Advanced Search fields and the Search Results table.

**End**

## Managing Your History

The My History view enables you to view and manage previous interactions between you and a contact. You can find and select your previous interactions by using the following views:

- My History tab in the Main Window
- My History window

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the My History view to do the following:

- Find interactions for contacts whom you have handled
- Perform the following actions on selected interactions:
  - Mark done open interactions
  - Assign interaction to another contact
- View information about selected interactions

This section contains the following procedure:

- [Lesson: Finding and viewing your interactions in the contact database](#)

Lesson:

## Finding and viewing your interactions in the contact database

### **Purpose:**

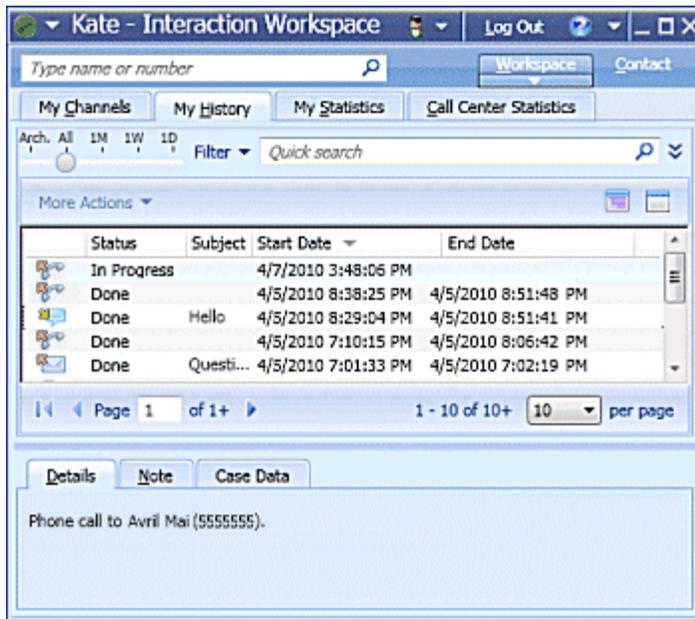
- To find and view or modify your interactions for a contact in the contact database by using the My History view.

### **Prerequisites**

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

### **Start**

1. Do one of the following:
  - On the Interaction Workspace Main Window (see the Main Window, displaying the My History tab in Workspace view figure):
    - a. Click **Workspace** to display your workspace.
    - b. Click the **My History** tab to display all of your interactions.

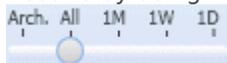


Main Window, displaying the My History tab in Workspace view

2. To find all of your interactions with a specific contact, do the following:
  - i. Click in the Quick Search field and enter the name of the contact for whom you are searching.
    - The Quick Search enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of 2 or find all interactions that are related to the subject of billing. See [Lesson: Using the History tab Quick Search to find an interaction](#).
  - ii. Click the magnifying-glass icon, or press Enter, to begin the search. When the search is complete, a list is displayed of all of your interactions in the contact database that match your search criteria.

To find a specific interaction in the list of search results, you can filter the results by date, interaction type, or advanced criteria.

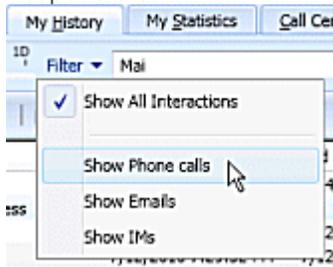
3. To filter the search results by date, specify the time interval that is to be used to filter your search results by using the Chronology slider.



The Chronology slider has five positions that represent different time intervals:

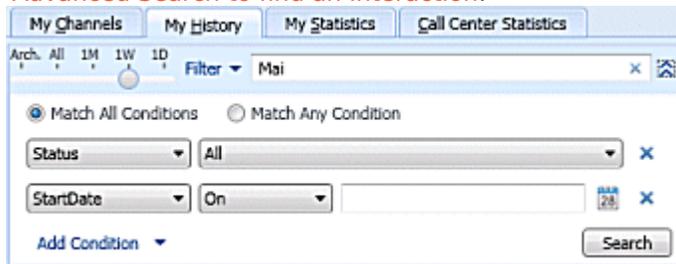
- **Arch.**--Search the database for messages that have been archived.
  - **All**--Search the entire database from the most recent interaction back to the earliest interaction.
  - **1M**--Search the database from the most recent interaction back to one month ago.
  - **1W**--Search the database from the most recent interaction, back to one week ago.
  - **1D**--Search the database from the most recent interaction, back to one day ago.
4. To filter the search results by type of interaction, use the Type filters to search only for interactions of a specific type (see the My History view Filter menu figure). The interaction types are: Voice, E-mail, and Chat/Instant Message. Select the types to display from the Filter drop-down menu. The Filter menu options turn the filters on and off. When a filter is on, a check mark is displayed next to its name in the menu. Your administrator might include filter types that are related to your specific role in the

company, such as the type of customer that your deal with or the business area for which you are responsible.



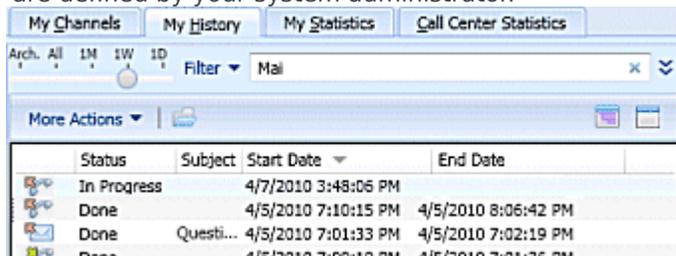
My History view Filter menu.

- The Advanced Search enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as Status, Start Date, and Subject (see the Advanced Search view displaying the My History tab figure). It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See [Lesson: Using the History tab Advanced Search to find an interaction.](#)



Advanced Search view displaying the My History tab

- If more than one interaction matches your search criteria, you can sort the contents of the search-results table by an attribute (see the Search results displaying the My History tab figure). The attributes are defined by your system administrator.



Search results displaying the My History tab

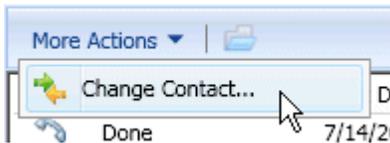
To sort the interactions by one of the attributes, click the column headings that match the attribute that you want to use to sort the results (see the Search results displaying the My History tab figure). Your available search criteria might include one of the following:

- **Status**--Done or In Progress
- **Subject**--For e-mail interactions only
- **Start Date**--The date and timestamp when the interaction was first received
- **End Date**--The date and timestamp when the interaction was marked Done

- Interaction Workspace enables you to view contact interactions either by attributes or as threads. Click the Show Interactions in Grid View/Show Interactions in Tree View button (  /  ) to specify how the Contact History panel is displayed. Grid View displays interactions by attribute and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (e-mail replies, multichannel conversations,

social-media threads, and so on).

8. Click an interaction to select it. The Details panel displays information about interactions on the Details tab, the Notepad tab, and the Case Data tab (see the Main Window, displaying the My History tab in Workspace view figure). If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the Details tab. If the status of an e-mail interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the Open button (📧) is displayed (if the e-mail is in a queue, a workbin, or in routing--including outbound in-progress e-mails).
  - a. Click Open to open the e-mail interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the e-mail from the Main Window or Gadget Contact History view.
  - b. After you open the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction (refer to [Lesson: Replying to a inbound e-mail interaction](#) and [Lesson: Creating and sending a new e-mail interaction to a contact](#)). You can also click Put back in original location (📧) to return the e-mail interaction back to the In-Progress workbin or into a queue.
9. If you are configured to manage contact data, open the More Actions menu and then choose one of the following actions:
  - **Mark Done**--If you complete an interaction, select it in the interactions table, and then click Mark Done. The status of the interaction will be changed to Done.
  - **Change Contact**--Assign a different contact for the selected interaction.



10. When you have finished working on the selected interaction in the My History tab, clear the search results by clicking the X button beside the search field.

**End**

## Managing Contacts and Contact Information

The Contact Directory view enables you to view and manage contacts and contact information. You can manage contacts by using the following views:

- Contact Directory (see [Lesson: Finding and viewing an interaction in the contact database](#))
- Information view of the current voice interaction (see [Lesson: Handle Voice Interactions](#))

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the Contact Directory view to do the following:

- Find interactions for the current contact or the currently selected contact
- Perform the following actions on selected interactions:

- Mark done open interactions
- Merge contacts
- Unmerge contacts
- View information about selected interactions

This section contains the following procedures:

- [Lesson: Adding a contact](#)
- [Lesson: Deleting a contact](#)
- [Lesson: Updating contact information](#)
- [Lesson: Merging contacts](#)
- [Lesson: Manually assigning an interaction to a contact](#)
- [Lesson: Unmerging contacts](#)

Lesson:

## Adding a contact

### Purpose:

- To add a contact to the contact database.

### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

### Start

1. If you are configured to do so, you can add new contacts to the contact database by using one of the following Contact Information views:
  - The Contact Directory in the Contact Information tab. Click Create New Contact to launch the Add Contact view.



- The Contact Information tab of the current Interaction window.

The Contact Information view enables you to view and edit contact information (see the Contact Information tab figure). If the contact is already in the contact database, their information will be displayed in this view. Use the fields to add or modify contact information.

Contact Information tab

2. Enter the contact information in the fields. A small red triangle appears in the top left hand corner of the text field to indicate that the information is not saved.
  3. Do one of the following:
    - Click the Save icon to save the information in the contact database.
- 
- Click the Reset icon to clear any unsaved changes from the Add Contact view.
- 
4. If you want to add additional phone numbers and e-mail addresses for the new contact, click the Add Phone Number or Add E-mail Address link. A new set of fields is added into which you can enter this information.
  5. To specify a phone number or e-mail address as the primary contact number or address, click the Primary radio button beside the phone number or e-mail address that you want to specify as the primary number or address (respectively) for the contact.

**End**

Lesson:

Deleting a contact

**Purpose:**

- To remove or delete a contact from the contact database.

**Prerequisites**

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

### Start

1. To delete a contact, you first must find the contact in the contact database and then select it in the Contact Directory (see the [Lesson: Using the Team Communicator feature to find a contact](#)).

2. With one or more contacts that you want to delete selected, click the Delete icon.



3. A confirmation dialog box is displayed.

- Click OK to remove the contact permanently from the contact database.
- Click Cancel to cancel the delete-contact function; this leaves the contact in the contact database.

4. When you have finished working on the selected interaction in the My History tab, clear the search results by clicking the X button that is displayed next to the search field.

### End

### Next Steps

- Manage contact records. See [Manage Contacts](#).
- Send or receive an internal Instant Message (IM). See [Handle Internal Instant Messaging](#).

### Lesson:

## Updating contact information

### Purpose:

- To update contact information in the contact database.

### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

### Start

1. If you are configured to do so, you can edit contacts in the contact database by using the Contact Directory in the Contact Information tab. The Contact Information view enables you to view and edit contact information (see the Contact Information tab figure). If the contact is already in the contact database, their information will be displayed in this view. Use the fields to add or modify contact information.

Contact Information tab

2. Enter the contact information in the fields. A small red triangle appears in the top left-hand corner of the text field to indicate that the information is not saved.
3. Do one of the following:
  - Click the Save icon to save the information in the contact database.



- Click the Reset icon to clear any unsaved changes from the Add Contact view.



4. If you want to add additional phone numbers and e-mail addresses for the new contact, click the Add Phone Number or Add E-mail Address link. A new set of fields is added, into which you can enter this information.
5. To specify a phone number or e-mail address as the primary contact number or address, click the Primary radio button beside the phone number or e-mail address that you want to specify as the primary number or address (respectively) for the contact.

**End**

Lesson:

## Merging contacts

### Purpose:

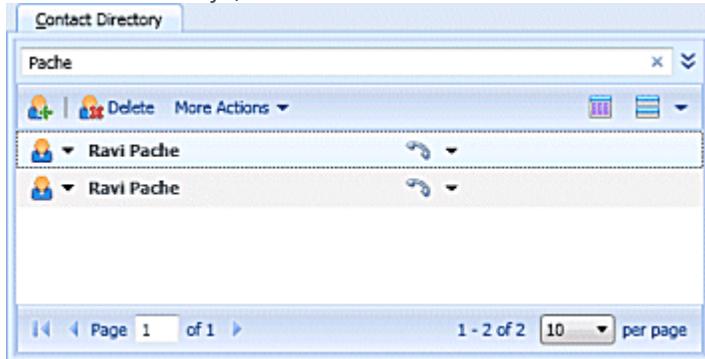
- To combine two contacts in the contact database.

### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

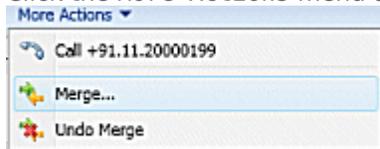
**Start**

1. If there are two contact entries in the contact database for the same contact, you can merge the two entries into a single entry. To merge a contact, you first must find the contact in the contact database (see the [Lesson: Using the Team Communicator feature to find a contact](#)) and then select it in the Contact Directory (see the Two contact entries for the same contact in the Contact Directory figure).



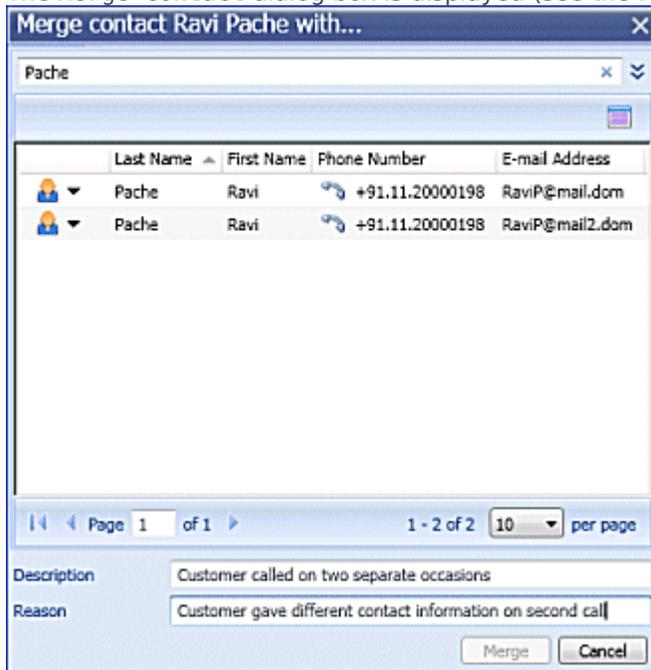
Two contact entries for the same contact in the Contact Directory

2. Click the More Actions menu and select Merge (see the Contact Directory More Actions menu figure).



Contact Directory More Actions menu

3. The Merge Contact dialog box is displayed (see the Merge Contact <name> With dialog box figure).



Merge Contact <name> With dialog box

Use the search tools to find the duplicate contact.

4. Select the duplicate contact.
5. If you are required to enter a description and/or reasons for the merge, use the fields after selecting the duplicate contact.
6. Do one of the following:
  - Click Merge to complete the merge of the two selected contact entries.
  - Click Cancel to cancel the merge and return to the Main Window.

## End

Lesson:

## Unmerging contacts

### Purpose:

- To unmerge into their original contact entries two contact entries in the contact database that previously have been merged.

### Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

### Start

1. First, find the contact in the contact database (see the [Lesson: Using the Team Communicator feature to find a contact](#)).
2. In the Contact Directory, select the contact who is to be unmerged.
3. In the More Actions menu, select Undo Merge.
4. A confirmation dialog box is displayed.
  - Click Yes to unmerge into the original two contact entries.
  - Click No to keep the contact merged.

## End

Lesson:

## Manually assigning an interaction to a contact

### Purpose:

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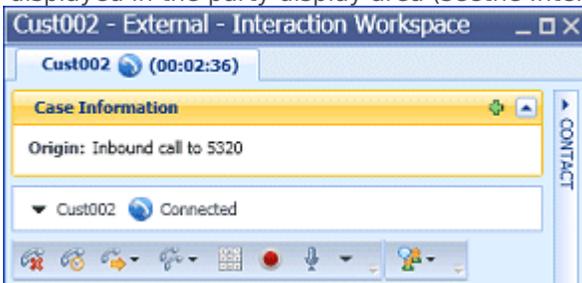
- To assign an interaction with an unknown contact to a contact that is in your contact database.

Sometimes a known contact might connect anonymously to your contact-center by using a phone, e-mail account, or other media that is not part of the information that is stored about that contact in the contact database. If your system is not configured to create a new contact automatically for an unknown contact, the Contact Information view for the current interaction window will be blank.

|  |                                                                                                                                                                                                                                              |
|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>Warning: You can also use the Assign Another Contact to This Interaction button to create a new contact or to manually reassign an interaction that has been assigned to the wrong contact. You can also use the Change Contact view.</p> |
|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

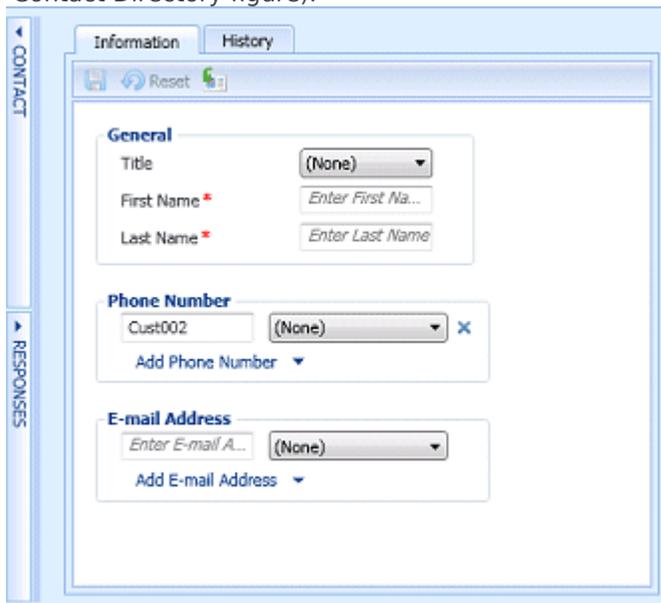
**Start**

1. If you are handling an interaction that has an unknown contact, there will not be a contact name displayed in the party display area (see the Interaction window with an unknown contact figure).



Interaction window with an unknown contact

2. If you identify the contact as being one of your known contacts, you can add the interaction to the history of the contact. Click Contact to display the Contact Directory (see the Information tab of the Contact Directory figure).



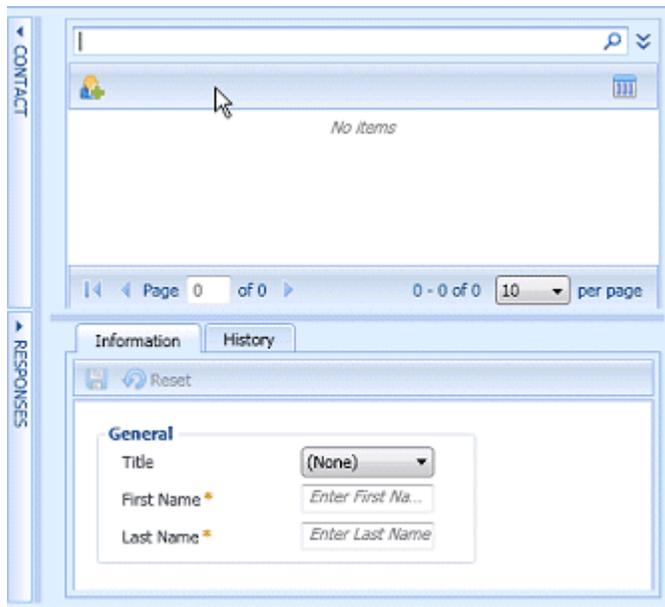
Information tab of the Contact Directory

3. Click Assign Another Contact to this Interaction (see the Assign another contact to this interaction button figure).



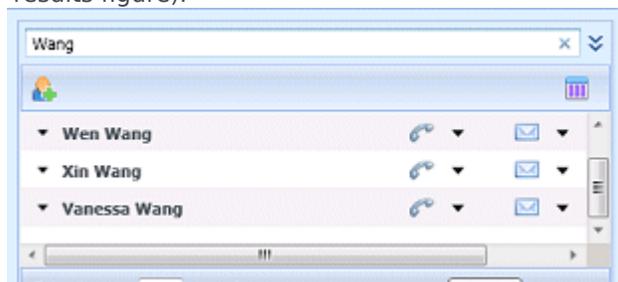
Assign another contact to this interaction button

The Contact Search view is displayed (see the The Contact Search view and Quick Search field figure).



The Contact Search view and Quick Search field

4. In the Quick Search field, enter the name or other identifying information of the contact.
5. Click the magnifying-glass icon to begin the search of the contact database (see the Quick Search results figure).



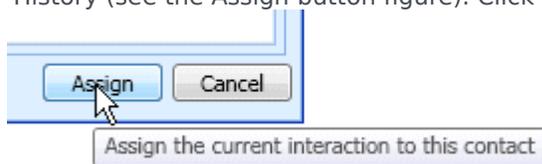
Quick Search results

6. In the Search Results list or grid, select the correct contact (see the Search Results list figure).



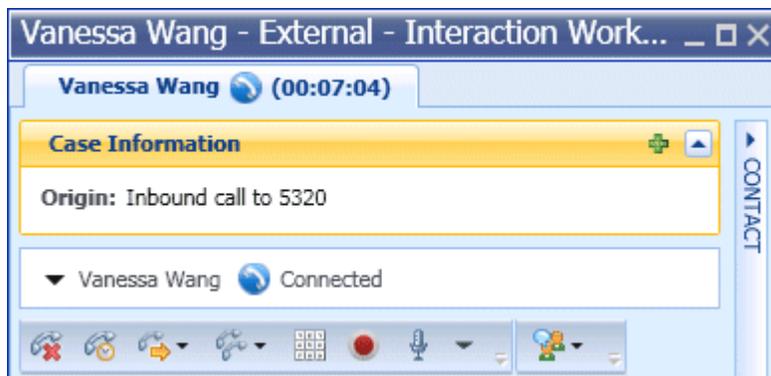
Search Results list

7. Click Assign to assign this interaction to the selected contact. The interaction is added to the Contact History (see the Assign button figure). Click Cancel to return to the blank Contact Information view.



Assign button

The title bar, tab, and party action area of the interaction window is updated to display the name of the contact (see the Interaction window displaying the name of the contact figure).



Interaction window displaying the name of the contact

**End**

# Using Workbins

In this lesson, you will learn how to access interactions that are stored in a workbin and belong to you, your place, your agent group, or your place group. Workbins

- [Using Workbins Lesson](#)

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# Using Workbins

In this lesson, you will learn how to access interactions that are stored in a workbin and belong to you, your place, your agent group, or your place group. A workbin is like a personal queue, in which you can store e-mail messages and other interactions that are to be handled later; however, unlike a queue, interactions that are stored in a workbin can be accessed in any order; they can be assigned to agents, places, agent groups, or place groups. Items that are stored in a workbin are owned by the owner of the workbin. Open interactions can be saved to a workbin for future processing or collaborative processing by the agent, place, agent group, or place group. Interactions can also be distributed to workbins by Universal Routing Server. This lesson contains the following section:

- [Using Workbins to Access Stored Interactions](#)

## Using Workbins to Access Stored Interactions

Interactions can be routed to you, your place, your place group, or your agent group and stored in a workbin to be handled at any time.

### Lesson:

#### Accessing and handling interactions that are stored in a workbin

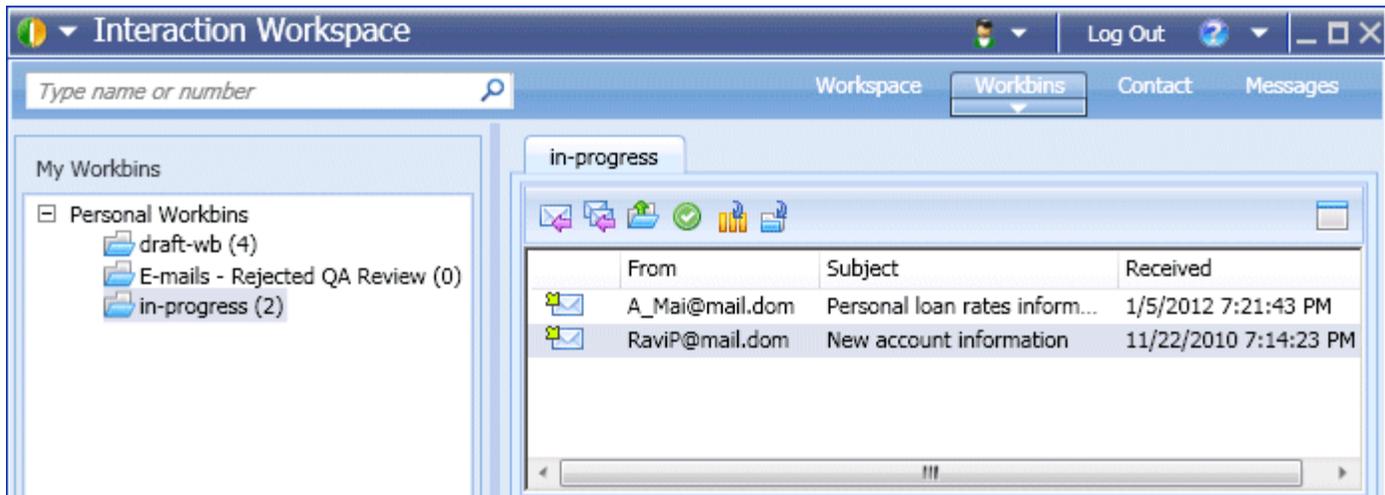
- To use a workbin to open an interaction.

#### Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You are the owner of the workbin in which the interaction is stored.

#### Start

1. To open the Workbin view from the Main Window, click the Workbins button (see the Workbins view in the Interaction Workspace Main Window figure).

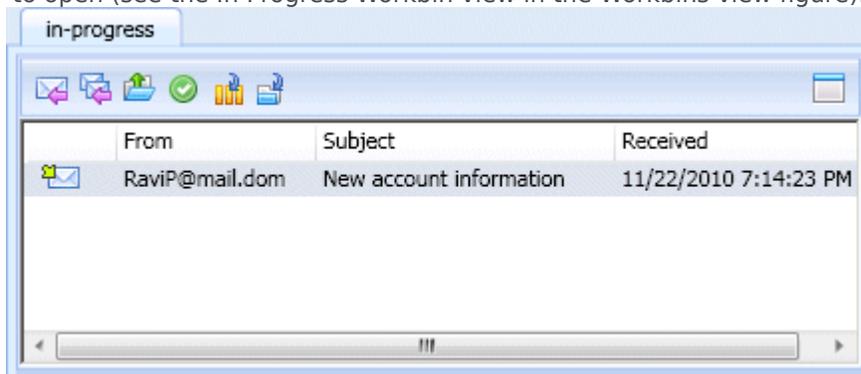


Workbins view in the Interaction Workspace Main Window

The Workbins view comprises three areas:

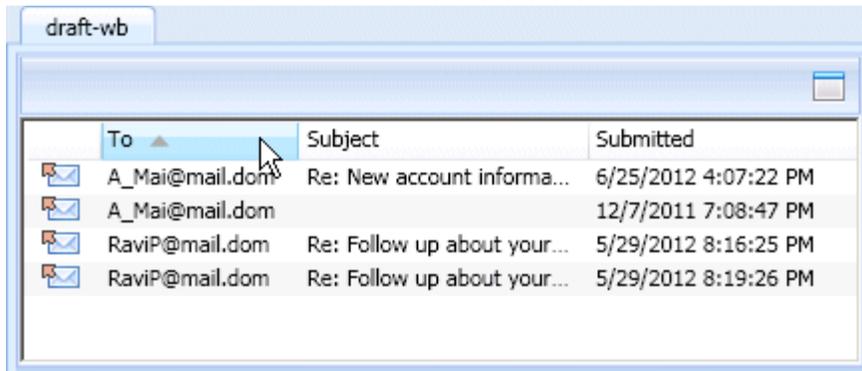
- Workbins Explorer--Enables you to select workbin folders from your personal workbins and your shared workbins
- Workbin view--Lists all the interactions that are stored in the selected workbins, and includes information about the status of the interaction; enables you to sort, search, and perform actions on interactions
- Workbin interaction information--Enables you to view the Details tab, the Notes tab, and the Case Data tab for the selected interaction (see the Workbins view in the Interaction Workspace Main Window with a selected draft interaction figure)

2. In the Workbins Explorer, select the workbin that contains the interaction that you want to open.
3. In the Workbin view, scroll through the list of interactions to find the specific interaction that you want to open (see the In Progress Workbin view in the Workbins view figure).



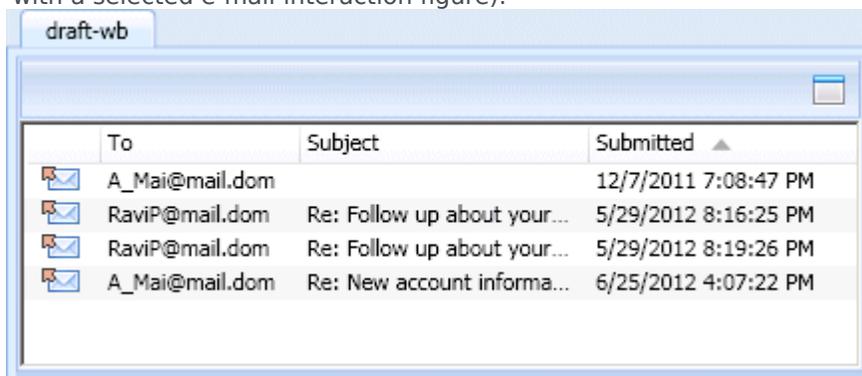
In Progress Workbin view in the Workbins view

4. To change the sorting order of the interactions, click the column headings in the table of interactions. Clicking the same column heading again reverses the sort order for that heading (see the Changed sorting order in the Workbin view figure).



Changed sorting order in the Workbin view

- Click the interaction that you want to handle when you find it in the Workbin view (see the Workbin view with a selected e-mail interaction figure).



Workbin view with a selected e-mail interaction

When you select an interaction, the following functionality becomes available for the interaction, depending on the interaction type:

- **Open**--Opens the interaction in an Interaction window (see [Lesson: Handling an inbound e-mail interaction](#))
- **Reply (for e-mail only)**--Creates a reply and opens the interaction in an outbound E-Mail Interaction window (see [Lesson: Replying to a inbound e-mail interaction](#))
- **Reply All (for e-mail only)**--Creates a reply and opens the interaction in an outbound E-Mail Interaction window and addresses the e-mail to the sender and all other recipients of the original e-mail (see [Lesson: Replying to a inbound e-mail interaction](#))
- **Mark Done**--Complete the interaction and close the interaction window; you might be configured to specify a disposition code before you can click Mark Done (see [Lesson: Handling an inbound e-mail interaction](#) and [Assigning Disposition Codes](#))

## End

## Lesson:

### Storing an interaction in your Draft workbin

- To use your Drafts workbin to store an outbound e-mail interaction to be completed at a later time by

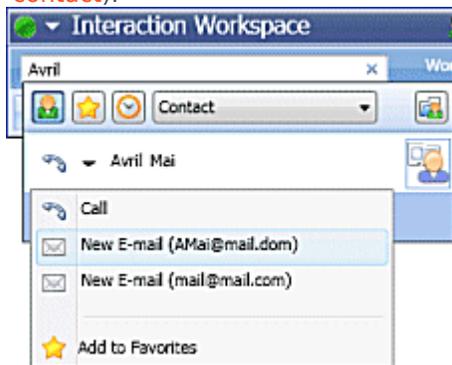
you or another agent.

## Prerequisites

- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You have accepted an inbound or transferred e-mail interaction (see [Receiving and Handling an Inbound E-Mail Interaction](#)) or you want to create a new outbound e-mail interaction (see [Creating and Handling a New or Reply E-Mail Interaction](#)).

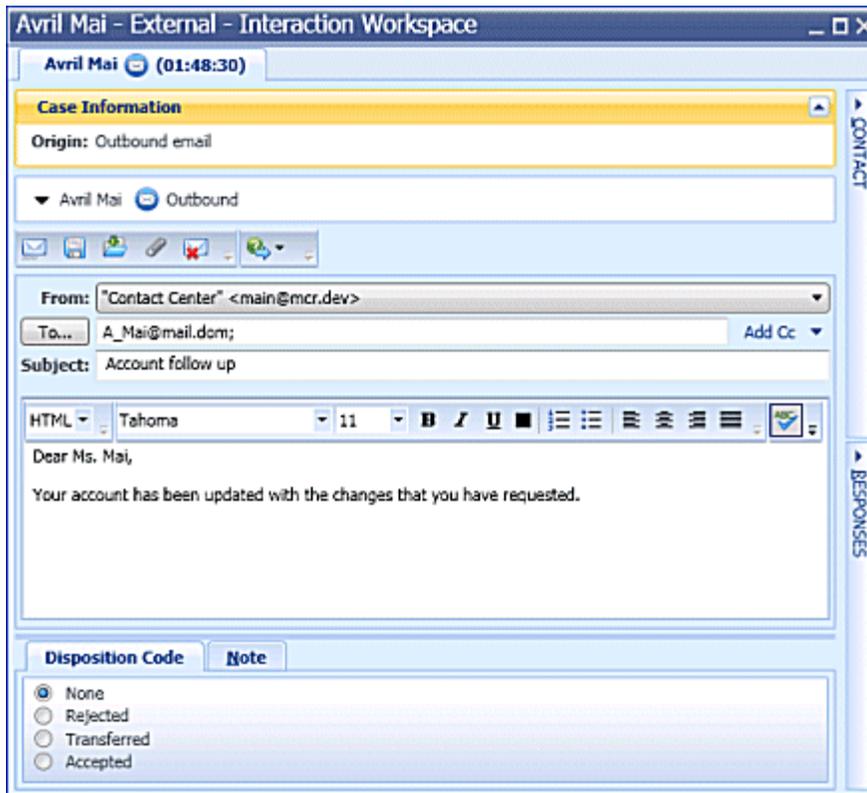
## Start

1. You can save a new outbound e-mail message or a reply outbound e-mail message (see [Lesson: Replying to a inbound e-mail interaction](#)) to your Draft workbin. To create new outbound e-mail, use the Team Communicator to find the contact, and select New E-Mail (see the New E-Mail option in the Team Communicator Action menu figure and [Lesson: Using the Team Communicator feature to find a contact](#)).



Procedure: Using the Team Communicator feature to find a contact

2. Compose your new or reply e-mail interaction in the E-Mail Interaction window (see the New outbound E-Mail Interaction window figure).



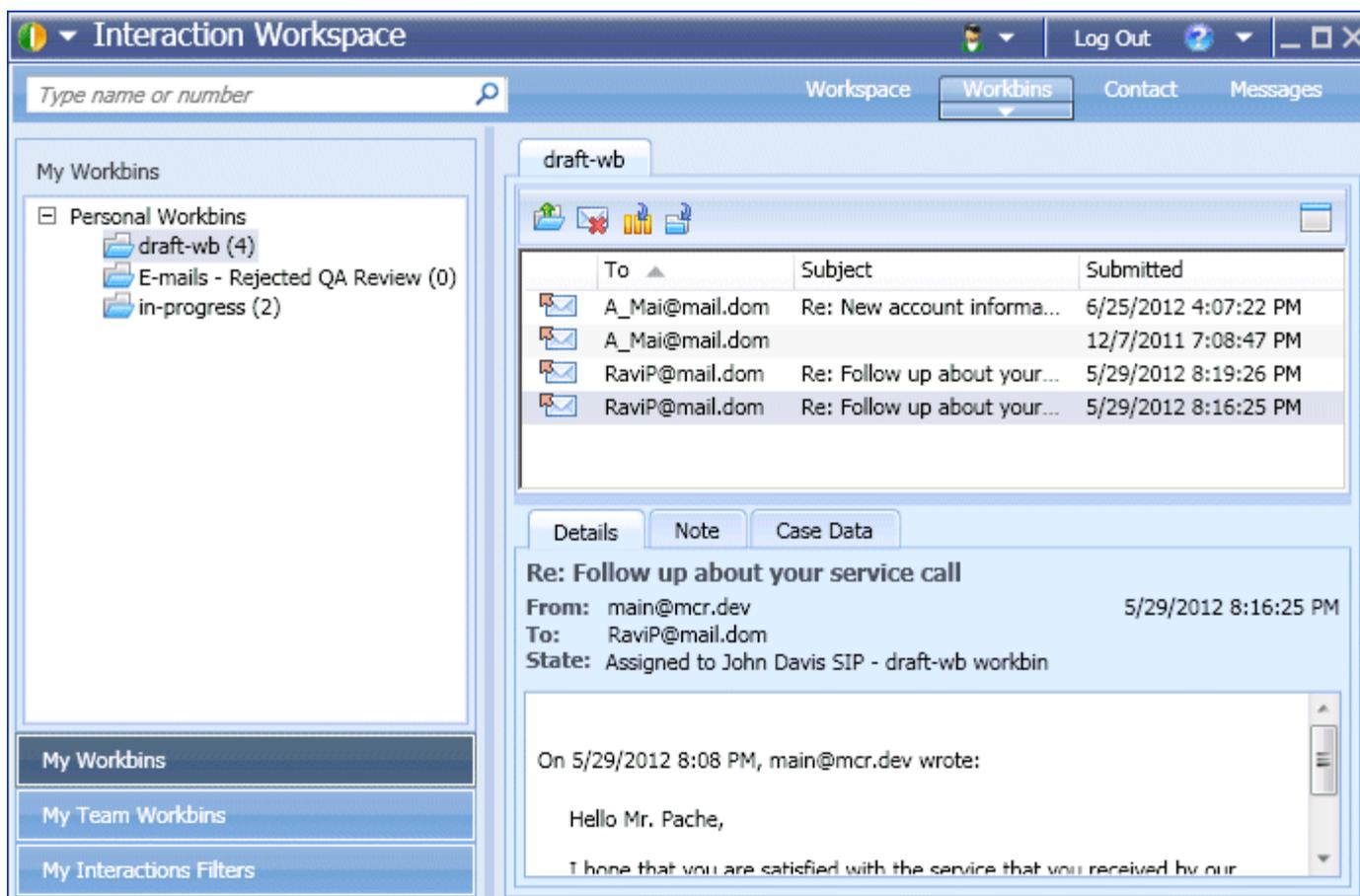
New outbound E-Mail Interaction window

- To save the outbound e-mail interaction in your Draft workbin folder, click the Save in Draft Workbin button.



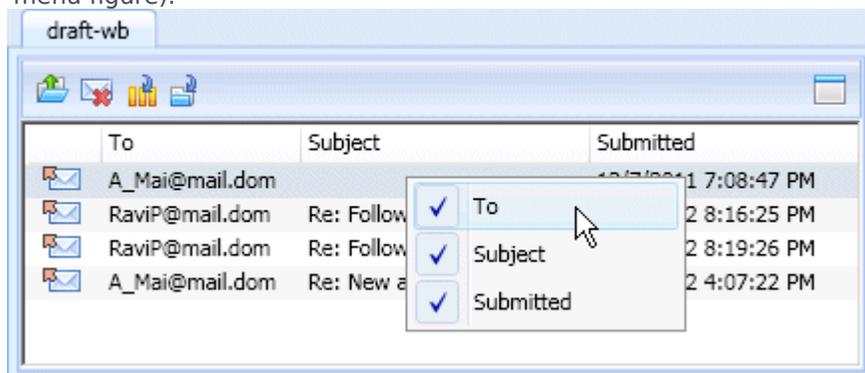
The interaction window closes, and the interaction is stored in your Draft workbin.

- If you want to open the interaction later to continue to work on it, click the Workbins button on the Interaction Workspace Main Window (see the Workbins view in the Interaction Workspace Main Window with a selected draft interaction figure). The Workbins Explorer displays the number of interactions in each workbin, and your saved interaction is displayed in the Draft workbin. The Draft Workbin enables you to use the following functionality:
  - Find an interaction by scrolling through the list of interactions.
  - Change the sort order of interactions by clicking the interaction list column heads.
  - Open--Open the interaction in an inbound E-Mail Interaction window (see [Lesson: Handling an inbound e-mail interaction](#)).
  - Delete--Delete the interaction permanently from the Interaction Server database (if you have the correct permissions).
  - Details--View the sender and recipient information, subject, and contents of the selected interaction.
  - Use the Notepad to attach a note to the interaction history. See [Managing Contact History](#)
  - Case Data--View Case Information and Disposition Code for the current interaction



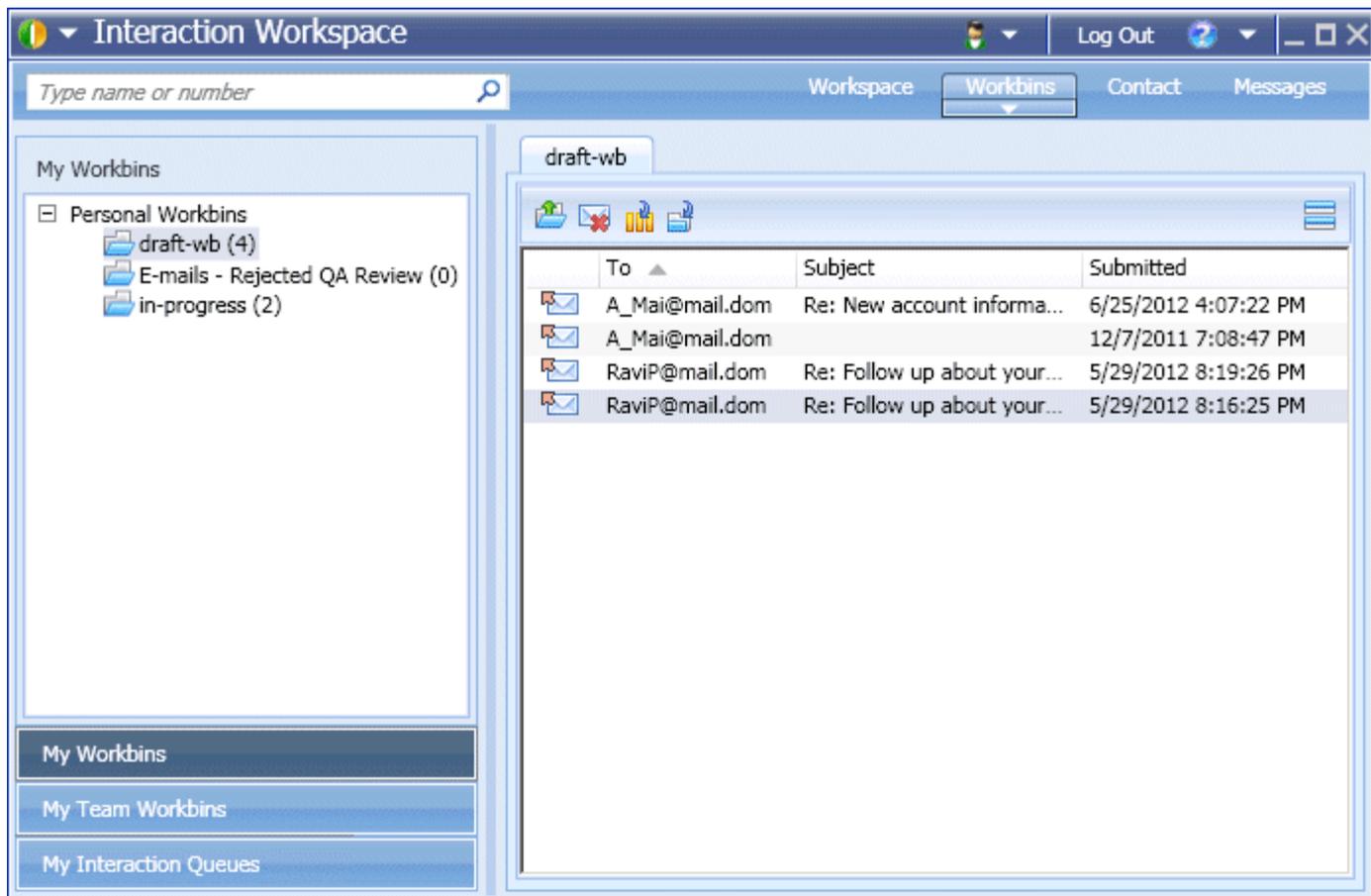
Workbins view in the Interaction Workspace Main Window with a selected draft interaction

- If you want to hide or show column headings in the interaction list, right-click in the list and select the headings that you want to hide or show respectively (see the Interaction list column-heading contextual menu figure).



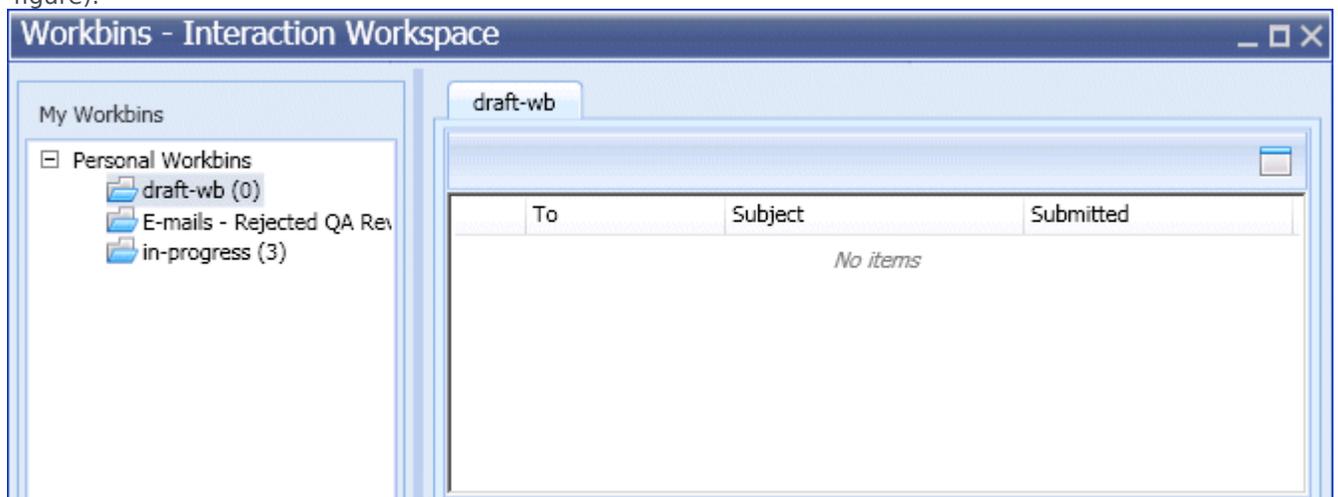
Interaction list column-heading contextual menu

- To show or hide the interaction information area, click the Show/Hide Details Panel button. The Draft workbin with the interaction information area hidden figure shows the Draft workbin in which the interaction-information area is hidden.



Draft workbin with the interaction information area hidden

7. When you have finished handling all the interactions in the Draft workbin, the Draft folder in the Workbins Explorer shows 0 entries and the Draft workbin shows *No items* (see the Empty Draft workbin figure).



Empty Draft workbin

**End**

# Team Lead Functionality

In this lesson, you will learn how a Team Supervisor can monitor, coach, and barge-in on agents who are handling voice and chat interactions. Team Lead

- [Monitor, Coach, and Barge-in Interactions](#)

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# Monitor Coach And Barge-in Interactions

In this lesson, you will learn how a Team Supervisor can monitor, coach, and barge-in on agents who are handling voice and chat interactions:

- Monitoring an agent enables you to hear the interaction between an agent and a contact without either party being able to hear you; or read the chat transcript between an agent and a contact without either party knowing that you are reading the transcript. Agents might be configured to know when they are being monitored (an icon is displayed in the interaction window), or they might be configured to be monitored without their knowledge (silent monitoring).
- You can barge-in to an active voice interaction that you are monitoring between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are monitoring.
- Coaching an agent enables you to hear the interaction between an agent and a contact without the contact being able to hear you coach the agent; or read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent.
- You can barge-in to an active voice interaction that you are coaching between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are coaching.

This lesson contains the following sections:

- [Monitoring a Voice Interaction](#)
- [Coaching a Voice Interaction](#)
- [Monitoring a Chat Interaction](#)
- [Coaching a Chat Interaction](#)
- [Switching Team Supervisor Modes](#)

To use the Team Supervisor functionality, you must be configured as a Supervisor for an agent group.

A Team Supervisor can monitor or coach as many chat agents as he or she want to, but he or she can monitor or coach only one voice agent at a time.

## Monitoring a Voice Interaction

Monitoring an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact without the agent or contact being aware that you are listening. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

Warning: You can monitor only one voice agent at a time.

## Lesson:

## Monitoring an agent who is handling a voice interaction

**Purpose:**

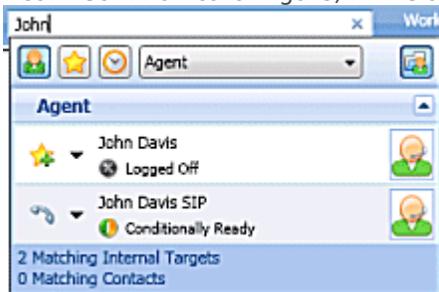
- To listen to an agent and a contact in a voice interaction without the agent or contact being able to hear you.

**Prerequisites**

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

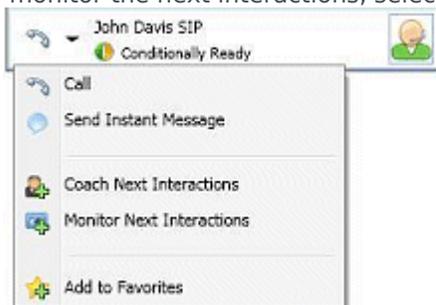
**Start**

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

2. Open the Action Menu for the agent whom you want to monitor and select Monitor Next Interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Monitor menu; to monitor the current interaction, select it from the Monitor menu. To monitor the next interactions, select Next Interactions.

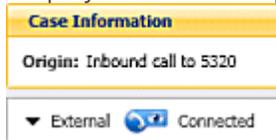


Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent. In the Team Communicator, the Action Menu for the agent whom you are monitoring changes to the Stop Monitoring button.



3. When the monitored agent accepts a voice interaction, a notification is displayed on your desktop. Click **Accept** to begin monitoring the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. Neither the contact nor the agent can hear you, but you can hear both parties. If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent. If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click **Accept**, you will begin monitoring the call that is already in progress. If the monitored agent is configured to be notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Voice Interaction window on the agent's desktop.



The same icon is displayed in the Voice Interaction Monitoring window on your desktop next to the party Action menu.



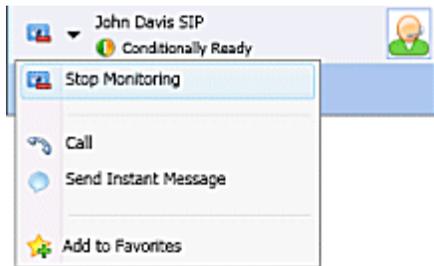
4. During a monitoring session, you can perform the following actions from the Voice Interaction Monitoring window:
- End Monitoring--Click End Monitoring (  ) in the Supervisor controls of the Call Actions toolbar to end the monitoring session.
  - Barge-in--Click Barge-in (  ) in the Supervisor controls of the Call Actions toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking End the Call (  ) in the Call Actions toolbar.
  - Coach via Instant Messaging--Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent whom you are monitoring by sending instant messages to them (see [Handle Internal Instant Messaging](#)).
  - Coach via voice--Select Coach via voice from the agent party Action menu, or use Unmute (Coach) (  ) in the Interaction toolbar to return to coaching.

For more information, see [Lesson: Coaching an agent who is handling a voice interaction](#).

If you stopped monitoring, you are disconnected from the call. The monitoring-indicator icon is removed from the Voice Interaction window of the agent.

If the agent ends the call while you are still monitoring the agent, your monitoring session ends automatically.

5. Click **Done** to close the Voice Interaction Monitoring window and mark the interaction as Done.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the Action Menu for the agent, and select **Stop Monitoring** (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

## End

## Coaching a Voice Interaction

Coaching an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact and speak to that agent without the contact being aware that you are listening and speaking to the agent. You can coach the current or next interaction of an agent.

### Lesson:

## Coaching an agent who is handling a voice interaction

### Purpose:

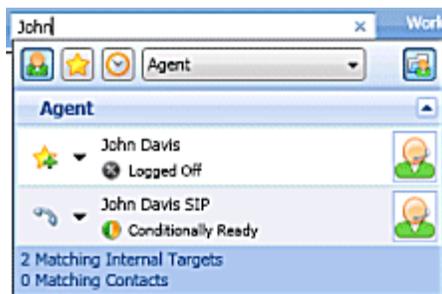
- To listen and speak to an agent who is handling a voice interaction without the contact being able to hear you.

### Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

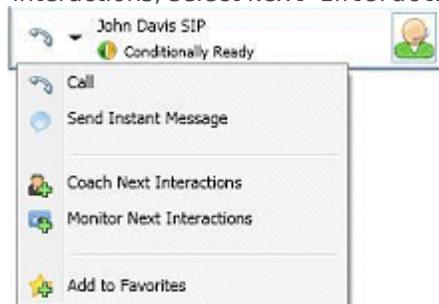
### Start

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

- Open the Action Menu for the agent whom you want to coach and select Coach Next Interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Coach menu; to coach the current interaction, select it from the Coach menu. To coach the next interactions, select Next Interactions.



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent. In the Team Communicator, the Action Menu for the agent whom you are coaching changes to the Stop Coaching button.



- When the coached agent accepts a voice interaction, a notification is displayed on your desktop. Click Accept to begin coaching the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. You can hear the agent and the agent can hear you, but the contact can hear only the agent. If you do not click Accept, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent. If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click Accept, you will begin coaching the call that is already in progress. The eye icon is displayed in the Voice Interaction Coaching window on your desktop next to the party Action menu.



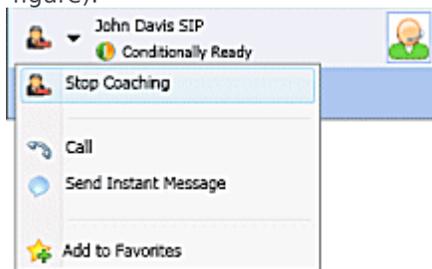
- During a coaching session, you can perform the following actions from the Voice Interaction Coaching window:
  - End Monitoring--Click End Monitoring (✖) in the Supervisor controls of the Call Actions toolbar to end the coaching session.
  - Mute (Monitor)--You can switch to monitoring the call by clicking Mute (Monitor) (🔇) in the Call Actions toolbar.

- Coach via Instant Messaging--Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent that you are coaching by voice by sending instant messages to that agent (see [Handle Internal Instant Messaging](#)).

If you stopped coaching, you are disconnected from the call.

If the agent ends the call while you are still coaching the agent, your coaching session ends automatically.

5. Click Done to close the Voice Interaction Coaching window and mark the interaction as Done.
6. To stop coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the Action Menu for the agent and select Stop Coaching (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

## End

## Monitoring a Chat Interaction

Monitoring an agent who is handling an interaction means that you can read a chat interaction between an agent and a contact without the agent or contact being aware that you are reading the interaction. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

### Lesson:

#### Monitoring an agent who is handling a chat interaction

##### Purpose:

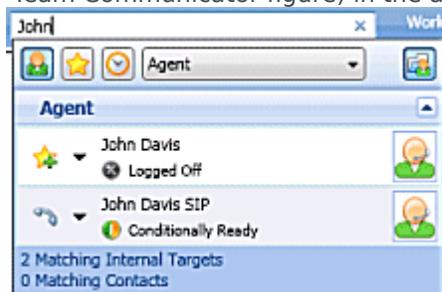
- To read the live transcript between an agent and a contact in a chat interaction without the agent or contact being aware of you.

##### Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Chat channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

**Start**

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

2. Open the Action Menu for the agent whom you want to monitor and select Monitor Next Interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Monitor menu; to monitor the current interaction, select it from the Monitor menu. To monitor the next interaction, select Next Interactions.

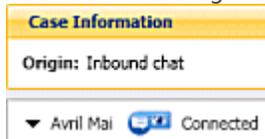


Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent. In the Team Communicator, the Action Menu for the agent whom you are monitoring changes to the Stop Monitoring button.



3. When the monitored agent accepts a chat interaction, a notification is displayed on your desktop. Click Accept to begin monitoring the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript, but you cannot send any text to the contact or the agent. If you do not click Accept, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent. If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click Accept, you will begin monitoring the chat that is already in progress. If the monitored agent is configured to be notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Chat Interaction window on the agent's desktop.



The same icon is displayed in the Chat Interaction Monitoring window on your desktop next to the party Action menu.



4. During a monitoring session, you can perform the following actions from the Chat Interaction Monitoring window:

- End Monitoring--Click End Monitoring (  ) in the Supervisor controls of the Call Actions toolbar to end the monitoring session.
- Barge-in--Click Barge-in (  ) in the Supervisor controls of the Call Actions toolbar to join the monitored chat session. Both parties will be able to see your messages. You can switch back to monitoring by clicking End Chat (  ) in the Call Actions toolbar.
- Coach via Instant Messaging--Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending instant messages to the agent (see [Handle Internal Instant Messaging](#)).
- Coach via voice--Select Coach via Voice from the agent party Action menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent (see [Making a Voice Call](#)).
- Coach via chat--Select Coach via Chat from the agent party Action menu. A chat session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending chat messages to the agent (see [or Receiving a Chat Consultation Starting or Receiving a Chat Consultation](#)).

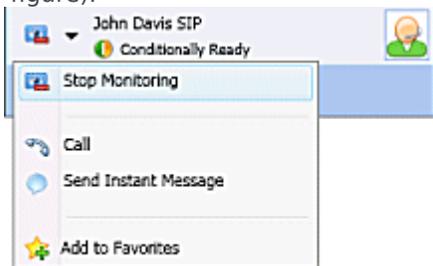
If you stopped monitoring, you are disconnected from the chat session. The monitoring indicator icon is removed from the Chat Interaction window of the agent.

If the agent ends the chat session while you are still monitoring the agent, your monitoring session ends automatically.

5. Click Done to close the Chat Interaction Monitoring window and mark the interaction as Done.

6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.

7. Open the Action Menu for the agent and select Stop Monitoring (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

**End**

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## Coaching a Chat Interaction

Coaching an agent who is handling an interaction means that you can read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent. You can coach the current or next interaction of an agent.

Lesson:

### Coaching an agent who is handling a chat interaction

#### Purpose:

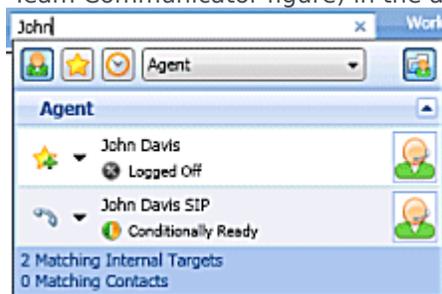
- To read the chat transcript and send messages to an agent who is handling a chat interaction without the contact knowing that you are reading the transcript and communicating with the agent.

#### Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Chat channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

#### Start

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

2. Open the Action Menu for the agent whom you want to coach and select Coach next interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Coach menu; to coach the current interaction, select it from the Coach menu. To coach the next interaction, select Next Interactions.

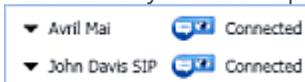


Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent. In the Team Communicator, the Action Menu for the agent whom you are coaching changes to the Stop Coaching button.



- When the coached agent accepts a chat interaction, a notification is displayed on your desktop. Click Accept to begin coaching the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript and send private chat messages to the agent without the contact seeing your messages. If you do not click Accept, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent. If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click Accept, you will begin coaching the chat session that is already in progress. The eye icon is displayed in the Chat Interaction Coaching window on your desktop next to the party Action menu.

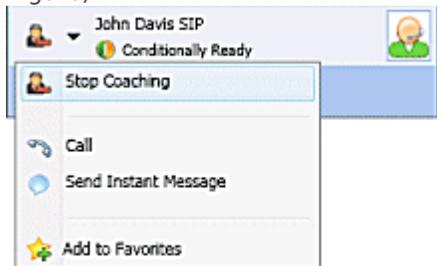


- During a coaching session, you can perform the following actions from the Chat Interaction Coaching window:
  - End Monitoring--Click End Monitoring (✖) in the Supervisor controls of the Call Actions toolbar to end the coaching session.
  - Barge-in--Click Barge-in (👤) in the Supervisor controls of the Call Actions toolbar to join the monitored chat session. Both parties will be able to see your messages. Your coaching session ends when you barge-in to the chat.

Click Done to close the coaching session in the window and mark the coaching interaction as Done. You can switch to monitoring the chat session (see [Monitoring a Chat Interaction](#)) by clicking End Chat (✖) in the Call Actions toolbar.

- Coach via voice--Select Coach via Voice from the agent party Action menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent (see [Making a Voice Call](#)).
- Coach via Instant Messaging--Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are coaching by chat by sending instant messages to that agent (see [Handle Internal Instant Messaging](#)).  
If you stopped coaching, you are disconnected from the chat session.  
If the agent ends the chat session while you are still coaching the agent, your coaching session ends automatically.

5. Click Done to close the Chat Interaction Coaching window and mark the interaction as Done.
6. To end coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the Action Menu for the agent and select Stop Coaching (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

## End

## Switching Team Supervisor Modes

Interaction Workspace enables you to switch from certain team-supervision modes to others. During the monitoring or coaching of an active interaction, you can switch from one supervision mode to another. The following transitions are supported:

- Monitoring to coaching--Use the party Action menu that is associated with the agent, or Use Unmute (Coach) in the Interaction toolbar to return to coaching.
- Monitoring to barge-in--Click Barge-in in the Supervision bar.
- Coaching to barge-in--Click Barge-in in the Supervision bar.
- Coaching to monitoring--Click End Chat, End Call, or End IM in the Interaction toolbar of the coaching interaction to return to monitoring, or Mute (Monitor) in the Interaction toolbar to return to monitoring.
- Barge-in to monitoring--Click End Call or End Chat in the Interaction toolbar to return to monitoring.
- Barge-in to coaching--Use the party Action menu that is associated with the agent.

Warning: Depending on the technical environment of your voice channel, some voice specific supervisor switching-modes might not be available, for example:

Switching from coaching to barge-in might not be possible.  
Switching from monitoring to barge-in might not be possible.

# Contact Center Tasks

In this lesson, you will learn how to use the KPI, Statistics, receive business and system messages, and personalize your workspace. System Tasks

- [View KPIs And Statistics](#)
- [Receive Business And System Messages](#)
- [Personalize Your Workspace](#)

# View KPIs And Statistics

Interaction Workspace provides two views of performance: My Statistics and Contact Center Statistics. The My Statistics view lists your Key Performance Indicators (KPIs). The Contact Center Statistics view displays statistics about the Switches, Routing Points, queues, and other objects. This lesson contains the following sections:

- [Viewing Your KPIs](#)
- [Viewing Contact Center Statistics](#)
- [Viewing Statistics by Using the Statistics Gadget](#)

## Viewing Your KPIs

There are three ways to view the My Statistics view:

- From the My Statistics tab of the Main Window Workspace (see [Lesson: Viewing your Key Performance Indicators \(KPIs\)](#))
- From the My Statistics window of the Gadget (see the *Interaction Workspace 8.1 Help*)
- From the Statistics Gadget (see [Viewing Statistics by Using the Statistics Gadget](#))

The My Statistics view displays your KPIs. Your system administrator configures the KPIs that are displayed to you. The following columns of information are available for each KPI:

- Error/Warning Level--The error or warning level, if either is exceeded
- Key Performance Indicator--A description of the statistic
- Personal--Your value for the statistic
- <Agent Group Name>--The value for the statistic for the agent groups to which you belong.

### Lesson:

#### Viewing your Key Performance Indicators (KPIs)=

##### **Purpose:**

- To determine if you are meeting the performance targets that have been set for you by your contact-center.

The My Statistics tab displays your current KPIs and agent group KPIs. The My Statistics tab enables you to compare your performance with other members of your team. Warning and error icons are displayed to indicate which KPIs require your attention.

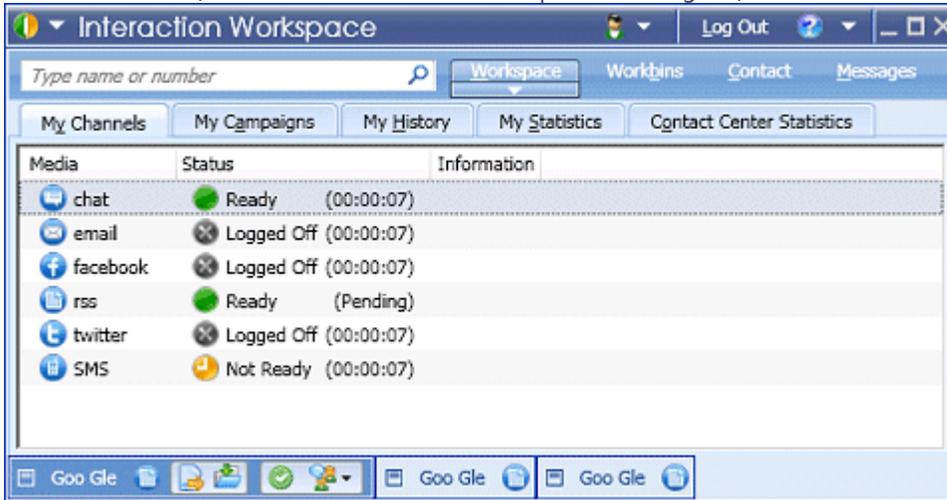
##### **Prerequisites**

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- You are configured to view your KPIs.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You are using the Main Window view, not the Gadget. To view the My Statistics window from the Gadget, select it from the Main Menu (see the *Interaction Workspace 8.1 Help*).

**Start**

1. In the Main Window view, click Workspace. The Main Window Workspace view opens below the Team Communicator (see the Main Window Workspace view figure).



Main Window Workspace view

2. In the Main Window Workspace view, click the My Statistics tab. The list of your Key Performance Indicators (KPIs) is displayed (see the The My Statistics tab in the Main Window Workspace view figure). This view is updated constantly so that you can view your current statistics.

| Key Performance Indicator          | Personal Tech Support L1 |   |
|------------------------------------|--------------------------|---|
| Total number inbound calls (Voice) | 10%                      | 2 |
| Total number internal calls        | 2                        | 4 |
| Outbound Calls                     | 83,33%                   | 7 |
| Total Number of Transferred Calls  | 1                        | 1 |

The My Statistics tab in the Main Window Workspace view

3. You can perform the following functions in the My Statistics tab:
  - Click column heads to change the sort order of the KPIs.
  - Right-click the My Statistics tab to access the shortcut menu that enables you to do the following:
    - Show or hide columns
    - Show or hide KPIs
    - Turn KPI filtering on or off to show only items that have warnings
4. To close the Workspace view, click Workspace.

**End**

## Viewing Contact Center Statistics

There are three ways to view the Contact Center Statistics view:

- From the Contact Center Statistics tab of the Main Window Workspace (see [Lesson: Viewing statistics about call center resources](#))
- From the Contact Center Statistics window of the Gadget (see the *Interaction Workspace 8.1 Help*)
- From the Statistics Gadget (see [Viewing Statistics by Using the Statistics Gadget](#))

The contact-center Statistics view displays statistics that summarize the state of various conditions that are monitored by your call center, such as the percentage of abandoned calls, the average call-waiting time, and the number of interactions in a queue. Your system administrator defines which statistics and objects are displayed to you. The following columns of information are available for each monitored object:

- **Error/Warning Level**--The error or warning level if either is exceeded
- **Call Center Resource**--A description of the type of object, such as a queue or a Routing Point
- **Description**--A description of the statistic
- **Value**--The value of the statistic

Lesson:

### Viewing statistics about call center resources=

#### **Purpose:**

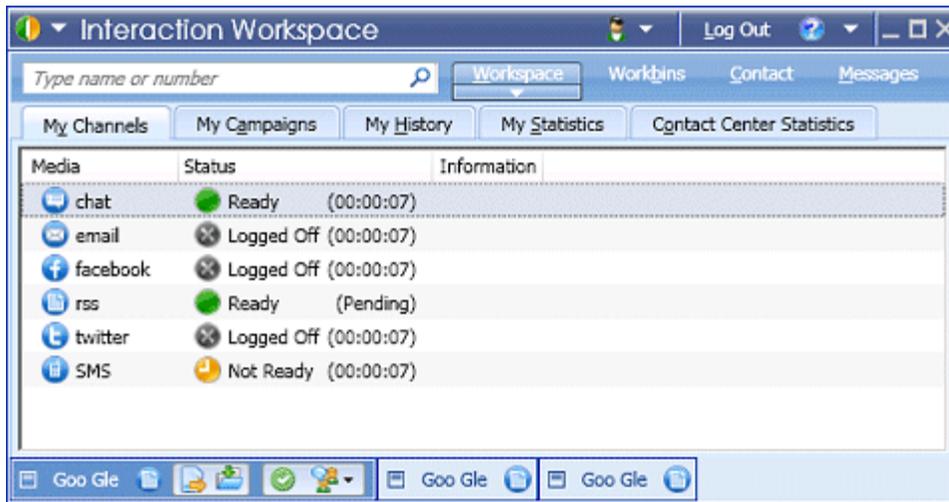
- To view statistics that summarize the states of various conditions that are monitored by your call center, such as the percentage of abandoned calls, the average call-waiting time, and the number of interactions that are in a queue.

#### **Prerequisites**

- You are configured to view statistics for your contact-center.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You are using the Main Window view, not the Gadget. To view the Contact Center Statistics window from the Gadget, select it from the Main Menu (see the *Interaction Workspace 8.1 Help*).

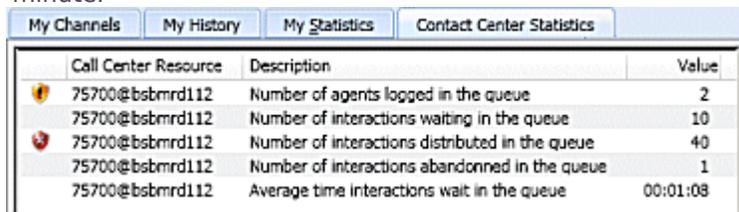
#### **Start**

1. In the Main Window view, click Workspace. The Main Window Workspace view opens below the Team Communicator (see the Main Window Workspace view figure).



Main Window Workspace view

- In the Main Window Workspace view, click the Contact Center Statistics tab. The list of statistics about objects in your call center is displayed (see the Main Window Workspace view Contact Center Statistics tab figure). This view is updated constantly so that you can view statistics from minute to minute.



Main Window Workspace view Contact Center Statistics tab

Statistics about switches, Routing Points, queues, and other objects, are displayed in the Contact Center Statistics tab. You can drag column headings to change the order or the columns. Also, you can click a column heading to sort the objects based on the value of the column.

- You can perform the following functions in the Contact Center Statistics tab:
  - Click column heads to change the sort order of the statistics.
  - Right-click the Contact Center Statistics tab to access the shortcut menu that enables you to do the following:
    - Show or hide columns
    - Show or hide statistics
    - Turn statistics filtering on or off to show only items that have warnings
- To close the Workspace view, click Workspace.

**End**

## Viewing Statistics by Using the Statistics Gadget

Statistics can be viewed either in the Main Window by selecting the My Statistics tab or the

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Contact Center Statistics tab in your Workspace, or by using the Statistics Gadget. The Statistics Gadget is a view of statistics that you can leave open all the time. The Statistics Gadget displays statistics in two ways:

- In a statistics ticker
- In a Tagged Statistics view

The advantage of the Statistics Gadget is that you can view your KPIs and Contact Center Statistics continuously, without opening your Workspace and clicking back and forth between tabs.

Lesson:

## Viewing your KPIs and Contact Center Statistics continuously by using the Statistics Gadget

### Purpose:

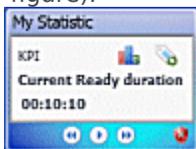
- To view your KPIs and Contact Center Statistics continuously without opening your Workspace and clicking back and forth between tabs.

### Prerequisites

- You are configured to view your KPIs and/or you are configured to view statistics for your contact-center.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

### Start

1. To show the Statistics Gadget, select Show Statistics Gadget from the Main Menu in the Main Window or the Gadget. The Statistics Gadget is displayed (see the Interaction Workspace Statistics Gadget figure).

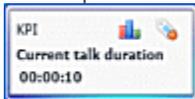


Interaction Workspace  
Statistics Gadget

The Statistics Gadget displays configured statistics in a ticking region. Each statistic is displayed for a specified period, then the next statistics is displayed.

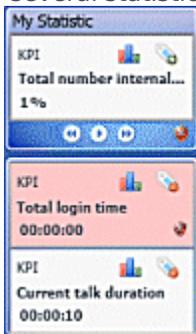
2. Use the buttons at the bottom of the Statistics Gadget to control the view (see the Interaction Workspace Statistics Gadget figure):
  - To stop the ticker at a specific statistic, click the Stop button.
  - To start the ticker, click the Play button.
  - To view the next statistic, click the Forward button.
  - To view the previous statistic; click the Back button.
3. Warning and error icons are displayed if one or more statistics exceed or drop below threshold values that are configured by your administrator.

- Click a warning or error icon to scroll immediately to the next statistics that is in a warning or error state.
4. The Statistics Gadget enables you to tag specific statistics in a static view that is displayed below the ticker.
- When a statistic is displayed in the ticker that you want to tag, click the Tag button: . The Tagged Statistics view is displayed below the Statistics Gadget ticker view (see the Interaction Workspace Statistics Gadget Tagged Statistic view figure).



Interaction Workspace  
Statistics Gadget  
Tagged Statistic view

5. You can tag more than one statistic at a time. The Tagged Statistics view expands to accommodate several statistics in a single view (see the Interaction Workspace Tagged Statistic View stack figure).



Interaction Workspace  
Tagged Statistic View  
stack

The default maximum size of the Tagged Statistics view is five statistics; however, this value might be set to a different size by your administrator. If you have tagged more than the maximum number of stacked statistics, click the Up and Down arrow buttons at the bottom of the Tagged Statistics view stack to scroll up and down through your tagged statistics.

6. To untag a statistic, click the Untag button: 
7. You can view your KPIs either as a graph or as text.
- Click the Graph View button to view the statistic as a graph: 
  - Click the Text View button to view the statistic as text: 

**End**

# Receive Business And System Messages

Interaction Workspace provides functionality that enables you to receive, preview, and view messages that are directed to you, your group, or your role. This lesson contains the following section:

- [Receiving and Viewing Messages](#)

## Receiving and Viewing Messages

Messages are displayed to you in three interfaces:

- The My Messages interactive notification
- The My Messages window
- The My Messages area in the Main Window

Lesson:

### Receiving and viewing messages on your desktop by using the Main Window

#### **Purpose:**

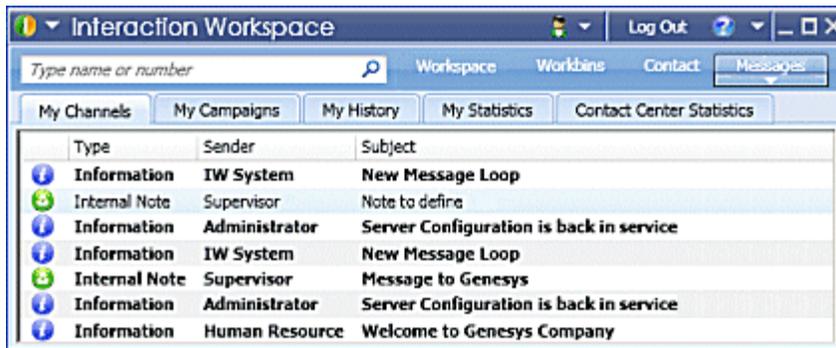
- To receive messages of varying importance that are directed to you, your group, or your role by your supervisor or administrator.

#### **Prerequisites**

- You are configured to receive broadcast messages.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You are using the Main Window view, not the Gadget.

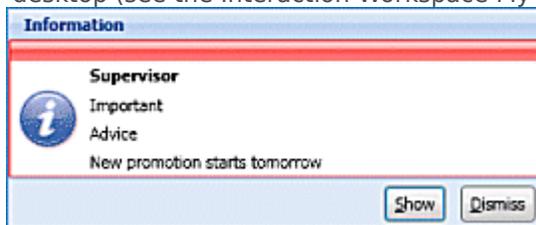
#### **Start**

1. In the Main Window view, click the Messages button to view any system or business messages that you might already have received. The messages are displayed in a scrolling list with the most recent message at the top. Messages that are displayed in bold have not been read (see the Interaction Workspace Main Window showing the Message Area open and displaying current messages figure).



Interaction Workspace Main Window showing the Message Area open and displaying current messages

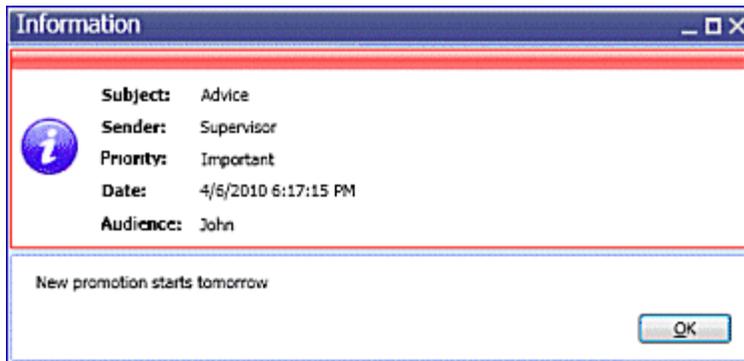
2. To read a message that is displayed in the Message Area, do one of the following:
  - Hover your mouse pointer over the message to view a pop-up that displays the content of the message.
  - Double-click the message to open the My Messages window.
3. If a new message is directed to you, the My Message interactive notification is displayed on your desktop (see the Interaction Workspace My Messages interactive notification figure).



Interaction Workspace My Messages interactive notification

Do one of the following:

- Click Show--Displays the Message window. The message is also displayed in the Messages Area of the Main Window. The message is marked as Read.
  - Click Dismiss--Closes the interactive notification. The message is displayed in the Messages Area of the Main Window. The message is marked as Unread (displayed in bold in the Message Area).
  - Do nothing--The interactive notification is dismissed automatically after a time interval that is defined by your system administrator; the message is displayed in the Messages Area of the Main Window. The message is marked as Unread (appears in boldface in the Message Area).
4. If you clicked Show, the Message window is displayed (see the Interaction Workspace Business Message window figure).



Interaction Workspace Business Message window

The Message window contains the full content of a message that has been directed to you, your group, or your role. As well as displaying the content of the message, the Message window might contain the following information:

- **Message Type**--This information might be conveyed by text, the title bar, and/or an icon.
- **Subject**--Information about the content of the message.
- **Sender**--The identity of the sender of the message.
- **Priority**--This information might be conveyed by text and/or by the color of the border that surrounds the information about the message.
- **Date**--The date and time that the message was sent.
- **Audience**--The target audience of the message.
- Other data that is defined by your administrator.

Click OK to close the Message window.

5. If you clicked Dismiss, or if you allowed the interactive notification to time-out by not clicking either button, the Message window is not displayed. To view the contents of the message, you must open the Message Area in the Main Window (see the Interaction Workspace Main Window showing the Message Area open and displaying current messages figure).

## End

## Lesson:

## Receiving and viewing messages on your desktop by using the Gadget

### Purpose:

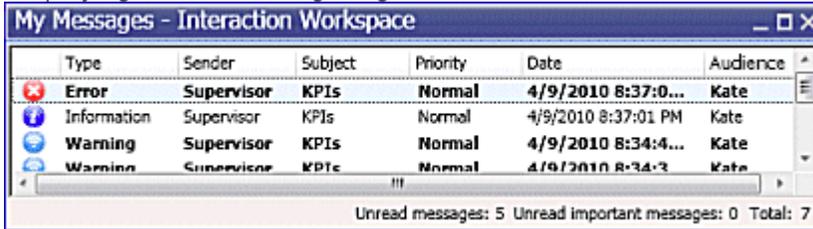
- To receive messages of varying importance that are directed to you, your group, or your role by your supervisor or administrator.

### Prerequisites

- You are configured to receive broadcast messages.
- You are logged in to Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).
- You are using the Gadget, not the Main Window view.

## Start

1. In the Gadget, select My Messages from the Gadget Main Menu. The messages are displayed in the My Messages view. This view contains a scrolling list, with the most recent message at the top. Messages in that are displayed in bold have not been read (see the Interaction Workspace My Messages window displaying current messages figure).



| Type           | Sender     | Subject | Priority | Date                | Audience |
|----------------|------------|---------|----------|---------------------|----------|
| <b>Error</b>   | Supervisor | KPIs    | Normal   | 4/9/2010 8:37:0...  | Kate     |
| Information    | Supervisor | KPIs    | Normal   | 4/9/2010 8:37:01 PM | Kate     |
| <b>Warning</b> | Supervisor | KPIs    | Normal   | 4/9/2010 8:34:4...  | Kate     |
| <b>Warning</b> | Supervisor | KPIs    | Normal   | 4/9/2010 8:34:3...  | Kate     |

Unread messages: 5 Unread important messages: 0 Total: 7

Interaction Workspace My Messages window displaying current messages

2. To read a message that is displayed in the My Messages view, do one of the following:
  - Hover your mouse pointer over the message to view a pop-up that displays the content of the message.
  - Double-click the message to open the Message window.
3. If a new message is directed to you, the My Message interactive notification is displayed on your desktop (see the Interaction Workspace My Messages interactive notification figure). Do one of the following:
  - Click Show--Displays the Message window. The message is also displayed in the My Messages tab of the Main Window. The message is marked as Read.
  - Click Dismiss--Closes the interactive notification. The message is displayed in the My Messages window if it is open. The message is marked as Unread (appears in boldface in the Message Area).
  - Do nothing--The interactive notification is dismissed automatically after a time interval that is defined by your system administrator; the message is displayed in the My Messages window if it is open. The message is marked as Unread (appears in boldface in the Message Area).
4. If you clicked Show, the Message window is displayed (see the Interaction Workspace Business Message window figure). The Message window contains the full content of a business message that has been directed to you, your group, or your role. As well as displaying the content of the message, the Message window might contain the following information:
  - **Message Type**--This information might be conveyed by text, the title bar, and/or an icon.
  - **Subject**--Information about the content of the message.
  - **Sender**--The identity of the sender of the message.
  - **Priority**--This information might be conveyed by text and/or by the color of the border that surrounds the information about the message.
  - **Date**--The date and time that the message was sent.
  - **Audience**--The target audience of the message.
  - Other data that is defined by your administrator.

Click OK to close the Message window.

5. If you clicked Dismiss, or if you allowed the interaction notification to time-out by not clicking either button, the Message window is not displayed. To view the contents of the message, you must select My Messages from the Gadget Main Menu to display the My Messages window (see the Interaction

Workspace My Messages interactive notification figure).

**End**

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# Personalize Your Workspace

You can change the appearance of the Interaction Workspace interface by choosing a predefined appearance from the Change Theme submenu. This lesson contains the following section:

- [Changing the Appearance of Interaction Workspace](#)

## Changing the Appearance of Interaction Workspace

You can change the way that the Interaction Workspace looks by using a simple menu selection. Interaction Workspace provides the default theme and an alternate theme that is called Royale. Your system administrator might also have created additional themes for you to use.

Lesson:

### Changing the appearance of the agent interface

#### Purpose:

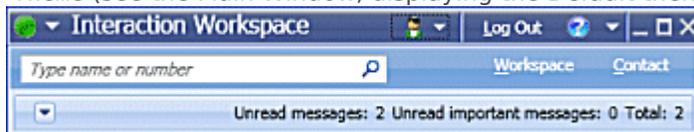
- To alter the way in which the Interaction Workspace interface is displayed on your desktop.

#### Prerequisites

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

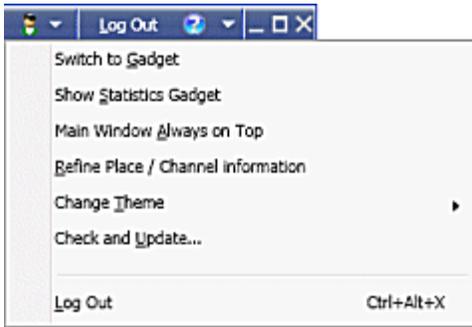
#### Start

1. The blue appearance of Interaction Workspace is the default color scheme; it is called the Default Theme (see the Main Window, displaying the Default theme figure).



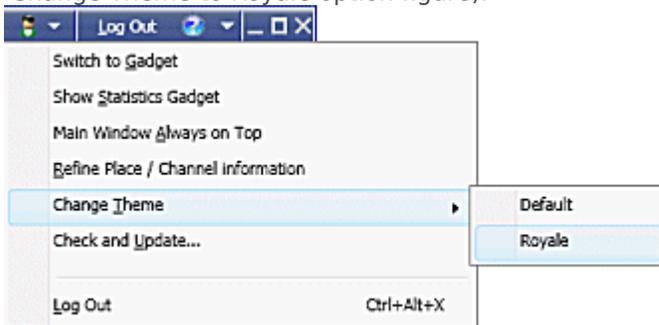
Main Window, displaying the Default theme

To change the color scheme of Interaction Workspace, in the Main Window or in the Gadget, open the Main Menu (see the Main Window Main menu figure).



Main Window Main menu

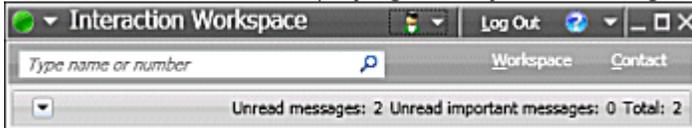
2. Select a different theme from the Change Theme submenu (see the Main Window Main Menu, displaying Change Theme to Royale option figure).



Main Window Main Menu, displaying Change Theme to Royale option

Interaction Workspace provides two additional themes, which are called Royale and Fancy. Your system administrator might have configured additional theme options from which you can choose.

3. The Main Window and all the other windows of Interaction Workspace are displayed with the new theme (see the Main Window displaying the Royale theme figure).



Main Window displaying the Royale theme

**End**