Workspace Desktop Edition Help

Workspace Desktop Edition 8.1.4

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Interaction Workspace Help

Interaction Workspace is a modular, customizable application that enables you to handle contact-center interactions, monitor contact-center and personal KPIs, and consult with your colleagues.

The Interaction Workspace Help contains information about how to:

- Use the Composite views to handle customer interactions, according to your role in the contact-center.
- Use the Atomic views that enable you to complete tasks, according to your role in the contact-center.
- Launch Interaction Workspace.
- Use keyboard navigation and accessibility.

Launching Interaction Workspace

Double-click the **Interaction Workspace** icon on your desktop to launch the application.

Interaction Workspace desktop icon

The Interaction Workspace Login Window is displayed.

After you authenticate, Interaction Workspace might automatically update if new tasks are assigned to you or if the application is updated.

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

Keyboard Navigation and Accessibility

Interaction Workspace supports keyboard shortcuts and hotkey combinations for certain common functions. The Interaction Workspace keyboard shortcuts and hotkeys are configured by your administrator. This is to ensure that there is no conflict between Interaction Workspace and other applications that you might use. Please ask your administrator for a list of the shortcuts and hotkeys that are configured for Interaction Workspace.

Shortcut and Hotkey Combinations

A shortcut is a combination of keys that you press to activate a certain function or behavior in a specific window or view. Your operating system might support shortcut keys for the following functions: copy, cut, paste, undo, delete, find, maximize window, minimize window, open menu and select command, switch application, cancel, change focus, and so on. Consult your operating-system documentation for a list of supported keyboard shortcuts.

Hotkeys are also combinations of keys that you press to perform certain functions; however, hotkeys are available to you no matter what window or application is active. For example, your administrator might have configured a hotkey combination for you that enables you to answer a phone call (voice interaction) or reject an e-mail interaction that has been routed to you. When the preview is displayed on your desktop, you can use the hotkey combination to perform the action without first having to switch to the interaction preview.

Access Keys

In addition, access keys are available for most Interaction Workspace menu items. Each supported menu item has an underlined letter or character. Press the **Alt** key to open a menu in the active window, and then press the letter or character that corresponds to the menu item that you want to select.

Keyboard Navigation

Interaction Workspace supports keyboard navigation for all features in the interaction windows. All features, functions, options, and menus are 100 percent navigable by keyboard.

The Interaction Workspace interface is 100 percent navigable by keyboard. This functionality enables users who cannot use a mouse, or who are using a device for accessibility that relies on keyboard navigation, to manipulate the desktop components. Keyboard navigation enhances the productivity of any user.

The appearance of the component that you select changes as you move the focus from one component to another. For example, buttons change color, and menus open with the current selection highlighted by color.

Some screen-reader applications are not compatible with these navigation shortcuts, because the screen reader uses some of these keys for other purposes. When screen reader mode is on, use **Alt + N** to disable the keyboard navigation function.

Note: If you are already in screen-reader mode, all keyboard shortcuts are disabled, except for the

Alt + *n* commands. Your system administrator turns screen-reader mode on and off.

Basic Navigation

Two keyboard shortcuts enable you to navigate among components—for example, from one menu to the next or from one view of the interaction interface to the next:

- **Tab**—Moves the focus to the next component (menu, field, button, view, and so on)
- **Shift + Tab**—Moves the focus to the previous component (menu, field, button, view, and so on)

Movement occurs from left to right and from top to bottom, unless the ordering of components dictates otherwise. Navigation moves from component to component within a view, and from view to view within the application.

Navigation Shortcuts

The following table contains keyboard shortcuts that enable you to manipulate controls, such as menus, lists, and buttons, in the Interaction Workspace interface.

Shortcut	Description
LEFT ARROW	Move left in a menu bar or out of a submenu.
RIGHT ARROW	Move right in a menu bar or into a submenu.
UP ARROW	Move up in lists and menus.
DOWN ARROW	Move down in lists and menus.
ALT+DOWN ARROW	Open a selected drop-down list.
ENTER	For a modifiable list, apply the edit mode, or validate the modification. For a button, execute the associated action. For a menu item, execute the associated action.
SPACE	For some controls, select or clear the check box that has the focus.
ESCAPE	For a modifiable list, cancel the edit mode.

Composite Views Overview

Composite views are windows that contain the components that are required to complete a task such as handling an Inbound Voice Interaction. They are supported by Atomic views which are contained in separate windows.

Login—The first view that you see. It enables you to identify yourself and, if required, enter additional login data based on your role or the technical environment. To open the Login Window, launch the Interaction Workspace application.

Main Window—Enables you to manage your status, contacts, favorites, and settings; view your KPIs and messages; and launch new interactions.

Gadget—Enables you to manage your status and favorites, create new interactions, and access information about interactions that are currently active.

Statistics Gadget—Enables you to view your KPIs and contact-center statistics in a permanent view. Statistics can be viewed in a ticker or in a static view.

Interaction Preview—Displays an interactive notification of a new inbound interaction. The notification is a preview that includes attached data that enables you to decide whether to accept or reject the interaction.

Voice Tasks

- Voice Interaction—Enables you to view all of the information that is necessary to handle a voice interaction with a contact or an internal agent.
- Internal Voice Interaction—Enables you to start a voice interaction with an internal target.
- Voice Consult—Enables you to consult with another agent about the current voice interaction, before you initiate a conference with the agent or transfer to the agent.
- Voice Recording—Enables you to record the current voice interaction with a contact or an internal target (for VoIP-/SIP-enabled agents only).

Web Callback Interaction—Enables you to view the information that is necessary to handle a web callback voice interaction with a contact.

Chat Tasks

- Chat Interaction—Enables you to view all of the information that is necessary to handle a chat interaction with a contact or an internal agent.
- Chat Consult—Enables you to consult with another agent about the current chat interaction, before you initiate a conference with the agent or transfer to the agent.

E-Mail Interaction—Enables you to view all of the information that is necessary to handle inbound and outbound e-mail interactions with a contact or internal agent, and how to handle QA review of outbound e-mail interactions.

SMS Interaction—Enables you to view all of the information that is necessary to handle an SMS interaction with a contact.

Workitems—Enables you to view non-interactive media types, such as faxes.

Internal IM—Enables you to send an Instant Message (IM) to another agent (internal target) or receive an IM from an internal target.

Outbound Campaign Tasks

- Outbound Preview Calls—Enables you to request an outbound campaign interaction and view contact-related data before you make the call to the contact.
- Outbound Push Preview Calls—Enables you to receive automatically an outbound campaign interaction and view contact-related data before you make the call to the contact.
- Outbound Progressive and Predictive Calls—Enables you to receive outbound interactions that are dialed automatically by the system.
- Call Actions for Outbound Calls—Enables you to perform common call functions such as transferring a call or scheduling a callback.

Plug-in Support

Interaction Workspace supports Genesys plug-ins for a variety of extended media channels, including social-media channels such as Facebook and Twitter. Refer to the documentation that comes with your Genesys eServices plug-ins for information about how to install and use these media channels.

Login

The Login view is the first view that you see. It enables you to identify yourself and, if required, enter additional login data, based on your role or the technical environment.

Logging in is a two-step process:

1. (SIP only) Plug in your USB headset.
2. Identify yourself to the system.
3. Define additional information about yourself, based on your role and the tasks that are assigned to you.

Step One

Logging In to the Interaction Workspace Application

After you have launched the Interaction Workspace application, the login view opens on your desktop.

1. Enter your user name in the User Name field.
2. Enter your password in the Password field. (Note: you might be required to change your password when you first login, at a specific interval, or for other security reasons. Refer to Your Password Changing Your Password).
3. If necessary, select your language from the Language drop-down list.
4. Do one of the following:

- Log In to authenticate yourself on the system.
- Cancel to stop logging in and close the login view.

This process identifies you to the system, so that the correct application is loaded onto your workstation. If no additional information is required, the Main Window or the Gadget view opens immediately after you click **Log In**. Otherwise, the Advanced Login Parameters view is displayed.

You might be configured to specify your preferred language. To specify a different language preference, select a language from the Language drop-down list.

More/Less Options

In the first login view, you might be configured to specify additional options.

- To specify additional options, click **More**.
- To hide the additional options, click **Less**.

Options that you might be configured to specify include the following:

- Name of the Interaction Workspace application.
- Name of the host that is running your configuration server.
- Port number of your configuration server. This port is normally 2020.
- **Keep recent place <Place Name>**. Check this box to use the same Place that was used most recently on the current workstation. You might have to use this option if you do not have a defined place configured for your login.

Contact your system administrator for more information about these options.

Step Two

Defining Advanced Login Parameters

After you have been authenticated and logged in, a new view might open on your desktop that enables you to 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. However, if no additional information is required, the Main Window or the Gadget view opens immediately.

The Advanced Login Parameters view confirms your login and notifies you that you must select one or more channels and provide any additional login information that is specific to those channels.

1. Enter your information, according to your role, and the tasks that you want to perform. You might have to specify your place, your queue, your login, your password, and the channels that you want to use (Voice, IM, SMS, workitems such as faxes, and so on). You might also be required to enter an optional phone number, if you are on a SIP Server system and log in remotely.
2. Do one of the following:

- Click **OK** to submit your information; the Main Window or the Gadget view opens.
- Click **Cancel** to close the System Parameters view and log out.
- Click **Change login account** to return to the first login view.

Remote Phone Number

If your company is using a SIP Server (VoIP), 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.

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 Advanced Login Parameters view. The phone number in this field might already be configured for you.

USB Headset Detection

When you log in 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 into the SIP Voice channel. Make sure that you plug in your USB headset so that you can 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.

The volume settings for your USB headset that you used the last time that you logged out are retained the next time that you log in. You can adjust the volume of your USB headset by using the volume control on the Voice interaction window.

Ready/Not Ready State

Your system administrator specifies what your status is for each channel when you log in. 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.

Changing Your Password

There are a number of reasons why you might have to or want to change your Interaction Workspace login password. For reasons that are related to the security of your company, your account might be configured so that your password expires automatically after a specified number of days. Your account might also be configured to require you to change your password after an inactivity time-out. For your personal security, your account might be configured with a temporary password when the account is assigned to you, and you might be required by your system administrator to change your temporary password before you can login to Interaction Workspace for the first time. You might also want to change your Interaction Workspace login password for other reasons—for example, your company might not have a specific policy about how often your password should be changed or you might have accidentally revealed your password to an unauthorized person.

In all of these scenarios, you use the Interaction Workspace Change Password dialog box to change your password. Consult with your system administrator about the specific password security policy that your company implements.

To manually change your password, from the **Main Menu**, select **Change Password**. The Change Password dialog box is displayed. Perform the following steps:

1. Enter your current password in the **Old Password** field.
2. Enter your new password in the **New Password** field.
3. Enter your new password again in the **Confirm Password** field.
4. Click **OK** to change your password or click **Cancel** to close the dialog box without changing your password. If you made any errors, after you click **OK** you will be asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new password that you specified.

If you are required to change your password by your administrator, the Change Password dialog box is displayed automatically. Perform the following steps:

1. Enter your new password in the **New Password** field.
2. Enter your new password again in the **Confirm Password** field.
3. Click **OK** to change your password or click **Exit** to close the dialog box and quit Interaction Workspace without changing your password. If you made any errors, after you click **OK** you will be asked to re-enter the information. If you entered all of the information correctly, your password is changed to the new password that you specified.

Main Window

The Main Window enables you to:

- Manage your status.
- Manage your settings and preferences.
- Launch new interactions by using the Team Communicator. (**Note:** You can also use the Contact Directory and the **Action** menu that is next to the name of a contact to call or e-mail a contact.)
- View your channels, history, statistics (KPIs) and contact-center statistics in My Workspace.
- Access your workbins.
- Manage contacts.
- Manage your active interactions by using the Interaction Bar.
- View your messages.
- Accept or reject inbound interactions by using the Interaction Preview.
- Start an Instant Message session with an internal target.
- Participate in an Outbound campaign.

Manage Your Status

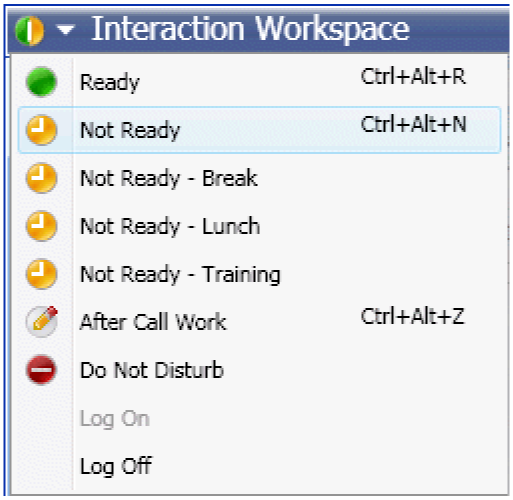
You can manage your Status in two places in the Main Window:

- Ready Status menu
- My Channels tab

Ready Status Menu

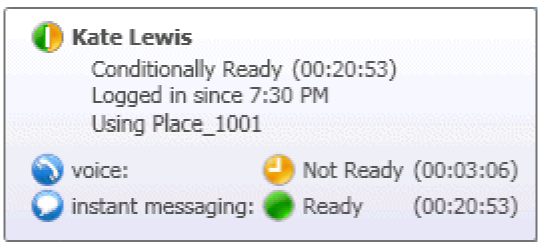
The title bar of the Main Window displays your ready status icon and your login status, and provides a button that enables you to log out.

Click the Ready Status icon (see figure) on the left-hand side of the Main Window title bar to open your ready status menu.



Status Menu

Place the mouse pointer over the Ready Status icon to view your status summary.



Hovering pointer over the Status Icon

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 state is displayed.

Your Ready status is also displayed in the My Channels tab of the Main Window. You can manage your status and forward interactions from the My Channels tab.

Not Ready Status

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

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.

Inactivity Timeout

Inactivity Timeout is a security feature that locks the Interaction Workspace windows on your workstation if you do not use your mouse or keyboard for a period of time that is defined by your administrator. You must authenticate to reactivate Interaction Workspace.

Manage Your Settings and Preferences

Click the Agent icon () to open the Main Menu. You control your settings and set your preferences from the Main Menu.

The Main Menu contains some or all of the following functions, depending on how your account is configured by your system administrator:

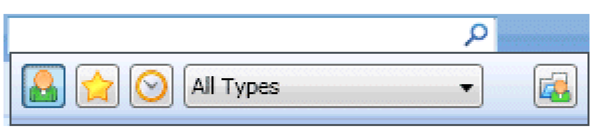
- **Switch to Gadget**—Toggles between the Main Window view and the Gadget view
- **Show Statistics Gadget**—Displays the Statistics Gadget view
- **Main Window Always on Top**—Keeps the Main Window on top of any other window that opens on your desktop
- **Refine Place / Channel information**—Displays the Advanced Login Parameters view to change your logged-in channel parameters
- **Change Theme**—Selects a different predefined appearance from the Theme menu
- **Check and Update**—Checks for updates to Interaction Workspace, and updates your software if an update is available
- **Change Password**—Displays the Your Password Change Password dialog box.
- **Log Out**—Logs off all channels and closes the application

Click **Log Out** (or select **Log Out** from the Main Menu) to log off all channels and close Interaction Workspace.

Click the Help icon () to launch this help document. Click the Help drop-down menu to launch this help document or get information about Interaction Workspace.

Team Communicator

The Main Window contains the Team Communicator Quick Search field. The Quick Search field is a universal lookup tool. It might be configured to provide Universal Contact Server lookup and Team lookup, or simply Team lookup. Use the Team Communicator to launch a new interaction.



Contact Management view

Type a name or number in the field to begin your search. When you click in the field, the Team Communicator toolbar is displayed. The toolbar enables you to search All, Favorites, and Recent contacts and internal targets. It also enables you to filter by contact or internal-target type and to group or ungroup your search results.

My Workspace

My Workspace is a tabbed view that enables you to view and manage your:

- Channel settings.
- Campaigns.
    - History.
    - Statistics (KPIs).
    - Contact-center statistics.

My Workbins

A workbin is like a personal queue, in which you can store e-mail and other interactions that are to be handled later.

Click the **Workbins** button to display the Workbins view, or from the **Workbins** drop-down list, choose one of the following workbin views:

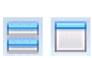
- **My Workbins**—For all agents, a view of your personal workbins.
- **My Team Workbins**—For Team Leads, a view of all of the workbins that belong to agents that you supervise.
- **My Interaction Queues**—For Team Leads, a filtered view of your system queues.

To view another workbin, click it in the Workbin explorer on the left-hand side of the view. The number of unopened e-mail messages in each workbin folder is indicated next to the name of the workbin folder.

The list of available workbins depends on the configuration of your system. The default selected workbin is the first workbin in the list that is specified by your system administrator. Some of the workbins which might be configured for you include:

- **In-Progress**—Contains inbound e-mail messages or other workitems that have not been processed
- **Draft**—Contains outbound e-mail messages that have been saved as draft

To view details, notes, and case date about an interaction, select it. Information about the selected interaction is displayed in the tabs at the bottom of the Workbins view. To display the interaction information tabs, click the **Show/Hide Details Panel button.**



Workbins details button

To open an interaction, double-click it.

You can perform the following functions on selected interactions in workbins by using the **Workbin**

Actions buttons:

- **Reply** ()
- **Reply All** ()
- **Open** ()
- **Mark Done** ()
- **Delete** ()—if you have the correct permissions
- **Move to Queue** ()—if you have the correct permissions
- **Move to Workbin** ()—if you have the correct permissions
- **Edit Case Information** ()—(if you have the correct permissions) Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

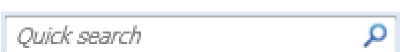
Click here for information about handling e-mail interactions.

Manage Your Contacts

Click the **Contact** button to open the Contact Directory. Use this feature to search for contacts. View details about the search results in the Details Panel.

Quick Search

To search the Contact Directory, type the name, phone number, or e-mail address of a contact in the Quick Search field. Click the magnifying glass to search for the criteria that you have entered.



Quick Search button

Click the **X** to clear the Quick Search field.

Quick Search is a *begins with* search.

Search results are displayed in a grid or list. Click the **Show Contacts in Grid View/Show Contacts in List View** toggle button to toggle back and forth between the two views of the Contact Directory.


Grid/List toggle button

Advanced Search

Click the **Show/Hide Advanced Search** toggle button to show or hide () the advanced search feature.

The Advanced Search feature enables you to enter multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as names, e-mail addresses, and phone numbers. It also contains drop-down lists with the following modifiers that determine how the criteria will affect the search: **Contains**, **Begins With**, and **Is**. Use the **Match Conditions** options to specify whether All or Any of the search conditions that you have specified are applied.

Search results are displayed in a grid or list. Click the **Show Contacts in Grid View**/**Show Contacts in List View** toggle button to toggle back and forth between the two views of the Contact Directory.

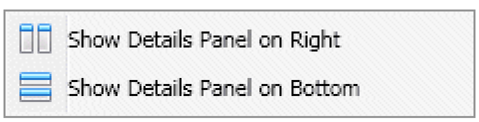
Grid/List toggle button

Details Panel

You can view contact information and contact history for the *currently selected contact* in the Details Panel by clicking the **Show Details Panel on Bottom**/**Hide Details Panel** toggle button:

Arrange Contact Information button

Click the down-arrow to change the Details Panel Layout to display either below or to the right of the Contact Directory:



Show Details Below button

The Information tab displays basic information about the currently selected contact, including the following:

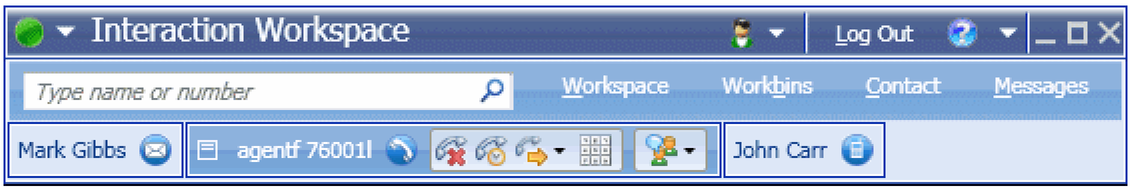
- General (Title, First Name, and Last Name)
- Phone Number(s)
- E-Mail Address(es)

The contact **History** tab enables you to view and, if you are configured to do so, edit current and archived interactions that are associated with the currently selected contact.

If you have the correct permissions, you can edit the fields of the **Contact Information** view and/or the **Contact History** view.

Manage Your Interactions

The Interaction Bar is displayed at the bottom of the Main Window whenever you have one or more active interactions. Each interaction is represented by a control bar. You can use the control bar to perform basic actions that are specific to the interaction type, such as ending a call. If you click the control bar for an interaction and then click the small box icon on the left of the control (or center-mouse-button click on the party name), that interaction window is brought to the front of your desktop and receives the focus.



Main Window Interaction Bar

If you place your mouse pointer over an interaction in the Interaction Bar, a Tooltip is displayed that summarizes the content of the interaction. It 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.

View Your Messages

The message display is a scrollable list of the latest information about the status of your contact-center network. It informs you of changes to the status of various network components, such as Contact Server, Statistics Server, Interaction Server (for chat, e-mail, and workitems), and your Voice switch. You can also view messages that are broadcast to you.

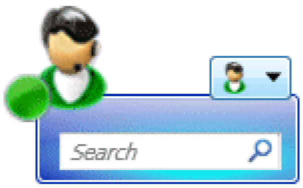
Click the **Messages** button to open a list of messages from your system administrator or supervisor.

Interaction Preview

If a new interaction arrives at your workstation, you are notified by the Interaction Preview interactive notification, unless you are configured for auto-answer. The preview includes attached data that enables you to decide whether to accept or reject the interaction.

Gadget

The Gadget enables you to manage your status and create new interactions.



Gadget View

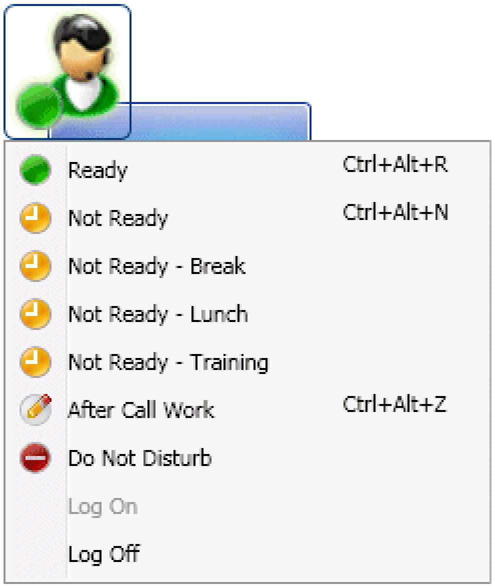
The Gadget is an alternate view to the Main Window. It provides only basic functionality. It does not enable you to manage your contacts.

The Gadget enables you to:

- Manage your Ready status.
- View contacts and internal targets, manage your favorites, and launch a new interaction.
- Manage your settings and open different views.
- Accept or reject inbound interactions by using the Interaction Preview.
- Start an Instant Messaging (IM) session with an internal target.

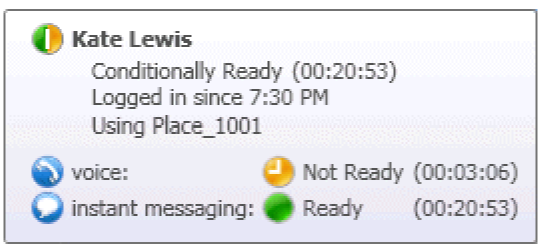
Manage Your Status

Click the Ready Status icon to open your status menu.



Ready Status icon

Place the mouse pointer over the Ready Status icon to view your status summary.



Hovering over the Ready Status icon

The status summary includes your login name, Place, channels, and channel status, as well as your Ready state.

Managing Multiple Channels

If you are logged in to more than one channel, detailed status for each channel is available in the My Channels view.

Not Ready Status

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

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.

Inactivity Timeout

Inactivity Timeout is a security feature that locks the Interaction Workspace windows on your workstation, if you do not use your mouse or keyboard for a period of time that is defined by your administrator. You must authenticate to reactivate Interaction Workspace.

Manage Your Contacts and Launch a New Interaction

You can view your contacts and internal targets, and Launch a New Interaction from the Gadget view. The Gadget view contains the Team Communicator Quick Search field. Enter an internal target or a contact name or phone number in the universal lookup field.

Contact Management Gadget

Manage Your Settings

Click the **Main Menu** icon to open the Main Menu. You control your settings and open different views from the Main Menu. The Main Menu contains the following functions:

- **Switch to Main Window**—Toggles between the Gadget and the Main Window
- **Show Statistics Gadget**—Displays the Statistics Gadget view
- **Gadget Always on Top**—Keeps the Gadget on top of any other window that opens on your desktop
- **Refine Place / Channel information**—Displays the Advanced Login Parameters view to change your logged-in channel parameters
- **My Workspace**—Opens the My Workspace views in a new window
  - **My Channels**—Opens the My Channels view in a new window
  - **My Campaigns**—Opens the My Campaigns view in a new window
  - **My History**—Opens the My History view in a new window
  - **My Workbins**—Opens the My Workbins view in a new window
  - **My Statistics**—Opens the My Statistics view in a new window
  - **Contact Center Statistics**—Opens the Contact Center Statistics view in a new window
- **My Messages**—Opens the My Messages view in a new window
- **Change Theme**—Selects a different predefined appearance from the Theme menu
- **Check and Update**—Checks for updates to Interaction Workspace and update your software if an update is available
- **Help**—Launches this help document

- **About Interaction Workspace**— Gets information about Interaction Workspace
- **Log Out**—Logs off all channels and closes the application

Interaction Preview

If a new interaction arrives at your workstation, you are notified by the Interaction Preview interactive notification.

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.

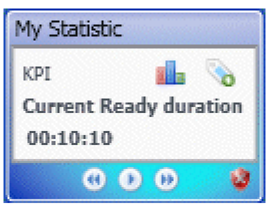
The Statistics Gadget displays statistics in two ways:

- 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 opening your Workspace and clicking back and forth between tabs.

To show or hide the Statistics Gadget, select **Show Statistics Gadget** from the **Main Menu** in the Main Window or the Gadget.

The Statistics Gadget displays configured statistics in a ticking region. Each statistic is displayed for a specified period, then the next statistic is displayed.



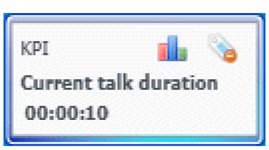
Statistics Gadget

Use the **Back**, **Stop**/**Play**, and **Forward** buttons on the control panel to scroll manually through the statistics that you are configured to view. The buttons are displayed if you are configured to view more than one contact-center statistic or KPI.

Alert icons are displayed in the bottom right corner if the statistics are in a warning state or an error state. The background color of the ticker also changes to indicate warning state.

Click the **Alert** icon on the control panel to display only the statistics that are in warning state or error state.

Click the **Tag** button () to display the current statistics in a static Tagged Statistics view.



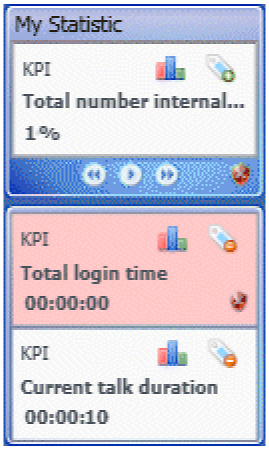
Tagged statistic

Click the **Untag** button () to close the Tagged Statistics view.

You can view your KPIs either as text or as a graph. Click the **Graph View** button () to view the statistic as a graph. Click the **Text View** button () to view the statistic as a graph.

Tagged statistics graph

You can tag more than one statistic at a time. The Tagged Statistics view expands to accommodate multiple statistics in a single view.



Tagged statistics stack

Click the **Up** and **Down** buttons to scroll up or down to view other tagged statistics.

Statistics Gadget Menu

To display the **Statistics Gadget Menu**, place your mouse pointer over the Statistics Gadget. Click the **Menu** button () to open the menu.

- **Hide My Statistics/Show My Statistics**—Shows only the contact-center statistics, or shows both My Statistics and the contact-center statistics
- **Hide Contact Center Statistics/Show Contact Center Statistics**—Shows only My Statistics or shows both My Statistics and the contact-center statistics
- **Always on Top**—Keeps the Statistics Gadget on top of all other windows
- **Show My Statistics on Main Menu**—Opens My Workspace on the Main Window and shows the My Statistics tab
- **Hide Contact Center Statistics on Main Menu**—Opens My Workspace on the Main Window and shows the contact-center-statistics tab
- **Close Statistics Gadget**—Closes the Statistics Gadget (including the Tagged Statistics stack)

Interaction Preview

Interaction Preview displays an interactive notification that enables you to preview a new inbound interaction. The preview includes attached data that enables you to decide whether to accept or reject the interaction. The Case Data that is displayed in your Interaction Preview depends on the items configured by your system administrator.

When a new inbound interaction is routed to your workstation an interactive Interaction Preview appears in the bottom right corner of your display. Depending on how your system is configured, the preview might contain some or all of the following information about the interaction:

- Reason for the interaction
- Type
- Contact type/Segment (for example, Gold)
- Priority
- Contact name, number, or other information
- Origin or Queue
- Time in queue (duration)

Use Cases

An interaction preview is displayed for each of the following interaction types, unless you are configured for auto-answer:

- Voice/VoIP/Outbound ()
- E-Mail ()
- Chat ()
- SMS ()
- IM ()
- Workitem ()

Voice/VoIP/Outbound

For a regular inbound call, if you are not configured for auto-answer, your phone set rings; you can preview the call, before accepting or rejecting it, by reviewing the information provided by an Interaction Preview. If you reject the call, it is sent to another agent, routing point, or queue.

For an inbound call on a VoIP/SIP system, you receive notification of the call. You can choose to view a call summary before accepting or rejecting the call. If you accept the interaction, the call arrives on your phone set, with or without preview for ringing. If you reject the call it is sent to another agent, routing point, or queue.

There are four modes of Outbound campaign calls. Some modes will enable you to preview a call, while others are auto-dialed and connected. Refer to Outbound Campaigns Overview for more information about Outbound campaign calls.

E-Mail, Chat, SMS, IM, Workitems

For a regular inbound interaction, if you are not configured for auto-answer, an interaction preview is displayed on your desktop; you can preview the interaction by reviewing the preview information before you accept or reject the interaction. If you reject the interaction, it is sent to another agent, routing point, or queue.

Accepting or Rejecting the Interaction

Depending on how your system is configured, you might have some or all of the following choices when an Interaction Preview is displayed on your desktop:

- **Accept**—Open the interaction in an interaction view.
- **Reject**—Return the interaction to another agent, routing point, or queue.

Voice Tasks Overview

Voice tasks enable you to initiate interactions with internal targets.

- Voice Interaction—Enables you to view the information that is necessary to handle a voice interaction with a contact or internal agent.
- Internal Voice Interaction—Enables you to start a voice interaction with an internal target.
- Voice Consult—Enables you to consult with another agent about the current voice interaction. Voice consultations that are started from an active interaction enable your internal target to view case data, contact information, and history. The target agent can choose not to accept your consultation request. You can also transfer or conference your call to an Active Consultation.
- Voice Recording—Enables you to record the current voice interaction with a contact or an internal target (for VoIP-/SIP-enabled agents only).

Voice Interaction

The Voice Interaction window enables you to view all of the information that is necessary to handle a voice interaction with a contact or an internal target.

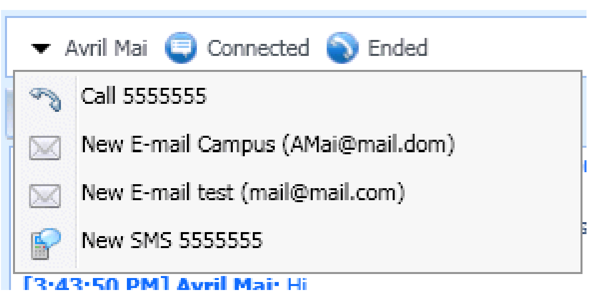
Voice interactions can be started by using the Team Communicator, or by selecting **Call** from the Contact Directory. During an IM, chat, or e-mail interaction, you can also use the **Action** menu on the left-hand side of the party name, and then select **Call**.

The Voice Interaction window enables you to handle many call-related tasks, including:

- Starting a consultation and transferring or conferencing the call to an internal target or with a contact.

Note: If you want to initiate an internal voice interaction to speak to another agent *without* transferring or conferencing the external call, use the Team Communicator.

- Viewing and managing contact history.
- Viewing and managing contact information. You might be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Solving stuck calls.
- Recording calls (VoIP/SIP only).
- Adjusting microphone and speaker volume (for Interaction Workspace SIP Endpoint only).
- Reading a standard response.
- Blending the interaction with other media (such as e-mail, voice, and SMS) by using the Party Action menu.



Media blending with the party action menu

The contents that are displayed to you in this view depend on your role and on the case information that is available about the contact.

This view is composed of many atomic views that together provide all of the features that you need to handle a voice interaction. You can use this view to:

- View the status of the call.
- End the call, hold the call, and send DTMF.

- For VoIP-/SIP-enabled agents, additional call actions are available.

Inbound SIP controls

The VoIP/SIP call actions enable you to:

- Record the call.
- Mute the microphone.
- Unmute the microphone.
- Mute the speaker (for Interaction Workspace SIP Endpoint only).
- Unmute the speaker (for Interaction Workspace SIP Endpoint only).
- Adjust the microphone volume (for Interaction Workspace SIP Endpoint only).
- Adjust the speaker volume (for Interaction Workspace SIP Endpoint only).
- Set a disposition code.
- Select Mark Done for the current interaction.
- Use the Notepad to attach a note to the call history.
- View Case Data (attached data) for the current call.
- View the history of the current call.
- View contact information and history. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	
Expand	

- Start a voice consultation with an internal target or contact and transfer or conference the call.
- Start an Instant Messaging (IM) consultation that passes contextual information to the IM internal target. After you initiate an IM consultation session, you can transition the IM session to a voice consultation.
  Note: Your administrator may have added custom views to enhance your use of the Voice Interaction view.

Call Status

The Call status area of the Voice Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**—You are actively talking to the contact or internal target.
- **Ended**—The call has been ended by either you or the contact.
- **On Hold**—The call is in a state where the contact is unable to hear you, and you are not able to hear the contact when they are on hold.
- **Establishing**—You are trying to connect to an internal target or queue for a voice consultation.
- **Establishing on hold**—The call is put on hold before the internal target answers, so that the internal target will be on hold when the call is answered.

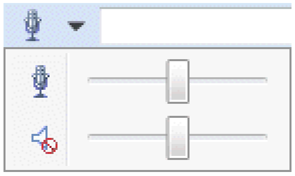
Call Actions

Call actions are standard controls for voice interactions. Interaction Workspace enables you to perform the following call actions:

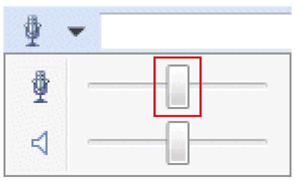
- **End Call**—Click **End Call** ( ) to disconnect the call.
- **Hold Call**]]—Click **Hold** ( ) to place the active call on hold. If a call is on hold, you cannot hear the contact and the contact cannot hear you.
- **Resume Call**—Click **Resume Call** ( ) to reconnect to a call that is on hold. You will be able to hear the contact, and the contact will be able to hear you.
- **Instant Call Transfer**—Click **Instant Call Transfer** ( ) to redirect the current voice interaction to a contact or internal target that you select by using the Team Communicator.
- **Instant Call Conference**—Click **Instant Call Conference** ( ) to start a voice conference instantly with the current voice interaction and a contact or internal target that you select by using the Team Communicator.
- **Send DTMF**—You can attach numerical data to a call by entering dual-tone multi-frequency (DTMF) digits into the call case history. Click the keypad button ( ) to open the DTMF keypad, then type numbers into the number field or click the keypad numbers to enter numbers.
- **Mute the Microphone**—(For VoIP-/SIP-enabled agents working with Interaction Workspace SIP Endpoint only) The party to whom you are connected cannot hear you when the microphone in your headset or on your workstation is muted. There are two ways to access the Mute the Microphone button. Either click **Mute microphone** ( ) on the Volume Properties control, or click to open the Volume Properties control menu, and then click **Mute the microphone** next to the Microphone Volume control. When your microphone is muted, a small red circle with a slash is displayed next to the microphone icon.

Microphone mute control

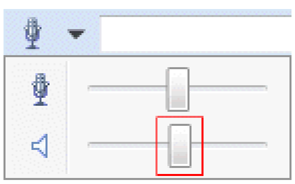
- **Mute the Speaker**—(For VoIP-/SIP-enabled agents working with Interaction Workspace SIP Endpoint only) To access the Mute the Speaker button, click to open the Volume Properties control menu, and click then **Mute the speaker** next to the Speaker Volume control. When your speaker is muted, a small red circle with a slash is displayed next to the speaker icon.


Speaker mute control

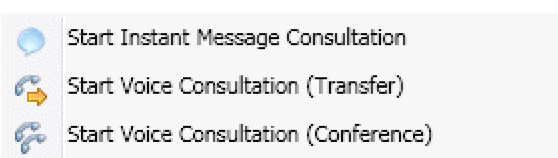
- **Adjust Microphone Volume**—(For VoIP-/SIP-enabled agents working with Interaction Workspace SIP Endpoint only) To access the Microphone volume control, click to open the Volume Properties control menu, and then move the Volume control slider left to decrease the volume and right to increase the volume.


Microphone volume control

- **Adjust Speaker Volume**—(For VoIP-/SIP-enabled agents working with Interaction Workspace SIP Endpoint only) To access the Speaker Volume control, click to open the Volume Properties control menu, and then move the Volume control slider left to decrease the volume and right to increase the volume.


Speaker volume control

- **Start Consultation**—Start a consultation with an internal target or a contact ( ). The target can choose not to accept the request. The target can end the consultation. You can end the consultation or you can transfer or conference your current interaction to or with the consultation target. Choose an Instant Message consultation or a Voice consultation.



Consultation menu

- **Mark Done**—Complete a call and close the Voice Interaction window by clicking **Mark Done** ( ). You might be configured to specify a disposition code before you can click **Mark Done**.

Contact Information and History

Use the **Show/Hide Information view menu** button (

) to show or hide contact information and contact history for the current contact.

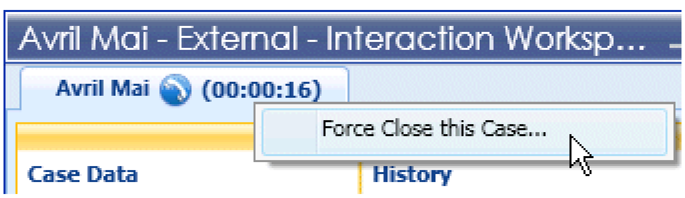
The **Contact Information** view enables you to view and edit contact information. If the contact is already in the Contact database, their information will be displayed in this view. Use the fields to add or modify contact information. For more information about the Information view, see Contact Directory.

The **Contact History** view enables you to view information about past interactions with the current contact if the contact is already in the contact database. Use the search tools to find specific interactions. For more information about the Contact History view, see Contact History.

If there are in progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Stuck Calls

If you are on a call and are unable to close the Interaction window because the call has become stuck in the system, right-click the tab in the Interaction window that represents the call, and select **Force Close This Case** from the shortcut menu. You will be prompted to confirm that you want to force-close the call.



Force close interaction

Internal Voice Interaction

The Voice Interaction Window enables you to start a voice interaction with an internal target. You can communicate with other agents or internal targets by using the Team Communicator toolbar in the Main Window view or your Gadget view, or from the Voice Interaction view while you are handling an active call with a Contact.

Communicating with Another Agent

The Voice Interaction Window enables you to call another agent or internal target. Use the Team Communicator to find an internal-target agent.

In the Internal Target Action menu, select **Call <target name>**. If the internal target accepts your invitation, the status in the Voice Interaction Window changes to **Connected. You can now talk to the internal target.**

You have access to the same controls and functionality when you are talking to an internal target as when you are talking to a contact. You can do the following:

- Check the call status.
- Perform call actions, such as ending the call, putting the call on hold, sending DTMF, or transferring/conferencing the call. For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.
- View the call history.
- Set a disposition code.

Communicating with Another Agent While Handling an Active Interaction

Interaction Workspace enables you to handle more than one voice interaction simultaneously. For example, you can put an active call on hold and launch a new voice interaction. This is done, typically, to consult with another agent or internal target to whom you do not intend to transfer or conference the active call.

While you are on an active call, use the Team Communicator toolbar in the Main Window or in the Gadget to launch a new voice interaction.

You can also initiate an IM session with an internal target from the active call. IM sessions that are started from an active call enable the internal target to view case data and contact information and history. You can transition an internal IM session to a voice-consultation call.

If you start a new voice interaction, the original active call is put on hold, and you are connected to the internal target. To resume the original call, click the **Resume Call** button on the original voice interaction window.

While the original call is on hold, you can connect to the internal-target call. The standard call actions are available.

Voice Consultation

The Voice Consult functionality enables you to consult with an internal target or a contact about the current voice interaction.

During the consultation, you can transfer to the target or start a conference with the target. The target can choose not to accept your consultation, transfer, or conference request, and can choose to end the consultation. Voice consultations that are started from an active interaction enable the internal target to view case data, contact information, and history.

Consult

The Voice Interaction view enables you to start a consultation with an internal target or a contact about your current voice call.

Click the **Start a Consultation** button ().

Use the Team Communicator to find an internal target or a contact.

In the **Action** menu, click:

- **Start Voice Consultation**—Start a voice consultation with an internal target or a contact.

  After the consultation request is initiated, the contact or internal target is put on hold, and the consultation request call is presented to the consultation target. The **Call Status** indicators that are next to the name of the party show whether the contact or internal is on hold, and indicates when the consultation request changes from **Establishing** to **Connected**.

  Or,

- **Start Voice Consultation (Transfer)**—Initiate a voice interaction to talk to the transfer target prior to transferring the call to the internal target or another contact.

- **Start Voice Consultation (Conference)**—Initiate a voice interaction to talk to the consultation target prior to conferencing the call to the internal target or another contact.

Note: you can also choose to start an Instant Message Consultation from the **Action** menu. Click **Start Instant Message Consultation** to display the Instant Message view in the current interaction window. Send a message to send an invitation to the consultation target.

Transfer

To talk to the transfer target prior to transferring the call to the internal target or another contact, click the consultation button in the toolbar, and from the Team Communicator **Action** menu select the following option:

Start Voice Consultation (or, **Start Voice Consultation (Transfer)**, depending on the type of environment that you have).

After the consultation request is initiated, the contact or internal target is put on hold, and the call is presented to the consultation target. Look at the Call Status indicators next to the name of the party to determine whether the contact or internal is on hold and to determine when the consultation request changes from Establishing to Connected.

After your target accepts the consultation, you are connected and you and the transfer target can speak to each other. The contact remains on hold.

Completing the Transfer

To complete the transfer, click the **Instant Transfer** button () from the main voice interaction, select the consultation target from the Team Communicator, and click **Instant Call Transfer**. The contact or internal target is connected to the transfer target, and the voice-call status changes to **Ended** in the Voice Interaction view.

You can perform any of the following functions by using the Voice Consult toolbar:

- Alternate (toggle) between the contact or internal target and the transfer target by clicking **Resume Call** (). The other party is put on hold until you toggle back or complete the transfer.
- End the call to the consultation target and resume the call with the Contact or internal target ().
- Send dual tone multi frequency (DTMF) to the transfer target by using the DTMF keypad ().
- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Once the transfer is completed, close the Voice Interaction window by clicking **Mark Done** (). You might be configured to specify a disposition code before you can click **Mark Done**.

Note: You choose to change the transfer to a conference by clicking the **Instant Conference** button (), selecting the consultation target from the Team Communicator, and clicking **Instant Voice Conference**. Refer to Completing the Conference.

Conference

To talk to the conference target prior to conferencing the call to the internal target or another contact, click the consultation button in the toolbar, and from the Team Communicator **Action** menu select the following option:

Start Voice Consultation (or **Start Voice Consultation (Conference)**, depending on the type of configuration that you have).

> After the consultation request is initiated, the contact or internal target is put on hold, and the call is presented to the consultation target. Look at the Call Status indicators next to the name of the party to determine whether the contact or internal is on hold and to determine when the consultation request changes from Establishing to Connected.

Completing the Conference

After your target accepts the consultation, to complete the Conference, click the **Instant Conference** button ( ), select the consultation target from the Team Communicator, and click **Instant Call Conference**. The contact or internal target is connected to the transfer target to conference the call to the target. The contact or internal target is connected to the conference target.

You can perform any of the following functions by using the Voice Consult toolbar:

- Alternate (toggle) between the contact or internal target and the conference target by clicking **Resume Call** ( ). The other party is put on hold until you toggle back or complete the conference.
- End the call to the conference target and resume the call with the Contact or internal target ( ).
- Send dual tone multi frequency (DTMF) to the conference target by using the DTMF keypad ( ).
- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Note: You can choose to change the conference to a transfer by clicking the **Instant Transfer** button ( ), selecting the consultation target from the Team Communicator, and clicking **Instant Voice Transfer**. See transfer for more information.

After the conference is established, you can perform the following actions:

- Disable and enable listening.
- Remove a party from the conference.
- Use the Notepad to attach a note to the call history.
- Complete the call by clicking **End Call** ( ).
- Close the Voice Interaction window by clicking **Mark Done** ( ). You might be configured to specify a disposition code before you can click **Mark Done**.
- For VoIP-/SIP-enabled agents, the following additional call actions are available: record the call, mute and unmute the call, and adjust the microphone and speaker volumes. Refer to Voice Interactions for a list of additional actions and limitations.

Disabling and Enabling Listening

You might be configured to disable and enable listening by parties in a conference. Click the **Party**

Action menu on the Voice Interaction view and select **Listen Disconnect** to disable listening for that party. The party can still talk, but the party cannot hear what you and the other party say. When Listen Disconnect is active for a party, a small red circle with a slash is displayed next to the party icon.

Click the **Party Action** menu on the Voice Interaction view and select **Listen Reconnect** to enable listening for that party. The party can now hear what the other two parties are saying.

Removing a Party from the Conference

You might be configured to remove a party from a conference. Click the **Party Action** menu on the Voice Interaction view and select **Delete From Conference** to remove that party from the conference. You can still talk to the party who was not removed from the conference.

Voice Recording

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. Interaction Workspace supports two different types of voice recording, emergency recording and controlled call recording. Your system administrator configures the type of voice recording that is supported in your environment.

If you are configured for emergency recording, you can start and stop recording by using a single toggle button.

If you are configured for controlled recording, you can start a recording, pause a recording, resume a recording, and end a recording.

In addition, you might also be configured for automatic or system-guided recording. If this is the case, you will receive a notification that recording is in progress.

Call recording enables you to perform the following functions from the Voice Interaction window and the Main Window Interaction Bar:

- **Record the call—*Click*** *Record the Call* () to record a call.
- **Stop recording the call**—Click **Stop Recording the Call** () to stop recording a call that you are currently recording.
- **Pause recording the call—Click** Pause Recording the Call () to pause recording a call that you are currently recording.
- **Resume recording the call—Click** Resume Recording the Call () to stop recording a call that you are currently recording.

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

SIP call recording

When you pause a call recording, the red call icon changes back to blue.

If you place your mouse pointer over the call icon, a Tooltip will be displayed to indicate both that the call is being recorded and the length of time of the recording.

A call-recording icon () is displayed in the title bar of the Main Window and on top of the Gadget when a call recording is active.

Web Callback Interaction

The Web Callback Interaction window is similar to the Voice Interaction window. It enables you to view all of the information that is necessary to handle a voice interaction with a contact who has requested a callback from your company web page.

Web Callback enables you to preview the web-callback interaction before you connect the call manually.

If your status is Ready on the Web Callback channel, new callback requests can be routed to you. When a web-callback interaction is routed to you, a new Interaction Notification is displayed. Click **Accept** to display the Web Callback Interaction Preview. Use the Web Callback Interaction Preview to make an outbound voice call. Click **Reject** to return the record to the another agent, routing point, or queue. If you do nothing, the interaction will be returned to another agent, routing point, or queue.

Web Callback Interaction Preview

The Web Callback Interaction Preview is a special version of the Voice Interaction view. More detailed information about voice interaction controls can be found here.

The Web Callback Interaction Preview enables you to view information about a web-callback interaction before you connect to the contact. The Web Callback Interaction Preview contains the following features and functionality:

- **Case Information**—Summary information about the interaction. The content of this area is specified by your administrator. It might contain information that the contact has entered into your company web page, the phone number of the contact, and so on.
- **Call Preview Actions** (toolbar)—Actions that you can perform, including starting the call, marking the call as **Done**, and scheduling a different time for the callback.
- **Callback Information**—Specific information about the record. The content of this area is specified by your administrator. 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 interaction.
- **Contact**—The Contact Directory view enables you to manage contact information.
- **Responses**—The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

Call Preview Actions

Call-preview actions are standard controls for web-callback interactions. Interaction Workspace enables you to perform the following call-preview actions:

- **Call the Contact**—Click **Call** ( ) to connect to the contact and display the Web Callback Interaction view.
- **Done**—Click **Done** ( ) to mark the call as Done. You can do this instead of calling the contact or after

you have called the contact.

- **Schedule a Callback**—Click **Schedule a Callback** () to reschedule a callback to a different time than the time that was requested by the contact (for example, if the contact does not answer their phone, the contact's line is busy, the contact is not available to take the call, or you get the contact's answering machine).

Web Callback Interaction View

If you click **Call**, the Web Callback Preview window is updated to display the Call Status and Call Actions of the Web Callback Interaction window.

Call Status

The call-status area of the Web Callback Interaction window provides the contact's phone number or name and the status of the call. Possible call statuses might include the following:

- **Connected**—You are actively talking to the contact or internal target.
- **On Hold**—The call is in a state in which the contact is unable to hear you and you are not able to hear the contact when the contact is on hold.
- **Ready to Call**—Your system is ready to connect the call to the contact. This is the default status if you or the other party end the call.

Call Actions

Call actions are standard controls for outbound interactions. Interaction Workspace enables you to perform the following call actions:

- **Party Action Menu**—In the call-status area, click the down arrow that is beside the name of the contact to start a different interaction type with the contact, such as an e-mail interaction, if the contact has additional channel information available in the contact database.
- **End Call**—Click **End Call** () to disconnect the call.
- **Hold Call**—Click **Hold** () to place the active call on hold. If a call is on hold, you cannot hear the contact, and the contact cannot hear you.
- **Resume Call**—Click **Resume Call** () to reconnect to a call that is on hold. You will be able to hear the contact, and the contact will be able to hear you.
- **Instant Call Transfer**—Click **Instant Call Transfer** () to redirect the current outbound interaction to a contact or internal target that you select by using the Team Communicator.
- **Instant Call Conference**—Click **Instant Call Conference** () to start a voice conference instantly with the current outbound interaction and a contact or internal target that you select by using the Team Communicator.
- **Send DTMF**—You can attach numerical data to a call by entering dual-tone multifrequency (DTMF) digits into the call case history. Click the keypad button () to open the DTMF keypad. Type numbers into the number field, or click the keypad numbers to enter numbers.

- **Schedule a Callback**—Click **Schedule a Callback** () to reschedule a callback (for example, if the contact is too busy to respond now) for a different date and/or time.
- **Start Consultation**—Start a voice consultation with an internal target or a contact (). The target can choose not to accept the request. The target can end the consultation. You can end the consultation, or you can transfer or conference your current interaction to or with the consultation target.
- **Mark Done**—Complete a call and close the Voice Interaction window by clicking **Mark Done** (). You might be configured to specify a disposition code before you can click **Mark Done**.

Dispositions

Use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Notepad to attach a note to the call history.

Chat Tasks Overview

Chat tasks enable you to handle chat interactions with contacts and internal targets.

- Chat Interaction—Enables you to view all of the information that is necessary to handle a chat interaction with a contact.
- Chat Consultation—Enables you to consult with another agent about the current chat interaction. Chat consultations that are started from an active interaction enable your internal target to view case data, contact information, and history, as well as the live transcript of the communication with the external contact. The target agent can choose not to accept your consultation request. You can also transfer or conference your call from an Active Consultation to the consultation target.

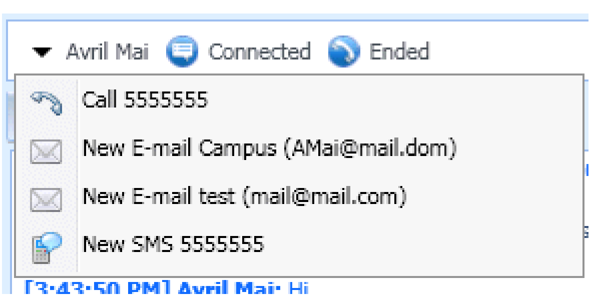
Chat Interaction

Chat is real-time two-way communication between you and your contact through your computer.

During a chat session, you and your contact enter text in the Chat Window interface, and the window maintains a scrolling list of the written correspondence. A small notice appears next to your contact's name when he or she is typing. The text that your contact types appears both on your chat window and on your contact's chat window.

The Chat Interaction window enables you to handle many chat-related tasks, which include the following:

- Send a response to the contact.
- View an indicator ( ) that enables you to determine when a response from you is pending.
- Push one or more URLs to your contact (open web pages automatically on the contact's desktop).
- ( ) Instant-transfer the chat.
- ( )Instant-conference the chat.
- Select **Mark Done** for the current interaction.
- Set a disposition code.
- Use the Notepad to attach a note to the interaction history.
- View Case Data (attached data) for the current interaction.
- Start a consultation:
    - Voice (internal targets and contacts).
    - IM (an internal target only).
    - Chat (an internal target only).
- Call the sender, if there is a phone number in the contact database. You can also click a phone number in the Chat transcript to launch a call.
- E-mail the sender, if there is an e-mail address in the contact database. You can also click an e-mail address in the Chat transcript to launch an e-mail message.
- Blend the interaction with other media (such as e-mail, voice, and SMS) by using the Party Action menu.



Media blending

- View and manage contact history.
- View and manage contact information. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	
Expand	

- Use a standard response.

Handling a Chat Interaction

When you accept a chat interaction, the Chat Interaction window is displayed.

The name of the contact and the elapsed time of the interaction are displayed at the top.

Connection-status information is displayed next to the contact drop-down menu. Use the contact drop-down menu to call the contact if the contact's phone number is available from your contact database.

If there are in progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

The Chat toolbar is above the Chat Transcript area. Use the Chat toolbar to do the following:

- **End Chat**—Click **End Chat** ( ) to stop the current chat interaction.
- **Instant Chat Transfer**—Click **Instant Chat Transfer** ( ) to redirect (transfer) the current chat interaction to an internal target by using the Team Communicator.
- **Instant Chat Conference**—Click **Instant Chat Conference** ( ) to share (conference) the current chat interaction with an internal target by using the Team Communicator. To conference with an agent group, a skill, or an interaction queue, choose the name of the skill, group, or queue, and an available agent with that skill or in that group or queue is notified of your conference request.
- **Consultation**—Click **Start Consultation** ( ) to start an IM, voice, or chat consultation with an internal target or a contact by using the Team Communicator. To consult with an agent group, a skill, or an interaction queue, choose the name of the skill, group, or queue, and an available agent with that skill or in that group or queue is notified of your consultation request.

Chat Consultation menu

- **Mark Done**—Complete a chat session and close the Chat Interaction window by clicking **Mark Done** ( ) for the current interaction. You might be configured to specify a disposition code before you can click **Mark Done**. The **Mark Done** button is displayed after the Chat interaction is ended.

Chat Transcript Area

The Chat Transcript area displays the contents of the chat messages that you exchange with your contact as well as system information, such as the names of participants as they join and leave the chat session, and the time of each event and message. System and message content is color-coded by participant, to enable you to distinguish the owner of each message visually. You can select and copy text from the chat transcript.

You might be configured to have a nickname (pseudonym) displayed as your participant name instead of your real name or your user name. A nickname might be a generic name for all agents in your group, or it might be a unique identifier for you. If you are configured to have a nickname, your nickname is displayed to the contact in the contact's chat transcript and in your chat transcript.

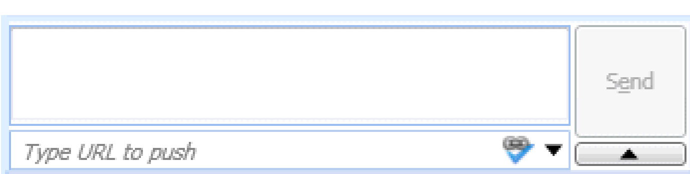
Chat Message Area

The Chat Message entry area enables you to enter, preview, and spell-check your message before you send it to your contact. The Chat Message entry area enables you to perform the following actions:

- Type text.
- Paste, copy, and select text by using the context menu.
- Insert and push a URL.
- Insert and edit a standard response.
- Verify the spelling of the content of your message.

Push a URL to a Contact

Click the **Show the Push URL area** button ( ) that appears below the **Send** button to open the Push URL area.



Chat Push URL view

Use this area to enter and test a URL before you push (send) it to your contact.

Type or paste a URL in the Push URL Area text field, or select a previously sent URL by selecting it from the drop-down list.

Click **Check URL** () to open the URL in a web browser on your desktop, to verify that the URL is correct.

Warning: Incorrectly typed URLs often point to websites that contain inappropriate content. If you send a customer to the wrong website, it might damage the reputation of your company and/or threaten your position in your company.

Click **Send** to push the URL to your contact. The following text and an active URL link are displayed in the Chat Transcript area of the chat window or browser of your contact:

Please navigate to the link: *<url>*

You can view the history of URLs that you have used by clicking the down arrow in the Push URL field to open a menu from which you can select a previous URL. Alternately, you can start typing a URL that you have used before, and Interaction Workspace will auto-suggest URLs in your history that match what you enter.

Click the **Hide the Push URL area** button () that appears below the **Send** button to close the Push URL area.

Pending Response Indicator

When you receive a message from your contact, a timer is started (). The duration of the timer is specified by your administrator. The timer indicates that you have a pending-response to your contact.

The pending-response indicator is displayed next to the interaction-type icon () at the top of the interaction window.

The color of the pending response indicator begins as green. If you have not responded by a specific time interval, the indicator changes to yellow. If you still have not responded by a second time interval, the indicator changes to red and begins to flash.

If you have a pending response, and the Chat Interaction window is not the active window, it begins to flash in the Windows taskbar, regardless of the condition that is displayed by the pending-response indicator.

If you place your mouse pointer over any flashing item, a preview of the interaction is displayed and the flashing stops. The preview displays the latest message from the contact.

Transferring a Chat Session

To transfer a chat session that you have accepted, perform the following steps:

1. Click the **Instant Chat Transfer** () button. The Team Communicator is displayed.
2. Choose a transfer target.
3. Select **Instant Chat Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, an error message informs you that the target has rejected the interaction.

Conferencing a Chat Session

To invite another party to join your chat session, perform the following steps:

1. Click the **Instant Chat Conference** () button. The Team Communicator is displayed.
2. Choose a conference target.
3. Select **Instant Chat Conference**.

An invitation is sent to the selected target.

If the target accepts the invitation, the target is added to your chat session. The target sees the chat transcript and is able to send messages to you and your contact simultaneously. Anything that you or your contact send during the conference is also displayed to the target. If you end the session, the ownership of the session is transferred to the conference target.

If the target rejects the invitation, a system message is displayed at the top of the Chat Interaction window to inform you that the conference invitation has been rejected.

Chat Consultation

The chat consultation functionality enables you to consult with an internal target about the current chat interaction without initiating a *conference* with the internal target.

To invite another party to consult with you about your chat session:

1. Click the **Start Consultation** ( ) button. The Team Communicator is displayed.
2. Choose a consultation target. To consult with an agent group or skill, choose the name of the skill or group, and an available agent with that skill or in that group or interaction queue is notified of your consultation request.
3. Select **Start Chat Consultation** from the **Action** menu.
   An invitation is sent to the target.
   If the target accepts the invitation, a new chat interaction with the target is added to your Chat Interaction window, below your first interaction.
   If the target rejects the invitation, a system message is displayed at the top of the Chat Interaction window to inform you that the conference invitation has been rejected.
4. Either you or your target can end the chat consultation. Ending the chat consultation does not end your chat interaction with your contact.

Use the new chat interaction to send chat messages to your target without your contact seeing what you type or what your target responds.

The target sees the chat transcript between you and your contact.

If you click **End** ( ) to end the session with your contact, the session with your consultation target also ends.

Both you and your target must click **Mark Done** ( ) to close the interaction.

Note: If you have a pending response, and the Chat Interaction window is not the active window, it begins to flash in the Windows taskbar, regardless of the condition that is displayed by the pending-response indicator.

You can also launch an Instant Messaging (IM) session or voice call with another agent to consult about the chat session.

You can transition your chat, IM, or voice consultation into a transfer to or conference with your consultation target.

Transfer to Consultation Target

You can transfer your active chat interaction to your consultation target.

1. Click the **Instant Chat Transfer** ( ) button. The Team Communicator is displayed.

2. Under Active Consultations, choose the active consultation target as your transfer target.
3. In the **Action** menu, select **Instant Chat Transfer**.

The contact is connected to the transfer target, and the Chat Interaction window on your desktop closes.

Conference with Consultation Target

You can conference your active chat interaction to your consultation target.

1. Click the **Instant Chat Conference** () button. The Team Communicator is displayed.
2. Under **Active Consultations**, choose the active consultation target as your conference target.
3. In the **Action** menu, select **Instant Chat Conference**.

The consultation target is added to your chat interaction. The Chat Interaction window displays the entire transcript of the chat session between you and the contact.

You, the contact, and the consultation target can each see the messages that are sent by the others.

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

During the chat conference, you can perform the following actions:

- In the **Action** menu next to the name of the connected party, you can choose **Delete From Conference** to remove the party from the conference.
- Click **End** () to end the session with your contact—the session between your consultation target and the contact continues.

E-Mail Tasks Overview

The E-mail Interaction window enables you to view all of the information that is necessary to handle inbound and outbound e-mail interactions with a contact.

If you are a supervisor or Team Lead, you might be responsible for QA Review of E-Mail Interactions.

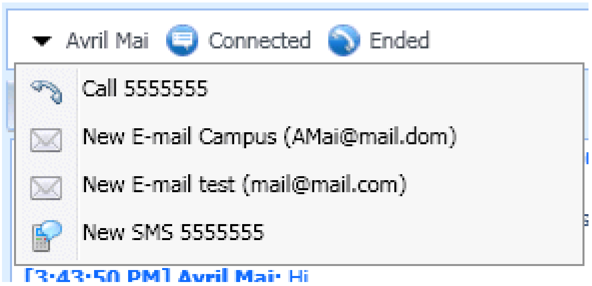
Inbound E-Mail

The Inbound E-mail Interaction window enables you to handle many e-mail–related tasks, including the following:

- Reply or Reply All to the e-mail.
- Transfer (forward) the e-mail.
- Forward the e-mail to an External Resource.
- Select Mark Done for the current interaction.
- Consult with an internal target or with a contact.
- Start a Voice Consultation with an internal target or with a contact.
- Start an IM Consultation with an internal target.
- Set a disposition code.
- Save the e-mail in a workbin for later handling.
- Use the Notepad to attach a note to the interaction history.
- View Case Data (attached data) for the current interaction.
- Call the sender if there is a phone number in the contact database.
- View and manage contact history. Open and handle e-mail interactions from the contact history.
- View and manage contact information. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Hide or display the controls and information about the current interaction by clicking the collapse/ expand Interaction View button:

Collapse	
Expand	

- View the standard response library, if you decide to call the sender instead of replying to the e-mail.
- Print the current e-mail interaction.
- Blend the interaction with other media, such as voice and SMS, by using the Party Action menu.



Media blending

If there are in progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Transferring an Inbound E-Mail

To transfer an e-mail interaction that you have accepted, click the **Transfer** () button. The Team Communicator is displayed. Choose a transfer target. Select **E-Mail Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, the interaction window reopens on your desktop and displays an error that informs you that the target rejected the interaction.

Forwarding an Inbound E-Mail to an External Resource

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

Enter a valid e-mail address, select a contact, or select a favorite to which the e-mail is to be forwarded.

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 is forwarded to the in-box of the external resource.

Outbound E-Mail

Outbound e-mail interactions can be generated in several different ways:

- From an Inbound E-mail Interaction window, by clicking:
  - **Reply** () or
  - **Reply All** ().
- By using the Team Communicator to find a contact and selecting **New E-Mail**.
- By selecting **Create a New E-Mail** from the Contact Directory.
- By replying to an inbound e-mail from the Workbins view.
- By replying to an inbound e-mail from the Contact History.
- During a voice, chat, or workitem interaction, by clicking the **Action** menu on the left-hand side of the name of a connected party and selecting **New E-mail**.

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 enables you to handle many e-mail-related tasks, including the following:

- Save the e-mail in a workbin for later handling.
- Attach one or more selected files to the e-mail.
- Delete the e-mail without sending it.
- Start a Voice Consultation with an internal target or with a contact
- Start an IM Consultation with an internal target
- Select the sender from the **From** drop-down list of addresses from which you are configured to send e-mail.
- Select an alternate e-mail address for the recipient.
- Add one or more Carbon Copy (CC) recipients.
- Add one or more Blind Carbon Copy (BCC) recipients.
- Call the recipient if there is a phone number in the contact database.
- Send the recipient an Instant Message (IM) if the recipient is an internal target.
- Set a disposition code.
- Use the Notepad to attach a note to the interaction history.
- View Case Data (attached data) for the current interaction.
- View and manage contact history. Open e-mail interactions from the contact history and put them back.
- View and manage contact information. You might also be configured to assign an unknown interaction

to a contact in the contact database by using the Manual Contact Assignment feature.

- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	
Expand	

- View the standard response library, and insert a response in the e-mail.
- Print the current e-mail interaction.
- Specify or change the e-mail subject.
- Write a reply or new e-mail.
- Switch between text-only and HTML-formatted e-mail.
- Specify fonts, text styles, and paragraph formats for an HTML-formatted e-mail.
- Choose which language is used for the spelling-check function.
- Send the e-mail to the recipient. **Note:** You might be configured to have your e-mail interactions reviewed before they are sent to your contacts; or, you might be configured to review the outbound e-mail interactions of other agents.
- Send an interim reply e-mail by clicking the **Send** button, and select **Interim Send** from the drop-down menu.

Note: You might be configured to have signatures inserted automatically into new e-mail interactions.

Sending an Outbound E-Mail

Outbound e-mail messages can be composed as either text-only or HTML-formatted. An HTML-formatted e-mail enables you to specify the appearance of the content and add HTML-formatted responses from the Standard Response Library. Text only e-mail does not support HTML-formatted standard responses; however, some HTML-formatted standard responses contain text-only components that can be inserted.

To create an outbound e-mail:

1. First confirm that you have specified one or more recipients by typing a recipient's e-mail address in the **To** field, or by selecting a recipient from the Team Communicator. You can add additional recipients by using the **Add Cc** menu.
2. Next, enter the subject of the e-mail in the **Subject** field.
3. Verify that your Spelling Check language is correct.
4. If you are sending an HTML-formatted e-mail, choose a font, font size, and style for the main body of your e-mail. You can set different fonts, font sizes, and colors by selecting individual characters, words, or blocks of text and specifying different options for the selected text.

Format individual paragraphs by selecting them and then using the paragraph format buttons to specify the Numbered, Bulleted, Indented, Right-aligned, Centered, Left-aligned, or Block paragraph format.

1. Compose your e-mail by typing in the composition area, or by clicking an insertion point in the composition area and inserting a response from the Standard Response Library. Right-click in the composition area to use the Cut, Copy, and Paste editing tools.
2. A red wavy line appears below each word that is not in the spelling-check dictionary that you have specified. Right-click the misspelled word to correct it or to add the word to your personal dictionary. You can also choose to ignore once (**Ignore**) or always ignore (**Ignore All**) the spelling.
3. Specify a disposition code, if required.
4. When your e-mail is complete, you can perform any of the following actions:

- Click **Save in Draft Workbin** () to store it in a workbin for further processing or review.
- Click **Send** () to send your e-mail to the specified recipient(s). The E-mail Interaction window is closed and the inbound e-mail is marked done.
- Click the **Send** button, and select **Interim Send** from the drop-down menu, if you want to send an interim reply e-mail. The E-mail Interaction window remains open and the inbound e-mail is not marked done.
- If you do not want to save or send the e-mail, click **Delete** ().

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 before the e-mail interaction is sent to your contact. If you are configured to be a QA reviewer, the review process is described here.

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 stored in a workbin that is specifically for reviews. The reviewed e-mail interaction might be returned to you directly or stored in a workbin that is specifically for e-mail interactions that are to be updated or reworked.

If your administrator has configured the status of the review to be displayed, it is displayed in the Case Information for the interaction, so that you know whether you have to update the e-mail interaction content. If the status is **Rejected** (or some other disposition that is defined by your system administrator), 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.

QA Review of E-Mail

Your system administrator defines the review process in your contact center. Agents might be set up for mandatory review or they might have to request review. There are many ways that an administrator might define the routing of reviewed e-mail interactions; for example, e-mail interactions for review might be routed directly to a reviewer, team lead, or supervisor, or they might be routed to a workbin.

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 receive e-mail interactions for review by an interaction preview or you might retrieve outbound e-mail interactions from a workbin.

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. You might view and edit the **QA Review Status** field. 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.

If you accept the e-mail interaction for review, the 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 Status area 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.

You can 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. In the Review E-mail Interaction window, you can do the following:

- Update the Review Status in the Case Information view (if you are configured to do so by your administrator)
- 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

If you are configured to set the status of the review, your **Send** button might contain a drop-down menu that enables you to select an action to occur when the interaction is sent. You can send the message as Approved to the contact, or return it to the agent as Rejected. Your administrator might have configured different "rejection reasons" from which you can choose.

Otherwise, when your review is complete, set the status in the Case Information are to one of the states that are configured by your administrator. For example, the following states might be available:

- **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**.
- **Unknown**—The e-mail interaction is sent back to the review queue or to a review workbin when you click **Send**.

If you specified **Rejected**, the QA Review Status in the Case Information is updated to **Rejected** and the interaction is returned to the originating agent.

SMS Interaction

Short Message Service (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 will be sent to accommodate your entire message.

Interaction Workspace supports two modes:

- **Page**—You receive a single inbound SMS to which you can send a response or that you can 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.

If there are in progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

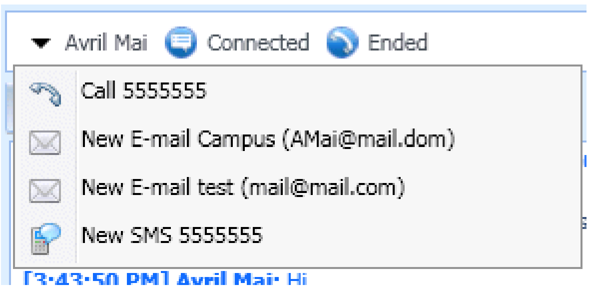
SMS Page Mode

In SMS Page Mode, a single SMS is received on your desktop. You can respond to the SMS or handle it in other ways, similar to the way that e-mail interactions are handled. You are not connected in real-time to your contact. The text that your contact types appears both on your SMS Session window and on your contact's device. The text that you enter and send from the SMS Session window is displayed on the contact's device.

The SMS Page Interaction window enables you to handle many SMS-related tasks, which include the following:

- Send a response to the contact. As soon as you click Send, the SMS Page Interaction window closes and the interaction is automatically marked Done.
- () Instant-transfer the SMS.
- Select **Mark Done** for the current interaction. This action closes the interaction window without sending a response.
- Set a disposition code.
- Use the Notepad to attach a note to the interaction history.
- View case data (attached data) for the current interaction.
- Start a consultation ():
    - Voice (internal targets and contacts).
    - IM (an internal target only).

- Call the sender, if there is a phone number in the contact database. You can also click a phone number in the SMS transcript to launch a call.
- E-mail the sender, if there is an e-mail address in the contact database. You can also click an e-mail address in the SMS transcript to launch an e-mail.
- Blend the interaction with other media (such as e-mail, voice, and SMS) by using the Party Action menu.



Media blending

- View and manage contact history.
- View and manage contact information. You can update the contact information. Commonly, you will receive SMS that does not link to the contact database. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Hide or display the controls and information about the current interaction by clicking the collapse/ expand Interaction View button:

Collapse	
Expand	

- Use a standard response.

Handling an SMS Page Interaction

When you accept an SMS Page interaction, the SMS Page Interaction window is displayed.

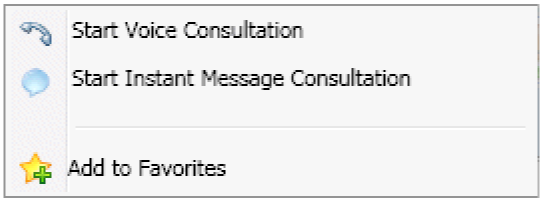
The name of the contact, the originating phone number, and the elapsed time of the interaction are displayed at the top.

Connection-status information is displayed next to the contact drop-down menu. Use the contact drop-down menu to call the contact, if the contact's phone number is available from your contact database.

The SMS toolbar is above the SMS Transcript area. Use the SMS toolbar to do the following:

- **Instant SMS Transfer**—Click **Instant SMS Transfer** () to redirect (transfer) the current SMS interaction to an internal target by using the Team Communicator.
- **Consultation**—Click **Start Consultation** () to start an IM or voice consultation with an internal

target or a contact by using the Team Communicator.



SMS Consultation Menu

- **Mark Done**—Complete the interaction and close the SMS Page Interaction window by clicking **Mark Done** () for the current interaction. You might be configured to specify a disposition code before you can click **Mark Done**. The **Mark Done** button is displayed as soon as the SMS Page interaction is displayed.

SMS Session Mode

During an SMS session, you and your contact enter text in the SMS Session Window interface, and the window maintains a scrolling list of the written correspondence. There is no typing notification during an SMS Session because you are not connected in real-time to your contact. The text that your contact types appears both on your SMS Session window and on your contact's device. The text that you enter and send from the SMS Session window is displayed on the contact's device.

Unlike Page Mode, you maintain ownership of the interaction until you click **Done** or until the timer for the exchange times-out. The time-out interval is configured by your administrator. If no SMS are exchanged for a specified time interval, the session ends. Click **Done** to close the session.

The SMS Session Interaction window simulates a chat interaction. It enables you to handle many SMS Session-related tasks, which include the following:

- Send a response to the contact.
- () Instant-transfer the SMS.
- Select **Mark Done** for the current interaction.
- Set a disposition code.
- Use the Notepad to attach a note to the interaction history.
- View Case Data (attached data) for the current interaction.
- Start a consultation ():
  - Voice (internal targets and contacts).
  - IM (an internal target only).
- Call the sender if there is a phone number in the contact database. You can also click a phone number in the SMS transcript to launch a call.
- E-mail the sender if there is an e-mail address in the contact database. You can also click an e-mail address in the SMS transcript to launch an e-mail.

- View and manage contact history.
- View and manage contact information. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Use a standard response.

Handling an SMS Session Interaction

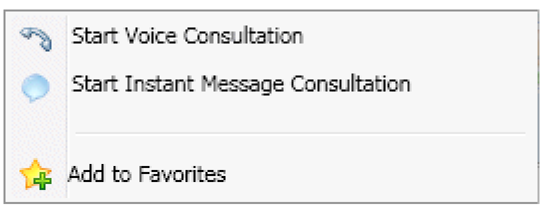
When you accept an SMS Session interaction, the SMS Session Interaction window is displayed.

The name of the contact, the originating phone number, and the elapsed time of the interaction are displayed at the top.

Connection-status information is displayed next to the contact drop-down menu. Use the contact drop-down menu to call the contact if the contact's phone number is available from your contact database.

The SMS Session toolbar is above the SMS Transcript area. Use the SMS Session toolbar to do the following:

- **Instant SMS Transfer**—Click **Instant SMS Transfer** () to redirect (transfer) the current SMS interaction to an internal target by using the Team Communicator.
- **Consultation**—Click **Start Consultation** () to start an IM or voice consultation with an internal target or a contact by using the Team Communicator.



SMS Consultation menu

- **Mark Done**—Complete the interaction and close the SMS Session Interaction window by clicking **Mark Done** () for the current interaction. You might be configured to specify a disposition code before you can click **Mark Done**. The **Mark Done** button is displayed as soon as the SMS Session interaction is displayed.

SMS Transcript Area

The SMS Transcript area displays the contents of the SMS messages that you exchange with your contact as well as system information, such as the names of participants as they join and leave the session, and the time of each event and message. System and message content is color-coded by participant, to enable you to distinguish the owner of each message visually. You can select and copy text from the SMS transcript.

If the SMS contains a phone number or an e-mail address, you can click it to launch a voice or e-mail interaction, respectively.

SMS Message Area

The SMS Message entry area enables you to enter, preview, and spell-check your message before you send it to your contact. The SMS Message entry area enables you to perform the following actions:

- Type text
- Paste, copy, and select text by using the context menu
- Insert and edit a standard response
- Verify the spelling of the content of your message

Transferring an SMS Session

To transfer an SMS or an SMS Session that you have accepted, perform the following steps:

1. Click the **Instant SMS Transfer** () button. The Team Communicator is displayed.
2. Choose a transfer target.
3. Select **Instant SMS Transfer.**

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, an error message informs you that the target has rejected the interaction.

Workitems

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.

The Workitem Interaction window enables you to handle tasks that are related to workitems, including the following:

- Transfer (forward) the workitem
- Select Mark Done for the current interaction
- Start a Voice Consultation with an internal target or with a contact
- Start an IM Consultation with an internal target
- Store it in a workbin for further processing or review
- Open an in-progress workitem from a workbin or Queue in the History view.
- Set a disposition code
- Use the Notepad to attach a note to the interaction history
- View Case Data (attached data) for the current interaction
- Call the sender if there is a phone number in the contact database
- Send the recipient an Instant Message (IM) if the recipient is an internal target
- E-mail the sender if there is an e-mail address in the contact database
- View and manage contact history
- View and manage contact information. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.
- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	
Expand	

- View the standard response library if you decide to call the sender to discuss the workitem contents

If there are in progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Transferring a Workitem

To transfer a workitem that you have accepted, click the **Workitem Transfer** () is displayed.

Choose a transfer target. The target must be configured to receive interactions of the type of the workitem. Select **<workitem type> Transfer**.

If the target accepts the interaction, the interaction window on your desktop closes.

If the target rejects the interaction, the interaction window reopens on your desktop and displays an error that informs you that the target has rejected the interaction.

Internal IM

This feature enables you to send an Instant Message (IM) to another agent (internal target) or receive an IM from an internal target. If you start the IM from an active Voice Interaction, you can share contact information with the IM target. You can transition from an IM consultation session to a voice consultation.

Note: You must be configured to use Internal Instant Messaging.

Sending an IM

Use the Team Communicator on your Main Window view or your Gadget view to find the internal target with whom you want to start an IM session.

In the Internal Target **Action** menu, select **Send an Instant Message <*target name*>**.

The IM session is started in the Interaction window. The target is presented with an interactive notification that enables them to accept or reject your invitation to start an Instant Messaging session. You are notified if the target accepts, rejects, or lets your invitation time-out.

The tab at the top of the Interaction window indicates the agent logon of the internal target with whom you are in an IM session.

The Status indicator displays the agent logon of the internal target with whom you are in an IM session and the status of the session. The status is either Connected or Ended.

The large text field contains a transcript of the IM session. Your logon and the logon of the Internal target are displayed above the messages in different colors to enable you to determine who is writing. Each entry is marked with a timestamp. The logons appear above the text that the participant entered.

Enter your message in the field next to the **Send** button. Click **Send** or press the **Enter** key on your keyboard to send your message to the internal target.

When your session is complete, click **End Session** ( ) to disconnect the IM session.

Click the **Mark Done** button ( ) to close the IM session window.

Receiving an IM

If another agent wants to start an Instant Message session with you, the other agent selects your name from the Team Communicator and then selects **Send an Instant Message** from the **Action** menu.

An interactive notification is displayed above the system tray and the interaction window is minimized in your task bar.

Click **Accept** to display the new IM interaction in your Interaction window. Click **Reject** to refuse the IM interaction. If you do not click Accept or Reject, the interactive notification is dismissed, but the pending IM interaction remains in your task bar until you display it.

The tab 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 indicator displays the agent logon of the internal caller with whom you are in an IM session and the status of the session. The status is either Connected or Ended.

The large text field contains a transcript of the IM session. Your logon and the logon of the Internal caller are displayed above the messages in different colors to enable you to determine who is writing. Each entry is marked with a timestamp. The logons appear above the text that the participant entered.

Enter your message in the field next to the **Send** button. Click **Send** or press the **Enter** key on your keyboard to send your message to the internal target.

When your session is complete, click **End Session** () to disconnect the IM session.

Click the **Mark Done** button () to close the IM session window.

Starting an IM Consultation from an Active Interaction

To start an IM consultation from an active interaction, such as voice, e-mail, or chat, perform the following steps:

1. Click **Start Consultation** () to open the Team Communicator on your active Interaction view to find the internal target with whom you want to start an IM session.
2. In the internal target **Action** menu, select **Start Instant Message Consultation**.
   A new Internal IM message window is displayed that has the status **Not Connected**.
3. To initiate an Internal IM session, enter a message and click **Send**. To cancel the IM session, click the **Mark Done** button ().

If you sent a message, the internal target receives an interactive notification of your instant message that includes your initial message.

If the internal target accepts your invitation, you and the target are engaged in an internal IM session. All of the Case Data about the interaction with the contact is displayed in the IM interaction window of your internal target. The Contact Information and Contact History tabs are available to 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 perform the following actions 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.

Transitioning an IM Consultation to a Voice Consultation

If you are engaged in a Consultation IM with an internal target that you initiated from the current voice interaction, you can transition the IM consultation to a voice consultation by performing the following steps:

1. Click **Start Consultation** ( ) to open the Team Communicator on your active Interaction view.
2. Under **Active Consultations**, choose the active consultation target as your voice consultation target. The internal target with whom you are engaged in an IM consultation is presented as the default selection unless you enter something in the search field or click any of the filter buttons.
3. Select **Start Voice Consultation** in the Team Communicator **Action** menu.

The contact is put on hold. When the internal target accepts the consultation request, you can speak to the internal target.

Outbound Campaigns Overview

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

There are two delivery modes of outbound calls. A supervisor determines in which mode you will work:

- **Manual**, in which 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 an agent, then the agent makes the call to the contact.
- **Automatic**, in which outbound calls are directed to your desktop. Automatic delivery has three dialing modes:
  - Push Preview. The system displays contact-related data to an agent, then the agent makes the call to the contact.
  - Progressive. The system dials customer numbers automatically and transfers a call to an agent only if the connection was successfully established.
  - Predictive. The system estimates the number of free agents on the basis of current statistics, and may start beforehand, even when no agents are free.

If your supervisor or someone else in your company starts an Outbound campaign to which you are assigned, you will receive a warning message to inform you that a specific campaign has begun and that you are assigned to that campaign.

Note: If the campaign began before you logged in, a warning message will be displayed. If you are working on a campaign, the My Campaigns view displays the list of active and running campaigns. Active campaigns are indicated by a Started status message in the My Campaigns view.

After you are connected with your contact, you can perform various tasks, depending on the nature of the interaction. For example, you can update customer records, schedule a callback, select a disposition code or do other call actions.

Negotiated Logout

Sometimes, an abrupt agent logout from a campaign will, by its timing, affect the quality of service of a campaign. For example, you might click Logout at the same moment that a predictive or progressive campaign selected you for a subsequent call currently being established with a customer. If Interaction Workspace logged you out immediately, this particular call may take more time to be delivered to an agent. To avoid this, your logout is delayed a few seconds, if you initiate it by either of the following methods:

- Select Logout from the Main Window title bar or the Main Menu.
- Select Logout from the Voice channel, from the My Channels view of your Workspace.

If you select **Logout** while you are receiving an interaction, a system message will be displayed on your desktop to inform you that you are awaiting logoff authorization. The message contains a countdown clock that informs you of how many minutes and/or seconds remain before you will be authorized to log out.

If you dismiss the message window, you can still monitor the time that remains for logout authorization by viewing your messages in the Main Window or in the My Messages window. You can also place your mouse pointer over the Status icon to see a notification of the time that remains for negotiated logout.

Both the My Messages view and the Status icon ToolTip provide confirmation when your logoff is authorized.

Outbound Preview Calls

Outbound Preview Campaign calls enable you to make campaign calls by requesting an interaction from a preset calling list. You connect the call manually when the interaction window is displayed.

When your administrator loads an Outbound Preview Campaign, you are informed by a pop-up notification. When your administrator starts an Outbound Preview Campaign, you are informed by a second pop-up notification.

The Outbound Campaign notification enables you to retrieve a contact record from the campaign list by clicking **Get Record** or to acknowledge that you are ready to join the campaign by clicking **OK**.

If you click **Get Record**, a new Interaction Preview is displayed.

If you click **OK**, you must retrieve a campaign record manually. In your Workspace view, select the My Campaigns tab. Click the name of the campaign that you want to use. Click **Get Record**. A new Outbound Interaction Preview is displayed. Use the Outbound Interaction Preview to make an outbound call.

Outbound Interaction Preview

The Outbound Interaction Preview is a special version of the Voice Interaction view. More detailed information about voice-interaction controls can be found here.

In preview mode, you can view information about a campaign call *before* you connect to the contact. The Outbound Interaction Preview contains the following features and functionality:

- **Case Information**—Summary information about the campaign. The content of this area is specified by your administrator. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- **Call Preview Actions (toolbar)**—Actions that you can perform, including changing or selecting the phone number, starting the call, and declining the call.
- **Record Information**—Specific information about the record. The content of this area is specified by your administrator. 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.
- **Contact**—The Contact view enables you to manage contact information.
- **Responses**—The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

Call-Preview Actions

Call-preview actions are standard controls for outbound interactions in preview mode. Interaction Workspace enables you to perform the following call-preview actions:

- **Select or change the phone number**—Click in the field that contains the phone number to edit the number; click the down arrow to open the list of possible numbers that are stored in the contact database for the contact.

- **Call this contact**—Click **Call** () to connect to the contact and display the Outbound Interaction view.
- **Decline**—Click **Decline** () to display the **Decline** menu. Choose **Call** this contact later to return the record to the campaign list that is to be called later. Choose **Do not call this contact** for this campaign to remove the contact from the campaign list.

Outbound Interaction View

If you click **Call** in the Outbound Interaction Preview, the view is updated to display the Call Status and Call Actions for the outbound interaction.

Call Status

The call-status area of the Outbound Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**—You are actively talking to the contact or internal target.
- **Ended**—The call has been ended by either you or the contact.
- **On Hold**—The call is in a state in which the contact is unable to hear you and you are not able to hear the contact when the contact is on hold.

Call Actions

Call actions are standard controls for outbound interactions.

Dispositions

The Dispositions view enables you to assign a call outcome to the outbound interaction by using the **Call Result** drop-down list. Select an outcome, or click the **Do Not Call** check box. The content of the Call Result menu is specified by your administrator.

You can also use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Notepad to attach a note to the call history.

Outbound Push Preview Calls

Outbound Push-Preview Campaign calls enable you to make campaign calls by first previewing an interaction from a preset calling list and then connecting the call manually when the interaction window is displayed.

When your administrator loads an Outbound Push-Preview Campaign, you are informed by a pop-up notification. When your administrator starts an Outbound Push-Preview Campaign, you are informed by a second pop-up notification.

The Outbound Campaign notification enables you to acknowledge that you are ready to join the campaign by clicking **OK**.

If your status is Ready, a new Interaction Preview is displayed. Click **Accept** to display the Outbound Interaction Preview. Use the Interaction Preview to make an outbound call. Click **Reject** to return the record to the top of the calling list. If you do nothing, the interaction will be returned to the top of the calling list.

Outbound Interaction Preview

The Outbound Interaction Preview is a special version of the Voice Interaction view. More detailed information about voice interaction controls can be found here.

In push-preview mode, you can view information about a campaign call *before* you connect to the contact. The Outbound Interaction Preview contains the following features and functionality:

- **Case Information**—Summary information about the campaign. The content of this area is specified by your administrator. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- **Call Preview Actions (toolbar)**—Actions that you can perform, including changing or selecting the phone number, starting the call, and declining the call.
- **Record Information**—Specific information about the record. The content of this area is specified by your administrator. 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.
- **Contact**—The Contact Directory view enables you to manage contact information.
- **Responses**—The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

Call-Preview Actions

Call-preview actions are standard controls for outbound interactions in preview mode. Interaction Workspace enables you to perform the following call-preview actions:

- **Select or change the phone number**—Click in the field that contains the phone number to edit the number; click the down arrow to open the list of possible numbers that are stored in the contact database for the contact.

- **Call the contact**—Click **Call** () to connect to the contact and display the Outbound Interaction view.
- **Decline**—Click **Decline** () to display the **Decline** menu. Choose **Do not take the record now** to return the record to the campaign list that is to be called later. Choose **Do not contact this record** to remove the contact from the campaign list.

Outbound Interaction View

If you click **Call** in the Outbound Interaction Preview, the view is updated to display the Call Status and Call Actions for the outbound interaction.

Call Status

The call-status area of the Outbound Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**—You are actively talking to the contact or internal target.
- **Ended**—The call has been ended by either you or the contact.
- **On Hold**—The call is in a state in which the contact is unable to hear you and you are not able to hear the contact when the contact is on hold.

Call Actions

Call actions are standard controls for outbound interactions.

Dispositions

Use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Notepad to attach a note to the call history.

Outbound Progressive Calls

Outbound Progressive and Predictive Campaign calls enable you to make campaign calls from a preset calling list. Both Progressive and Predictive outbound calls are directed to your desktop and dialed automatically. The interaction window is displayed as soon as you are connected.

When your administrator loads an Outbound Progressive or Predictive Campaign, you are informed by a pop-up notification. When your administrator starts an Outbound Progressive or Predictive Campaign, you are informed by a second pop-up notification.

The Outbound Campaign notification enables you to acknowledge that you are ready to join the campaign by clicking **OK**.

If your status is Ready, a new Interaction Preview is displayed. Click **Accept** to display the Outbound Interaction view. Your outbound call is connected automatically. Click **Reject** to return the record to the top of the calling list. If you do nothing, the interaction will be returned to the top of the calling list.

Note: Progressive and Predictive calls might behave slightly differently if you are configured for Active Switching Matrix (ASM). In this scenario, an empty record is delivered to your desktop, and it is not populated with user information unless a connection is made to the user. Non-ASM calls are connected after the call record is displayed on your desktop.

Outbound Interaction View

In progressive and predictive modes, you can view information about a campaign call as soon as you are connected to the contact. The Outbound Interaction view also displays the Call Status and Call Actions for the outbound interaction.

The Outbound Interaction View contains the following features and functionality:

- **Case Information**—Summary information about the campaign. The content of this area is specified by your administrator. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- **Record Information**—Specific information about the record. The content of this area is specified by your administrator. 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.
- **Contact**—The Contact Directory view enables you to manage contact information.
- **Responses**—The Responses view enables you to access a database of prewritten standard responses for your interactions. You can read these responses to the contact during a phone interaction.

Call Status

The call-status area of the Outbound Interaction view provides the contact's phone number or name, or the internal target's extension or name, and the status of the call. Possible call statuses might include the following:

- **Connected**—You are actively talking to the contact or internal target.
- **Ended**—The call has been ended by either you or the contact.
- **On Hold**—The call is in a state in which the contact is unable to hear you and you are not able to hear the contact when the contact is on hold.

Call Actions

Call actions are standard controls for outbound interactions.

Dispositions

Use the Dispositions view to assign a disposition code to an ongoing or terminated interaction, to qualify the outcome of the interaction.

Note

Use the Notepad to attach a note to the call history.

Call Actions for Outbound Calls

Call actions are standard controls for outbound interactions. Interaction Workspace enables you to perform the following call actions:

- **End Call**—Click **End Call** ( ) to disconnect the call.
- **Hold Call**—Click **Hold** ( ) to place the active call on hold. If a call is on hold, you cannot hear the contact, and the contact cannot hear you.
- **Resume Call**—Click **Resume Call** ( ) to reconnect to a call that is on hold. You will be able to hear the contact, and the contact will be able to hear you.
- **Instant Call Transfer**—Click **Instant Call Transfer** ( ) to redirect the current outbound interaction to a contact or internal target that you select by using the Team Communicator.
  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 campaign, the ownership of the record stays with you.
- **Instant Call Conference**—Click **Instant Call Conference** ( ) to start a voice conference instantly with the current outbound interaction and a contact or internal target that you select by using the Team Communicator.
- **Send DTMF**—You can attach numerical data to a call by entering dual-tone multifrequency (DTMF) digits into the call case history. Click the keypad button ( ) to open the DTMF keypad. Type numbers into the number field, or click the keypad numbers to enter numbers.
- **Schedule a Callback**—Click **Schedule a Callback** ( ) to reschedule a call (for example, if the contact is too busy to respond now) for a different date and/or time.
- **Start Consultation**—Start a ( ) voice consultation with an internal target or a contact. The target can choose not to accept the request. The target can end the consultation. You can end the consultation, or you can transfer or conference your current interaction to or with the consultation target.
- **Mark Done**—Complete a call, close the Voice Interaction window, and preview the next contact on the campaign call list by clicking **Mark Done** ( ). You might be configured to specify a disposition code before you can click **Mark Done**.

(Outbound Preview calls only) Click **Done and Stop** ( ) to stop opening the preview for the next call automatically.

- **Party Action Menu**—In the call-status area, click the down-arrow that is beside the name of the contact to start a different interaction type with the contact, such as an e-mail interaction, if the contact has additional channel information available in the contact database.

Atomic Views Overview

Atomic views are typically components of composite views, but each can also be a stand-alone window. Composite views are windows that contain the component atomic views that are required to complete a task such as handling an inbound voice interaction.

Atomic views enable you to complete specific tasks that relate to your task in the composite view. For example, the Call History atomic view enables you to view and query information about the contact with whom you are interacting, based on the content of the inbound-voice-interaction window.

Agent Tools

- My Status—Provides a universal status monitor for all of your media channels.
- My Campaigns—A tab that provides a list of the campaigns in which you are currently involved, including active campaigns that are loaded but not yet started, as well as running campaigns that are loaded and started.
- Team Communicator—Enables you to contact other agents or contact-center targets, determine the status of other agents or contact-center targets, launch outgoing interactions, or start the monitoring or coaching of agents.
- Team Lead—Enables you to contact other agents or contact-center targets, determine the status of other agents or contact-center targets, launch outgoing interactions, or start the monitoring or coaching of agents.
- Inactivity Timeout—A security feature that locks the Interaction Workspace windows on your workstation, if you do not use your mouse or keyboard for a period of time that is defined by your administrator. You must authenticate to reactivate Interaction Workspace.

Statistics, Status, and Other Information

- Contact Center Statistics—The list of statistics about the switches, Routing Points, queues, and other contact-center resources.
- My Statistics—The list of your Key Performance Indicators (KPIs).
- My Messages—Provides you with up-to-date information on the status of your contact-center, changes that are related to your activities, and business messages that are sent by your leads.
- In Progress and Recent Interactions—If there are in progress or recent interactions for the current contact, the number of interactions is displayed beside the connection status of the interaction.

Functions and Information for Contacts

- Workbins—Enables you to store e-mail messages and other interactions (workitems) that are to be handled later; however, unlike in a queue, interactions that are stored in a workbin can be accessed in any order.
- Contact History—Enables you to view and manage previous interactions with a contact that you have selected from the Contact Directory or from the Information view of the current interaction.

- Interaction History—Provides you with specific information about where the interaction (voice, e-mail, chat, and workitem) came from, who the contact is, and how long the interaction has been active. It is part of the specific interaction view.
- Case Data—Provides you with critical information about the active interaction in the Voice Interaction view.
- Contact Directory—Enables you to manage contact information and use the Change Contact view to assign an interaction to a different contact.
- Manual Contact Assignment—Enables you to create a new contact or to manually reassign an interaction that has been incorrectly assigned to the wrong contact. You can also use the Change Contact view.

Functions and Information for Interactions

- Spelling Check—Enables you to verify the spelling of the content of your message before you send it by using an interactive Spelling Checker.
- Disposition Code—Enables you to assign one or more codes to an ongoing or terminated interaction that qualifies the outcome of the interaction.
- My History—Enables you to view and manage your previous interactions.
- Notepad—Enables you to enter comments about the current interaction or about a selected interaction in the history database.
- Responses—Enables you to access a database of prewritten standard responses for your interactions. You can search for a response (all interactions), choose from a list of your favorite responses (all interactions), or choose from a list of suggested responses that are sorted by their relevance to the incoming interaction.
- Schedule a Callback—Enables you to set a new date and time to call an Outbound campaign contact.
- Print—Enables you to set up the appearance of printed e-mail interactions before you print them.

My Status

The My Status view provides a universal status monitor in the Main Window for all of your media channels.

You can view your status universally and by media type. Place the mouse pointer over the Ready Status icon to view your status summary for each media to which you are logged in. For the voice channel, you can also forward your calls to a different extension.

Use the toolbar to apply actions to selected media types. You can apply the following actions:

- Log On/Log Off
- DND on
- Not ready (reason)/Ready
- After call work

The following statuses are available for each of the media types to which you are logged in:

- Out of service
- Logged Off
- DND is on
- Not ready (reason)/Ready

Security

The following security features can be configured by your administrator to protect you and your workstation:

- 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.
- In the ToolTip for the Ready Status icon, you can verify the date and time of your last login. Place your mouse pointer over the Ready Status icon to open its ToolTip.

Capacity Rules

The view of your state that other agents see might be configured to be based on a capacity rule. Your state on any channel might not be Busy until you are *at capacity* for that channel.

My Channels Tab

Use the My Channels tab to view and modify which interaction channels you are using. If you are using the Gadget, this information is available from the My Channels view.

Right-click a channel in either the Status column or the Forward column, to open the Action menu for that channel and column. Use the Action menu to perform the following actions:

- Change your Ready status on a channel
- Log on to or log off from a channel
- Turn on/off your Do Not Disturb status
- Forward calls that are directed to your extension to another extension on the voice switch/channel

Forwarding Calls

To forward calls to a different extension, on the selected media channel, right-click in the Forward column and click **Forward**.

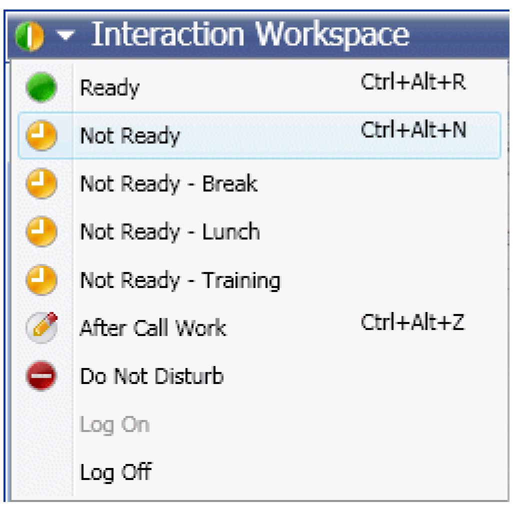
This action opens the Forward dialog box. Enter the extension to which you want to forward your calls and click **Apply**. Click **Cancel** to return to the My Channels tab without forwarding your calls.

If you have an active forward set and you want to disable it, on the selected media channel, right-click in the Forward column, and select **Cancel Forward**.

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

Ready Status Icon

Click the **Ready Status** icon to open your status menu.



Ready Status icon

Select your status from the menu. The contents of this menu are defined by your administrator. Status choices might include Ready, Not Ready, Do Not Disturb, After Call Work, Not Ready with a reason, and Log On/Log Off.

Selections that you make from this menu are applied to *all of the media to which you are logged in.*

My Campaigns

The My Campaigns view is part of the Workspace in the Main Window and a separate window if you are in Gadget view. It provides a list of the active (loaded, but not yet started) and running (loaded and started) campaigns in which you are currently involved.

The My Campaigns view displays the name, delivery mode (automatic or manual), and description of each campaign.

If you are part of an Outbound Preview campaign, you can use the My Campaign view to request a new record by selecting the name of the campaign and then clicking **Get Record**.

Team Communicator

The Team Communicator is a common service that is available in the following views:

- Main Window
- Gadget view
- Interaction windows (for transfer, consultation, or the initiation of a voice interaction from a non-voice interaction):
  - Voice
  - Chat
  - E-mail
  - SMS
  - Internal IM
  - Workitem
  - Social Media Channels (through eServices plug-ins)

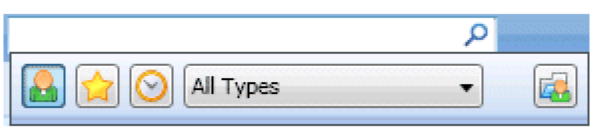
The Team Communicator is a service that enables you to find an internal target or a contact and initiate an interaction. Your administrator might configure your system to restrict your search results.

The Team Communicator enables you to initiate different types of communication with internal or external resources to help resolve a particular customer case or for other purposes, such as a follow-up call or a meeting.

If you are configured as a Supervisor or Team Lead, you can use the Team Communicator and Call Actions toolbar to manage agent monitoring and coaching, which includes starting and stopping.

Main Window Team Communicator

The Main Window contains the Team Communicator Quick Search field. The Quick Search field is a universal-lookup tool; it can search both the contact database and the internal-target directory. Your system administrator might have configure it to provide universal contact lookup or simply to provide internal-target lookup.



Contact Management area

When you click in the field, the Team Communicator toolbar is displayed. Enter a name, telephone number, or other keyword in the field to begin your search. The toolbar enables you to search all (), search favorites (), and search recent () contacts and internal targets. It also enables you to filter by contact or internal-target type, and to group or ungroup () your search results by category or type.

Launching a New Interaction

To launch a new interaction (internal Instant Messaging or external/internal voice interaction or outbound e-mail), enter the name of an internal target (agent, skill, group, queue, or Routing Point) or a contact name, telephone number, or e-mail address in the universal-lookup field.

As you type, Interaction Workspace searches the internal target and contact databases and lists potential contacts and internal targets. The system opens a view that lists potential contacts and internal targets. The status of each internal target is displayed.

You can use the pop-up view to do the following:

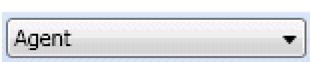
- Filter and sort the list of search results.
- Perform actions on a selected contact such as calling, sending an instant message, creating a new outbound e-mail, or saving as a favorite.

Filtering and Sorting the List of Search Results

Search results are displayed in a list. The search is a “keyword” search that searches each field of the contact database for the word or words (name, telephone number, e-mail address, or other criteria) that you provide in the search field. Each field of the database is searched by using a “starts-with” search for the keywords 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.

You can filter search results by result-type by using the result-type drop-down list.

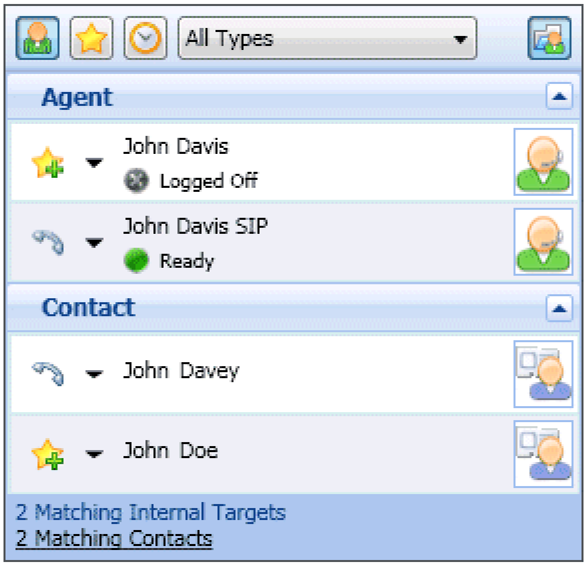


Contacts drop-down list

Result types might include the following:

- All types
- Agent
- Agent Group
- Contact
- Interaction Queue
- Queue
- Routing Point
- Skill

Click the **Sort Results by Type/Categories** icon () to arrange the search results by type/categories. You can collapse categories by clicking the arrow that is displayed beside the name of the category.

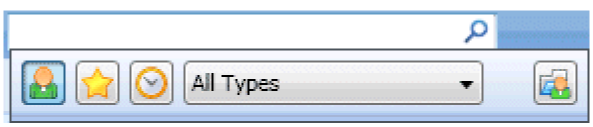


Sorting results by group

To view only contacts, click the **Matching Contacts** link. The Contact Directory view is displayed.

Matching external contacts

Below the Quick Search field are five controls that you can use to list previous contacts quickly.



Quick Search field

From left to right, the buttons are the following:

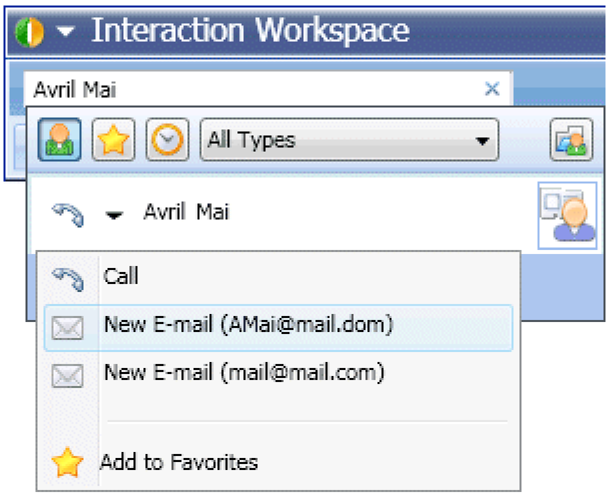
-  **Search All**—Click to select from all matching internal targets and contacts. Does not affect the sort order.
-  **Show and Search my Favorites**—Click to show only contacts/internal targets that you have flagged as favorites. Sort is by category or type.
-  **Show and Search my Recent Interactions**—Click to select from the last 1 to 10 contacts/internal targets that you have directly dialed, instant messaged, e-mailed, or monitored. Sort is by date.
- **Filter by Type**—Select the type to search, including Agent, Contact, Routing Point, Skill, Queue,

Interaction Queue, and Agent Group.

-  **Show/Hide Types**—Click to show or hide types or categories.

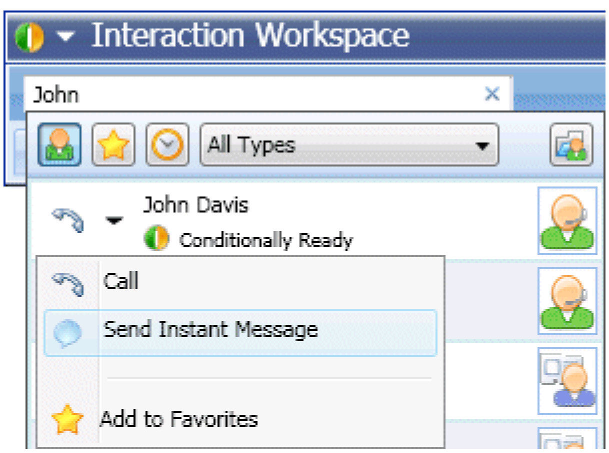
Actions

Click the **Action Menu** pop-up list next to the internal target or contact that you want to find. This example shows the Action Menu for a contact:



Team Communicator Action menu

This example shows the **Action Menu** for an internal target:



Team Communicator Action menu for an internal target

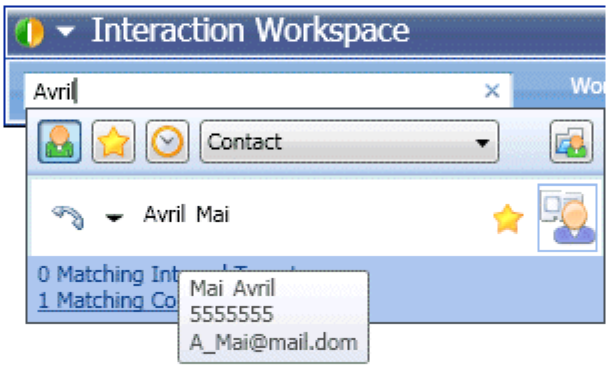
From the list, you can:

- Select the kind of interaction that you want to launch (external voice, internal voice, outbound e-mail, or internal instant message).
- Select **Add to Favorites** to add the contact to your list of favorite contacts.

Viewing Contact Information

Place your mouse pointer over the contact icon to view additional contact information. The Contact Summary pop-up view is displayed briefly to enable you to view critical information, such as the following:

- Contact name
- Contact information
- Other Business Attributes



Contact summary

Click the telephone icon to launch a voice interaction.

Favorites

A favorite is an internal target or a contact that you call frequently, or who you want to be able to find quickly. You can designate internal targets and contacts as "favorites" by using the **Action Menu** in the Team Communicator. When you designate an internal target or a contact as a favorite, you might be configured to assign him, her, or it 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.

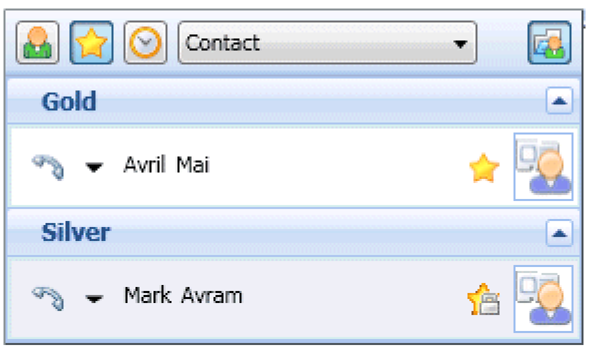
To designate an internal target or a contact as a favorite, perform the following steps:

1. Find the internal target or contact in the Team Communicator.
2. Click to open the **Action Menu** that is displayed beside the name of the internal target or contact that you want to add to your favorites, and select **Add to Favorites**.
3. The **New Favorite** dialog box is displayed.
    - The **Category** drop-down list enables you to define a new category or select from a list of existing categories.
    - Click **OK** to add the internal target or contact to a category as a favorite. If you do not choose a category, the favorite will be listed in the Other Favorites category when the Team Communicator is displayed in the Category view.

In the Team Communicator, designated favorites are marked by a gold star (), and corporate favorites are marked by a locked gold star (). Your administrator might designate corporate favorites for you that might be context-sensitive, determined by your role, or with which contact you are currently interacting.

Finding a contact

If you filter your Team Communicator search results by favorites and by type (category), the Team Communicator sorts favorites into the designated categories. In the figure below, favorite contacts are displayed in two categories, Gold and Silver. The first contact is a personal favorite and the second is a corporate favorite.



Finding a favorite

You can edit a favorite to add, remove, or change a category. Select **Edit Favorite** () from the **Action Menu** to display and use the **Edit Favorite** dialog box.

You can remove an internal target or a contact from your list of favorites by selecting **Remove from Favorites** () from the **Action Menu**.

Notes:

- You cannot edit or remove Corporate Favorites. These favorites are controlled by your administrator.
- If you added a target as a Personal Favorite and then your administrator adds this same target as a corporate favorite, that target will be designated as a Corporate Favorite in the flat view, and as both a Personal Favorite and Corporate Favorite in the categorized view.

Gadget Team Communicator

Like the Main Window, the Gadget view contains the Team Communicator Quick Search field.

Contact Management Gadget

The Team Communicator functions the same in the Gadget view as it does in the Main Window view, except that the Matching Contacts link does not display the Contact Directory view.

Team Lead

If you are configured as a supervisor (Team Lead or Team Supervisor)) for an agent group, you can monitor or coach agents. If you accept the interaction, an interaction window is displayed on your desktop, and you are connected to the call or chat interaction.

If you are monitoring the agent, neither the agent nor the contact can hear you. The agent might be configured to know when he or she is being monitored (an icon is displayed in the interaction window), or he or she might be configured to be monitored without his or her knowledge.

If you are coaching the agent, the agent can hear you, but the contact cannot.

You can choose to join (barge-in to) a call or chat interaction.

Interaction Workspace enables you to switch from certain team supervision modes to others.

Monitoring

When you monitor a selected agent who is in your group, you receive an Interaction Preview that informs you that the selected agent is handling a voice or chat interaction. You can monitor the current or next interaction of an agent.

You can start monitoring an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Monitor Next Interactions** (). 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**.

You can end monitoring an agent by using the Team Communicator and selecting **Stop Monitoring** in the **Action Menu** ().

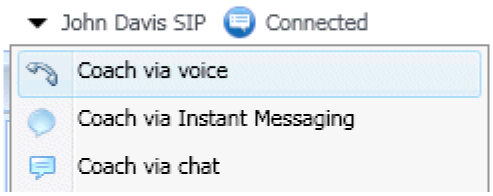
You can stop monitoring the current interaction by clicking **End Monitoring** () in the Call Actions toolbar in the interaction window.

Coaching

When you coach a selected agent who is in your group, you receive an Interaction Preview that informs you that the selected agent is handling a voice or chat interaction. You can coach the current or next interaction of an agent.

You can start coaching an agent in your group by using the Team Communicator to find the agent. In the **Action Menu**, select **Coach Next Interactions** (). 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**.

In the current monitored interaction, you can also start coaching an agent in your group by using **Action Menu** that is associated with the party.



Team Lead switch party action menu

Coaching is available for three channels: voice, chat, and IM.

You can end coaching an agent by using the Team Communicator selecting **Stop Coaching** from the **Action Menu** ().

You can end coaching the current interaction by clicking **End Monitoring** () in the Call Actions toolbar in the interaction window.

Barge-in

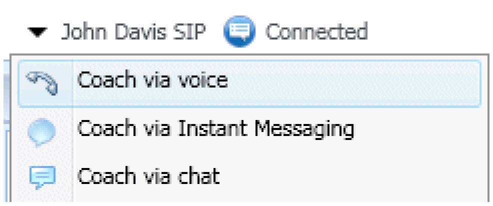
When you barge in to an active interaction, you must already be either monitoring or coaching the interaction.

To barge in to (join) an active interaction that you are either monitoring or coaching, click **Barge-in** () in the Supervision toolbar. **Barge-in** is a simple button if you are supervising a single channel interaction (voice or chat), and it is a drop-down menu button if you are monitoring a multiple channel interaction (both voice and chat interactions at the same time).

Switching Modes

During monitoring or coaching of an active interaction, you can switch from one supervision mode to another:

- Monitoring to coaching—Use the **Action** menu that is associated with the party, or use **Unmute (Coach)** () in the Interaction toolbar to return to coaching.

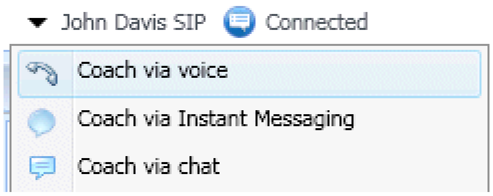


Team Lead switch party action menu

- Monitoring to barge-in—Use **Barge-in** () in the Supervision toolbar.
- Coaching to barge-in—Use **Barge-in** () in the Supervision toolbar.
- Coaching to monitoring—Use **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—Use **End Chat** () or **End Call** () in the Interaction toolbar to return to

monitoring.

- Barge-in to coaching—Use the **Action** menu that is associated with the party.



Team Lead switch party action menu

- Use **End Monitoring** () in the Interaction toolbar to end monitoring.

Inactivity Timeout

For your security and the security of your company, Interaction Workspace might be configured by your administrator to become locked after a specific period of time during which neither your mouse nor keyboard is used. This feature protects you from unwanted system access, if you walk away from your workstation without locking it.

When the specified time period of inactivity is reached, all of the open Interaction Workspace windows on your desktop are minimized, and the Reauthenticate view is displayed.

To unlock Interaction Workspace, you must enter in the Reauthenticate view the password that was used to log in the locked application, then click **Authenticate**. Click **Cancel** to log off all channels and exit the application.

Your status might be set to Not Ready. To change your status, use the My Status view.

All Interaction Workspace windows are minimized when the application is locked, except for the following windows, which are locked but remain visible:

- Interaction notifications (with Case Information hidden during lock-out)
- System-tray icon

System notices are not locked. When Interaction Workspace times out, a system-message notification is displayed to alert you that Interaction Workspace has timed out.

Click **Show** to view the message. Click **Dismiss** to dismiss the notification.

If you clicked **Show**, click **OK** to dismiss the message.

Contact Center Statistics

The list of statistics about the Routing Points, Queues, and other contact-center objects is displayed in the Contact Center Statistics tab of the Main Window. If you are using the Gadget, this information is available from the Contact Center Statistics view. You can also view the contact-center statistics in the Statistics Gadget.

The Contact Center Statistics tab 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 that are in queue.

The following columns of information are available for each monitored object:

- **Contact Center Resource**—The name or location of the object
- **Description**—A description of the call center statistic
- **Value**—The value of the contact-center statistic

Click column heads to change the sort order of the objects.

Right-click in the Contact Center Statistics view to display the Statistics menu.

Use the Statistics menu to do the following:

- Show or hide statistics
- Show only alerting statistics or show all statistics

Note: Your Key Performance Indicators (KPIs) are displayed in the My Statistics tab.

My Statistics

The **My Statistics** tab of the Main Window displays the list of your Key Performance Indicators (KPIs). If you are using the Gadget, this information is available from the My Statistics view. You can also view your KPIs in the Statistics Gadget.

The KPIs that are displayed are configured by your system administrator. The statistics defined as KPIs could also be evaluated for the agent groups of which you are a member. Your performance is displayed in the Personal column, and the statistic value for each Agent Group is displayed in a column with the name of the agent group as the column header.

Click column heads to change the sort order of the KPIs.

The **My Statistics** tab displays your current KPIs and a summary of the KPIs of your work group(s). The **My Statistics** tab enables you to compare your performance with the overall performance of the group(s) to which you belong.

A warning icon is displayed in the left-most column of the row. The warning icon is displayed if the evaluation of your performance for the KPI goes beyond the expected warning level for the KPI ().

An error icon might be displayed next to a KPI if the evaluation of the performance is below the expected error level for the KPI ().

Right-click in the **My Statistics** tab to access the shortcut menu that enables you to show/hide columns and KPIs, and to turn on or off KPI filtering to show only those that have alerts.

The **My Statistics** menu enables you to specify which KPIs are displayed. Select a KPI to show or hide it. KPIs that are displayed have a check mark next to them.

The **Agent Groups** menu enables you to show or hide the column that contains the KPI values for the agent group. Select a group to show or hide it. Agent Groups that are displayed have a check mark next to them.

Select **Show All statistics** to display all of the KPIs. Select **Show Only Alerting Statistics** to display only KPIs that have warnings or errors. This menu does not affect the columns that are displayed.

Note: Statistics about the Routing Points, Queues, and so on, are displayed in the Contact Center Statistics tab.

If a statistic has been configured incorrectly, the background of the statistic becomes red and the error icon is displayed. You should report errors immediately. The reason for the problem is displayed in a tooltip if you place your mouse pointer over the problematic statistic row.

My Messages

Your lead or your administrator can send messages directly to you or your group by using the Interaction Workspace Broadcast Message function. You might receive business-type messages or system-type messages.

Examples of business messages include:

- Performance reminders
- Instructions for you or your workgroup
- Information about upcoming events or requirements

Examples of system messages include:

- Switch is out of service
- Channel voice is out of/back in service
- The Universal Contact Server is out of service

Message Preview

If you receive a message, a Message Preview interactive notification is displayed on your desktop.

Message priority might be indicated by one or more of the following methods:

- Audio cue
- Color border around the message preview
- Message type indicator graphic
- Priority text (for example: High)

If a Message Preview interactive notification is displayed on your desktop, you can do one of the following:

- Click **Show**—Displays the message window. The message is also displayed in the My Messages area of the Main Window. The message is marked as Read.
- Click **Dismiss**—Closes the Message Preview. The message is displayed in the My Messages area of the Main Window. The message is marked as Unread.
- Do nothing—The Message Preview is dismissed automatically after a time interval that is defined by your system administrator; the message is displayed in the My Messages area of the Main Window. The message is marked as Unread. If you are using the Gadget, the message is also accessible by using the Gadget Main Menu to open the My Messages window.

Message Window

You can display the Message Window by clicking **Show** in the Message Preview or by double-clicking the message in the Messages area of the Main Window.

The Message Window contains the full content of a message that has been directed to you or your group. As well as displaying the content of the message, the Message Window also might contain the following information:

- Message Type—This information might be conveyed by text, the title bar, and/or an icon.
- Subject
- Sender
- Priority—This information might be conveyed by text and/or by the color of the border that surrounds the information about the message.
- Date
- Topic (target audience)
- Other data that is defined by your administrator

My Messages

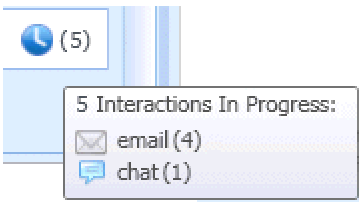
The My Messages view of the Main Window, or the My Messages window that is opened from the Gadget, provides you with up-to-date information on the status of your contact-center, changes related to your activities, and business messages sent by your leads.

To open the My Messages view in the Main Window, click the **Messages** button. Click the **Messages** button again to close the My Messages view.

In the Messages view, the messages are displayed in a scrolling list with the most recent message on the top.

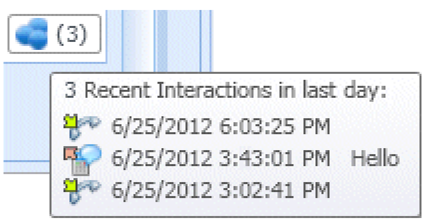
In-Progress and Recent Interactions

If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction. 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. If you click the icon, the Contact view is opened and the Contact History tab is displayed.



Dynamic contact history

If there are recent interactions for the current contact; the number of interactions is displayed beside the connection status of the interaction. 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 in the last-specified number of days.



Display of recent interactions

Workbins

A workbin is like a personal queue, in which you can store e-mails and other interactions (workitems) to be handled later; however, unlike with a queue, interactions that are stored in a workbin can be accessed in any order; interactions 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.

Interactions are placed in workbins in different ways: by routing strategies, by saving in-progress interactions (interactions that are not marked as done), or by a Team Lead who manually moves interactions.

To open the Workbin view from the Main Window, click the **Workbins button.**

The list of available workbins depends on the configuration of your system.

To open the Workbin view from the Gadget, from the Main Menu, select **Workbins** > **My Workbins**, or **Workbins** > **My Team Workbins**, or **Workbins** > **My Interaction Queues**.

The Workbins view comprises three areas:

- **Workbins Explorer**—Enables you to select workbin folders from your personal workbins and your shared workbins. For agents who are configured as Team Leads, you can change the explorer view to the following views:
  - **My Workbins**—For all agents, a view of your personal workbins.
  - **My Team Workbins**—For Team Leads, a view of all of the workbins that belong to agents that you supervise.
  - **My Interaction Queues**—For Team Leads, a filtered view of your queues and workbins.
- **Workbin view**—Lists all of the interactions that are stored in the selected workbins; 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

Workbin Explorer

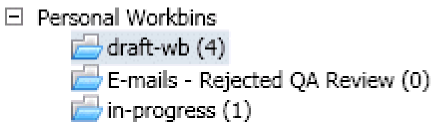
The Workbin Explorer enables you to view a list of your personal and shared workbins, and to navigate to a specific workbin to view its contents in the Workbin view.

Choose a workbin view by clicking the one of the Workbin Explorer view buttons at the bottom of the Workbin Explorer view:

- **My Workbins**—For all agents, a view of your personal workbins.
- **My Team Workbins**—For Team Leads, a view of all of the workbins that belong to agents that you supervise.

- **My Interaction Queues**—For Team Leads, a filtered view of your queues and workbins.

To view a workbin, click it in the Workbin Explorer.



Selecting a workbin

The number of stored e-mail messages and/or workitems in each workbin is indicated in parentheses next to the name of the workbin folder.

To navigate directly to a specific workbin from the Main Window, click the drop-down menu button on the **Workbins** button. Select a workbin from the menu. Some of the workbins which might be configured for your **My Workbins** view include:

- **In-Progress**—Contains inbound e-mail messages or other workitems that have not been processed
- **Draft**—Contains outbound (reply) e-mail messages that have been saved as draft
- **Custom**—Your administrator might have configured you to view additional workbins.

My Team Workbins

For Team Leads, this view in the Workbins Explorer contains a list of all the agents that you are configured to supervise. To view the workbins for the agents that you supervise, click the name of the agent in the list, then click the workbin to open it.

My Interaction Queues

For Team Leads, this view in the Workbins Explorer contains a list of filters that are defined by your system administrator. Click a filter or a queue to view its contents in the Workbin view.

Interaction filters search the interaction database for interactions that meet certain criteria, such as time in queue, date received, interactions state, and so on. Filter results are "snapshots" of the state of the interactions in the database at the time that the query was executed. Snapshot views are not updated automatically. You must click **Refresh** () to see the latest changes to the database.

Workbin View

The Workbin view enables you to view, sort, and perform actions on selected interactions.

Information about the selected interaction is displayed in the tabs that appear at the bottom of the Workbins view.

To open an interaction, double-click it.

You can perform the following functions on selected interactions in workbins by using the Workbin Actions toolbar:

- **Reply** ()—Opens a reply to the interaction in an outbound E-mail Interaction window.
- **Reply All** ()—Opens a reply to 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.
- **Open** ()—Opens the selected e-mail interaction in an inbound or outbound E-mail Interaction window. Opens the selected workitem in a Workitem Interaction window.
- **Mark Done** ()—Complete the e-mail and close the Interaction window; you might be configured to specify a disposition code before you can click **Mark Done**; in that case, the interaction is opened to enable you to set the disposition code before allowing you to click **Mark Done**.
- **Delete** ()—Deletes the e-mail from the contact database, if you have the correct permissions.
- **Move to Queue** ()—(if you have the correct permissions) Opens the Team Communicator to enable you to select a queue to which you want to move the selected interaction(s). Enter the name of the queue into the Team Communicator search field, then from the Queue item Action menu, select Move to Queue.
- **Move to Workbin** ()—(if you have the correct permissions) Opens the Team Communicator to enable you to find an agent or agent group to which you want to move the selected interaction(s).
- **Edit Case Information** ()—(if you have the correct permissions) Opens the Edit Case Information window to enable you to edit the content of the Case Data tab for the selected interaction(s).

The Workbin view is a table that lists all of the interactions that are stored in the currently selected workbin. The four columns provide basic information about the interactions and their status. You can change the sorting order of the table columns by clicking the column heads. Clicking the active column head a second time reverses the sort order. Unhandled interactions are displayed in bold text.

The Workbin view contains the following sortable columns for e-mail interactions:

- **Icon**—Displays the interaction type and status.
- **From**—Lists the names of the sender.
- **Subject**—Lists the subject of the interaction.
- **Received**—Lists the date and time at which the interaction was first received.

To show or hide columns, right-click in the list area to open the column context menu and select the column to show or hide.

Other media that can be stored in a workbin, such as workitems, might have different columns configured for them. The columns that are displayed for interaction queues are configured by your administrator. Ask your administrator for information about other columns.

Workbin Interaction Information

Details, notes, and case data for the selected interaction are displayed in the interaction information tabs. You might have to display the interaction information tabs. To do so, click the **Show/Hide Details Panel** ( ) button.

The interaction information area contains the following tabs:

- **Details**—Information that is specific to the interaction, including To, From, attachments, and the body of the interaction
- **Notes**—The content of the notes that are stored in the Contact History
- **Case Data**—The case data that is stored in the Contact History

Details

The Details tab contains a preview of the selected interaction, links to attachments, and the following information about the e-mail interaction:

- Subject
- Date and time at which the interaction was sent
- To (recipient) e-mail address
- From (sender) e-mail address
- Custom fields that are configured by your administrator

For workitem interactions, such as faxes, the Details tab contains the following information:

- Media Type
- Interaction Type
- Interaction Sub-Type

Contact History

The Contact History view enables you to view and manage previous interactions with a contact that you have selected from the Contact Directory or from the Information view of the current voice, chat, e-mail, or workitem interaction.

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 Done past voice and chat interactions that are still open.
  - Change Contact for the selected interaction if the status is **In-Progress** (not supported for all media types).
  - Reply or Reply All to e-mail interactions.
  - Resend a previously sent e-mail.
  - Open in-progress inbound and outbound e-mail interactions (that are in the process of being routed out of and into workbins and queues).
- View information about the selected interaction.

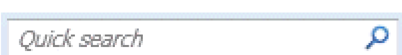
Finding Interactions

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 view, filter, and perform actions on the interactions that you select. Your administrator might configure your system to restrict your search results.

Quick Search

The Quick Search enables you to search for any attribute that begins with the criteria you enter. For example, you could search for a disposition code of "Transferred" or find all interactions that are related to the subject of "billing".

To search the contact history, enter into the **Quick Search** field the attribute value for which you are searching. Quick Search is a *contains* keyword search. You can us the standard Windows wildcard characters to expand your search.



History tab Quick Search

Click the magnifying glass to search for the value that you have entered. Click the **X** to clear the **Quick Search** field.

Advanced Search

Click the **Show/Hide Advanced Search** () toggle button to show or hide the advanced search feature.

The Advanced Search feature enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as Status, Subject, Start Date, and End Date.

From the column of search modifiers to the right of the attribute column, choose how the search string should be considered.

Menus for pre-defined fields, such as Status, contain the pre-defined 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:

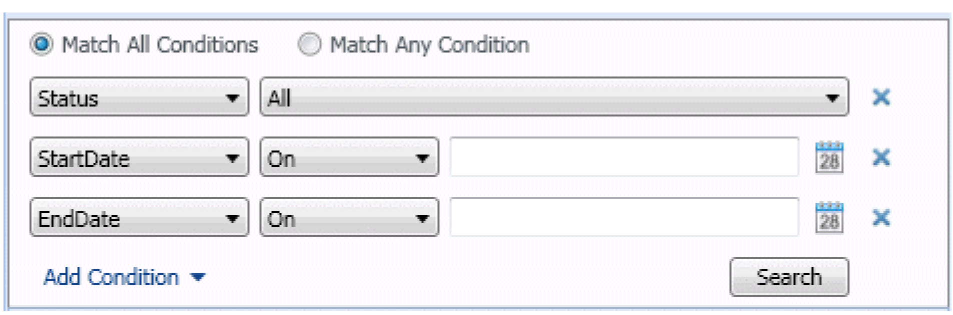
- **Contains**—The specified text string occurs anywhere in the selected criterion.
- **Begins With**—The specified text string occurs at the beginning of the selected criterion.
- **Is**—The specified text string exactly matches the criterion.

Enter the search value in the text field on the right side. If your criterion is a start date or end date, use the calendar pop-up window to specify the date.

Note: You can use standard Windows wildcard characters in your specified search strings.

Use the **Match Conditions** options to specify whether **All** or **Any** of the search conditions that you have specified are applied.

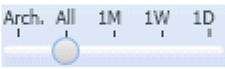
To search based on the Start Date, use the calendar icon () to select a date, or enter the date in the format that conforms to your local day and time display preferences.



History tab Advanced Search

Filtering

The Contact History view filtering controls enable you to refine your search. The chronology slider enables you to search the contact history by time interval.



History tab Time Filter

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

The Interaction Type filters enable you to select and deselect the types of interactions that are to be searched. The items that are displayed depend on the interaction types that you are configured to handle. Click the **Filter** menu to select the interaction types that you want to search. You can select multiple items in the **Filter** menu. The following types are available, by default:

- Show all Interactions
- Show voice Interactions
- Show e-mail Interactions
- Show chat Interactions
- Show SMS Interactions
- Show Other Media Interactions

When a filter is on, a check mark appears next to it in the **Filter** menu.

Your administrator might have configured additional customized options for the **Filter** menu, such as business area/department (for example: accounts, sales, and service) or customer level (for example: Silver, Gold, and Platinum). Custom filters enable you to refine your search. For example, if you are looking for e-mail interactions about a service request, you can make two selections in the **Filter** menu to refine your search: **Show e-mail Interactions** and **Show Interactions with Service Department**.

Grid View and Tree View

Interaction Workspace enables you to view contact interactions either chronologically or as threads. The **Show Interactions in Grid View**/**Show Interactions in Tree View** button (/) enables you to specify how the Contact History panel is displayed.

Grid View displays interactions chronologically, and Tree View displays the 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 conversation, social-media threads, and so on).

Both the Grid and Tree views have columns that contain information about each interaction. Depending on how your system is configured, columns might include **From**, **Subject**, **Status**, **Start Date**, **End Date**, or custom attributes that are assigned by your administrator. Depending on your system configuration, interaction status might include the following states:

- Done
- In-progress
- Assigned to <agent> in <name> workbin
- Assigned to <name> Place in <name> workbin
- In shared workbin <name>
- Assigned to <agent> Actively Handling
- Delivery in-progress
- In a queue

Page Controls

Page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button () to view the next page.
- Click the **Go to the Previous Page** button (to view the previous page.
- Click the **Go to the First Page** button () to return to the start of the list of search results.
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

Viewing Search Results

The search results are displayed in the interactions table. The search result table is not sortable. To sort the interactions table, clear the search field to display the full history set.

Actions

Interaction Workspace enables you to perform actions on interactions that you have selected in the interactions table. You must be configured to perform contact management by your system administrator.

Actions that you might be configured for include the following:

- Marking Done (voice interactions)
- Change Contact
- Replying/Replying All (e-mail interactions)

- Resending a previously sent e-mail
- Opening in-progress e-mail interactions

Completing Interactions

To complete a voice interaction, select it in the Interactions table, open the **More Actions** menu, and click **Mark Done**. The status of the interaction changes to **Done**.

Changing Contact

To assign a voice interaction with the status of In Progress to a different contact, select it in the Interactions table, and click Change Contact. In the Change Contact window, select a new contact and click **Merge**.

Reply or Reply All

Reply or Reply All to an e-mail interaction.

Resending a Previously Sent E-Mail

If you select an outbound e-mail interaction in the Contact History view that is in the **Done** state, the **Resend** button () is displayed if you are configured to resend outbound e-mails that have already been sent.

Click **Resend** to open the previous outbound e-mail interaction in a new outbound E-mail Interaction window. The contents of the previous e-mail interaction are copied into the body of your new e-mail interaction, and the recipients are copied into the recipient list of the outbound E-mail Interaction window.

Opening In-Progress E-Mail Interactions

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). 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.

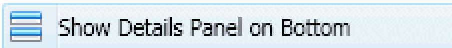
After you pull the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction. You can also click **Put back in original location** () to return the e-mail interaction back to the In-Progress workbin or into a queue.

About the Selected Interaction

Interaction Workspace enables you to view information details about interactions that you have selected in the Contact History view. The **Show Details Panel on Bottom/Hide Details Panel** button () enables you to specify how the Details panel is displayed. Click the **Show Details**

Panel on Bottom/**Hide Details Panel** button to choose one of the following views:

- 

—Displays the Details panel to the right of the workspace area.
- 

—Displays the Details panel below the workspace area.
- 

—Hides the Details panel.

The Details panel contains the following three tabs:

- Details
- Note
- Case Data

Details

The **Details** tab might display information such as the following:

- Phone number
- To and from e-mail addresses
- Origin of the call—for example, the name of the agent who transferred the call (this information is stored in the Note tab)
- Time—Elapsed time between the interaction **connected event** and the **markdone** event by the agent or the system
- Timestamp
- Chat transcript
- Name of the contact

Note

The Note is a feature that enables you to enter comments about the current interaction or read comments that have been entered in the past. The comments are stored as a part of the history for the contact. The contents of the Note are available to any agent who views the contact's history.

Case Data

Case Data (attached data) provides information—such as an account number, type of service, and disposition—about an interaction. Your system administrator configures which attached data is displayed.

Interaction History

The Interaction History view provides you with specific information about where the interaction (voice, e-mail, chat, and workitem) came from, who the contact is, and how long the interaction has been active.

- **Contact**—If the contact is in the contact database, the name of the contact is displayed. The display might also show the contact's number or e-mail address, or "Unknown".
- **Duration**—The time in hours, minutes, and seconds that you have been handling the interaction.

The Interaction History view is part of the Interaction window and the History tab of the Contact Directory view.

Case Data

The Case Data (attached data) view provides information about an interaction—for example, an account number or type of service. Your system administrator configures which attached data is displayed.

The following are examples of the type of critical information that the Case Data view provides about the active interaction:

- Contact name
- Contact type
- Call type
- Account information
- Subject

The Case Data view is part of the Interaction view and the History tab of the Contact Directory view.

Hyperlinks

Some Case Data might be a URL (website address). If you are configured to preview the URL target, you can place your mouse pointer over the URL to display a preview of the target. You might also be configured to click active URLs in the Case Data to open the target in the interaction window. A URL might be displayed as the title of the web page, as an anchor, or as a URL. If the URL is active, it is displayed as blue text.

Editing Case Data or Adding Missing Fields

You might be configured to edit one or more entries in the case-data area. Any field that can be edited displays a Pencil icon when you place your mouse pointer over it. Click the field to edit the content. Press the Enter key or click away from the field to commit your change.

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 Data toolbar. Click **Add Field** to display a drop-down list of fields. Select a missing field to display the field in the Case Data view. You can edit he added field. Enter the missing Case Data, then press **Enter** to add the Case Data to the case information for the interaction. Click **X** to remove the field.

Contact Directory

The Contact Directory view enables you to manage contact information.

The **Contact Directory** enables you to do the following:

- Find contacts
- Manage or call contacts by using contact actions
- Assign interactions with unknown contacts to a known contact

The following are examples of the type of the fields that are available in the Contact Directory view:

- Title
- First name
- Last name
- Address
- E-mail address
- Phone number
- Other criteria

To view the contact directory, click the **Contact** button on the Interaction Workspace Main Window. The Contact Directory view is contained in a tab that opens below the Main Window.

Contact Actions

Select a contact from the search results, list view, or grid view to perform any of the following actions:

- Delete the contact
- Call the contact if there is a phone number in the contact database
- Create an outbound e-mail if there is an e-mail address in the contact database
- Merge or unmerge the contact
- View contact information
- View contact history

You can double-click a contact in the search results, list view, or grid view to open the Contact information and history views.

Finding Contacts

You can search the contact database in one of two ways:

- Quick Search
- Advanced Search

Your administrator might configure your system to enable you to search only the contacts that are related to your work.

Quick Search

To search the contact directory, type the name, phone number, or e-mail address of a contact in the Quick Search field. Quick Search is a *begins with* search. You can use the standard Windows wildcard characters to expand your search.

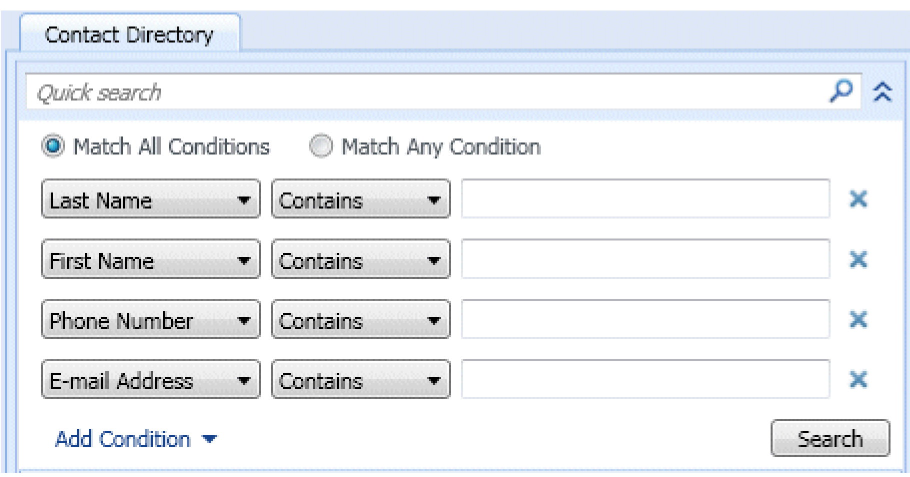
Contact Quick Search

Click the magnifying glass to search for the value that you have entered.

The contact database is search based on your criteria and the search results are displayed in the Contact Directory.

Click the **X** to clear the Quick Search field.

Advanced Search



Contact Directory

Click the **Add Condition** link to add more search criteria. Remove criteria from consideration by clicking the **X** next to the option.

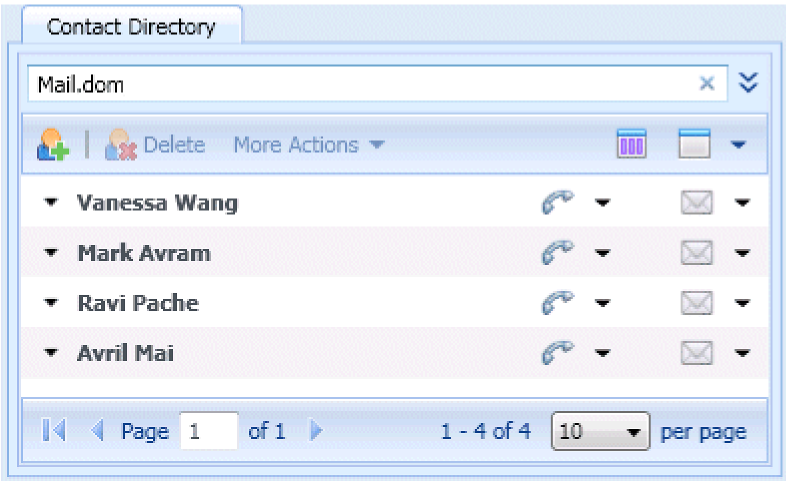
Click the magnifying glass to search for the value(s) that you have entered.

The contact database is search based on your criteria and the search results are displayed in the Contact Directory.

Click the **X** to clear all search field.

Search Results

Search results are displayed in a list or in a tabular grid.



Contact Directory

Use the **Show Contacts** in Grid/List View () button to toggle back and forth between the two views.

Page Controls

Page through the list of search results by doing any of the following:

- Click the **Go to the Next Page** button () to view the next page.
- Click the **Go to the Previous Page** button () to view the previous page.
- Click the '*Go to First Page* button () to return to the start of the list of search results.
- Specify the number of items that are displayed on each page by using the **per page** drop-down list.

List View

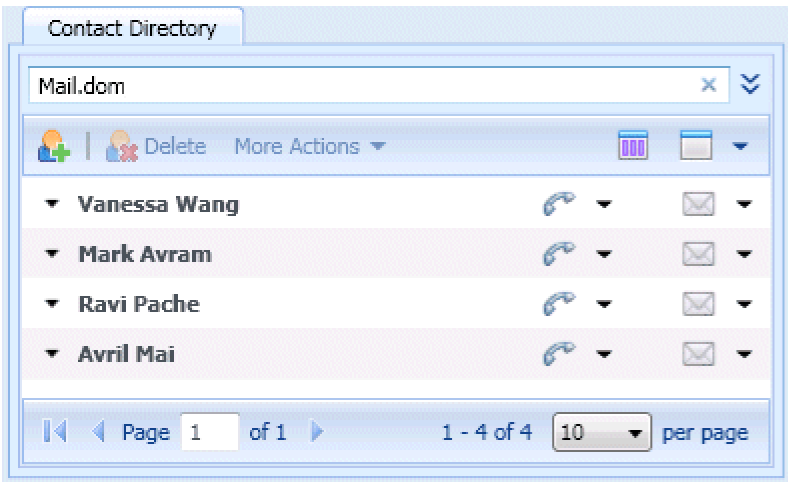
Click the **Show Contacts in List View** button () to display the Contact Directory List view.

The List view displays an unsorted list of all of the contacts in the contact database that match the search criteria.

The search is 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. 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.

Use the page controls to navigate the list. Click a contact to select it for an action. Use the Grid view to sort the search results based on contact attributes.



Contact Directory

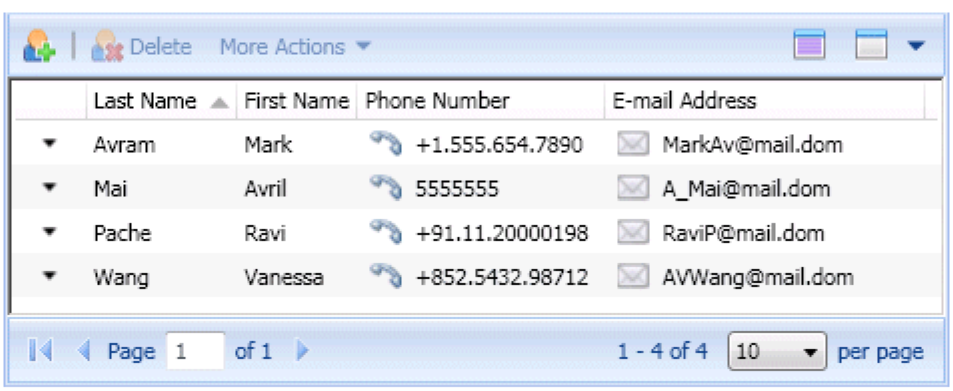
Grid View

Click the **Show Contacts in Grid View** button () to display the Contact Directory Grid view.

Grid mode performs a *begins-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 sorted according to the default search field, such as Last Name.

The Grid view can be used to help to refine your search by sorting the results.



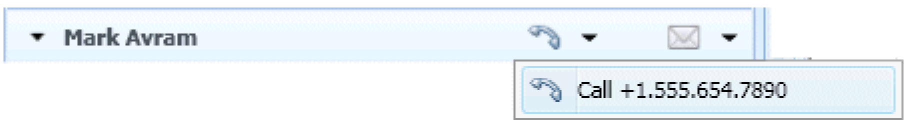
Quick Search results

Click a column head in the Grid view to sort the list based on that criterion. Click a column head a second time to switch between ascending and descending sort order. Use the page controls to navigate the list. Click a contact to select it for an action.

Call or E-Mail Contacts

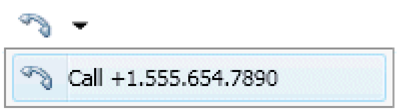
To call or e-mail the contact that you have selected in the search results, do one of the following:

- Click the **Contact** icon next to the contact name and select the number that you want to call from the Action drop-down list.



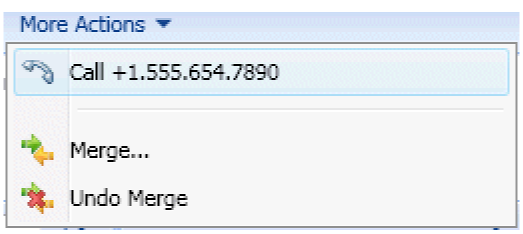
Contact icon

- Click the **Phone** icon to call the contact using the primary phone number associated with that contact. Click the Phone icon drop-down list to select the number that you will use to call the contact. If you are sending an e-mail, click the **E-Mail** icon.



Phone icon

- In the **More Actions** drop-down menu, select the number or e-mail address that you will use to call or send an e-mail message to the contact.

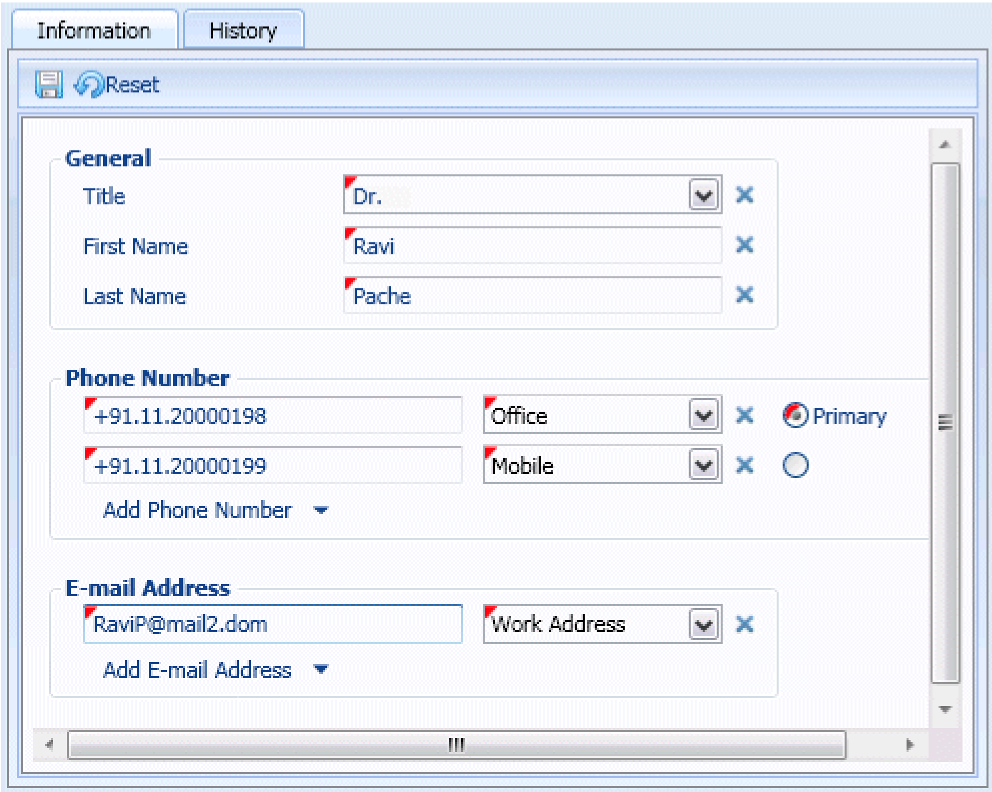


Call Contact More Actions menu

Any of these actions launches the outgoing Voice Interaction view. Use this view to handle the voice interaction.

Add Contacts

If you are configured to do so, you can add new contacts to the contact database by clicking the **Add Contact** icon () to launch the Add Contact view in the Contact Information tab.



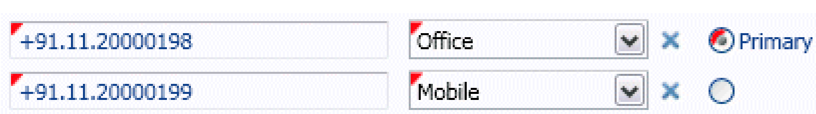
New Contact view

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. 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.

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** button. A new set of fields is added into which you can enter this information.

To specify a phone number or e-mail address as the *primary* contact number or address, click the **Primary** radio button next to the phone number or e-mail address that you want to specify as the primary for the contact.



Primary Phone Numnber

Delete Contacts

To delete a contact, you must first find the contact in the contact database and then select it in the Contact Directory.

Select one or more contacts that you want to delete, then click the **Delete** icon (

).

A confirmation dialog box is displayed. Click **OK** to remove the contact from the contact database permanently. Click **Cancel** to cancel the delete contact function; this leaves the contact in the contact database.

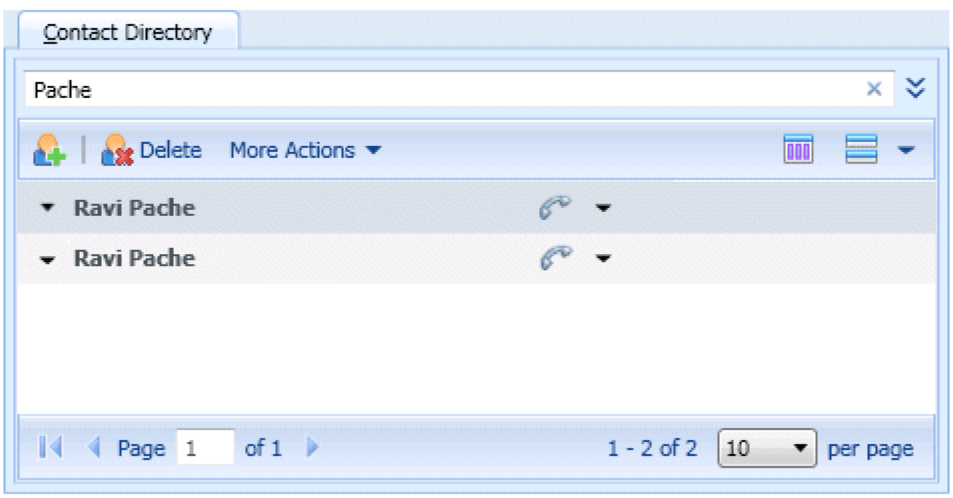
Merge and/or Unmerge Contacts

To Merge or Unmerge a contact, you must first find the contact in the contact database and select it in the Contact Directory.

Merge Contacts

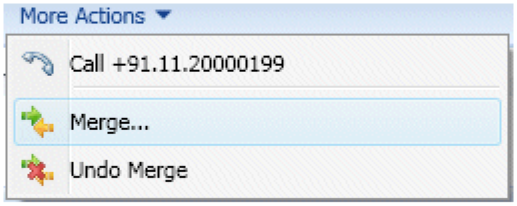
If there are two contact entries in the contact database for the same contact, you can merge the two entries into a single entry.

First, find the contact in the contact database, then select it in the Contact Directory.



Merge selected contact

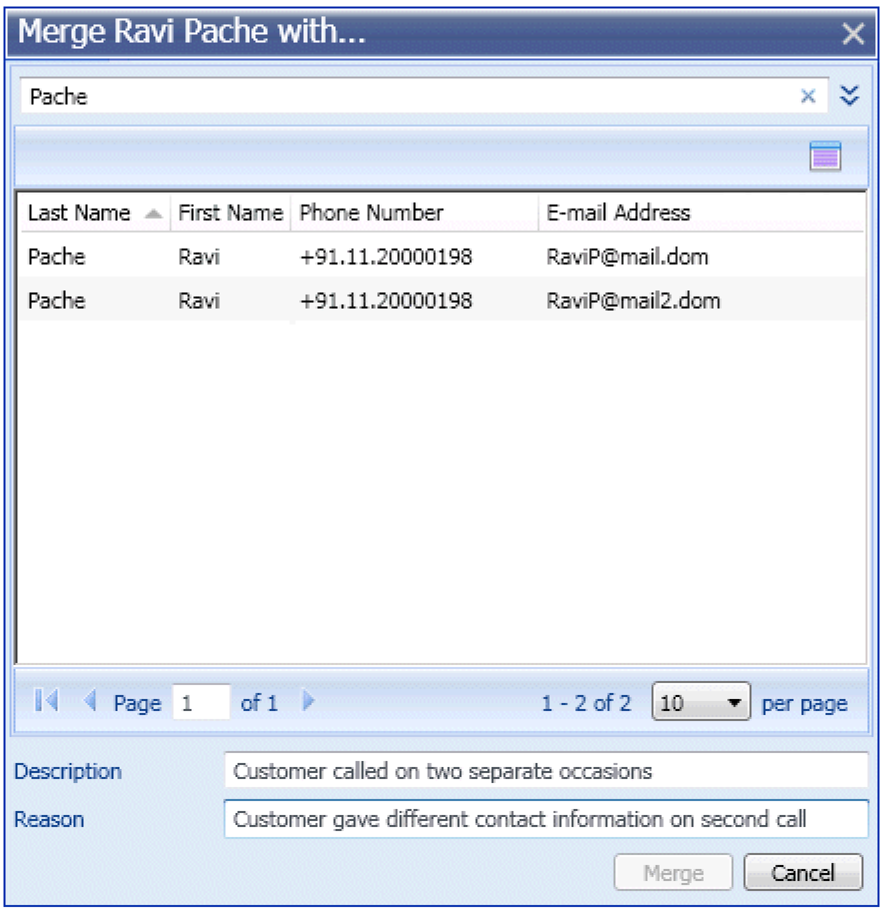
Click the **More Actions** menu and select **Merge**.



Merge More Actions menu

The Merge Contact dialog box is displayed. Use the search tools to find the duplicate contact, and then do one of the following:

- Click **Merge** to complete the merge of the two contact entries.
- Click **Cancel** to cancel the merge and return to the Main Window.



Merge with Contact dialog box

You might be required to enter a **Description** and/or **Reasons** for the merge. Use the fields after selecting the duplicate contact.

Unmerge Contacts

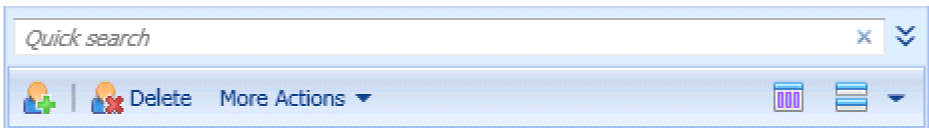
If there are two contact entries in the contact database that have previously been merged, you can unmerge them into their original contact entries.

First, find the contact in the contact database, then select it in the Contact Directory.

Click **Undo Merge**. A confirmation dialog box is displayed. Click **Yes** to unmerge and **No** to keep the contact merged.

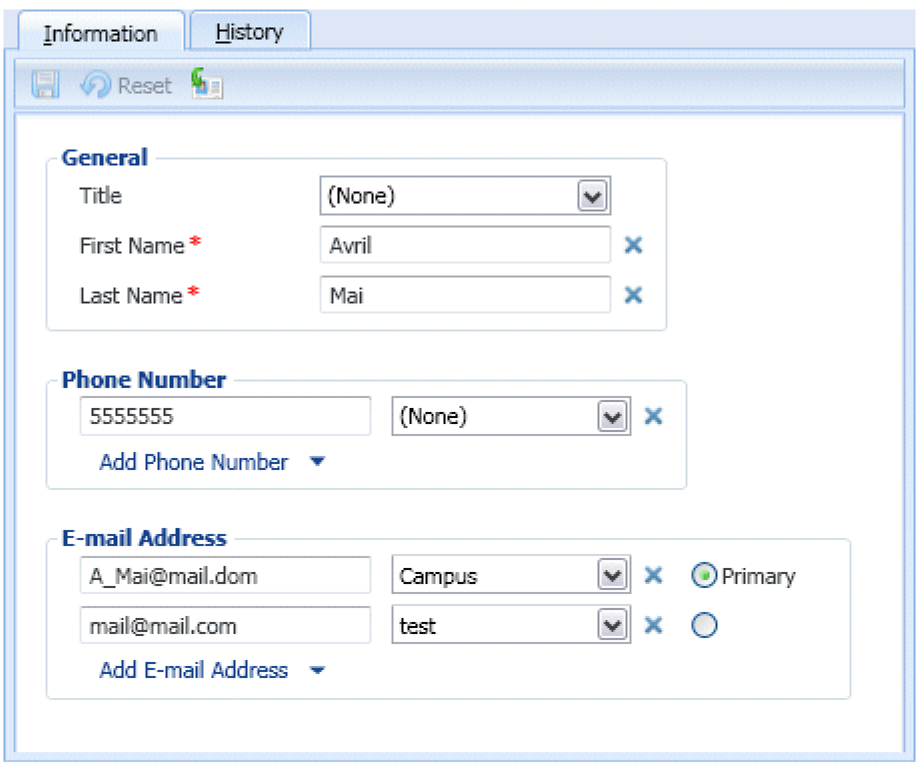
Contact Information and Contact History

Click the **Show Details Panel on Bottom/Hide Details Panel** button to show or hide contact information and contact history for the currently selected contact.



Contact Directory tool bar

The Contact Information view enables you to view and, if you are configured to do so, edit information for the currently selected contact. You might also be configured to assign an unknown interaction to a contact in the contact database by using the Manual Contact Assignment feature.

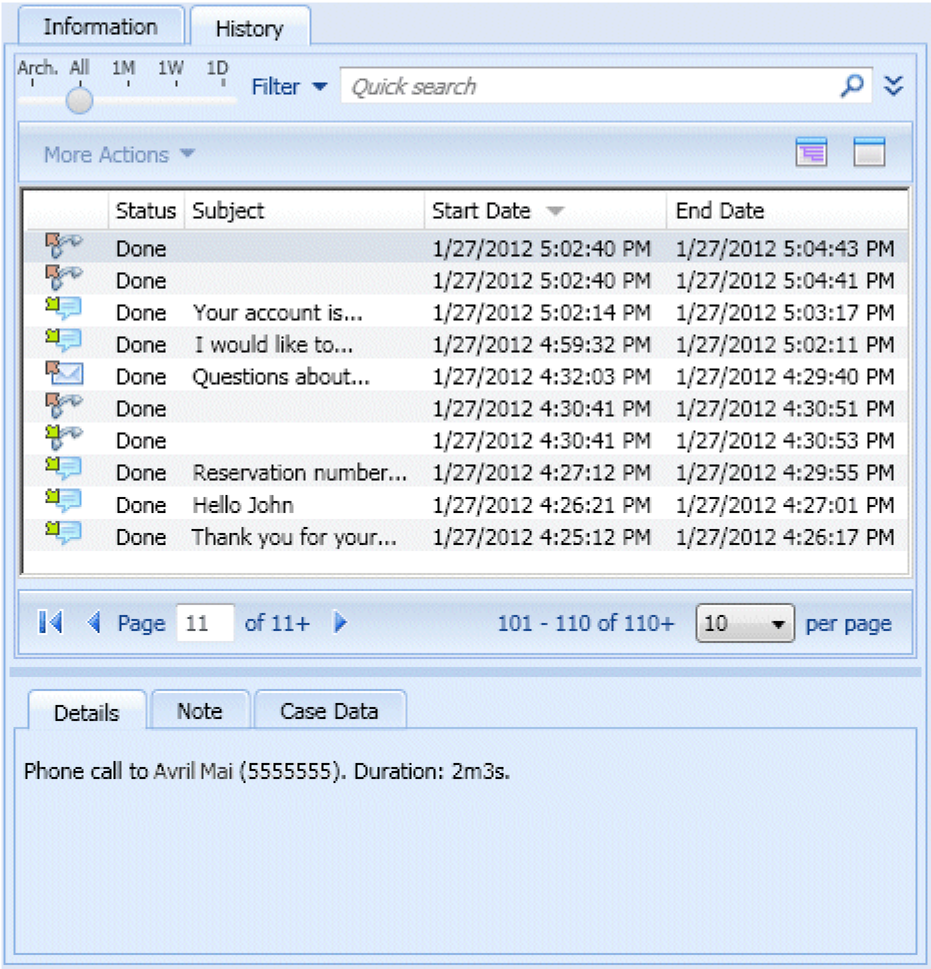


Contact Information view

The **Show Details Panel on Bottom/Hide Details Panel** () button in the Contact

Information view specifies where the Contact Information view is placed in the Contact Directory view: next to the directory or below the directory.

The Contact History view tab enables you to view and, if you are configured to do so, edit current and archived interactions that are associated with the currently selected contact.



Contact History view

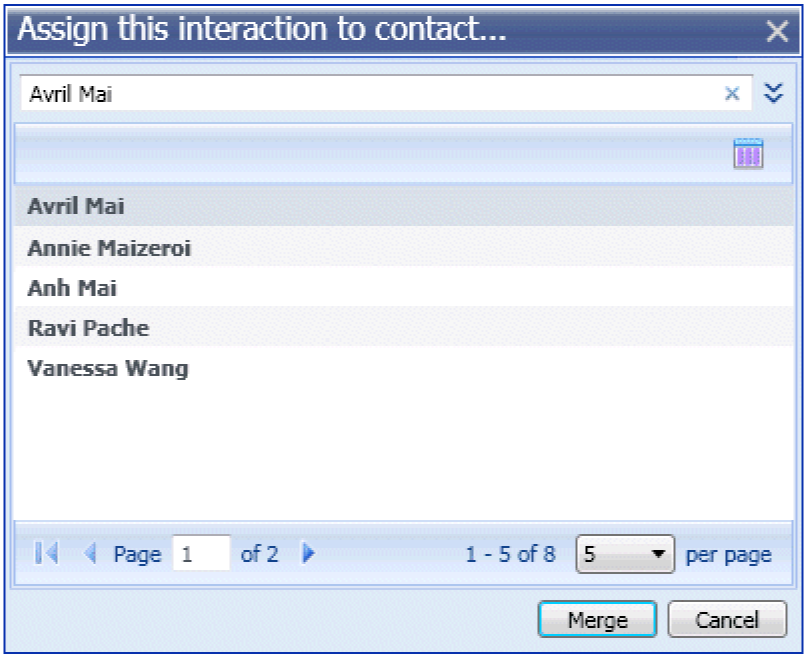
Change Contact

The Change Contact view enables you to assign a different contact for the selected interaction.

If an interaction has been incorrectly assigned to a specific contact, or if a new contact was created for an interaction when the contact already existed in the contact database, you can assign an open interaction to a specific Contact by using the **Change this interaction to contact** view.

In the **More Actions** menu, select **Change Contact**. The Change this interaction to contact view is displayed.

Use the Quick Search or the Advanced Search to find the Contact to whom you want to assign the interaction that you selected in the My History view or the Contact History view.



Assign This Interaction to Contact dialog box

Select the contact from the result list and then click **Merge** to assign the interaction to the Contact History for the selected contact. Click **Cancel** to return to the My History view or the Contact History view without assigning the interaction to a contact.

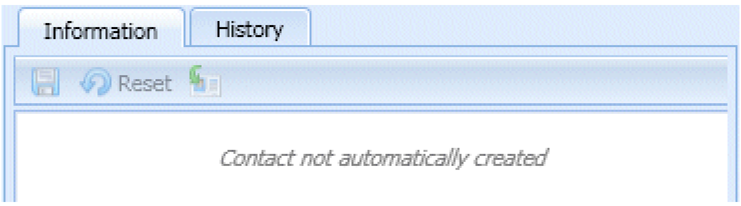
You can verify that the update to the interaction record was completed correctly by selecting the interaction in the My History view or the Contact History view and checking the Details tab. You can also search for the interaction in the contact database.

You can also use the **Assign Another Contact to This Interaction** button to manually reassign an interaction that has been incorrectly assigned to the wrong contact.

Manual Contact Assignment

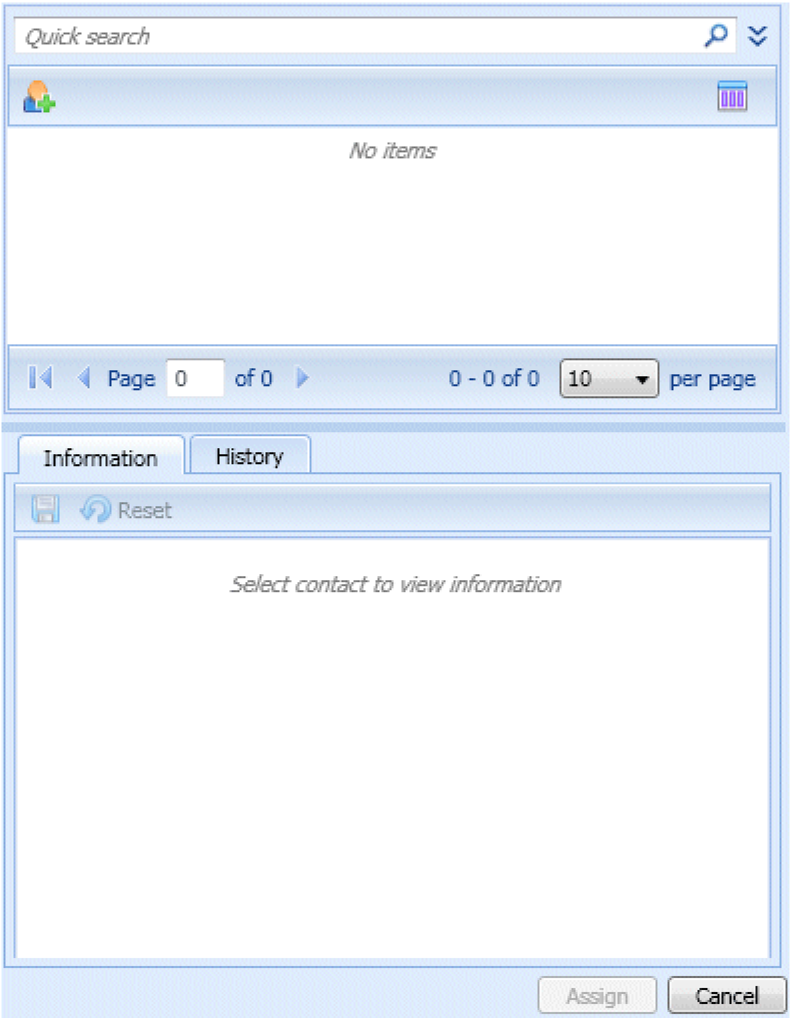
Sometimes a known contact might connect anonymously to your contact-center by using a phone, e-mail account, or other media that is not part of the information that is stored about that contact in the contact database.

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.



Contact Information view

If you identify the contact as being one of your known contacts, you can add the interaction to the history of the contact by clicking **Assign Another Contact to this Interaction** ( ). The Contact Search view is displayed.



Manual Contact assignment

In the **Quick Search** field, enter the name, or other identifying information of the contact, and click the magnifying-glass icon to begin the search of the contact database.

In the **Search Results** list or grid, select the correct contact.

Click **Assign** to assign this interaction to the selected contact. The interaction is added to the Contact History. Click **Cancel** to return to the blank Contact Information view.

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 incorrectly assigned to the wrong contact. You can also use the Change Contact view.

Spelling Check

The spelling-check feature enables you to verify the spelling of the content of your message before you send it by using an interactive Spelling Checker. You have access to three dictionaries: a corporate dictionary that is defined by your administrator, a language-specific dictionary that you can choose from a drop-down menu, and a personal dictionary that is called My Dictionary.

Interaction Workspace creates a single dictionary for each agent. Any additions or changes that you make affect only your personal dictionary. If you are working at a different workstation, you can still access your personal dictionary, provided that you are logged in under your unique user name and password.

As you type your message, a red wavy line appears below each word that is not in the spelling-check dictionary that you have specified. Right-click the misspelled word to correct it or to add the word to your personal dictionary. You can also choose to ignore once (**Ignore**) or always ignore (**Ignore All**) the spelling.

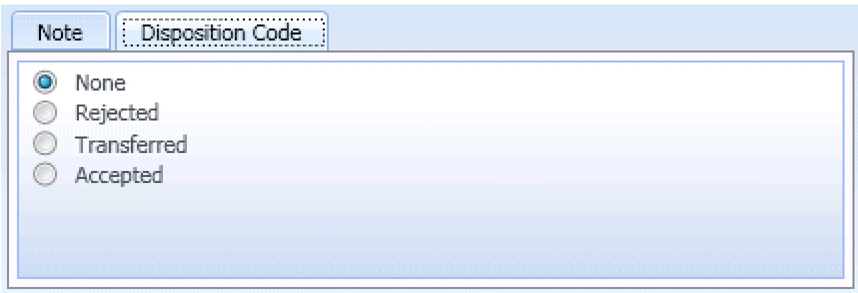
The spelling-check context menu contains the following options:

- **Suggestions**—A list of words from the currently selected dictionary that might be the correct spelling of the underlined word.
- **Ignore**—Do not mark this instance of this spelling as incorrect.
- **Ignore All**—Do not mark any instance of this spelling as incorrect.
- **Add to Dictionary**—Add this spelling to the currently selected dictionary.
- **Spell Checking**—Turn spelling check on and off.
- **Languages**—Select the language that you want to use for spelling check.

Disposition Code

The Disposition Code view enables you to assign one or more codes to an ongoing or terminated interaction to qualify the outcome of the interaction.

The Disposition Code view is a tab in the Interaction window. It contains a checklist of options that you can click to specify the outcome of the interaction.



Disposition Code view

Click a disposition radio button to select a disposition code for the interaction.

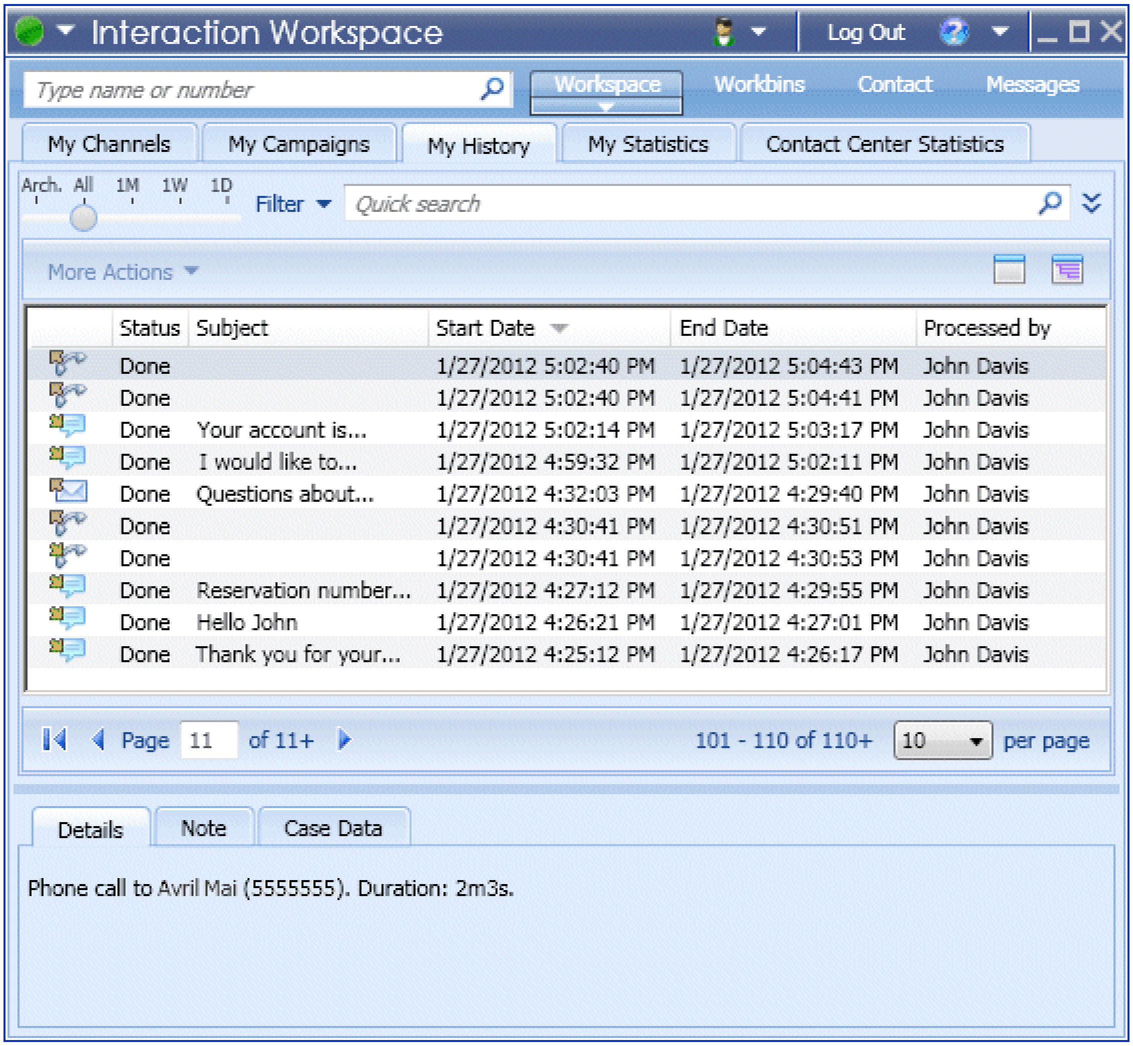
Depending on your system configuration:

- You might have to set a disposition code before you click **Mark Done**.
- You might be able to click **Mark Done** without a disposition code.
- The Disposition Code view might not be displayed.

My History

The My History view enables you to view and manage your previous interactions with a contact.

In the Main Window, click the **Workspace** button, and then click the **My History** tab to access the My History view. If you are using the Gadget, this information is available from the My History view.



My History tab

Use the My History view to do the following:

- Find interactions. The Quick Search and Advanced search return only your interactions.
  - Searching on a phone number, status, start date, or end date returns a list of your interactions that match the criterion or criteria.
  - The search and filter tools work the same in this view as they do in the Contact History view, except

that they return only your interactions, not all interactions that match the criteria.

- Perform the following actions on selected interactions:
  - Mark done voice interactions.
  - Reply/Reply All to e-mail interaction.
  - Resend a previously sent e-mail.
  - Open in-progress inbound and outbound e-mail interactions (that are in the process of being routed out of and into workbins and queues).
  - Assign contact for the selected voice interaction assigns the interaction to an existing contact.
- View information about the selected interaction.

Interaction Workspace enables you to view information details about interactions that you have selected in the My History view. The **Show Details Panel on Bottom**/**Hide Details Panel** button ( ) enables you to specify how the Details panel is displayed. Click the **Show Details Panel on Bottom**/**Hide Details Panel** button to choose one of the following views:

- Details Panel Right
- Details Panel Bottom
- Hide Details Panel

Grid View and Tree View

Interaction Workspace enables you to view contact interactions either chronologically or as threads. The **Show Interactions in Grid View**/**Show Interactions in Tree View** button (/) enables you to specify how the My History panel is displayed. Refer to the Contact History page for information about how to use the features of the Contact History view, including opening in-progress interactions and resending e-mail interactions that have been marked as **Done**.

Grid View displays interactions chronologically, 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 conversation, social-media threads, and so on).

The Details panel contains three tabs:

- Details
- Notes
- Case Data

Notepad

The Notepad is a feature that enables you to enter comments about the current interaction or about a selected interaction in the History database. The comments are stored as a part of the history for the contact. The contents of the Notepad can be viewed by any agent who views the contact's history.

The Notepad is available as a tab in the following views:

- Voice Interaction
- E-Mail Interaction
- Chat Interaction
- Workitem Interaction
- History

Type notes in the Notepad text field. Click **Save** to save the notes as part of the interaction.

Responses

The Responses view enables you to access a database of prewritten standard responses for your interactions. You can insert these responses as replies into any outbound interaction, such as an e-mail or a chat message, or you can read them to the contact during a phone interaction.

After inserting a response into an outbound interaction, such as an e-mail or a chat message, you can modify the contents of the text.

Using the Responses View

To access the Responses view, click the vertical **RESPONSES** button on the active-interaction window.

The Responses view comprises two main areas, the Search and Filter area and the Responses Explorer.

Search and Filter

The Search and Filter area enables you to specify keywords for which to search in your company's Standard Response Library. It has the following features:

- **Search field**—Enter the keyword for which you want to search, and click the magnifying-glass icon to initiate the search.
- **Search type**—A drop-down list that enables you to search using one of the following strategies:
  - **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.
- **Basic/Advanced Search**—Specify where to search for the specified keywords; enables you to limit or expand the search.
  - **Responses Names**—Search for the keywords in the names of the responses.
  - **Responses Body Text**—Search for the keywords in the body of the responses.
- **View**—A drop-down list that enables you to view:
  - **All Responses**—All of the prewritten responses that are available for you to use.
  - **Favorite Responses**—Those prewritten responses that you have designated as favorites.
  - **Suggested Responses**—Responses are selected automatically, based on categories, and sorted according to their relevance to the content of the incoming interaction. You can select an auto-suggest response and insert it into your reply. Then, you can modify the text of the auto-suggest

response as necessary. Responses are ranked according to their relevance to the incoming interaction. You can choose to sort by Response name, Relevance, or Parent category by clicking the respective column head in the Responses List view.

Note: The search is applied to the selected view; to clear the search criteria and display all contents, click the **X** in the search field.

Responses Explorer

The Responses Explorer contains a tree view of folders (standard-response categories) and pages (standard-response documents). You can change the view to a sortable table view of response documents and Parent Category folders.

The Responses Explorer enables you to:

- View the responses that meet the criteria that you have specified in the Search and Filter area.
- Navigate the responses folders and documents by clicking folders to open or close them and clicking documents to select them.
- Insert standard-response text into the current interaction at the insertion point by selecting a response document and then clicking **Insert Standard Response Text** ().
- Add the currently selected response document to your list of favorites by clicking **Add Standard Response** into Favorites Responses ().
- Remove the currently selected response document from your list of favorites by clicking **Remove Standard Response from Favorites Responses** ().
- Show results in List view or in Tree view by clicking the **View Mode** button ().
- Show and hide the responses details area by clicking the **Show Detail**/**Hide Detail** () button.
- View the contents of the selected response document in the responses details area.
- Copy content from the responses details area and paste it into the message area of your e-mail or chat interaction.

Schedule a Callback

There are two types of callbacks that you can reschedule:

- Outbound campaign interaction callback
- Web Callback interaction callback

Rescheduling a Callback

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–call interaction window, in the call-action tool bar, click **Schedule a Callback** (). The Schedule a Callback view is displayed.

Click the **Schedule Callback** check box to reschedule the call. After you have specified a new date and/or time and, if necessary, a new number, click **End Call** () to disconnect the call. Click **Mark Done** () to schedule the callback. The **Schedule a Callback** button changes to after the callback has been scheduled.

To set a new date, either enter a new date in the date field or use the calendar view to click a new day. Use the left and right arrow buttons to change the month and year.

To set a new time, either enter a new time in the time field or use the up and down arrow buttons to change the hours, minutes, and seconds.

Click **Personal Callback** to schedule the callback from you personally. Leave the **Personal Callback** check box clear to send the interaction back to the calling queue.

To select a new number for the contact, click the **Phone** drop-down list, and choose a different number.

To add a new number that is to be used for the callback, click **New Phone Number**. The Add New Number view is displayed. The following options are available for you to use:

- **Phone**—Enter a new phone number that is to be used for the scheduled callback.
- **Type**—Select a voice or other media type, such as a mobile phone.
- **From**—Select a start time for which the device can be contacted.
- **Until**—Select an end time for which the device can be contacted.

Rescheduling a Web Callback

You can reschedule a Web Callback call (for example, if the contact does not answer at the time that he or she requested the Web Callback) to a different date and/or time by using the Schedule a Callback function.

In the Web Callback Preview window, in the call-action tool bar, click **Schedule a Callback** ( ). The Schedule a Callback view is displayed.

Click the **Schedule Callback** check box to reschedule the call. Use the **On** field to enter a new date, or use the Calendar picker to click a new date. Specify a new time and call duration by using the **From** and **Till** fields. The clock-face display will update to show the new "from" time.

If necessary, you can specify a new number by selecting a number for the contact from the **To** drop-down list.

After you have specified a new date and/or time and, if necessary, a new number, click the **X** to close the Schedule a Callback view. The **Schedule a Callback** button changes to after the callback has been scheduled.

Click **Mark Done** ( ) to schedule the callback to the date and time that you specified. At the specified date and time, the Web Callback interaction notification is displayed on your desktop.

Printing

The Print Preview window enables you to specify the format of e-mail interactions before you print them.

To display the Print Preview window, open an e-mail interaction then click **Print** ().

The Print Preview window enables you to do the following:

- Print the e-mail interaction by applying the layout that you specify in the Print Preview window. Click **Print** to print the specified layout. Click **Cancel** to close the Print Preview window.
- Select a destination printer from the **Destination** drop-down list of printers that are available on your network.
- Specify which pages to print: all pages, a range of pages and/or specific pages. Click **All** to print the entire document. Into the text field, enter a range—for example **2-6**—or individual page numbers, separated by commas.
- Specify the number of copies to print in the **Copies** field.
- Specify a **Portrait** or **Landscape** layout.
- Specify the page margins. Select **Uniform Margins** to make all of the margins match the value that you specify for the top margin, or un-select **Uniform Margins** and specify the margins for the top, left, right, and bottom margins. Margin units are determined by your local settings.
- Add page numbers to the printout.
- Print by using the **System Print** dialog box.

In the Print Layout view, you can preview your printout. The Print Layout view contains the following controls:

- Zoom in/out
- View at 100%
- Fit the page into the view by page width
- Fit the whole page into the view
- View pages as front and back pairs side-by-side