GENESYS
AN ALCATEL-LUCENT COMPANY

Interaction Workspace 8.0

User's Guide

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Preface

Welcome to the *Interaction Workspace User's Guide*. This document introduces you to the concepts, terminology, and procedures that are relevant to Interaction Workspace.

This document is valid only for the 8.0 release(s) of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

This preface contains the following sections:

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 151.

About Interaction Workspace

Interaction Workspace is the customer-interaction interface for the Genesys 8 suite. The Interaction Workspace application enables you to manage from your workstation desktop both Public Switched Telephone Network (PSTN) and Internet-based contact interactions.

Interaction Workspace comprises a collection of modules that encompass tasks and sets of related tasks. The tasks and sets of related tasks enable you to handle customer interactions, manage your status, and interact with others in your contact center.

On your workstation desktop, Interaction Workspace displays both atomic and composite views which enable you to perform the tasks that are assigned to you. Atomic views typically enable you to perform a single function, such as viewing case data or specifying a disposition code. Composite views enable you to perform multiple functions, such as previewing and accepting interactions; managing your status, channels, and contacts; or viewing your messages, KPIs, and contact center statistics.

Your administrator can personalize the appearance of Interaction Workspace in the Genesys Configuration Layer. If you are configured to do so, you can personalize your instance of the application by using settings that enable you to specify font size, font color, column order, and so on.

Interaction Workspace can be customized through the application programming interface (API). You also can create your own modules that plug-in through the Interaction Workspace API. For information about writing custom modules or modifying existing modules to better meet your needs, refer to the *Interaction Workspace Developer's Guide*.

Intended Audience

This document is primarily intended for contact center supervisors, trainers, and administrators. It has been written with the assumption that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications.
- Network design and operation.
- Your own network configurations.

You might also be familiar with Genesys Framework architecture and the use of Genesys Administrator.

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Document Change History

This section lists topics that are new or that have changed significantly since the first release of this document.

New in Document Version 8.0.201.00

The following topics have been added or significantly changed since the initial 8.0 release:

- “Finding Contacts, Internal Targets, and Interactions” on page 22
- Inactivity Timeout notice on page 25 and page 31
- Information for SIP enabled agents to the following:
  - Procedure: Logging In to Interaction Workspace, on page 27
  - Procedure: Handling an Inbound Voice Interaction, on page 39
  - Procedure: Calling an internal target, on page 54
  - Procedure: Calling a contact, on page 57
  - Procedure: Initiating a Voice conference, on page 62
  - Procedure: Receiving a conference call, on page 67

  - Procedure: Initiating a Voice transfer, on page 74
  - Procedure: Receiving a transferred call, on page 78
- "Managing Your History" on page 115
- "Managing Contacts and Contact Information" on page 119

Chapter

1 Interaction Workspace Concepts

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

This chapter contains the following sections:

Introduction

Interaction Workspace is the customer-interaction user-interface for the Genesys 8 suite.

The Interaction Workspace application enables you to manage, from your workstation desktop, both Public Switched Telephone Network (PSTN)-based and Internet-based contact interactions.

Interaction Workspace enables you to handle customer interactions, manage your status, and interact with others in your contact center.

Privileges are assigned to you, based on your role. You might be a junior agent who has only a limited set of media and controls, you might be an expert agent who has access to all of the privileges that are available through Interaction

Workspace, or you might have a specialized role created for you by your administrator that enables you to handle specific types of interactions.

Interaction Workspace Windows and Views

Interaction Workspace displays on your workstation desktop a set of Composite Views, which are composed of Atomic Views components that enable you to perform the tasks that are assigned to you, based on your privileges. Composite views enable you to perform multiple functions, such as previewing and accepting interactions; or managing your status, settings, and contacts. Atomic views typically enable you to perform a single function, such as viewing case data or specifying a disposition code.

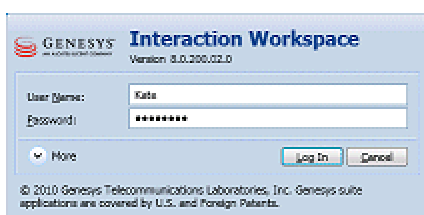
Some atomic views, such as the Case Data view, are displayed in separate windows. Other atomic views are part of a composite view, such as the Voice Interaction window; these are displayed in one window along with other atomic views.

Refer to the *Interaction Workspace 8.0 Help* for details on the functionality in each window and view.

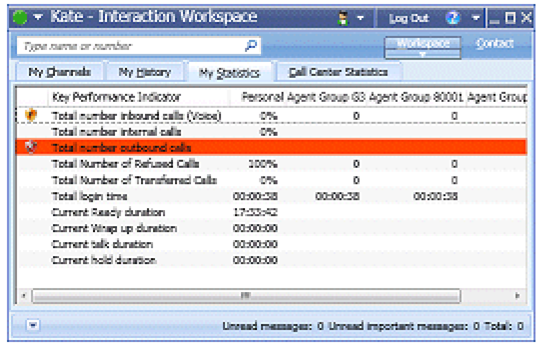
Composite Views

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

- **Login Window**—The first view that you see (refer to Chapter 2). It enables you to identify yourself and, if required, enter additional login data, based on your role or on the technical environment.

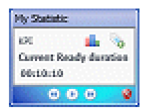


- **Main Window**—Enables you to manage your status, contacts, and settings; view your Key Performance Indicators (KPIs) and system messages; and launch new interactions (refer to “Interaction Workspace Main Window” on page 18).

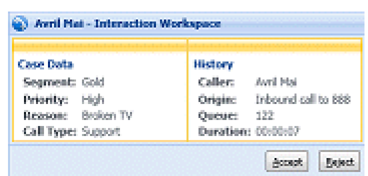


- **Gadget**—Enables you to manage your status and contacts, create new interactions, and access information about interactions that are currently active (refer to “Interaction Workspace Gadget” on page 19).

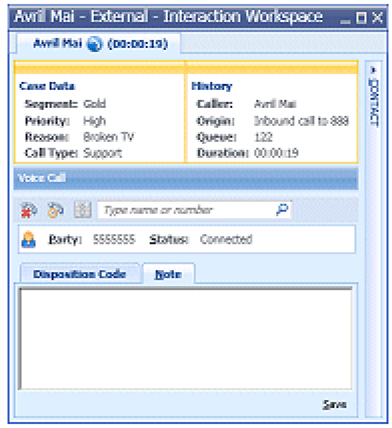
- **Statistics Gadget**—Enables you to view your KPIs and Contact Center Statistics in a permanent view. Statistics can be viewed in a ticker and/or in a static view (refer to “Statistics Gadget” on page 21).



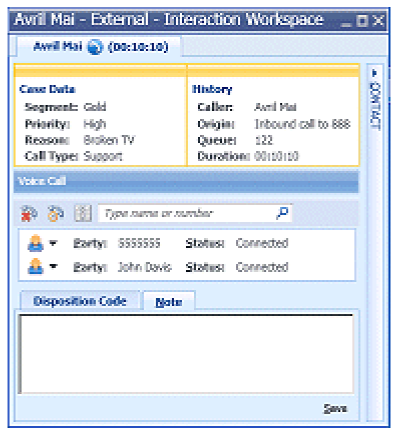
- **Interaction Preview**—Displays an interactive notification of a new inbound interaction. The preview includes attached data to enable you to decide whether to accept, reject, or redirect the interaction (refer to Chapter 5).



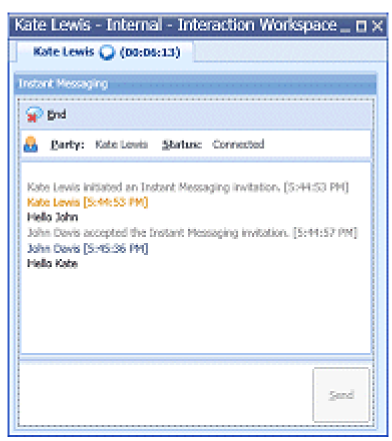
- **Voice Interaction Window**—Enables you to view all of the information that is necessary to handle a voice interaction with a customer (refer to “Interaction Workspace Interaction Window” on page 20). This window also contains information about contacts and the Team Communicator (refer to “Atomic Views” on page 17).



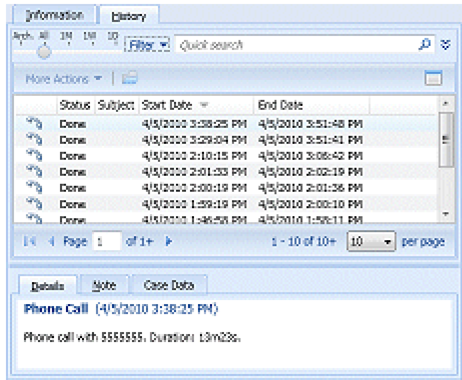
- **Voice Consult**—Enables you to initiate a call to an internal expert or support person. It is part of the Team Communicator functionality (refer to "Atomic Views").



- **Internal IM**—Enables you to initiate an Instant Messaging (IM) session with an internal expert or support person. It is part of the Team Communicator functionality (refer to "Atomic Views").



- **History**—Enables you to view case data (business context of the case). Compiles the attached data that is associated with the main interaction of the case into a Case History (refer to Chapter 13). It is part of the voice interaction functionality.



Atomic Views

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

The following atomic views are included in Interaction Workspace; however, through customization, many more can be created:

- **Case Data**—Provides you with critical information about the active interaction. The information that is provided is configured by your system administrator.
- **Contact Summary**—Provides you with critical information about the contact who is involved in the active interaction.
- **Voice Media**—Enables you to control the active voice interaction or start a new interaction.
- **Voice Internal**—Enables you to control the active internal voice interaction or start a new internal interaction.
- **Case Toolbar**—Enables you to hold, connect, and end current interactions.
- **Disposition Code**—Enables you to assign one or more codes to an ongoing or terminated interaction to qualify or characterize the outcome of the interaction.
- **Notepad View**—Enables you to record information about the current interaction or view attached data.
- **History List**—Enables you to view the history of interactions with the selected contact.
- **History Interaction Details**—Enables you to view the details of previous interactions with the selected contact.

- **Contact Record**—Enables you to view information about contacts that has been collected by your contact center.
- **Team Communicator**—Enables you to call an internal target or contact, start a conference, or transfer the current interaction.
- **Child Interaction Navigator**—Enables you to view and select any **"**child**"** interactions that you have initiated that relate to the current customer interaction (the parent interaction), such as an internal consultation call or a chat with another agent.
- **IM Media**—Enables you to initiate or receive Instant Messaging (IM) interactions.
- **My Status**—Enables you to monitor the status of your media channels.
- **My Messages**—Provides you with up-to-date information about the status of your contact center, changes that are related to your activities, and business messages that your leads send to you.
- **Preferences**—Enables you to control the appearance of various Interaction Workspace interface components.
- **Recent Items**—Enables you to select a recent contact from a drop-down list.
- **My History**—Enables you to view a record of your recent activity.
- **My Statistics**—Enables you to view your Key Performance Indicators (KPIs).
- **Contact Center Statistics**—Enables you to view the statistics of your contact center.

Interaction Workspace Main Window

The Interaction Workspace Main Window (see Figure 1) is a module that enables you to manage your channels, status, KPIs, contacts, and attached data. It can be used to initiate interactions, either directly or through a search of the contact database and interaction history. The Main Window supports simultaneous interactions on one or more channels and provides the interaction Preview interactive notification. You can use the Main Menu to set preferences, launch Help, switch to the Gadget, display the Statistics Gadget, and exit the application.

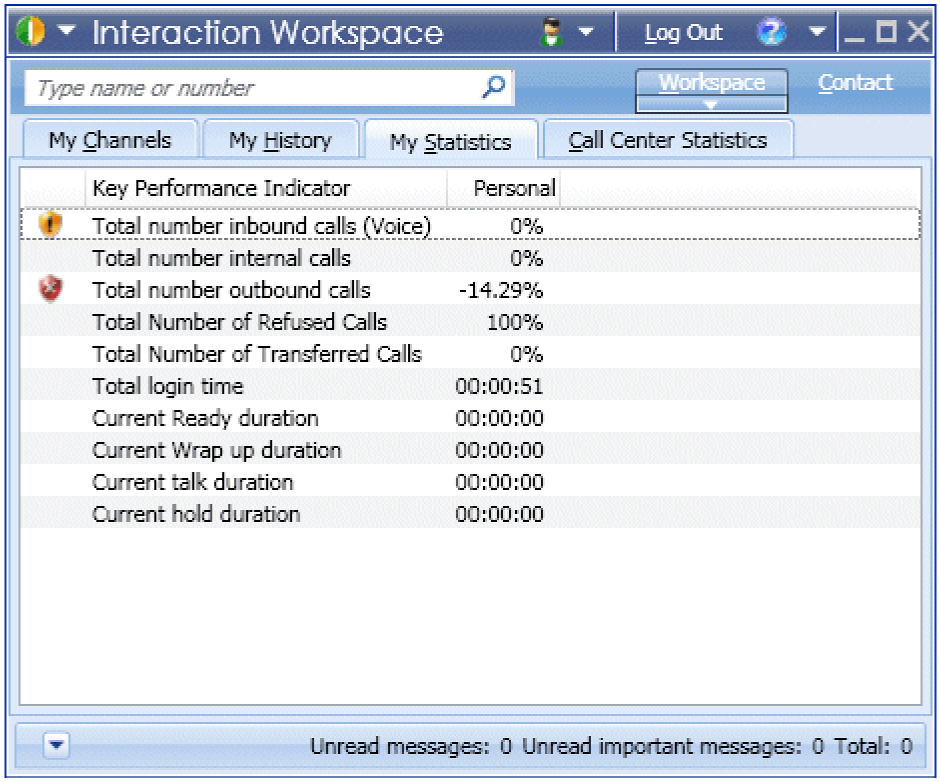


Figure 1: Interaction Workspace Main Window displaying personal statistics (KPIs)

For more information on the functions that are available in the Main Window, see the following chapters:

- **Go Ready**—Chapter 3
- **Set a Forwarding Number**—Chapter 4
- **Find an Internal Target or a Contact**—Chapter 6
- **Call an Internal Target or a Contact**—Chapter 7
- **IM an Internal Target**—Chapter 10
- **Manage Contacts**—Chapter 13
- **View Statistics**—Chapter 14
- **Receive Messages**—Chapter 15
- **Change the Appearance of Interface**—Chapter 16

Interaction Workspace Gadget

The Interaction Workspace Gadget (see Figure 2, “Interaction Workspace Gadget,” on page 20) is a module that acts as a simplified version of the Interaction Workspace Main Window (refer to “Interaction Workspace Main Window” on page 18). It enables you to view the status of your channels and initiate a new interaction. It also enables you to use the Main Menu to set preferences, launch Help, change Place, change channels, toggle to the Main Window, and exit the application.

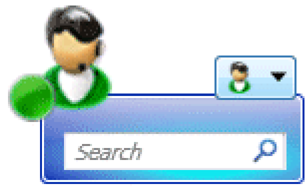


Figure 2: Interaction Workspace Gadget

For more information on the functions that are available in the Gadget, see the following chapters:

- **Go Ready**—Chapter 3
- **Set a Forwarding Number**—Chapter 4
- **Find an Internal Target or a Contact**—Chapter 6
- **Call an Internal Target or a Contact**—Chapter 7
- **IM an Internal Target**—Chapter 10
- **View Statistics**—Chapter 14
- **Receive Messages**—Chapter 15
- **Change the Appearance of Interface**—Chapter 16

Interaction Workspace Interaction Window

The Voice Interaction window (see Figure 3, "Interaction Workspace Voice Interaction window," on page 21) enables you to view all the information that is required to handle a voice interaction with a contact or an internal target.

You can view call status, history, and attached data. You can control the call, conference or transfer the call, enter notes about the call, and send DTMF.

For more information on the functions that are available in the Voice Interaction window, see the following chapters:

- **Find an Internal Target or a Contact**—Chapter 6
- **Call an Internal Target or a Contact**—Chapter 7
- **Conference with an Internal Target or a Contact**—Chapter 8
- **Transfer to an Internal Target or a Contact**—Chapter 9
- **IM an Internal Target**—Chapter 10
- **Transition an IM Consultation to a Voice Consultation**—Chapter 11
- **Set a Disposition Code**—Chapter 12
- **Manage Contacts and Contact Case History**—Chapter 13

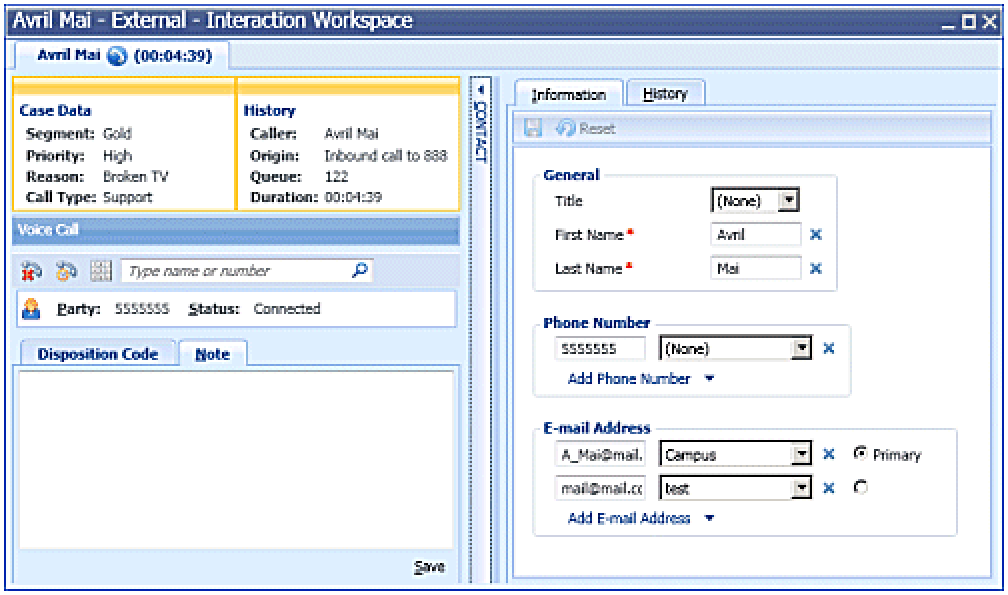


Figure 3: Interaction Workspace Voice Interaction window

Statistics Gadget

Statistics can be viewed either in the Main Window by selecting the `My Statistics` tab or the `Contact Center Statistics` tab in your Workspace, or by using the Statistics Gadget (see Figure 3).

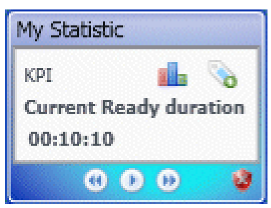


Figure 4: Statistics Gadget displaying Contact Center Statistics

The Statistics Gadget displays statistics in two ways:

- A statistics ticker
- A tagged-statistic view

The advantage of the Statistics Gadget is that you can view your KPIs and Contact Center Statistics continuously without having to open your Workspace and clicking back and forth between tabs.

For more information on the functions that are available in the Statistics Gadget, see the following chapter:

- **View Statistics**—Chapter 14

Finding Contacts, Internal Targets, and Interactions

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

- Grid mode
- List mode

Grid Mode

Grid mode performs a "starts-with" search that searches each field of the contact database for the phrase (name, phone number, e-mail address, or other criteria) that you provide in the search field.

Results are returned in tabular form and are sorted according to the default search field, such as Last Name.

The following views employ the grid-mode search:

- **Contact History view/My History view**—See:
  - Chapter 13, "Task: Manage Contacts," on page 105.

For more details on search results and the functionality in each window and view, refer to *Interaction Workspace 8.0 Help*.

List Mode

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

Results are returned in a list that is sorted according to the rules of Lucene scoring. In most cases, you can refine the search results by using the filtering features of the list view. For example, you can filter your search results so that only contacts or favorites are displayed.

The following views employ the list-mode search:

- **Main Window/Gadget**—See:
  - "Team Communicator Overview" on page 45.
  - "Finding an Internal Target or a Contact" on page 46.
  - "Sending and Receiving Internal Instant Messages" on page 84.
- **Voice Interaction Window**—See:
  - "Starting a Voice Conference" on page 62.
  - "Transferring a Voice Call" on page 74.
  - "Sending an Internal Instant Message then Transitioning to Voice" on page 92.
- **Contact History view/My History view**—See:
  - Chapter 13, "Task: Manage Contacts," on page 105.

For more details on search results and the functionality in each window and view, refer to *Interaction Workspace 8.0 Help*.

Definition: Role-Based

The Genesys 8 suite of products implement role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which role privileges (see “Definition: Role Privilege” on page 24) you are enabled to perform based on privileges assigned to your role.

Interaction Workspace comprises a set of Graphical User Interface (GUI) elements called views. The role that is assigned to you determines which Interaction Workspace views are enabled for you to use. The views enable you to complete your assigned tasks.

Examples of roles that may be enabled for some or all of the Interaction Workspace functionality include the following:

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

A user who is assigned to the role of Junior Agent may be enabled to perform the following role privileges:

- Set My After Call Work Status
- Perform a One Step Call Transfer
- Perform a Two Step Call Transfer
- Make an Outbound Call
- Specify a Disposition Code for an Interaction
- Put a Call on Hold and Resume a Call from Hold
- Send DTMF
- End an Active Interaction

A user who is assigned to the role of Expert Agent may be enabled to perform the following role privileges:

- Set My Do Not Disturb Status
- Set My After Call Work Status
- Perform a One Step Call Transfer
- Perform a Two Step Call Transfer
- Perform a One Step Call Conference
- Perform a Two Step Call Conference
- Make an Outbound Voice Call
- Make an Internal Voice Call
- Specify a Disposition Code for an Interaction

- Put a Call on Hold and Resume a Call from Hold
- Send DTMF
- End an Active Interaction
- Remove a Party from a Conference
- End and Resume to a Conference

Definition: Role Privilege

The Genesys 8 suite of products implement role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which tasks you are enabled to perform. A role privilege is a single functionality or set of functionalities that are required to complete a Use Case (see "Basic Use-Case Summary" on page 25).

Interaction Workspace contains role privileges that are used to handle customer interactions, manage your status, view your KPIs, set personal preferences, and consult with team members.

Role privileges are made available through views. Interaction Workspace is composed of both atomic views and composite views. Views contain the user-interface elements, such as buttons, menus, and text fields, that enable you to interact with Interaction Workspace. Atomic views typically perform single functions, such as setting preferences, viewing KPIs, or viewing the history of an interaction. Composite views contain atomic views that are grouped into a single composite interface.

Examples of Interaction Workspace role privileges that might be enabled for some or all users include the following:

- Login
- Select Media
- Set My Do Not Disturb Status
- Set My After Call Work Status
- Perform a One Step Transfer
- Perform a Two Step Transfer
- Perform a One Step Conference
- Perform a Two Step Conference
- Start an Internal IM Interaction
- Make an Internal Voice Call
- Make an Outbound Voice Call
- Specify a Disposition Code for an Interaction
- Put a Call on Hold and Resume a Call from Hold
- Send DTMF

- End an Active Interaction
- Record a Voice Interaction
- Remove a Party from a Conference
- End and Resume to a Conference
- Mute a Party in a Conference
- Clear a Conference

Basic Use-Case Summary

The intent of this user's guide is to enable you to learn the *basic* functionality of Interaction Workspace. Refer to the *Interaction Workspace 8.0 Help* for more details about each user-interface component. To access the context-sensitive Help from any window in the Interaction Workspace interface, open the Help menu, or press the `F1` key on your keyboard.

This section summarizes the *high-level* steps that you might follow to handle a voice interaction.

Note: During your use of Interaction Workspace, you might be locked out of Interaction Workspace and have your status set to Not Ready if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Interaction Workspace, you must reauthenticate and reset your status to Ready to receive new interaction. For more information, refer to *Inactivity Timeout* in the *Interaction Workspace 8.0 Help*.

Prerequisites

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

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

Starting the Application and Handling an Inbound Interaction

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

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

2. Log in to the system (see Procedure: Logging In to Interaction Workspace, on page 27).
3. Enter your additional authentication information.
4. Enter a media channel or select one from the list.
5. In the Main Window set your status to `Ready` (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).

   Your default view might be the Gadget. Only basic communication and agent status functionalities of Interaction Workspace are available from the Gadget.
6. Accept inbound interactions that are routed to you (see Procedure: Handling an Inbound Voice Interaction, on page 39).
7. Handle each inbound interaction. This step can include any or all of the following functions:
   - Make a consultation call (see Procedure: Initiating a Voice conference, on page 62).
   - Transfer the call (see Procedure: Initiating a Voice transfer, on page 74).
   - Update the Contact History (see "Managing Contact History" on page 105).
   - Update the Notepad (see "Managing Contact History" on page 105).
   - Send or receive an internal Instant Message (IM) (see "Instant Messaging Overview" on page 83).
8. Complete the interaction.
9. If required, enter a disposition code (see "Assigning Disposition Codes" on page 99).
10. Click `Mark Done`.
11. Complete any required aftercall work.
12. Click the close box to close the Interaction view.
13. Set your status to `Ready` (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).
14. View your Key Performance Indicators (KPIs) or the KPI status of your group (see Chapter 14, "Task: View KPIs and Statistics," on page 131).
15. After you have completed all of your tasks for the day, select `Log Out` from the Main Menu.

Chapter

2 Task: Log In

In this chapter, you will learn how to launch the Interaction Workspace application from your workstation, provide authentication information, and log in to your system.

This chapter contains the following section:

Getting Started

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

Procedure:
Logging In to Interaction Workspace

Purpose: To authenticate yourself on the system and choose your channels.

Prerequisites

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

Start of procedure

1. Start the Interaction Workspace application by doing one of the following:
   - Double-click the Interaction Workspace icon on your workstation desktop (see Figure 5).
   - Open the `Start` menu and choose `Interaction Workspace` from the `Genesys Telecommunications Laboratories` program group.
   - Select the Interaction Workspace ClickOnce web link that was provided to you by your system administrator.

Figure 5: Interaction Workspace desktop shortcut

2. In the Login view, type your user name and password (see Figure 6).

Figure 6: Initial login view

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

3. Click `Log In` to log in, or click `Cancel` to stop logging in and close the Login view.

4. After you have successfully logged in, a new view opens in your browser in which you can specify additional information, based on the tasks that you want to perform. The contents of the view are defined by your administrator; they are specific to your role.

   Additional information that you might have to specify includes your Place, your queue, your agent login, your agent password, your phone number, and what media you want to use (such as Voice or Instant Messaging). Figure 7 shows an example of a secondary login view. The view that is displayed on your screen might be different.

Figure 7: Example of the System Parameters login view. Your view might be different

If your company is using a SIP Server, you might be configured to log in by using a remote phone number at which you can be reached if you are not logged in from a phone that is on the internal phone system of your company (see Figure 8).

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

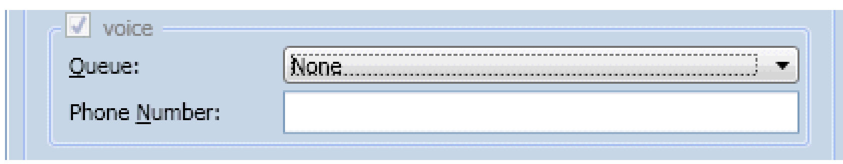


Figure 8: Remote phone number field in the System Parameters login view

5. Click `OK` to submit your information. Click `Cancel` to stop logging in and close the Login view.
6. If authentication is successful, the Main Window view or Gadget is displayed. If your status is configured to be set to `Ready` by default, you are ready to receive interactions that are routed to you.

End of procedure

Next Steps

- Set your status to `Ready`—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.

- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

3 Task: Manage Your Status

In this chapter, you will learn how to manage your status in the Main Window.

This chapter contains the following section:

Note: You might be locked out of Interaction Workspace and have your status set to Not Ready if you do not use your keyboard or mouse for an inactivity period that is defined by your administrator. If you are locked out of Interaction Workspace, you must reauthenticate and reset your status to Ready to receive new interaction. For more information, refer to *Inactivity Timeout* in the *Interaction Workspace 8.0 Help*.

Going Ready

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

Procedure:
Going Ready in the Interaction Workspace Main Window

Purpose: To set your status to `Ready` so that you can receive Voice Interactions.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. If your status is configured to be set to `Ready` by default, you receive interactions that are routed to you as soon as you log in.
2. Otherwise, click the Status icon to change your status to `Ready` (see Figure 9) so that inbound interactions can be routed to you.

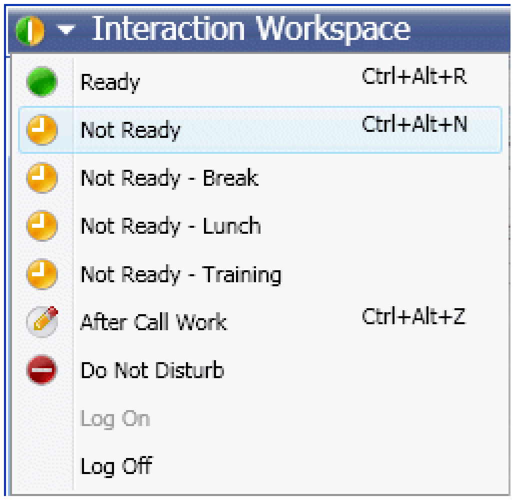


Figure 9: Example of a Status menu

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

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

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

3. You can check your ready status by hovering your mouse pointer over the Status icon (see Figure 10).

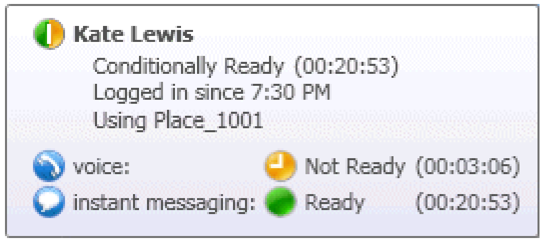


Figure 10: Status Summary pop-up

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 just your Ready state is displayed.

4. If you are logged in to more than one channel, you can manage the ready status of each channel individually by using either the My Channels tab in the Workspace of the Main Window or the My Channels window, which is opened from the Gadget.
   a. In the Main Window, click `Workspace`.
   b. Click the `My Channels` tab (see Figure 11).

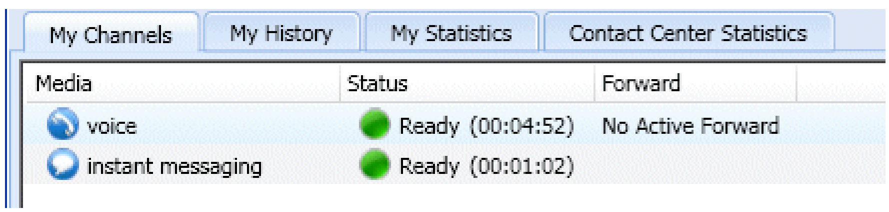


Figure 11: My Channels tab

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

End of procedure

Next Steps

- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.

- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

4 Task: Forward Your Calls

In this chapter, you will learn how to forward your call by using the My Channels tab in the Main Window.

This chapter contains the following section:

Forwarding Calls

You can forward your calls to a different destination.

Procedure: Forwarding your calls to a different destination

Purpose: To specify a different destination to which your calls are directed temporarily.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. To forward calls to a different destination, in the Main Window, click Workspace.
2. Click the My Channels tab.
3. On the media channel that you want to forward, right-click in the Forward column, and select Forward (see Figure 12).

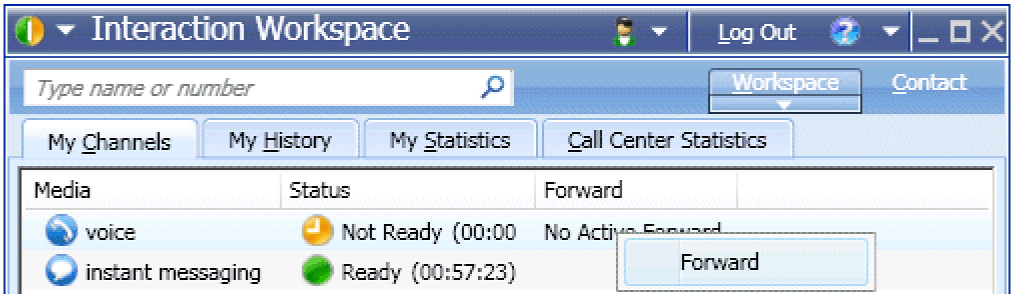


Figure 12: Main Window Workspace My Channels Forward menu

The `Forward` dialog box is displayed (see Figure 13).

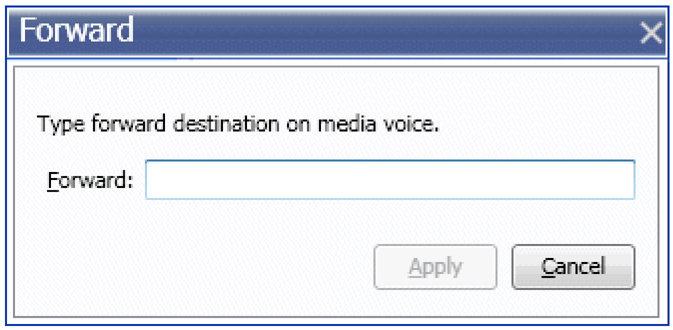


Figure 13: Forward dialog box

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

Canceling Your Call Forward

6. If you have an active forward set and you want to disable it, in the `My Channels` tab, right-click in the `Forward` column and select `Cancel Forward` (see Figure 14).

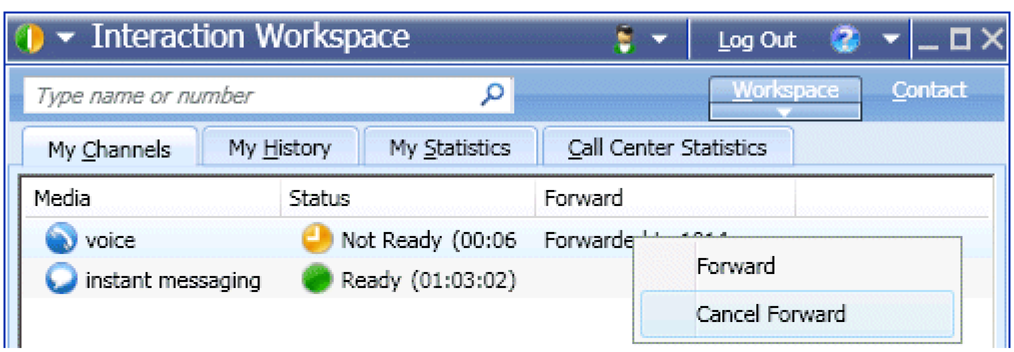


Figure 14: Main Window Workspace My Channels Forward menu selecting Cancel Forward

The `Cancel Forward` dialog box is displayed (see Figure 15).

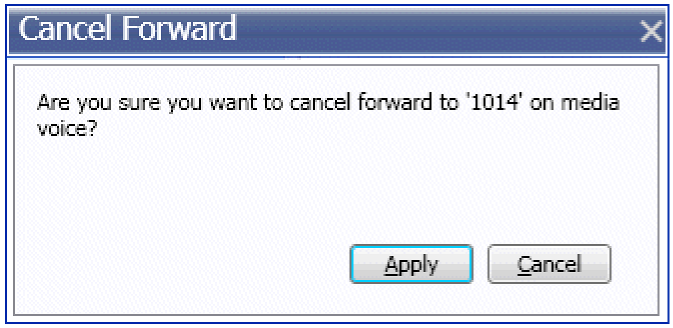


Figure 15: Cancel Forward dialog box

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

End of procedure

Next Steps

- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

5 Task: Handle an Inbound Voice Interaction

In this chapter, you will learn how to accept an inbound voice interaction by using Interaction Workspace.

This chapter contains the following section:

Receiving a Voice Interaction

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

Procedure: Handling an Inbound Voice Interaction

Purpose: To handle an inbound voice interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).
- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).
- You are the internal target for the inbound interaction.

Start of procedure

1. Your hard phone or soft phone rings and a preview of the inbound interaction is displayed on your workstation desktop in an interactive notification view (refer to Figure 16).

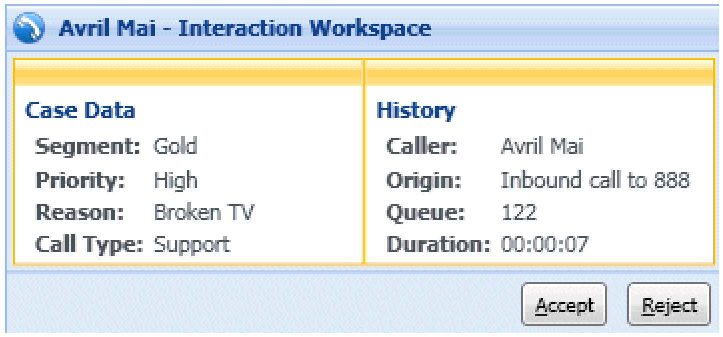


Figure 16: Voice Interaction Preview interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to answer the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the call is answered in your hard phone or soft phone and the Voice Interaction view is displayed (refer to Figure 17).

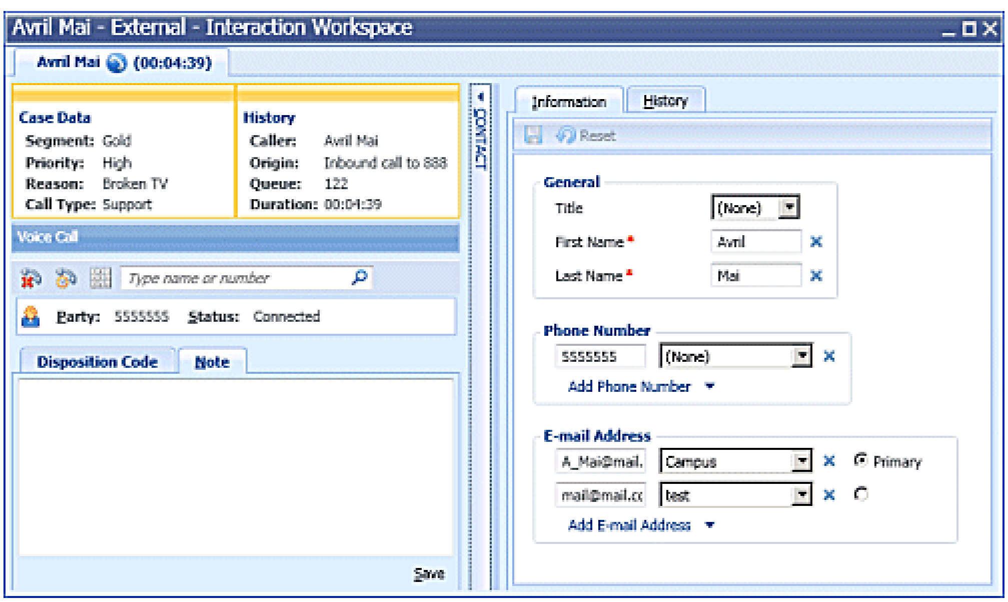


Figure 17: Voice Interaction view

You can use the Voice Interaction view to do the following:

- View contact records—See Procedure: Finding and viewing an interaction in the contact database, on page 106.
- View contact history—See “Managing Contact History” on page 105.
- Launch the Team Communicator—See “Starting a Voice Conference” on page 62, “Transferring a Voice Call” on page 74, and “Transitioning an IM consultation to a Voice consultation” on page 92.
- Set a disposition code—See “Assigning Disposition Codes” on page 99.
- Use the Notepad to add information about the interaction to the interaction history—See “Managing Contact History” on page 105.
- View the attached data for the interaction—See “Managing Contact History” on page 105.

4. If you successfully connect with the contact, you can do one of the following:
- Terminate the call (see Step 5).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Initiate a conference call (see “Starting a Voice Conference” on page 62).
- Transfer the call (see “Transferring a Voice Call” on page 74).
- For SIP enabled agents, additional call actions are available:
  — Record the call.
  — Mute and unmute the call.
  — Adjust the microphone and speaker volume.

Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

5. When the interaction is complete, either you or the contact can end the call.

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

6. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `disposition code` drop-down list or radio button list in the Disposition Code view (refer to “Assigning Disposition Codes” on page 99).

7. Click `Mark Done`.

8. If the Voice Interaction view does not close automatically, close the Voice Interaction view window after you have clicked `Mark Done` for each of the active interactions.

9. Complete your after-call work.

End of procedure

Next Steps

- Set your status to `Ready`—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Procedure:
Dealing with a stuck call

Purpose: To close the Interaction window if the call has become stuck in the system.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).
- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).
- You are the internal target for the inbound interaction.
- You are on a call and are unable to close the Interaction window because the call has become stuck in the system

Start of procedure

1. 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 (see Figure 18).

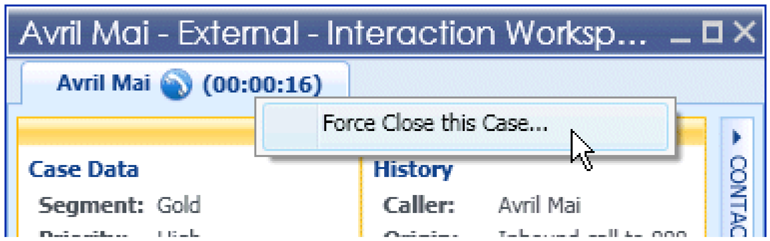


Figure 18: Force Close This Case menu

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

2. In the `Close Case` dialog box, confirm that you want to force-close the call (see Figure 19):

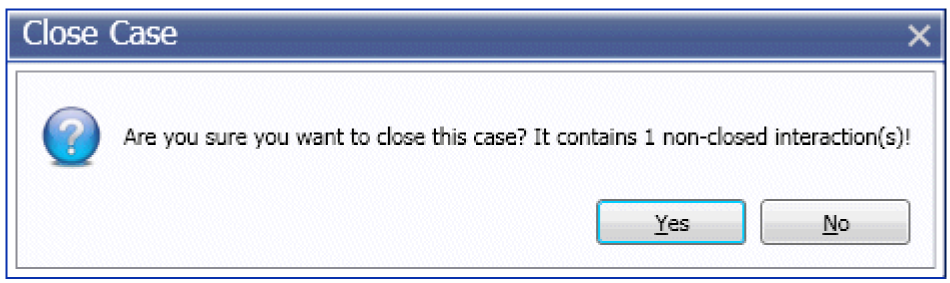


Figure 19: Close Case dialog box

Click `Yes` to force-close the case. The Interaction window closes. The status of the call remains as `In Progress` in the call history until you mark it as `Done`.

Click `No` to cancel the action and return to the Voice Interaction window.

3. Complete your after-call work.

End of procedure

Next Steps

- Set your status to `Ready`—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.

- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

6 Task: Use the Team Communicator to Find a Contact or an Internal Target

In this chapter, you will learn how to use the Team Communicator feature to find a contact or an internal target in your contact database or company directory.

The Team Communicator enables you to find a contact or an internal target, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call.

This chapter contains the following sections:

Team Communicator Overview

The Team Communicator feature is a universal lookup tool that searches all the directories to which you are connected. Use the Team Communicator to find an internal target such as a team member, Routing Point or queue; or, if you are connected to the contact database, you can use it to find a contact.

The Team Communicator can filter the results of your search or group the results into categories to help you to quickly find the internal target or contact for whom you are searching.

Enter a name, telephone number, or e-mail address to find an internal target or contact, and then select the action that you want to perform, such as:

- Calling a contact.
- Calling an internal target.
- Sending an Instant Message (IM) to an internal target.
- Adding a contact to your list of favorites.

Finding an Internal Target or a Contact

If you want to find an internal target in your company directory, or if you want to find a contact in the contact database, use the Team Communicator feature of the Interaction Workspace Main Window or the Interaction Workspace Gadget.

The Team Communicator feature enables you to find an internal target or a contact by entering basic information about that contact, such as name, phone number, or e-mail address. Use the filtering and sorting functions to quickly find the person that you want to contact. Save the contact as a favorite to find the contact even more quickly the next time that you want to contact them.

This section contains the following procedures:

- Procedure: Using the Team Communicator feature to find an internal target, on page 46
- Procedure: Using the Team Communicator feature to find a contact, on page 49

Procedure:
Using the Team Communicator feature to find an internal target

Purpose: To find an internal target in the corporate directory.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).

Start of procedure

1. In the Main Window or in the Gadget, click in the Team Communicator `Quick Search` field (refer to Figure 20).

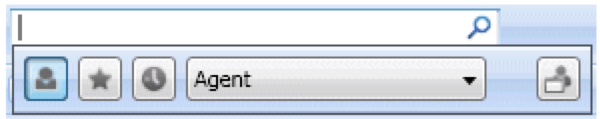


Figure 20: Main Window Team Communicator control and Quick Search field

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

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

   As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (refer to Figure 21). A pop-up view lists potential contacts and indicates the status of each internal target.

   Click the `X` to clear the search field.

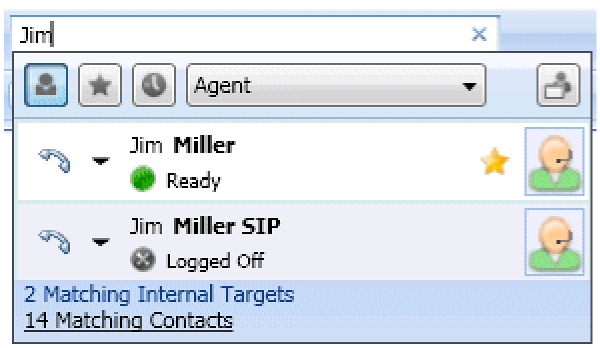
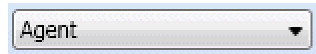


Figure 21: Example of Team Communicator search results with agent filtering

Below the `Quick Search` field are the following five controls (refer to Figure 20), from left to right:

- `Search All`—Click to select from all matching internal targets and contacts.
- `Show and Search Favorites`—Click to show in the Contacts list only contacts/internal targets that you have flagged as favorites.
- `Show and Search Recent Calls`—Click to select from the last 1 to 10 contacts/internal targets that you have directly dialed.
- `Filter by Type`—Click to search by type, including `Agent`, `Agent Group`, `Contact`, `Queue`, `Routing Point`, and `Skill` (see Step 3).
- `Sort Results by Type/Categories`—Click to arrange the search results by type/category.

3. Do one of the following to find an internal target:
   - Use the `Filter Type` drop-down list to filter the internal targets by type.

     The filters that you see might include the following:
     — `All Types`—Show all contacts and internal targets that contain the specified search criteria.
     — `Contact`—Show contacts that contain the specified search criteria.
     — `Agent`—Show only agents that contain the specified search criteria.
     — `Skill`—Show only skills that contain the specified search criteria.
     — `Agent Group`—Show only agent groups that contain the specified search criteria.
     — `Queue`—Show only queues that contain the specified search criteria.
     — `Routing Point`—Show only Routing Points that contain the specified search criteria.
   - Toggle sorting by type/category on or off by clicking the `Sort Results by Type/Categories` folder icon:

4. Click the `Action Menu` drop-down list next to the icon of the contact for which you are searching (refer to Figure 22).

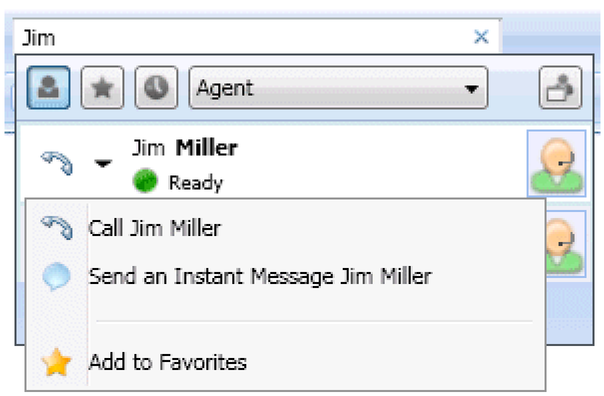


Figure 22: Internal Target Action menu

To perform an action, do one of the following:
- Select the type of internal interaction that you want to launch:
  — Voice Interaction (see “Calling an internal target” on page 54)
  — Instant Messaging (IM) Interaction (refer to Chapter 10, “Task: Use Internal Instant Messaging,” on page 83)
- Select `Add to Favorites` to add the contact to your list of favorite contacts.

- Hover your mouse pointer over the contact icon to view additional contact information.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to call a contact or an internal target—See “Making a Voice Call” on page 54.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Procedure:
Using the Team Communicator feature to find a contact

Purpose: To find a contact in the contact database.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You have a connection to the contact database.
- You are configured for outbound communication.

Start of procedure

1. In the Main Window or in the Gadget, click the Team Communicator `Quick Search` field (refer to Figure 23).

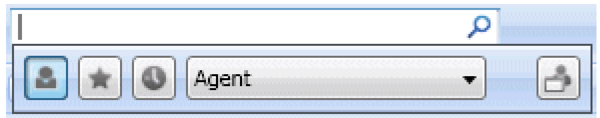


Figure 23: Main Window Team Communicator control and Quick Search field

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

2. Enter the name, telephone number, or other information about the contact with whom you want to communicate.

   As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (refer to Figure 24). A pop-up view lists potential contacts.

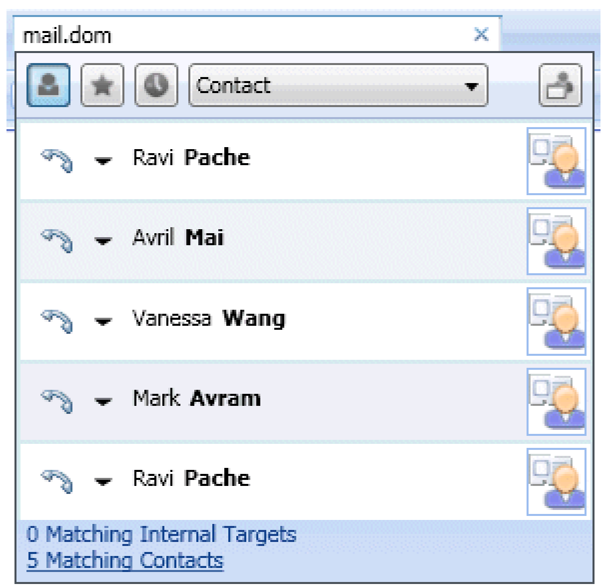


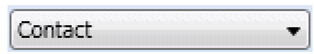
Figure 24: Example of Team Communicator search results with Contacts filtering

   Below the `Quick Search` field are the following five controls (refer to Figure 23), from left to right:

   - `Search All`—Click to select from all matching internal targets and contacts.
   - `Show and Search Favorites`—Click to show in the Contacts list only contacts/internal targets that you have flagged as favorites.

- `Show and Search Recent Calls`—Click to select from the last 1 to 10 contacts/internal targets that you have directly dialed.
- `Filter by Type`—Click to search by type, including `Agent`, `Agent Group`, `Contact`, `Queue`, `Routing Point`, and `Skill` (see Step 3).
- `Sort Results by Type/Categories`—Click to arrange the search results by type/category.

3. Do one of the following to find the contact:
   - Use the `Filter Type` drop-down list to view only contacts by selecting `Contact`.

     The filters that you see might include the following:
     — `All Types`—Show all contacts and internal targets that contain the specified search criteria.
     — `Contact`—Show contacts that contain the specified search criteria.
     — `Agent`—Show only agents that contain the specified search criteria.
     — `Skill`—Show only skills that contain the specified search criteria.
     — `Agent Group`—Show only agent groups that contain the specified search criteria.
     — `Queue`—Show only queues that contain the specified search criteria.
     — `Routing Point`—Show only Routing Points that contain the specified search criteria.
   - Toggle sorting by type on or off by clicking the `Sort by Types/Categories` folder icon:

   - View only contacts by clicking the `Matching Contacts` link:

4. Click the `Action Menu` drop-down list next to the icon of the contact for which you are searching (refer to Figure 25).

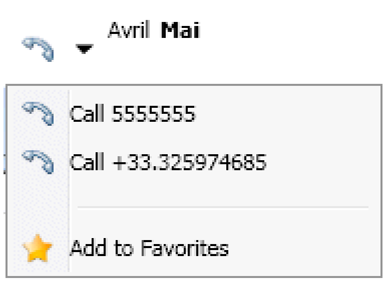


Figure 25: Contact Action menu

To perform an action, do one of the following:

- Select the telephone number to launch a Voice Interaction (see Procedure: Calling a contact, on page 57).
- Select `Add to Favorites` to add the contact to your list of favorite contacts.
- Hover your mouse pointer over the contact icon to view additional contact information.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to call a contact or an internal target—See “Making a Voice Call” on page 54.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

7 Task: Use the Team Communicator to Call a Contact or an Internal Target

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

The Team Communicator enables you to find a contact or an internal target, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference call, or transfer a call.

This chapter contains the following sections:

Team Communicator Overview

The Team Communicator feature is a universal lookup tool that searches all the directories to which you are connected. You can use the Team Communicator to find an internal target such as a team member, a Routing Point, or a queue, or, if you are connected to the contact database, you can use it to find a contact.

The Team Communicator can filter the results of your search or group the results into categories to help you quickly find the contact for whom you are searching.

Enter a name, telephone number, or e-mail address to find an internal target or contact, and then select the action that you want to perform, such as:

- Calling a contact
- Calling an internal target

- Sending an internal target an Instant Message (IM)
- Adding a contact to your list of favorites

Making a Voice Call

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

This section contains the following procedures:

- Procedure: Calling an internal target, on page 54
- Procedure: Calling a contact, on page 57

Procedure:
Calling an internal target

Purpose: To make a voice interaction with an internal target.

The Voice Interaction window enables you to view all the information that is necessary to handle a voice interaction with an internal agent. The window contains tabs that enable you to handle more than one interaction simultaneously.

The information that is displayed to you in this view depends on your assigned role and the case information that is available about the internal target.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You have found the internal target and have selected an Internal Voice Interaction (see Procedure: Using the Team Communicator feature to find an internal target, on page 46).

Start of procedure

1. When you choose to call an internal target (see Procedure: Using the Team Communicator feature to find an internal target, on page 46), the Voice Interaction window opens. The status is `Establishing` (refer to Figure 26).

   Wait for the internal target to accept your invitation.

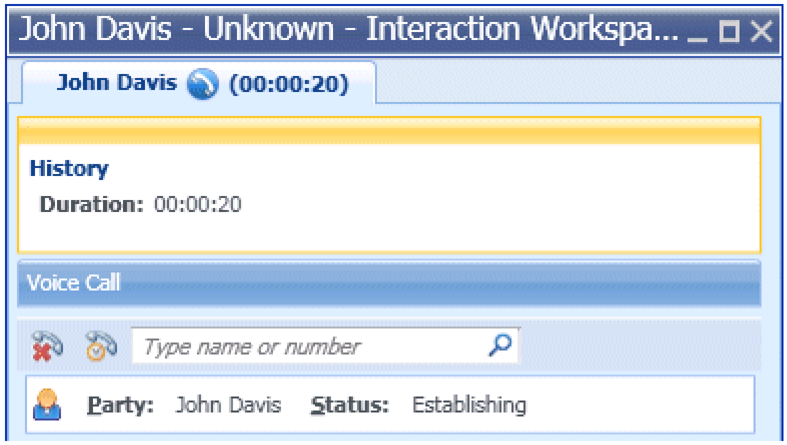


Figure 26: Voice Interaction window displaying status as Establishing

2. If the internal target accepts your invitation, the status in the Interaction window changes to `Connected` (refer to Figure 27). You are now connected to the internal target.

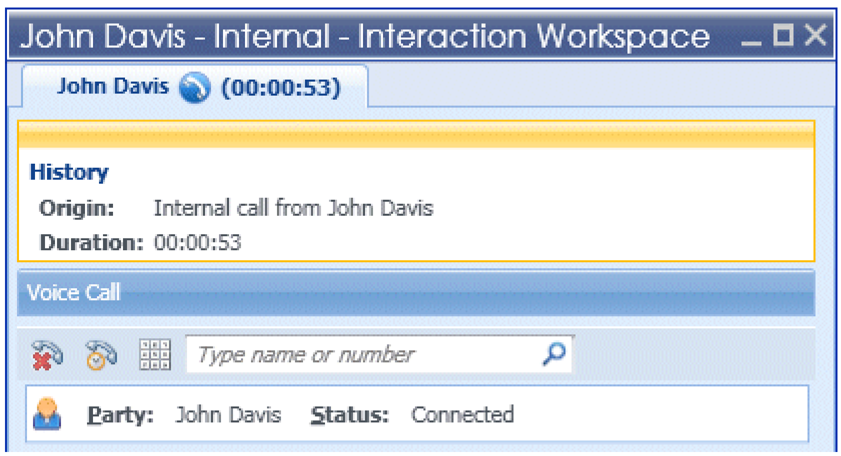


Figure 27: Voice Interaction window displaying status as Connected

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

Note: You can click the `Team Communicator Recent Calls` button to try to call the internal target again. For more information, refer to the *Interaction Workspace Context-Sensitive Help*.

3. If you successfully connect with the internal target you can do one of the following:
   - Terminate the call (see Step 4).
   - Put the call on hold, and then resume the call. The call status changes to `On Hold` when you put the call on hold, and then back to `Connected` when you resume the call.
   - Use the keypad to send DTMF to the internal target.

- Initiate a conference call (see “Starting a Voice Conference” on page 62).
- Transfer the call (see “Transferring a Voice Call” on page 74).
- For SIP-enabled agents, additional call actions are available:
  - — Record the call
  - — Mute and unmute the call
  - — Adjust the microphone and speaker volume

Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

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

If you want to terminate the call, click the `End Call` button. The call status changes to `Ended` and the call is released (refer to Figure 28).

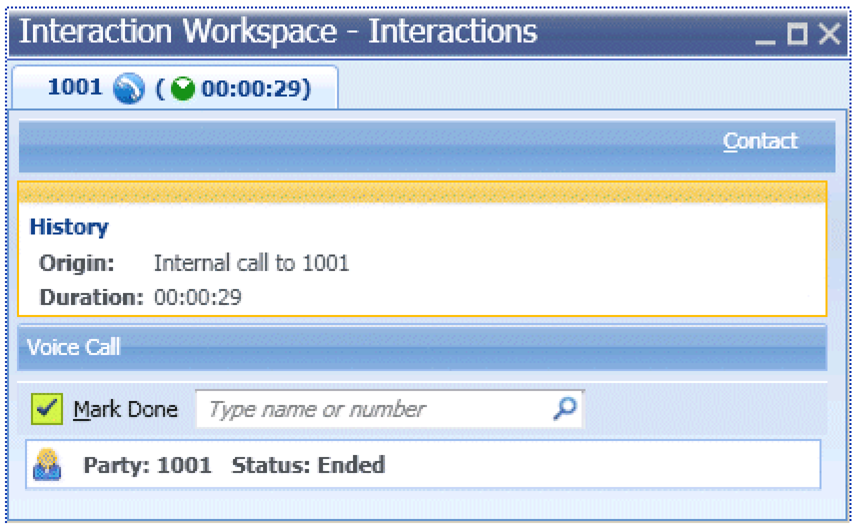


Figure 28: Voice Interaction window displaying status as Ended

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

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

  Note: Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code. Refer to “Assigning Disposition Codes” on page 99 for more information on Disposition Codes.

After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Procedure: Calling a contact

Purpose: To make a voice interaction with a contact.

When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact. The window contains tabs that enable you to handle more than one interaction simultaneously.

The information that is contained in this view depends on your assigned role and the case information that is available about the contact.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You have found the contact and have selected an External Voice Interaction (see Procedure: Using the Team Communicator feature to find a contact, on page 49).

Start of procedure

1. When you choose to call a contact (see Procedure: Using the Team Communicator feature to find a contact, on page 49), the Voice Interaction window is displayed. The Status is `Establishing` (refer to Figure 29).

   Wait for the contact to accept your invitation.

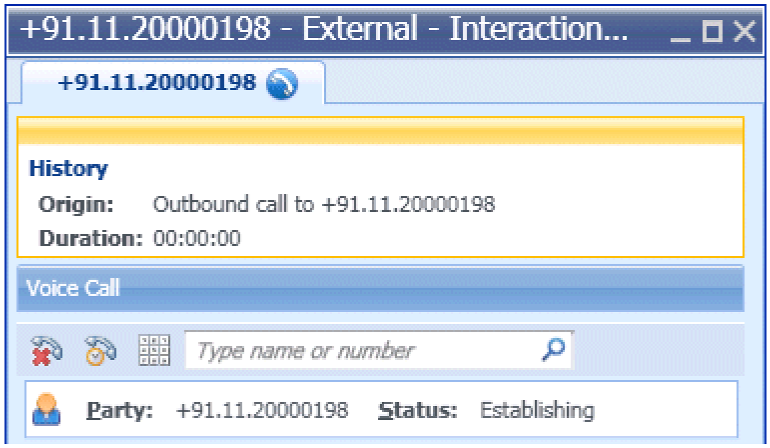


Figure 29: Voice Interaction window displaying status as Establishing

2. If the contact accepts your invitation, the status in the Voice Interaction window changes to `Connected` (refer to Figure 30). You can now talk to the contact.

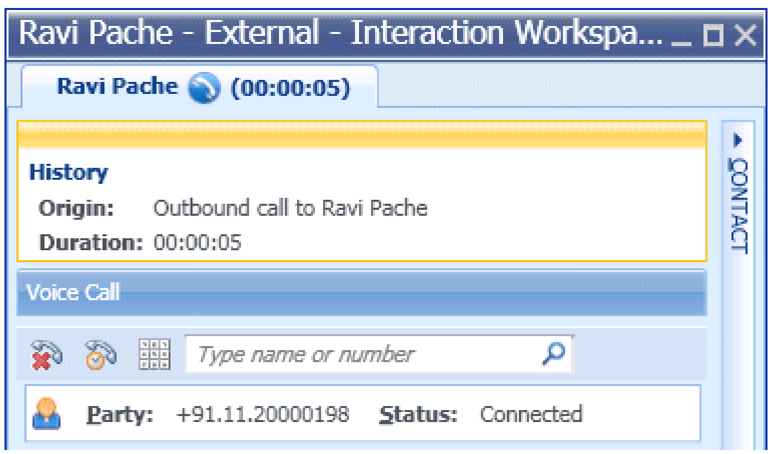


Figure 30: Voice Interaction window displaying status as Connected

If the contact rejects or fails to accept your invitation, the call status changes to `Ended` (refer to Figure 31). To try to call the contact again; or, to call a different contact, repeat Step 1.

3. If you successfully connect with the contact, you can do one of the following:
   - Terminate the call (see Step 4).
   - Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
   - Use the keypad to send DTMF to the contact.
   - Initiate a conference call (see "Starting a Voice Conference" on page 62).
   - Transfer the call (see "Transferring a Voice Call" on page 74).

- For SIP-enabled agents, additional call actions are available:
  — Record the call.
  — Mute and unmute the call.
  — Adjust the microphone and speaker volume.

  Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

4. When you have finished talking to the contact you can terminate the call or wait for the contact to terminate the call.

   If you want to terminate the call, click the `End Call` button. The call status changes to `Ended`, and the call is released (refer to Figure 31).

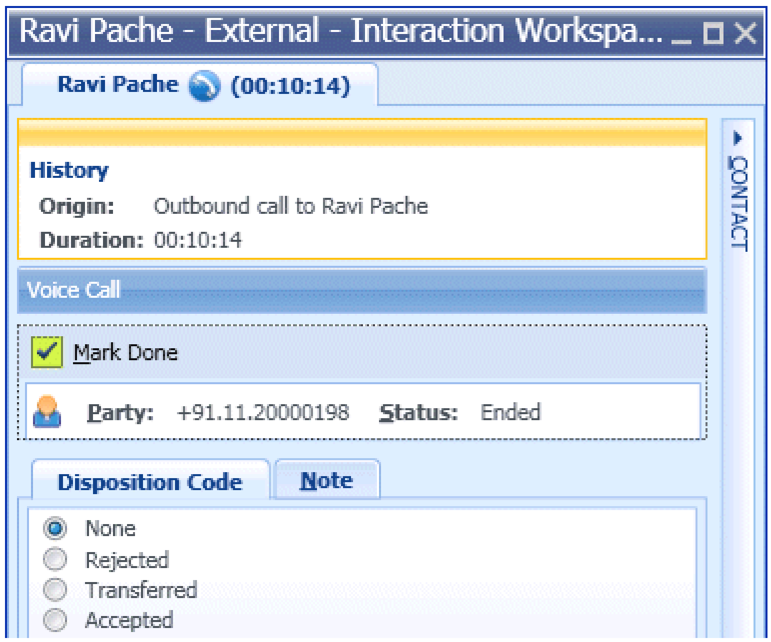


Figure 31: Voice Interaction window displaying status as Ended

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

     Note: Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code. Refer to "Assigning Disposition Codes" on page 99 for more information on Disposition Codes.

   After a call has been released and you have completed any required post-call tasks, the Voice Interaction window closes.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact record—See: Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

8 Task: Use the Team Communicator to Start a Voice Conference

In this chapter, you will learn how to use the Team Communicator feature to find an internal target (such as an agent, Routing Point, or queue) or a contact and start a voice conference. You can also use the first procedure in this chapter to find a contact and start a voice conference.

The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call an internal target or a contact, initiate a conference, or transfer a call.

This chapter contains the following sections:

Team Communicator Overview

The Team Communicator feature is a universal lookup tool that searches all the directories to which you are connected. You can use the Team Communicator to find an internal target such as a team member, Routing Point, or queue; or, if you are connected to the contact database, you can use it to find a contact.

The Team Communicator can filter the results of your search or group the results into categories to help you quickly find the contact for whom you are searching.

Enter a name, telephone number, or e-mail address to find an internal target or contact, and then select the action that you want to perform, such as:

- Calling a contact.
- Calling an internal target.

- Sending an internal target an Instant Message (IM).
- Adding a contact to your list of favorites.

Starting a Voice Conference

The Interaction Workspace Voice Interaction window enables you to conference your current voice call with an internal target or a contact. You can start a standard (two-step) conference or a one-step conference. In a standard conference the current call is put on hold while you talk to the other party. In a one-step conference, the conference starts as soon as the other party accepts the interaction.

This section contains the following procedures:

- Procedure: Initiating a Voice conference, on page 62
- Procedure: Receiving a conference call, on page 67

Procedure:
Initiating a Voice conference

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

You can also call a contact to initiate a conference.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You have an active interaction with a contact (see “Receiving a Voice Interaction” on page 39).

Start of procedure

1. In the active voice interaction, use the Team Communicator (refer to Figure 32) to find the internal target with whom you want to start a conference (refer to the Procedure: Using the Team Communicator feature to find an internal target, on page 46).

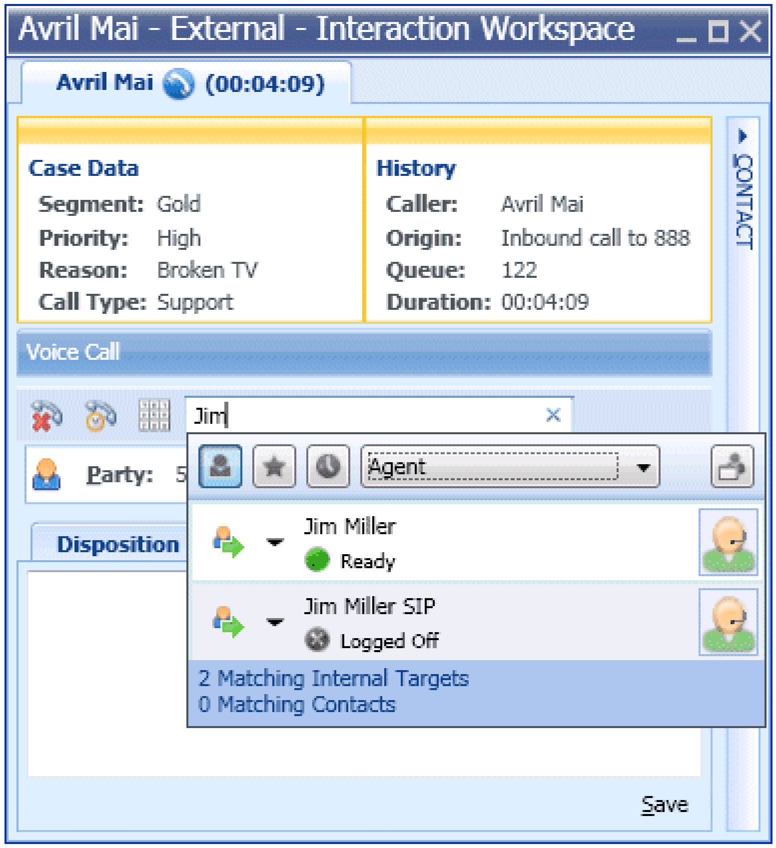


Figure 32: Finding an internal target for a voice conference in the active Voice Interaction window

2. Click the `Action Menu` drop-down list next to the name of the internal target with whom you want to conference, and then select one of the following conference options:
   - `Initiate Conference`—The contact is put on hold. When the internal target accepts the interaction request, you can speak to the internal target agent.
   - `One-Step Conference`—The conference begins as soon as the internal target accepts the interaction request. Depending on the configuration of your system, this option might not be available.

3. If you clicked `Initiate Conference`, your contact is put on hold, and you are connected to your conference target as soon as they accept the request.

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

4. When you are connected to your conference target, the internal target is added to the Interaction Workspace Interaction window (refer to Figure 33).

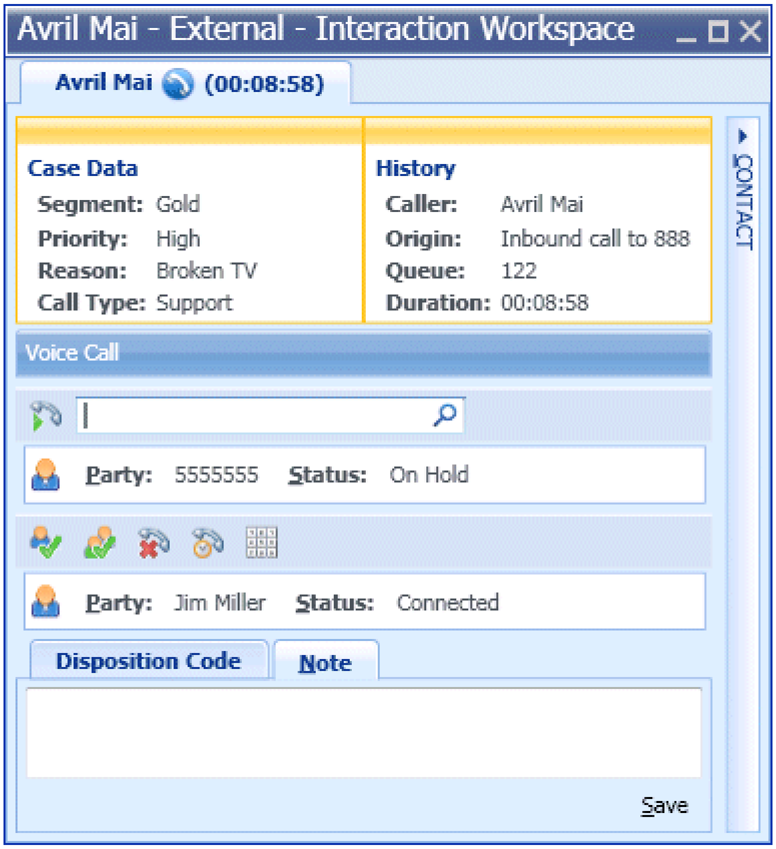


Figure 33: Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold

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

- Complete the conference.
- Complete the consultation as a transfer instead.
- Alternate (toggle) between the contact and the internal target. The other party is put on hold until you toggle back or complete the conference.
- End the call to the internal target and resume the call with the contact.
- Send DTMF to the internal target.

- For SIP-enabled agents, additional call actions are available:
  - — Record the call
  - — Mute and unmute the call
  - — Adjust the microphone and speaker volume

Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

5. If you clicked the `Complete Conference` button, you, the contact, and the internal target agent are placed into a three-way conference (refer to Figure 34).

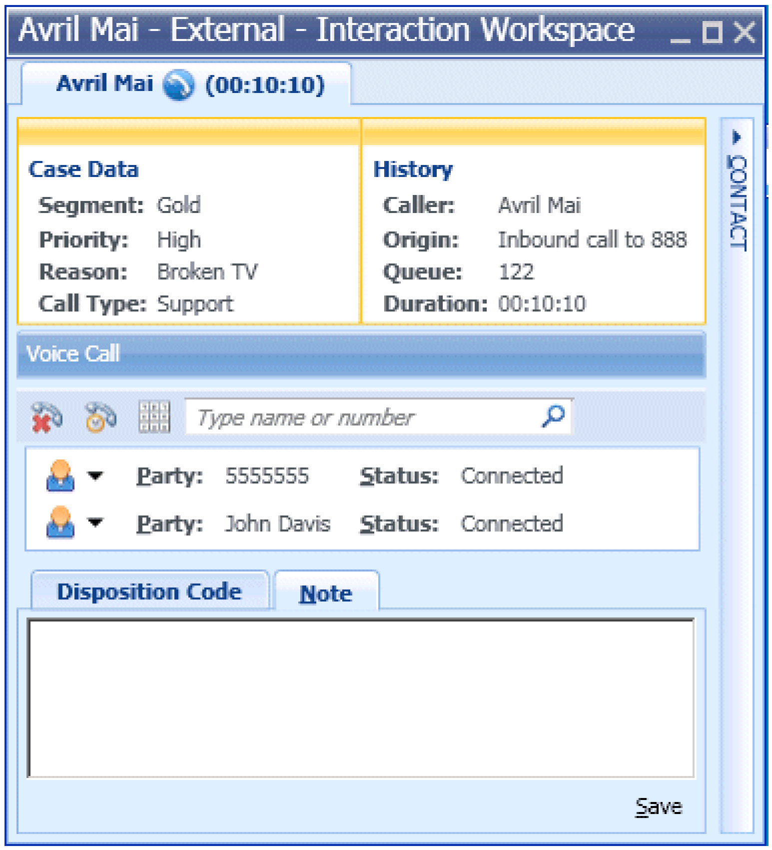


Figure 34: Voice Interaction window, displaying a conference with a contact and a second agent

In a conference, you can perform one or more of the following functions:

- End the Call—Both lines are disconnected (go to Step 7).
- Use the Conference Party Action Menu (next to the Party Status) to do one of the following:
  - — **Delete from Conference**—Terminate the connection to the party
  - — **Listen Disconnect**—Disable listening for the selected party. The party can still talk, but the party cannot hear what you and the other party say

  - — **Listen Reconnect**—Enable listening for that party. The party can hear what the other two parties are saying
- For SIP-enabled agents, additional call actions are available:
  - — Record the call
  - — Mute and unmute the call
  - — Adjust the microphone and speaker volumes

Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

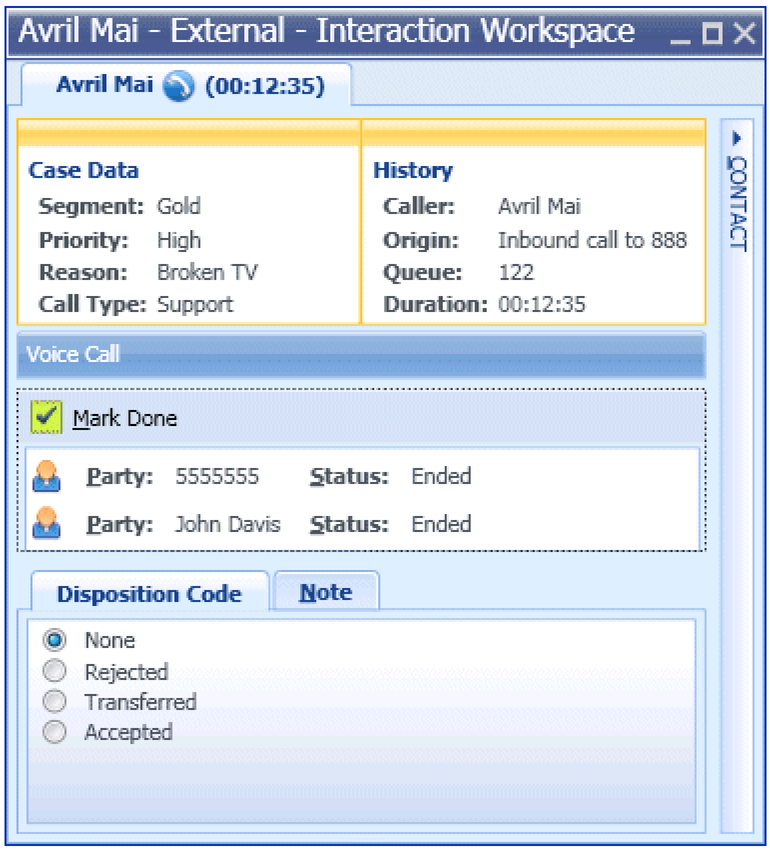


Figure 35: Voice Interaction window displaying an ended conference with a contact and a second agent

6. The internal target agent can choose to release the call. If this happens, the internal target agent is disconnected, but you remain connected to the contact. You can complete your call with the contact, transfer the contact, or start a new conference call.

7. If you have completed your call and the internal target agent is still connected, when you click the `End Call` button, the call is automatically transferred to the internal target agent. Go to Step 4 of the Procedure: Calling a contact.

   If you have completed your call and the internal target agent has already disconnected from the conference, go to Step 4 of the Procedure: Calling a contact.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Procedure: Receiving a conference call

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

You may be invited to a one-step or two-step conference.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- Your status is `Ready` for the voice media channel (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).

Start of procedure

1. If another agent wants to consult with you on a voice interaction they will initiate a voice consultation (conference). They can choose between a one-step conference and a two-step conference. You are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (refer to Figure 36).

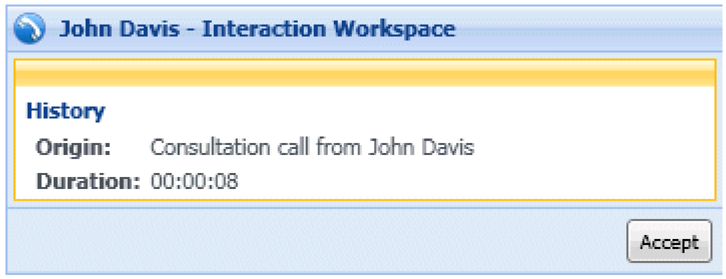


Figure 36: Interaction Preview interactive notification, informing you of a conference request

Click `Accept` to connect to the conference:

- If the calling agent initiated a one-step conference, you are immediately in the conference with the contact. Go to "Remaining Connected After the Conferencing Agent Disconnects" on page 70.
- If the calling agent initiated a two-step conference, the Interaction Workspace Voice Interaction window is displayed. It shows your status as connected to the calling agent (refer to Figure 37).

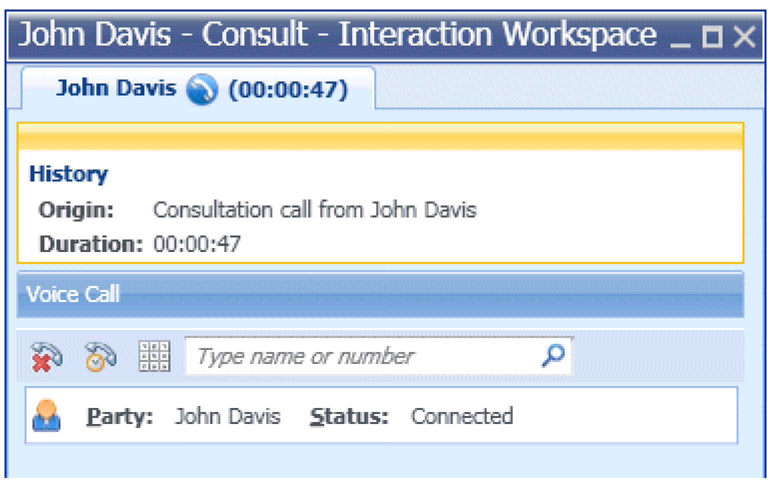


Figure 37: Voice Interaction window, displaying your status as Connected to the calling agent

2. The Interaction Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, prior to joining the conference call:
   - Speak privately with the calling agent about the conference prior to joining the conference.

- End the call—This function ends your participation in the consultation call; you are not joined to the conference.
- Put the call on hold and resume the call.
- Send DTMF by using the keypad.
- Start a conference call.
- Transfer the call to a different internal target.
- For SIP enabled agents, additional call actions are available:
  - — Record the call
  - — Mute and unmute the call
  - — Adjust the microphone and speaker volume

Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

3. If the calling agent joins you to the conference, all three parties can hear and speak to one another. The Interaction Workspace Voice Interaction window is updated to display the status of the parties to whom you are talking. The status changes to `Connected` (refer to Figure 38).

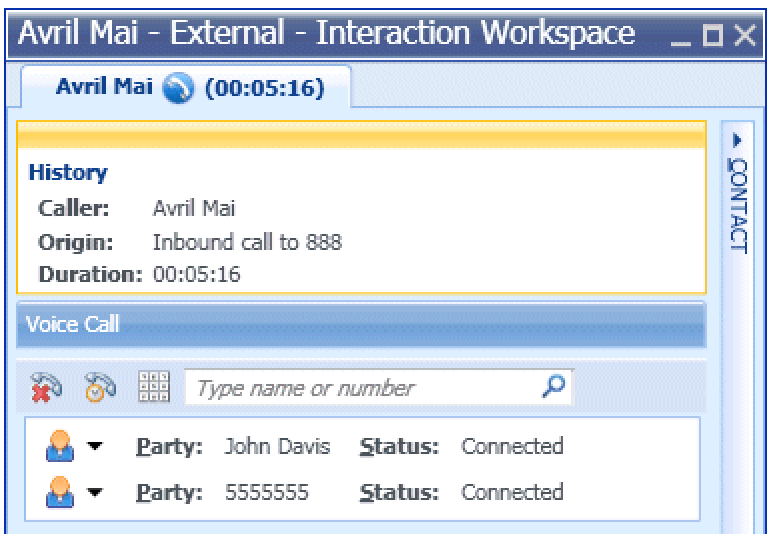


Figure 38: Voice Interaction window, displaying Conferenced status

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

- Use the Conference Party Action Menu (adjacent to the Party Status) to do the following:
  - — **Delete From Conference**—Terminate the connection to the party.
  - — **Listen Disconnect**—Disable listening for the selected party. The party can still talk, but the party cannot hear what you and the other party say.
  - — **Listen Reconnect**—Enable listening for that party. The party can now hear what the other two parties are saying.
- For SIP-enabled agents, additional call actions are available:

- Record the call
- Mute and unmute the call
- Adjust the microphone and speaker volume

Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

- End the call—Terminates your connection to the conference. The calling agent remains connected to the contact.
- Set a Disposition Code for the call.

Remaining Connected After the Conferencing Agent Disconnects

If the calling agent releases the call, the calling agent is disconnected, but you remain connected to the contact (refer to Figure 39). You can complete your call with the contact, transfer the contact, or start a new conference call.

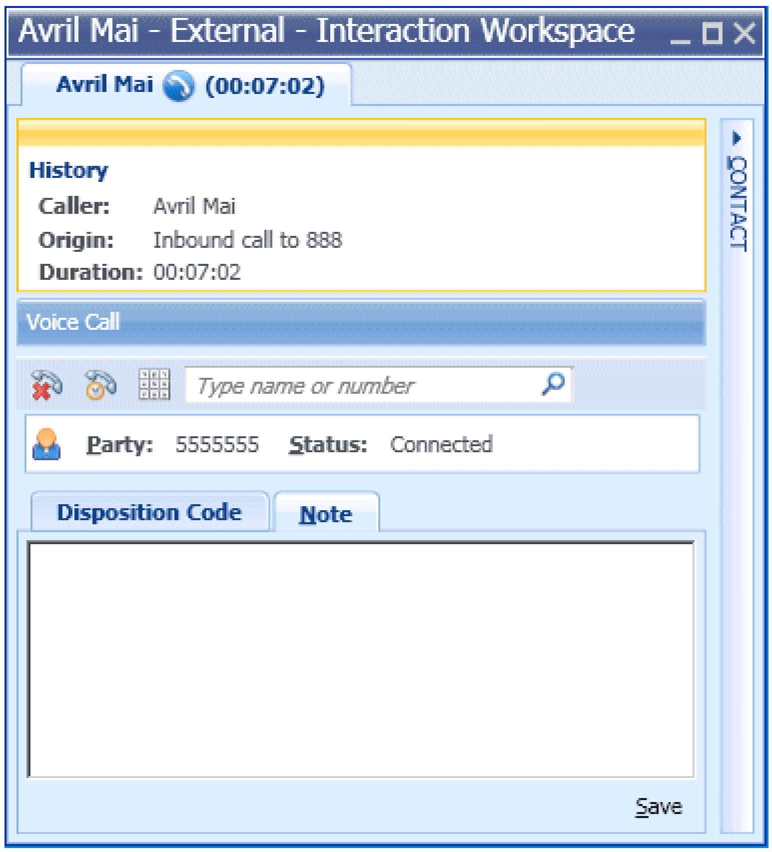


Figure 39: Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

4. Click `End Call` to terminate your connection to the call or conference.

   The Interaction Workspace Voice Interaction window is updated to display the status of the conference as `Ended` (refer to Figure 40).

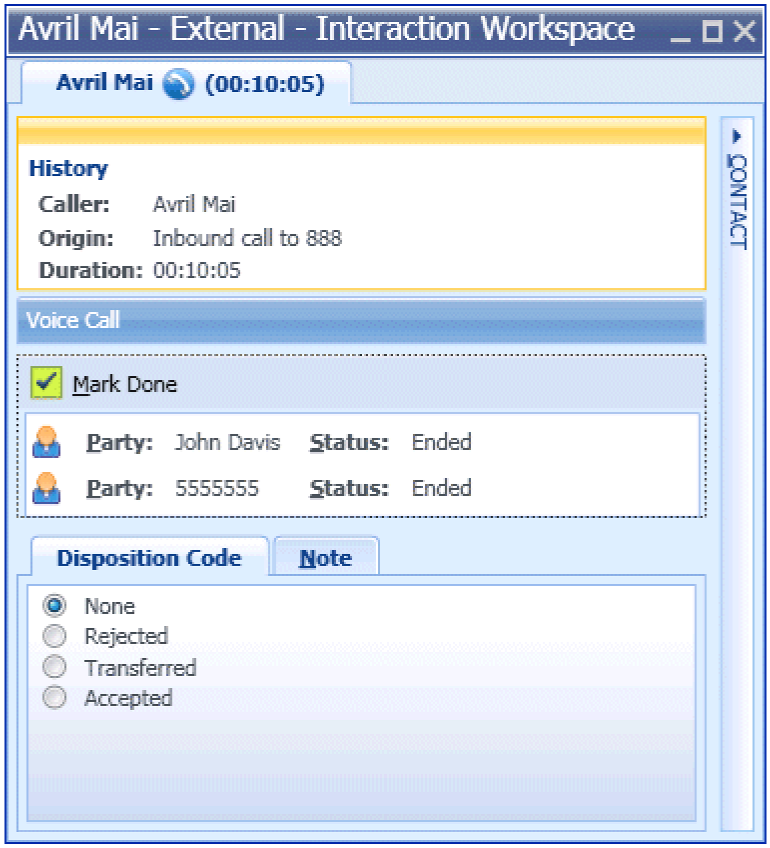


Figure 40: Voice Interaction window, displaying the status at the end of a conference call

If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (refer to "Assigning Disposition Codes" on page 99).

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

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.

- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

9

Task: Use the Team Communicator to Transfer a Voice Call

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

The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call.

This chapter contains the following sections:

Team Communicator Overview

The Team Communicator feature is a universal lookup tool that searches all the directories to which you are connected. You can use the Team Communicator to find an internal target such as a team member, a Routing Point, or a queue; or, if you are connected to the contact database, you can use it to find a contact.

The Team Communicator can filter the results of your search or group the results into categories to help you quickly find the contact for whom you are searching.

Enter a name, phone number, or e-mail address to find an internal target or contact, and then select the action that you want to perform, such as:

- Calling an internal target.
- Calling a contact.
- Sending an internal target an Instant Message (IM).
- Adding a contact to your list of favorites.

Transferring a Voice Call

The Interaction Workspace Voice Interaction window enables you to transfer your current voice call to another party. You can start a standard (two-step) transfer or a one-step transfer. In a standard transfer the current call is put on hold while you talk to the other party. In a one-step transfer, the call is transferred as soon as the other party accepts the interaction.

This section contains the following procedures:

- Procedure: Initiating a Voice transfer, on page 74
- Procedure: Receiving a transferred call, on page 78

Procedure: Initiating a Voice transfer

Purpose: To find an internal target (such as an agent, Routing Point, or queue), consult with the internal target, and then complete a call transfer to the internal target.

You can also transfer a call to a contact.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You have an active interaction with a contact (see “Receiving a Voice Interaction” on page 39).

Start of procedure

1. In the active voice interaction, use the Team Communicator (refer to Figure 41) to find the internal target to whom you want to transfer the current interaction (refer to the Procedure: Using the Team Communicator feature to find an internal target, on page 46).

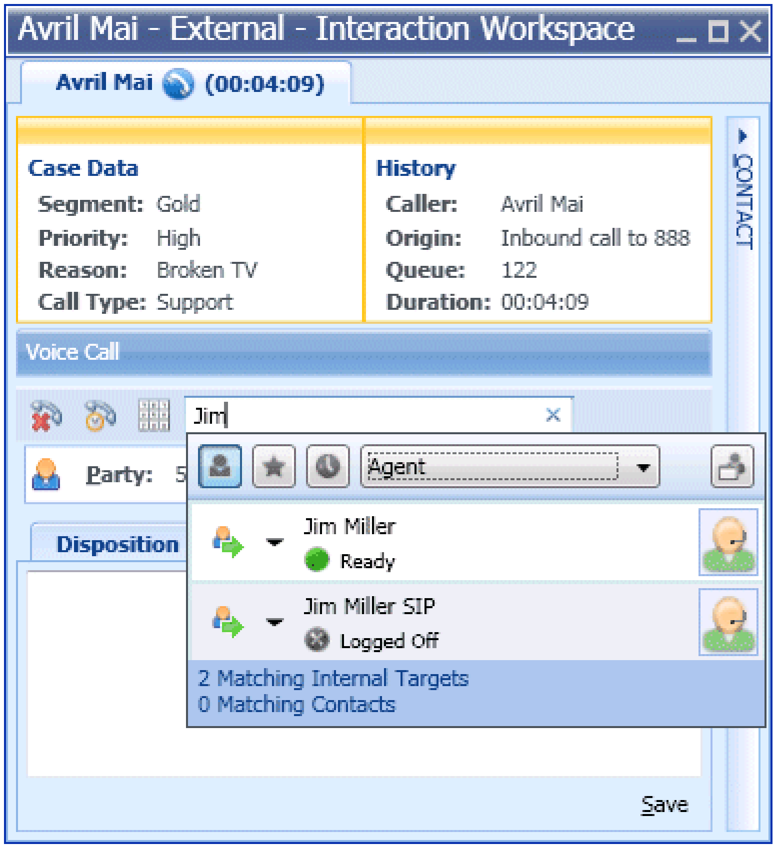


Figure 41: Finding an internal target for a voice transfer in the active Voice Interaction window

2. Click the `Action Menu` drop-down list next to the name of the internal target to whom you want to transfer the interaction and select one of the following transfer options:
   - `Initiate Transfer`—The contact is put on hold. When the internal target accepts the interaction request, you can speak to the internal target agent.
   - `One Step Transfer`—The call is transferred as soon as the internal target accepts the interaction request. Depending on the configuration of your system, this option might not be available.

3. If you clicked `Initiate Transfer`, your contact is put on hold, and you are connected to your transfer target as soon as they accept the request.

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

4. When you are connected to your transfer target, the internal target is added to the Interaction Workspace Voice Interaction window (refer to Figure 42).

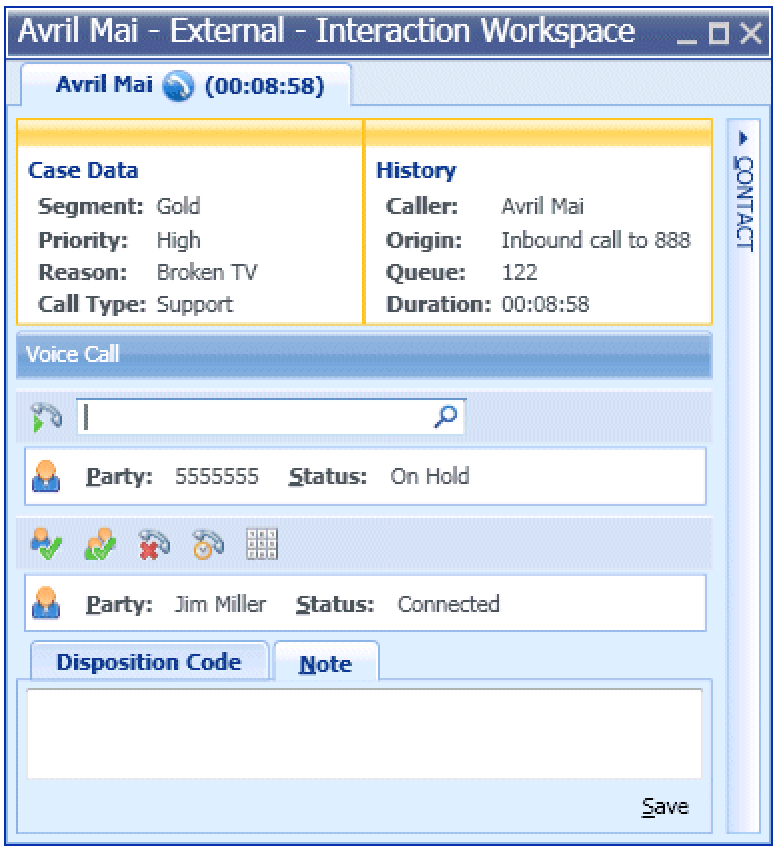


Figure 42: Voice Interaction window displaying a consultation call that is connected to the internal target while the contact party is on hold

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

- Complete the transfer.
- Complete the consultation as a conference, instead.
- Alternate (toggle) between the contact and the internal target. The other party is put on hold until you toggle back or complete the transfer.
- End the call to the internal target and resume the call with the contact.
- Send DTMF to the internal target.

- For SIP-enabled agents, additional call actions are available:
  - Record the call
  - Mute and unmute the call
  - Adjust the microphone and speaker volume

  Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

5. If you clicked the `Complete Transfer` button, the contact is transferred to the internal target agent. The call status changes to `Ended` (refer to Figure 43).

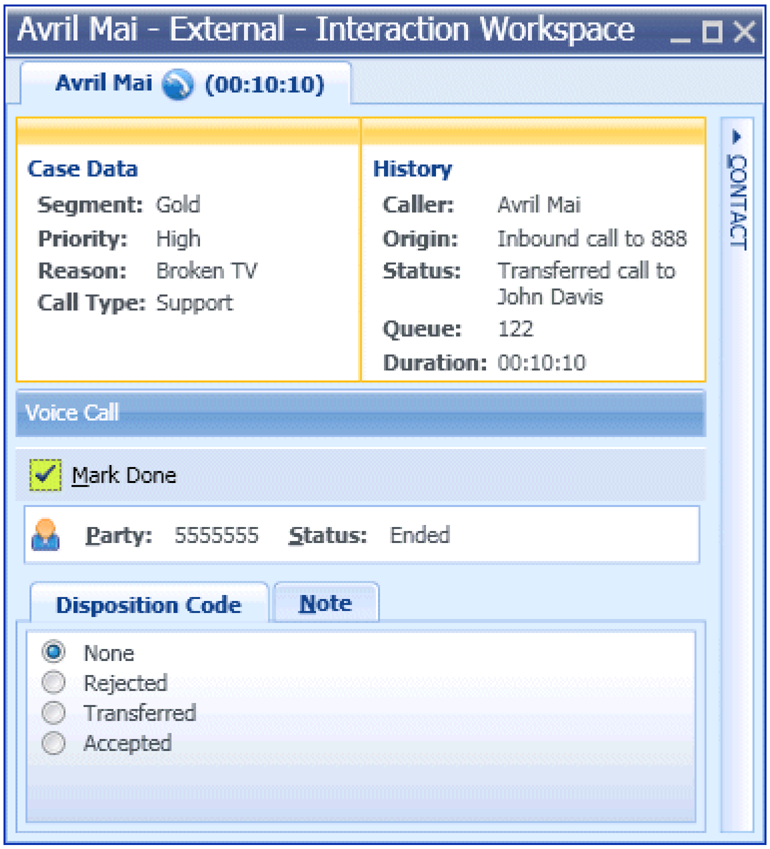


Figure 43: Voice Interaction window, displaying status as Ended

6. After a call is released, one or more of the following actions might be available to you, depending on your assigned role:
   - Click `Mark Done` to close the Voice Interaction window.
   - Select a disposition (refer to "Assigning Disposition Codes" on page 99).

     Note: Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code.
7. Close the Voice Interaction window.
8. Complete your after-call work.

9. Set your status to `Ready`.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Procedure: Receiving a transferred call

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

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. If another agent wants to transfer a voice interaction to you, they can choose between a one-step and a two-step transfer. You are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (refer to Figure 44).

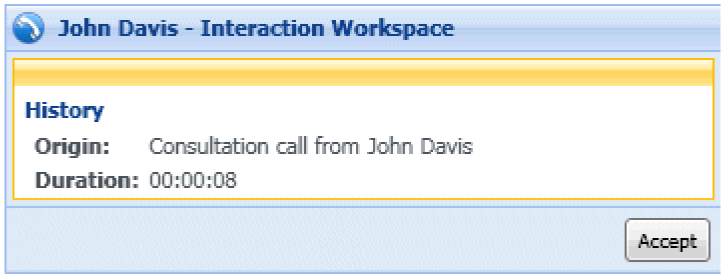


Figure 44: Interaction Preview interactive notification, informing you of a transfer request

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

- If the calling agent initiated a one-step transfer, the call is immediately transferred to you. Go to Step 3 on page 80.
- If the calling agent initiated a two-step transfer, the Interaction Workspace Voice Interaction window is displayed. It shows your status as connected to the calling agent.

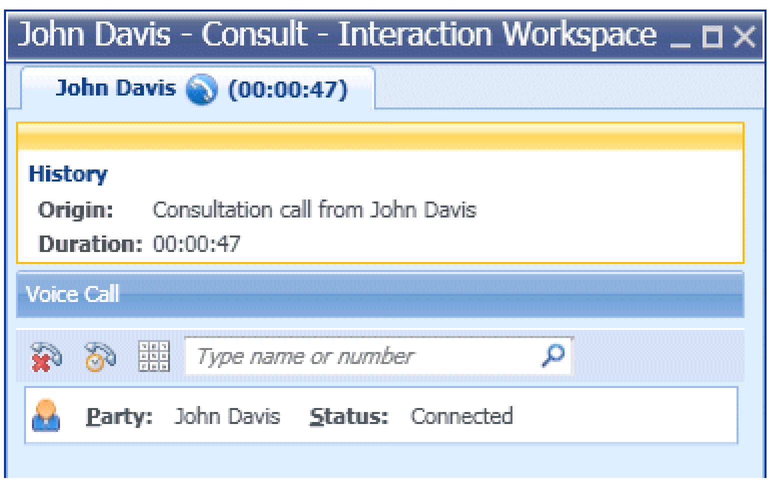


Figure 45: Voice Interaction window, displaying your status as connected to the calling agent

2. If the transferring agent used a two-step Transfer, the Interaction Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, prior to accepting the transferred call:
   - Speak privately with the calling agent about the call, prior to joining the conference.

- End the call—This function ends your participation in the consultation call; the call is not transferred to you.
- Put the call on hold and retrieve the call.
- Send DTMF by using the keypad.
- Start a conference call.
- Transfer the call.
- For SIP enabled agents, additional call actions are available:
  - — Record the call
  - — Mute and unmute the call
  - — Adjust the microphone and speaker volume

Note: For information on how to use the functionality in the interaction window, refer to the *Interaction Workspace 8.0 Help*.

3. If the calling agent completes the transfer to you, the Interaction Workspace Voice Interaction window is updated to display the status of the party to whom you are talking. The status changes to `Connected` (refer to Figure 46).

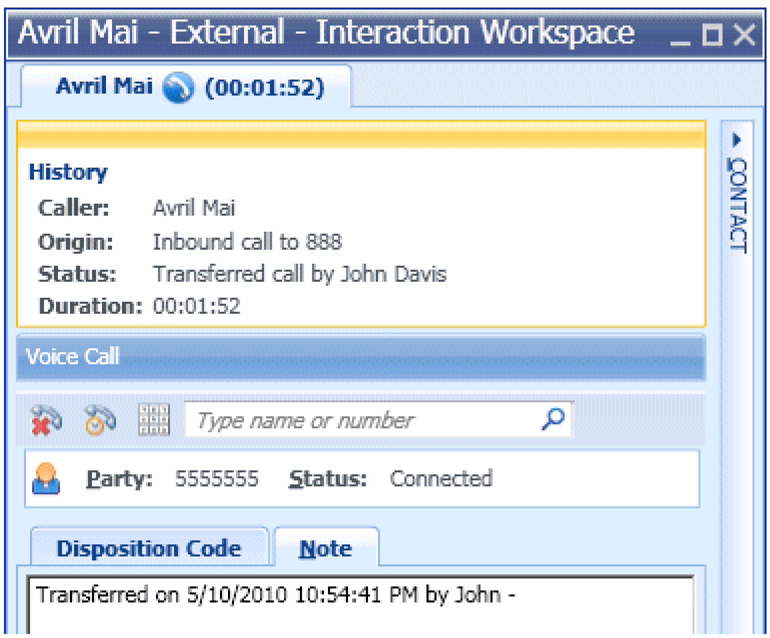


Figure 46: Voice Interaction window, displaying your status as connected to the transferred contact

The Interaction Workspace Voice Interaction window enables you to use all the functionality of an inbound call (see Step 3 of Procedure: Handling an Inbound Voice Interaction, on page 39).

4. Click `End Call` to terminate your connection to the call.

   The Interaction Workspace Voice Interaction window is updated to display the status of the call as `Ended` (refer to Figure 47).

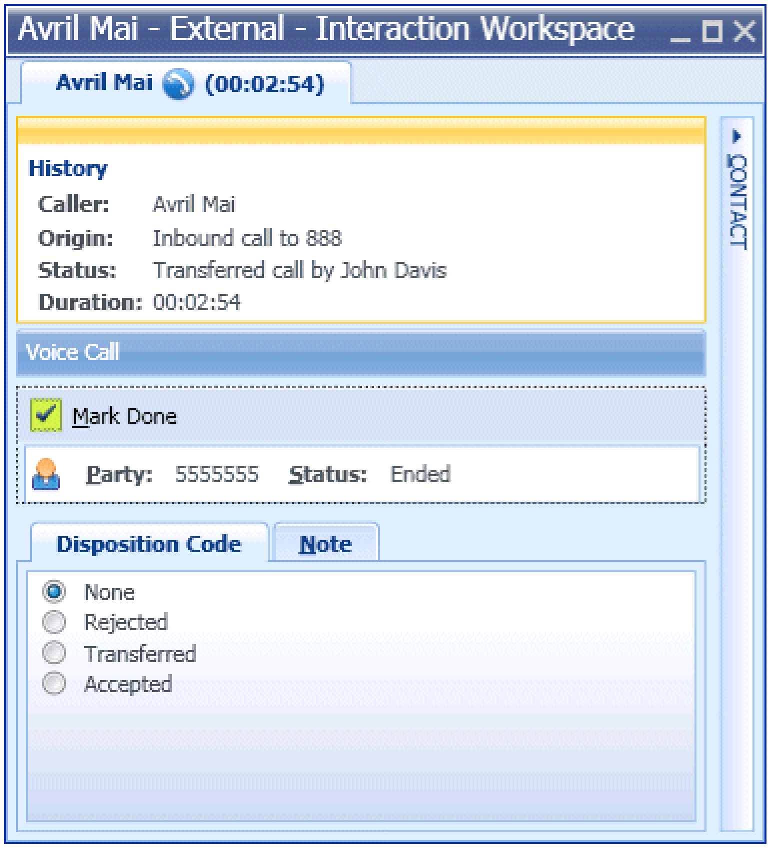


Figure 47: Voice Interaction window, displaying the status at the end of a conference call

If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (refer to “Assigning Disposition Codes” on page 99).

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

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.

- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

10 Task: Use Internal Instant Messaging

In this chapter, you will learn how to use the Team Communicator feature to send an Instant Message (IM) to an internal target and receive an IM from an internal target.

The Team Communicator enables you to find an internal target or a contact, send an Instant Message (IM) to an internal target, call a contact or an internal target, initiate a conference, or transfer a call.

This chapter contains the following sections:

Instant Messaging Overview

Instant Messaging is a type of real-time, text-based communication between two or more participants over a network. IM enables you to convey a text message immediately and receive an immediate text reply without the overhead and time delay that are associated with e-mail and other text-based communication technologies.

This feature enables you to send an IM to another agent (internal target) or receive an IM from an internal target.

The Interaction Workspace IM view provides identification of all connected parties, as well as a timestamp for each message.

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

Sending and Receiving Internal Instant Messages

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

Note: Interaction Workspace supports only internal IM sessions.

This section contains the following procedures:

- Procedure: Initiating an Instant Messaging session, on page 84
- Procedure: Receiving an Instant Messaging session, on page 87

Procedure: Initiating an Instant Messaging session

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. Use the Team Communicator in your Main Window view or in your Gadget to find the internal target with whom you want to start an IM session (refer to Chapter 6).
2. Select `Send an Instant Message` from the `Action Menu` drop-down list next to the name of the internal target in the Team Communicator pop-up result-list (refer to Figure 48).

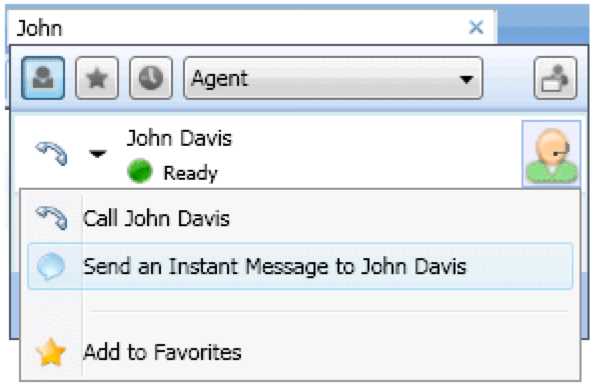


Figure 48: The Send an Instant Message option of the Team Communicator Action menu

The IM interaction window is displayed.

3. Enter a message to your target. The session starts in the Interaction window (refer to Figure 49) when you send your first message.

   The target is presented with an interactive notification that enables the target to accept or reject your invitation to engage in an IM session.

   You are notified if the target accepts, rejects, or lets your invitation time-out.

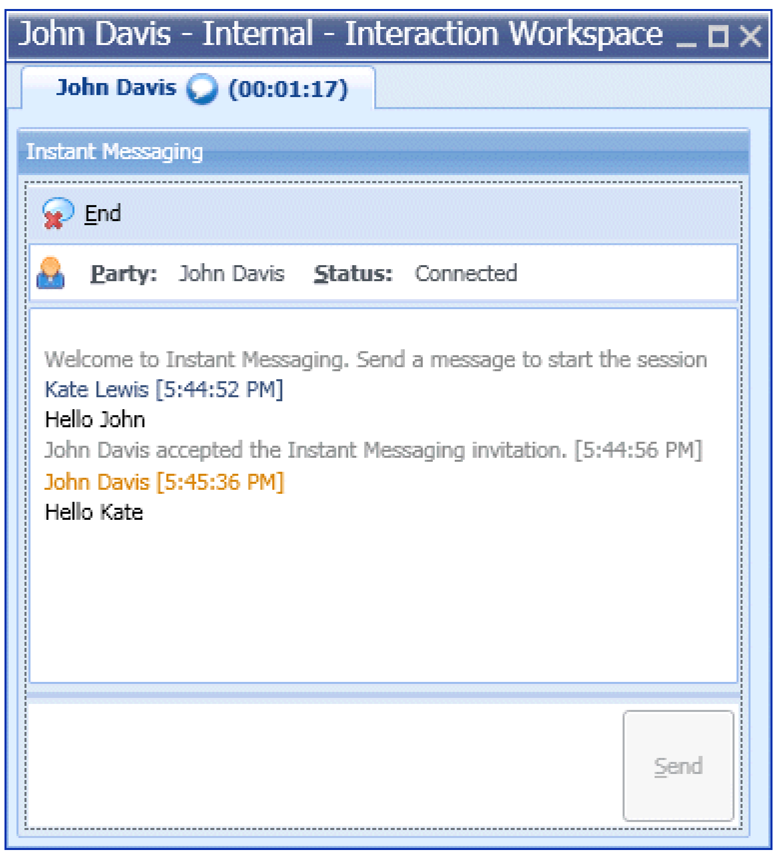


Figure 49: An Instant Messaging session in the Interaction window

4. If your target accepts your invitation, you can conduct an IM session by entering a text message to the internal target in the text field at the bottom of the view.
5. Click `Send` or press the `Enter` key on your keyboard to send your message to the internal target.

   The text of your message is displayed in the `Transcript` field of your interaction window.

   Messages from you are identified by your login name and a color that is different from the one that is used to identify replies from the internal target.

   Replies from the internal target are displayed in the `Transcript` field along with your messages.

   Messages are displayed in the order in which they are sent and received.

   Each message is tagged with a timestamp (refer to Figure 49).

   The Interaction view displays the name of the party to whom you are connected and the status of the connection: `Establishing`, `Connected`, or `Ended`.
6. When your session is complete, click the `End Session` button to end the IM session. The internal target may also do this.
7. Click the `Close` button to close the Interaction window.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Procedure:
Receiving an Instant Messaging session

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. If another agent selects you as an internal target for an IM session, an interactive notification is displayed that invites you to accept or reject the invitation to join the IM session (see Figure 50).

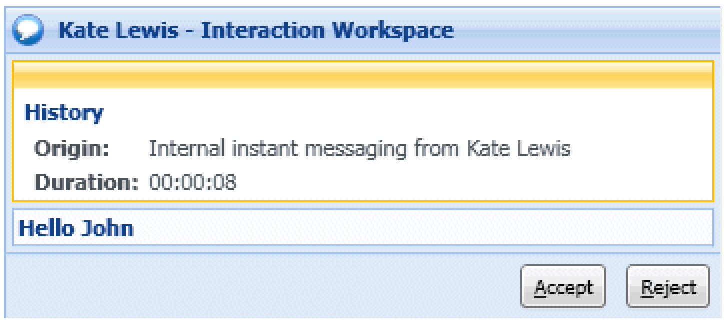


Figure 50: Instant Messaging interactive notification

2. Do one of three things:
   - Click `Accept` to display the new IM interaction in your Interaction window.
   - Click `Reject` to refuse the IM interaction.
   - Allow the invitation to time-out. The interactive notification is dismissed.
3. If you clicked `Accept`, the session starts in your Interaction view.

   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 of the connection: `Not Connected`, `Connected`, or `Disconnected`, is displayed near the top of the Interaction view.

   The large text field contains a transcript of the IM session. Your logon and the logon of the internal caller are displayed above your messages in different colors to help you to identify who is writing. Each entry is marked with a timestamp. Messages are displayed in the order in which they are sent and received (refer to Figure 51).

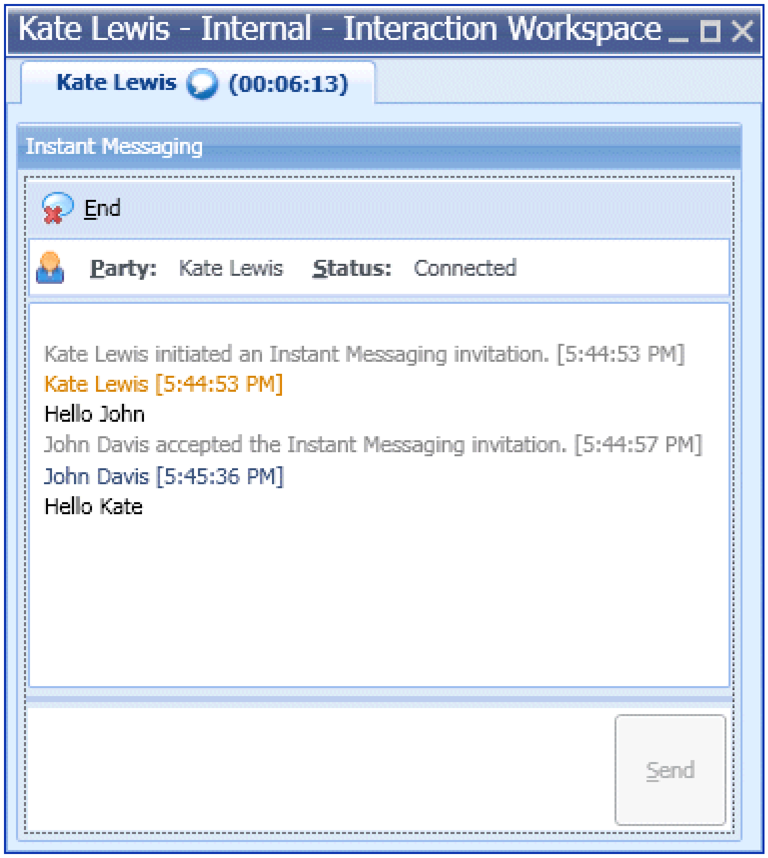


Figure 51: An Instant Messaging session in the Interaction view that was initiated by another agent

4. Reply to the calling agent by entering your message in the field next to the Send button.
5. Click Send or press the Enter key on your keyboard to send your message to the internal caller.
6. When your session is complete, click the End Session button to end the IM session. The caller may also do this.
7. Click the Close button to close the Interaction window.

End of procedure

Next Steps

- Set your status to Ready to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.

- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Chapter

11 Task: Transition from Internal Instant Messaging to Voice Consultation

In this chapter, you will learn how to use the Team Communicator feature to send an Instant Message (IM) to an internal target during a voice interaction and then, if necessary, transition the IM session to a voice consultation or transfer.

The Team Communicator enables you to find an internal target or a contact, send an IM to an internal target, call a contact or an internal target, initiate a conference, or transfer a call.

This chapter contains the following sections:

Instant Messaging Overview

Instant messaging (IM) is a type of real-time, text-based communication between two or more participants over a network. IM enables you to convey a text message immediately and receive an text reply immediately without the overhead and time delay that are associated with e-mail and other text-based communication technologies.

This feature enables you to send an IM to another agent (internal target) or receive an IM from an internal target.

The Interaction Workspace IM view provides identification of all connected parties, as well as a timestamp for each message.

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

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

Sending an Internal Instant Message then Transitioning to Voice

During a voice interaction, you can use the Team Communicator to send an Instant Message to an internal target.

Note: Interaction Workspace supports only internal IM sessions.

This section contains the following procedures:

- Procedure: Transitioning an IM consultation to a Voice consultation, on page 92

Procedure: Transitioning an IM consultation to a Voice consultation

Purpose: To transition an Instant Message consultation regarding an active voice interaction to a voice consultation.

If you are engaged in an active voice interaction (see “Task: Handle an Inbound Voice Interaction” on page 39) and you want to start an IM session with an internal target that displays the case data and other call information automatically to the internal target, use the Team Communicator on the Interaction window.

For information on voice conferencing, voice transfer, and Instant Messaging, see:

- “Task: Use the Team Communicator to Start a Voice Conference” on page 61
- “Task: Use the Team Communicator to Transfer a Voice Call” on page 73
- “Task: Use Internal Instant Messaging” on page 83

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).
- You are engaged in an inbound voice interaction.

Start of procedure

1. An inbound voice interaction displays case data and call-history information (see Figure 52). If you want to consult with an internal target about the inbound interaction, you can share this information with the internal target by using the Team Communicator on the interaction window (see "Task: Use the Team Communicator to Start a Voice Conference" on page 61 and "Task: Use the Team Communicator to Transfer a Voice Call" on page 73).

   Use the Team Communicator to find an internal target.

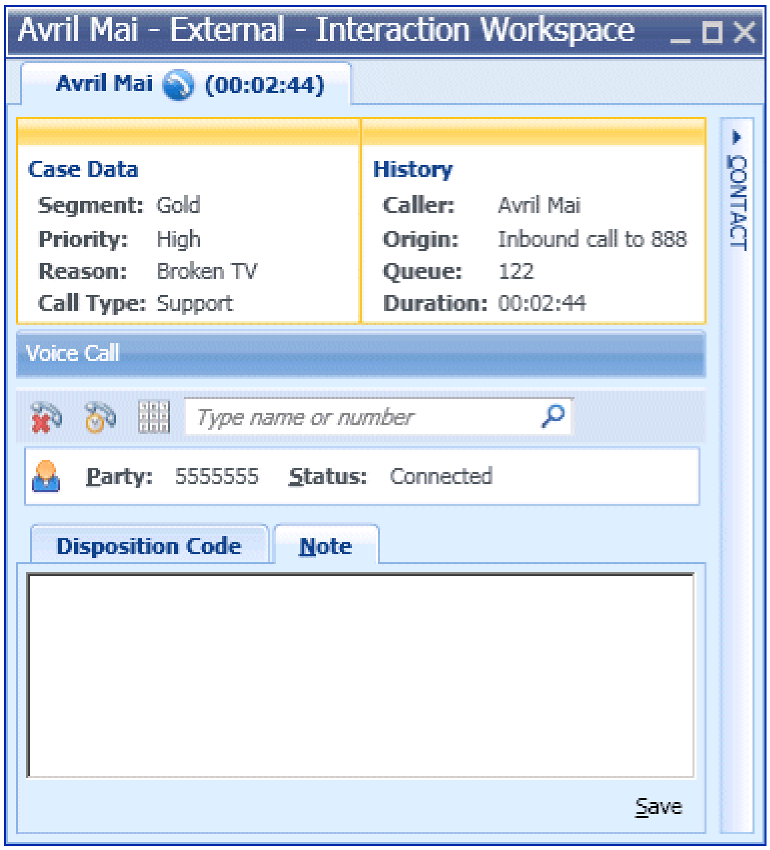


Figure 52: Voice Interaction window displaying case data, call history, and the Team Communicator

2. Click the `Action Menu` drop-down list next to the name of the internal target to whom you want to send an instant message, and select `Send an Instant Message to` (see Figure 53).

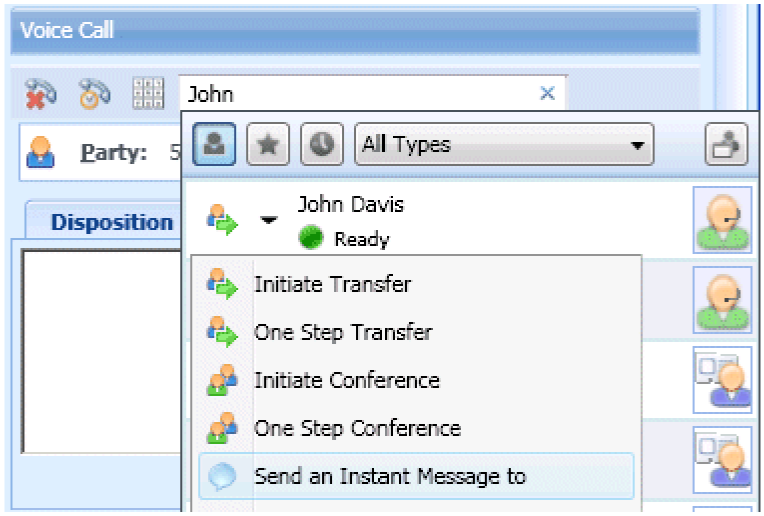


Figure 53: Voice Interaction Team Communicator Internal Target Action menu

3. Enter an initial message to send an invitation to the internal target. When the internal target replies, you are connected and can begin the IM consultation (see Figure 54).

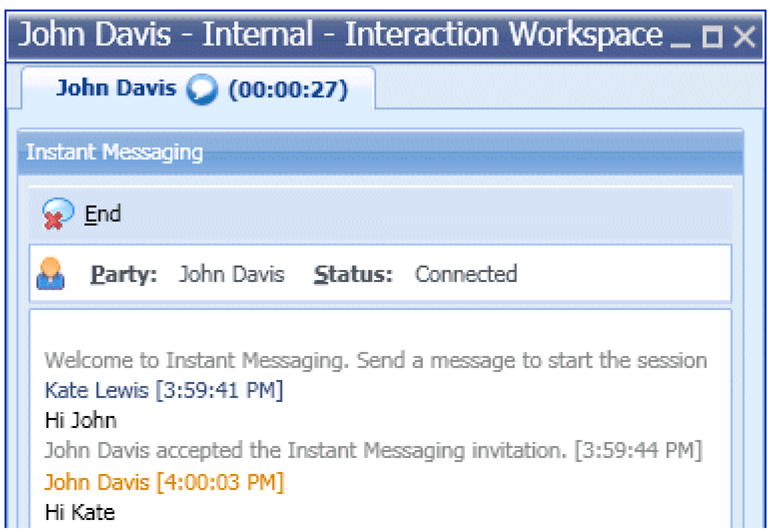


Figure 54: Internal Instant Messaging window

The Instant Messaging window that is displayed on the desktop of your internal target contains the case data for your inbound voice interaction (see Figure 55).

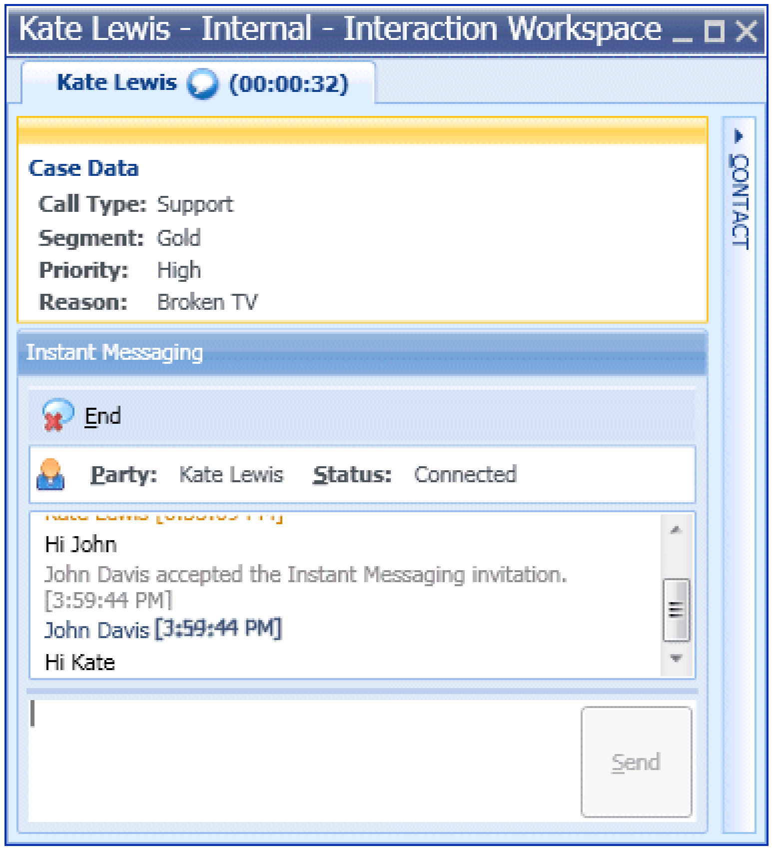


Figure 55: IM Consultation Instant Messaging window that is displayed to the internal target

4. To transition the Instant Message Consultation session to a Voice Consultation, click in the Voice Interaction window Team Communicator (seeFigure 56).

   If you do not enter anything into the Team Communicator, the `Active Consultation` drop-down menu opens and displays the `Action Menu` options for the internal target with whom you are already involved in an active IM consultation. Select one of the following consultation options:

   - `Initiate Transfer`—The contact is put on hold. When the internal target accepts the interaction request you can speak to the internal target agent.
   - `One Step Transfer`—The call is transferred as soon as the internal target accepts the interaction request. Depending on the configuration of your system, this option might not be available.
   - `Initiate Conference`—The contact is put on hold. When the internal target accepts the interaction request you can speak to the internal target.
   - `One Step Conference`—The conference begins as soon as the internal target accepts the interaction request. Depending on the configuration of your system, this option might not be available.

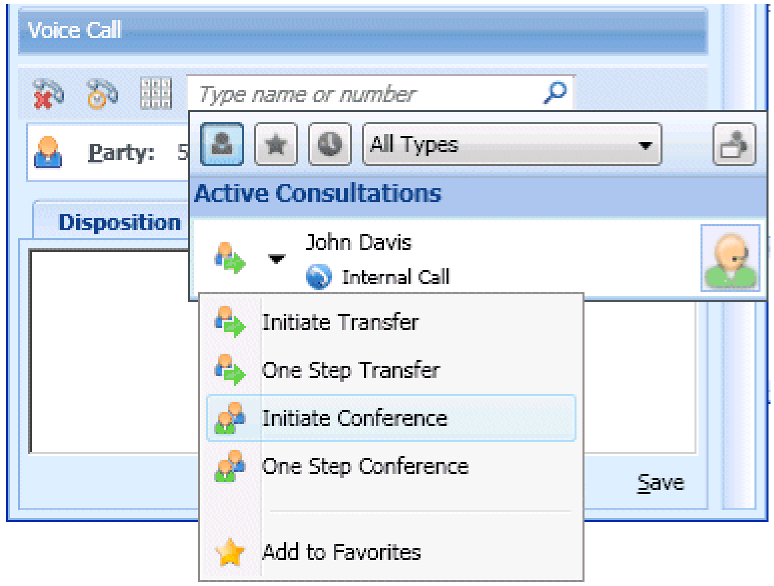


Figure 56: Voice Interaction window Team Communicator, displaying the Active Consultations drop-down menu

Continue the consultation as either a conference or a transfer call. For information on voice conferencing and voice transfer, see:

- "Task: Use the Team Communicator to Start a Voice Conference" on page 61
- "Task: Use the Team Communicator to Transfer a Voice Call" on page 73

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.

- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

12 Task: Apply Disposition Codes

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

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

Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code. Your system might be configured so that the Disposition Code view is not displayed.

This chapter contains the following sections:

Assigning Disposition Codes

Many contact centers attach data to interactions that specifies the outcome of each interaction. The outcomes are defined by the contact center administrators. Each outcome is assigned a disposition code that enables contact center personnel or systems to determine whether a call was successful, transferred, or whether a follow-up interaction is required.

Interaction Workspace employs a simple radio-button interface to enable you to assign a disposition code to your interaction quickly and easily.

Procedure: Applying a disposition code to a Voice interaction

Purpose: To attach information about the outcome of the current or selected interaction.

A disposition code can be set at different times depending on the configuration of your system. Your system might require you to set the disposition code before you click `Mark Done` to complete an interaction. Your system might require you to set the disposition code before you transfer or conference the interaction. Or, you might set the disposition code on an existing interaction in the contact database.

The following procedure assumes that you must set the disposition code before you click `Mark Done`.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main Window, on page 31).
- You have an open Voice Media interaction (see "Receiving a Voice Interaction" on page 39).
- Your assigned role requires you to assign disposition codes to interactions.

Start of procedure

1. If the customer has not ended the call, but you are ready to hang up, in the active Voice Interaction view (refer to “Receiving a Voice Interaction” on page 39), click `End Call` (the phone-set button with the red `X`; refer to Figure 57).

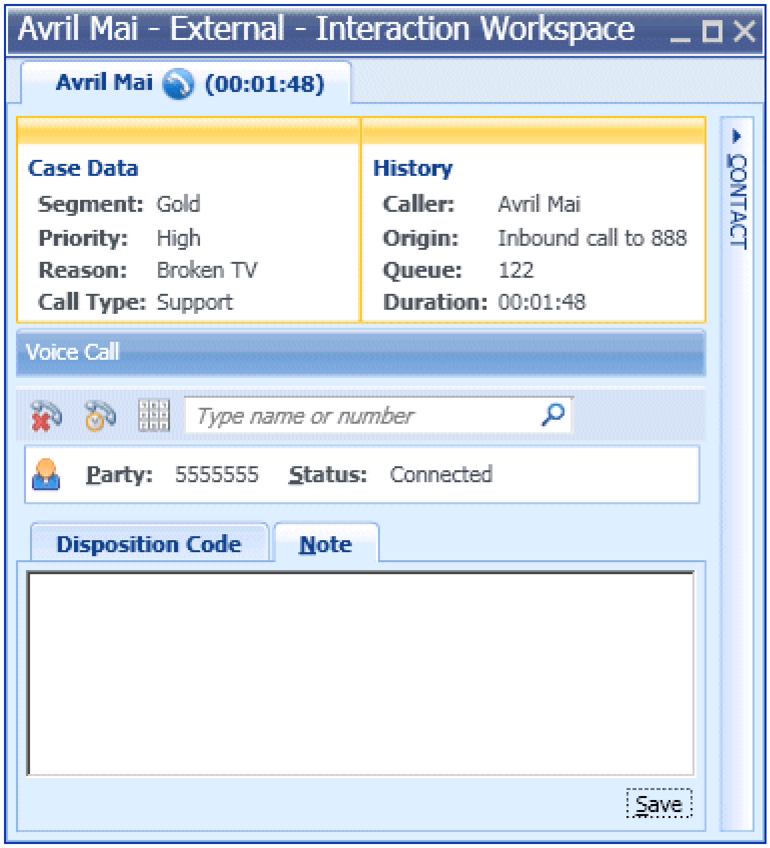


Figure 57: Inbound Voice Interaction view, with no disposition code set

2. Click the `Disposition Code` tab (refer to Figure 58) to display the Disposition Code selector.

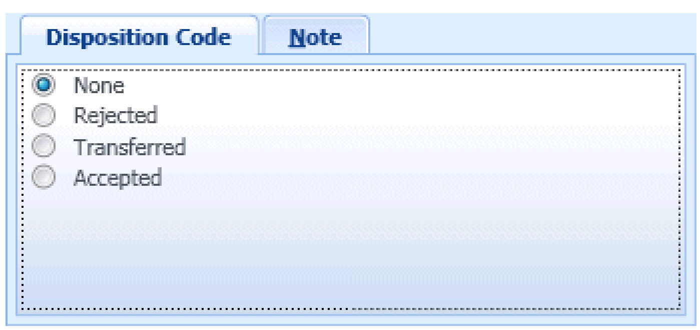


Figure 58: Disposition Code view, with no disposition code set

3. Click the `Disposition Code` radio button to specify the outcome of the call. The available options are configured by your system administrator; they might not be the same values that are shown in Figures 58 and 59.

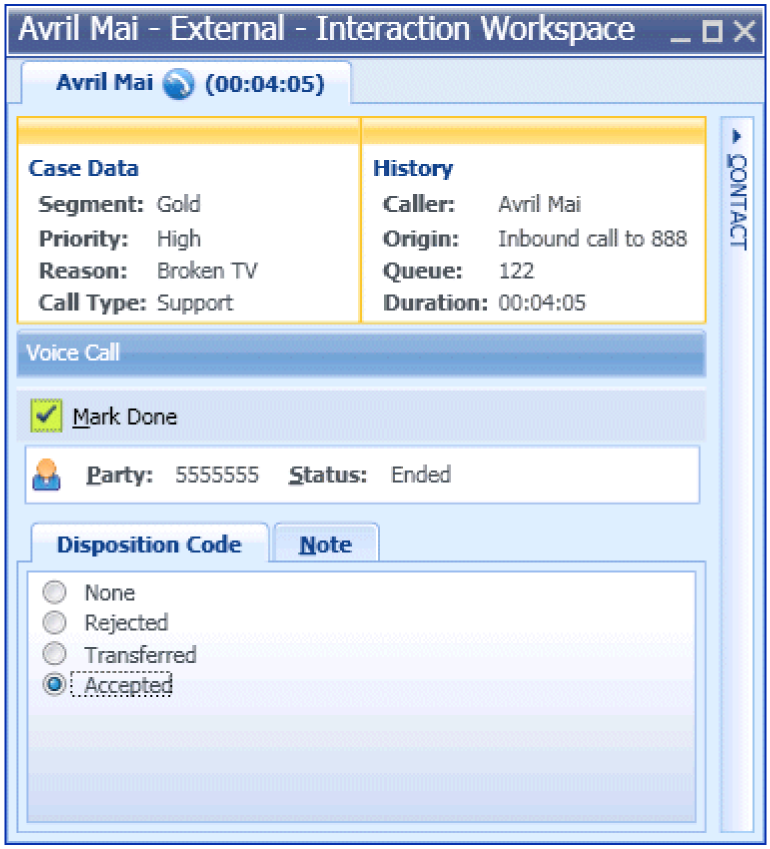


Figure 59: Voice Interaction view, with disposition code set

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

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interaction—See: Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.

- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

13 Task: Manage Contacts

The Interaction Workspace Contact History view enables you to view and manage previous interactions with a contact.

This chapter contains the following sections:

Managing Contact History

The Contact History view enables you to view and manage previous interactions with a contact. You can find and select previous interactions by using the following views:

- Contact Directory (refer to Procedure: Finding and viewing an interaction in the contact database, on page 106)
- Information view of the current voice interaction (refer to Chapter 5, “Task: Handle an Inbound Voice Interaction,” on page 39)

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the Contact History view to do the following:

- Find interactions for the current contact or the currently selected contact.
- Perform the following actions on selected interactions:
  - Mark done open interactions
  - Merge interactions
  - Unmerge interactions
- View information about selected interactions

This section contains the following procedures:

- Procedure: Finding and viewing an interaction in the contact database, on page 106
- Procedure: Using the Quick Search to find an interaction, on page 111
- Procedure: Using the Advanced Search to find an interaction, on page 113

Procedure: Finding and viewing an interaction in the contact database

Purpose: To find and view or modify existing interactions for a contact in the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. Do one of the following:
   - On the Interaction Workspace Main Window:
     i. Click `Contact` to display the `Contact Directory` tab.

Figure 60: Contact Directory tab

     ii. Click in the `Quick Search` field and enter the name of the contact for whom you are searching to find the contact in the contact database.

iii. Click the magnifying-glass icon, or press `Enter`, to begin the search.

iv. Click on the name of the contact in the search-results table or list.

v. In the `Show Details Panel` drop-down list, display the Details panel (refer to Figure 61).

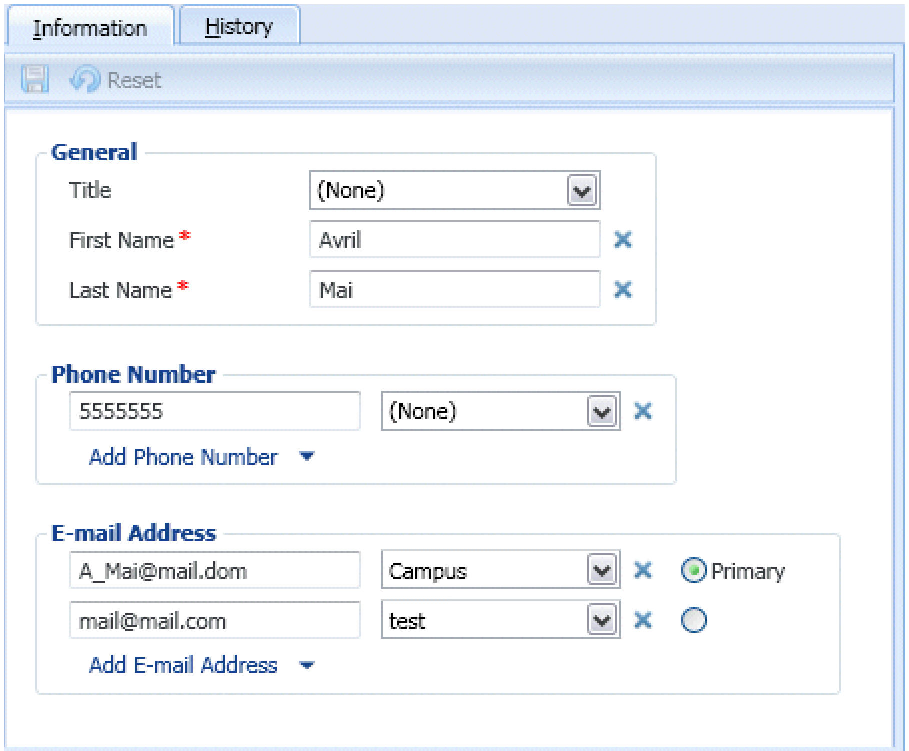


Figure 61: Contact Details view displaying the Contact Information tab

vi. Click the `History` tab to display the contact History view (refer to Figure 62).

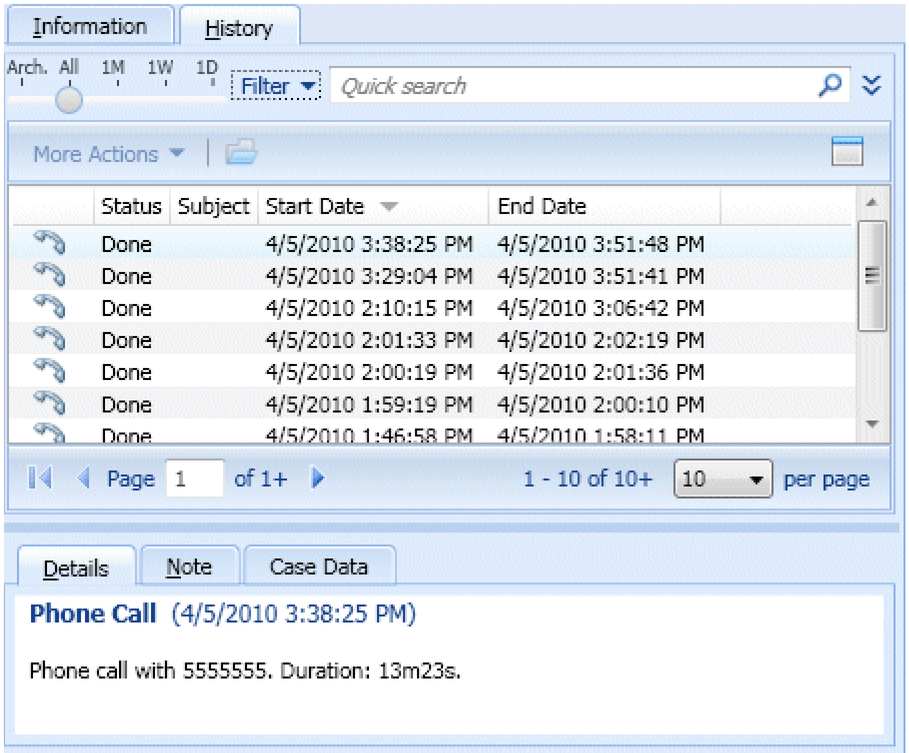


Figure 62: Contact Details view displaying the Contact History tab

- From the Information view of the current Interaction view, click the `Contact` button on the right-hand side of the current interaction and select `History` from the drop-down list to display the `History` tab (refer to Figure 63).

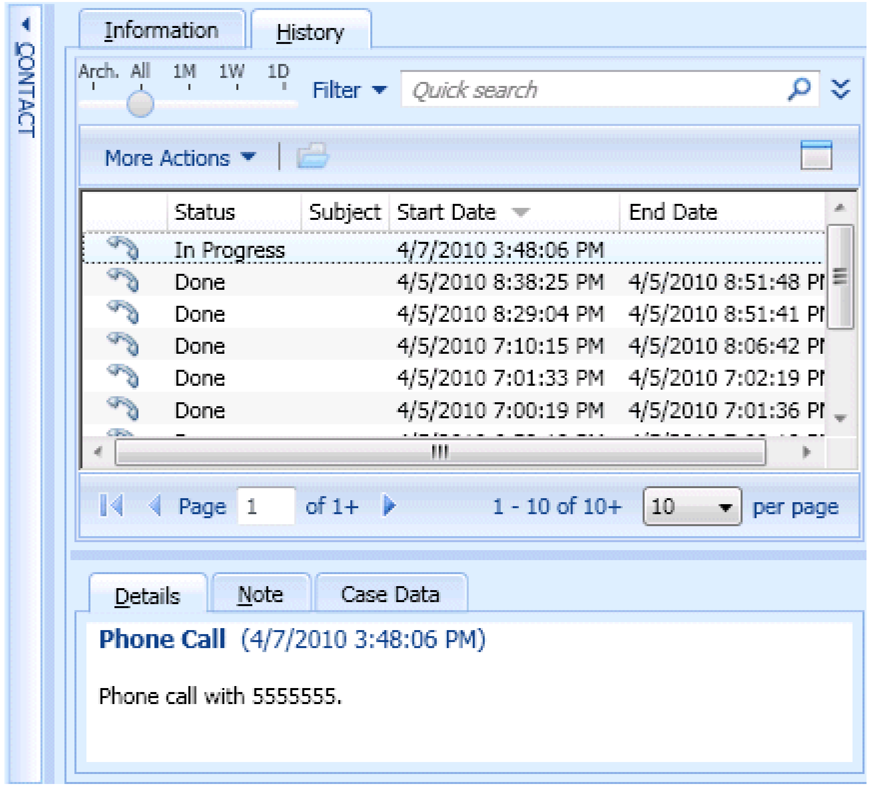


Figure 63: History View for the current or selected contact

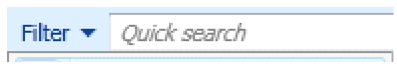
2. Find the interaction that you want to view by using one of the following search types:
   - **Quick Search**—Enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of `2` or find all interactions that are related to the subject of `billing`. Refer to the Procedure: Using the Quick Search to find an interaction, on page 111.
   - **Advanced Search**—Enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject`. It also contains drop-down lists with modifiers that determine how the criteria will affect the search. Refer to Procedure: Using the Advanced Search to find an interaction, on page 113.
3. If more than one interaction matches your search criteria, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.

   The slider has five positions that represent different time intervals:
   - **Arch.**—Search the database for messages that have been archived.

- **All**—Search the entire database from the most recent interaction back to the earliest interaction.
- **1M**—Search the database from the most recent interaction back to one month ago.
- **1W**—Search the database from the most interaction recent back to one week ago.
- **1D**—Search the database from the most interaction recent back to one day ago.

4. If more than one type of interaction matches your search criteria, use the Type filters to search only for interactions of a specific type. The interaction types are: Voice, E-mail, and Chat/Instant Message. Select the filter type from the drop-down list to turn the filters on and off. When a filter is on, a check mark appears beside its name in the menu.



5. If more than one interaction matches your search criteria, you can sort the contents of the search results table by an attribute. The attributes are defined by your system administrator.

   To sort the interactions by one of the attributes, click the column headings that match the attribute that you wan to use to sort the results (refer toFigure 63 on page 109). Your available search criteria might include one of the following:

   - **Status**—The disposition code that was assigned to the interaction, if any
   - **Subject**—For e-mail interactions only
   - **Start Date**—The date and timestamp when the interaction was first received
   - **End Date**—The date and timestamp when the interaction was marked Done.

6. Click an interaction to select it. Information about the interaction is displayed in the `Details` panel, in the `Details` tab, the `Notepad` tab, and the `Case Data` tab (refer to Figure 63 on page 109).

7. If you are configured to manage contact data, open the `Actions` menu and then choose one of the following actions:

   - **Mark Done**—Displayed only if an interaction is still in progress. If you complete an interaction, select it in the interactions table and then click `Mark Done`. The status of the interaction will be changed to `Done`.
   - **Change Contact**—Assign a different contact for the selected interaction.

8. When you have finished working on the selected interaction in the Main Window, clear the search results by clicking the `X` button beside the search field.

   When you have finished working on the selected interaction in the Interaction view, close the Information view by clicking the `Contact` button on the right-hand side of the current interaction.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Procedure: Using the Quick Search to find an interaction

Purpose: To search for any interaction by status, end date, and start date.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You have completed Step 1 of Procedure: Finding and viewing an interaction in the contact database, on page 106.

Start of procedure

1. To search the contact history, type in the `Quick Search` field (refer to Figure 64) the attribute value for which you are searching.

   You can use the standard Windows wildcard characters—such as ?, *, _, and %—to expand your search.

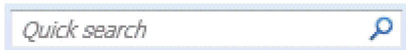


Figure 64: Contact History view Quick Search tool

> **Note:** Quick Search is a *begins-with* search.

2. Click the magnifying-glass icon, or press `Enter`, to search for the criteria that you have entered.

   Your search results are displayed in the Search Results table (refer to Procedure: Finding and viewing an interaction in the contact database, on page 106).

3. Click the `X` to clear the `Quick Search` field and the Search Results table.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Procedure:
Using the Advanced Search to find an interaction

Purpose: To enter multiple interaction criteria to refine your search of the contact database. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, `End Date`, and `Subject`. It also contains drop-down lists with modifiers that determine how the criteria will affect the search.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You have completed Step 1 of Procedure: Finding and viewing an interaction in the contact database, on page 106.

Start of procedure

1. To search the contact history, enter in the Advanced Search view (refer to Figure 65) the attribute value or values that you want to find. You can use the standard Windows wildcard characters to expand your search.

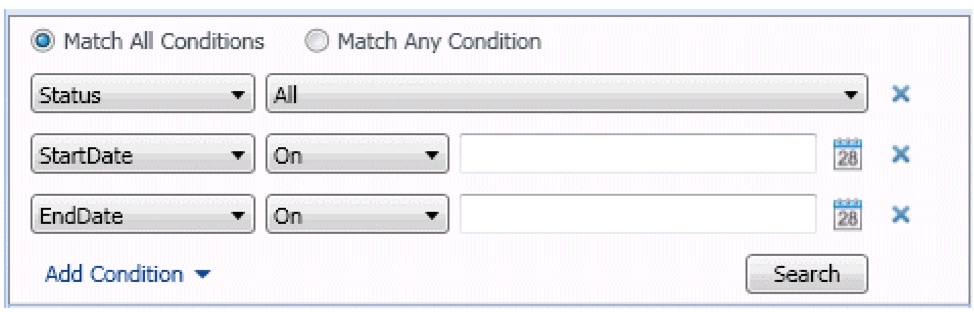


Figure 65: Contact History view Advanced Search tool

   - From the column of search attributes on the left, choose the attribute within which you want to search from the drop-down lists.
   - From the column of search modifiers to the right of the attribute column, choose how the search string should be considered.

     Menus for predefined fields, such as `Status`, contain the predefined field names from the database—for example: `All`, `Done`, and `In progress`.

     Menus for date fields contain the following choices:

     — **On**—The exact date.

     — **On or after**—The specified date or any date after.

- **Before**—Before the specified date.

Menus for text fields contain the following choices:

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

- Enter the search value in the text field on the right-hand side. If your criterion is a start date or end date, use the calendar pop-up window to specify the date.
- Select a `Match Conditions` option to specify whether `All` or `Any` of the search conditions that you have specified are applied.

2. Click the magnifying-glass icon, or press `Enter`, to search for the values that you have entered.

   Your search results are displayed in the Search Results table (refer to Procedure: Finding and viewing an interaction in the contact database, on page 106).

3. Click the `X` to clear the `Advanced Search` fields and the Search Results table.

End of procedure

Next Steps

- Set your status to `Ready` to receive inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Managing Your History

The My History view enables you to view and manage previous interactions between you and a contact. You can find and select your previous interactions by using the following views:

- `My History` tab in the Main Window
- `My History` window

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the My History view to do the following:

- Find interactions for contacts whom you have handled
- Perform the following actions on selected interactions:
    - Mark done open interactions
    - Assign interaction to another contact
- View information about selected interactions

This section contains the following procedure:

- Procedure: Finding and viewing your interactions in the contact database, on page 115

Procedure: Finding and viewing your interactions in the contact database

Purpose: To find and view or modify your interactions for a contact in the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. Do one of the following:
   - On the Interaction Workspace Main Window (see Figure 66):
     i. Click `Workspace` to display your workspace.

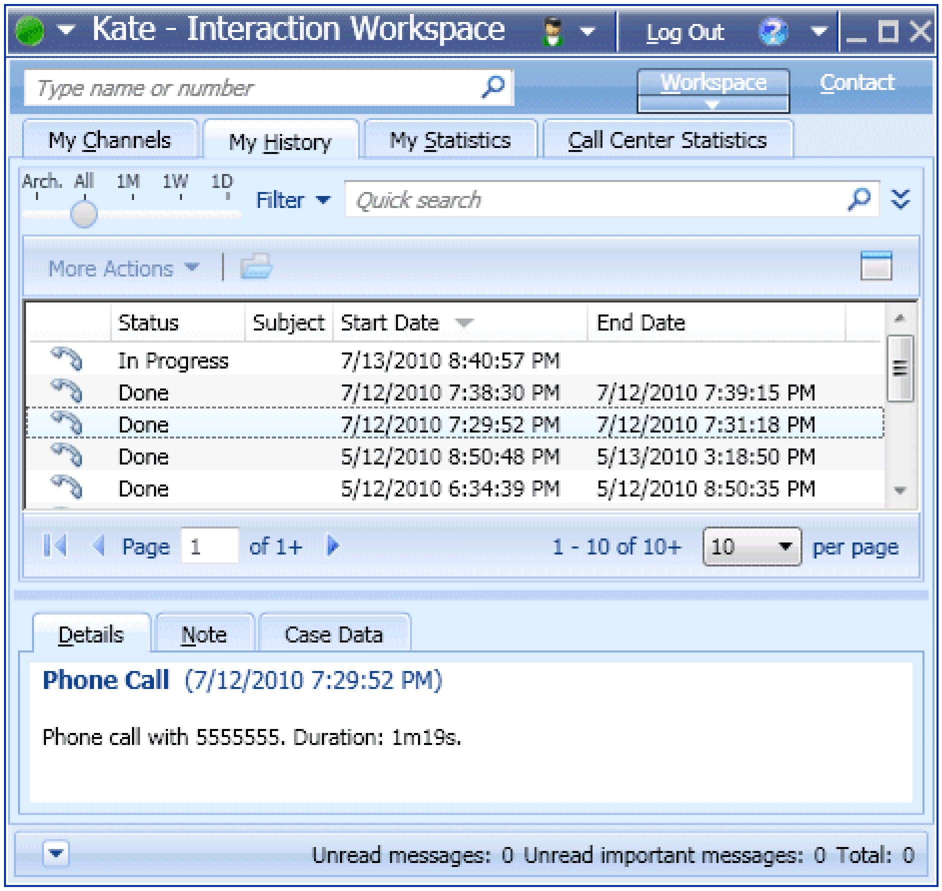


Figure 66: Main Window displayed the My History tab in the Workspace view

     ii. Click the `My History` tab to display all of your interactions.

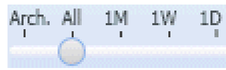
2. To find all of your interactions with a specific contact, do the following:
     i. Click in the `Quick Search` field and enter the name of the contact for whom you are searching.

     The Quick Search enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of `2` or find all interactions that are related to the subject of `billing`. Refer to the Procedure: Using the Quick Search to find an interaction, on page 111.

ii. Click the magnifying-glass icon, or press `Enter`, to begin the search. When the search is complete, a list is displayed of all of your interactions in the contact database that match your search criteria.

To find a specific interaction in the list of search results, you can filter the results by date, interaction type, or advanced criteria.

3. To filter the search results by date, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.



The `Chronology` slider has five positions that represent different time intervals:

- **Arch.**—Search the database for messages that have been archived
- **All**—Search the entire database from the most recent interaction back to the earliest interaction
- **1M**—Search the database from the most recent interaction back to one month ago
- **1W**—Search the database from the most interaction recent back to one week ago
- **1D**—Search the database from the most interaction recent back to one day ago

4. To filter the search results by type of interaction, use the Type filters to search only for interactions of a specific type (see Figure 67). The interaction types are: Voice, E-mail, and Chat/Instant Message. Select the types to display from the `Filter` drop-down menu. The `Filter` menu options turn the filters on and off. When a filter is on, there is a check mark beside it in the menu.

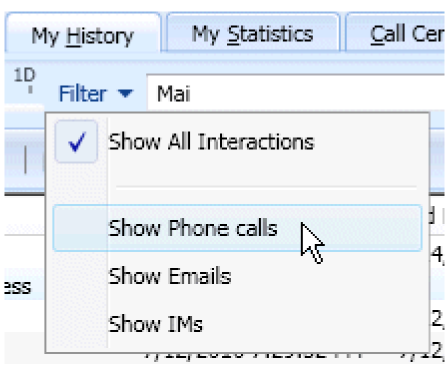


Figure 67: My History view Filter menu.

5. The Advanced Search enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject` (see Figure 68). It also

contains drop-down lists with modifiers that determine how the criteria will affect the search. Refer to Procedure: Using the Advanced Search to find an interaction, on page 113.

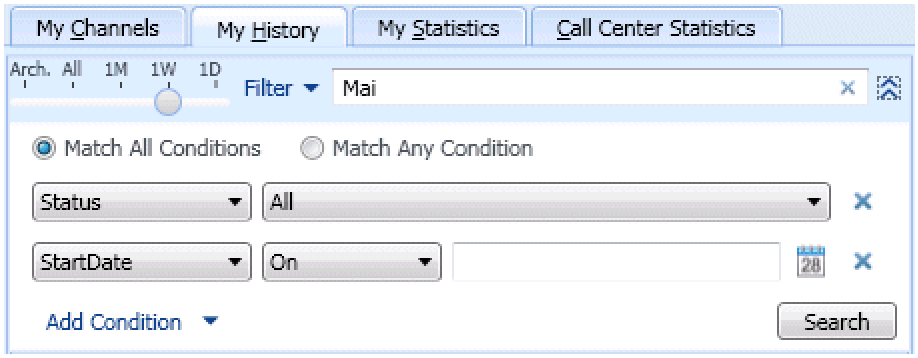


Figure 68: Advanced Search view displaying the My History tab

6. If more than one interaction matches your search criteria, you can sort the contents of the search results table by an attribute (see Figure 69). The attributes are defined by your system administrator.

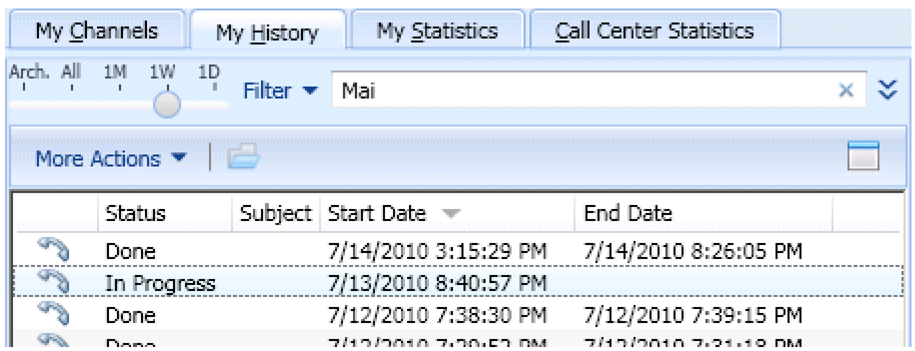


Figure 69: Search results displaying the My History tab

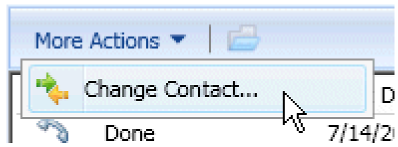
To sort the interactions by one of the attributes, click the column headings that match the attribute that you want to use to sort the results (refer to Figure 69). Your available search criteria might include one of the following:

- **Status**—Done or In Progress
- **Subject**—For e-mail interactions only
- **Start Date**—The date and timestamp when the interaction was first received
- **End Date**—The date and timestamp when the interaction was marked Done

7. Click an interaction to select it. Information about the interaction is displayed in the `Details` panel, `Details` tab, `Notepad` tab, and `Case Data` tab (refer to Figure 66 on page 116).

8. If you are configured to manage contact data, open the `More Actions` menu and then choose one of the following actions:

- **Mark Done**—If you complete an interaction, select it in the interactions table, and then click `Mark Done`. The status of the interaction will be changed to `Done`.
- **Change Contact**—Assign a different contact for the selected interaction.



9. When you have finished working on the selected interaction in the `My History` tab, clear the search results by clicking the `X` button beside the search field.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Managing Contacts and Contact Information

The Contact Directory view enables you to view and manage contacts and contact information. You can manage contacts by using the following views:

- Contact Directory (refer to Procedure: Finding and viewing an interaction in the contact database, on page 106)
- Information view of the current voice interaction (refer to Chapter 5, “Task: Handle an Inbound Voice Interaction,” on page 39)

Interactions are stored with various attributes. You can use these attributes to find specific interactions. Search results are shown in the interactions table. You can sort, filter, and perform actions on the interactions that you select. Use the Contact Directory view to do the following:

- Find interactions for the current contact or the currently selected contact
- Perform the following actions on selected interactions:
  - Mark done open interactions
  - Merge contacts
  - Unmerge contacts
- View information about selected interactions

This section contains the following procedures:

- Procedure: Adding a contact, on page 120
- Procedure: Deleting a contact, on page 122
- Procedure: Updating contact information, on page 123
- Procedure: Merging contacts, on page 125
- Procedure: Unmerging contacts, on page 128

Procedure: Adding a contact

Purpose: To add a contact to the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. If you are configured to do so, you can add new contacts to the contact database by using one of the following Contact Information views:
   - The Contact Directory in the `Contact Information` tab. Click `Create New Contact` to launch the Add Contact view.

   - The `Contact Information` tab of the current Interaction window.

   The Contact Information view enables you to view and edit contact information (see Figure 70). 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.

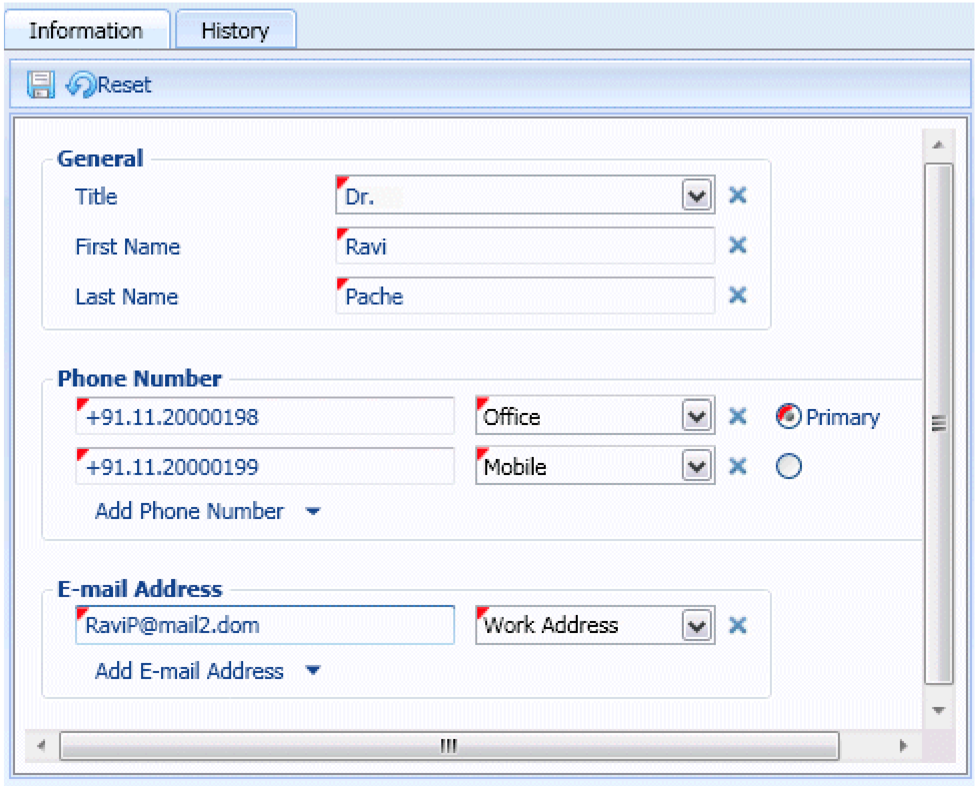


Figure 70: Contact Information tab

2. Enter the contact information in the fields. A small red triangle appears in the top left hand corner of the text field to indicate that the information is not saved.
3. Do one of the following:
   - Click the Save icon to save the information in the contact database.

   - Click the Reset icon to clear any unsaved changes from the Add Contact view.

4. If you want to add additional phone numbers and e-mail addresses for the new contact, click the `Add Phone Number` or `Add E-mail Address` link. A new set of fields is added into which you can enter this information.
5. To specify a phone number or e-mail address as the primary contact number or address, click the `Primary` radio button beside the phone number or e-mail address that you want to specify as the primary number or address (respectively) for the contact.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Procedure:
Deleting a contact

Purpose: To remove/delete a contact from the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. To delete a contact, you first must find the contact in the contact database and select it in the contact directory (refer to the Procedure: Using the Team Communicator feature to find a contact, on page 49).
2. With one or more contacts that you want to delete selected, click the Delete icon.

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

4. When you have finished working on the selected interaction in the `My History` tab, clear the search results by clicking the `X` button beside the search field.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Procedure: Updating contact information

Purpose: To update contact information in the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. If you are configured to do so, you can edit contacts in the contact database by using the Contact Directory in the `Contact Information` tab.

   The Contact Information view enables you to view and edit contact information (see Figure 71). 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.

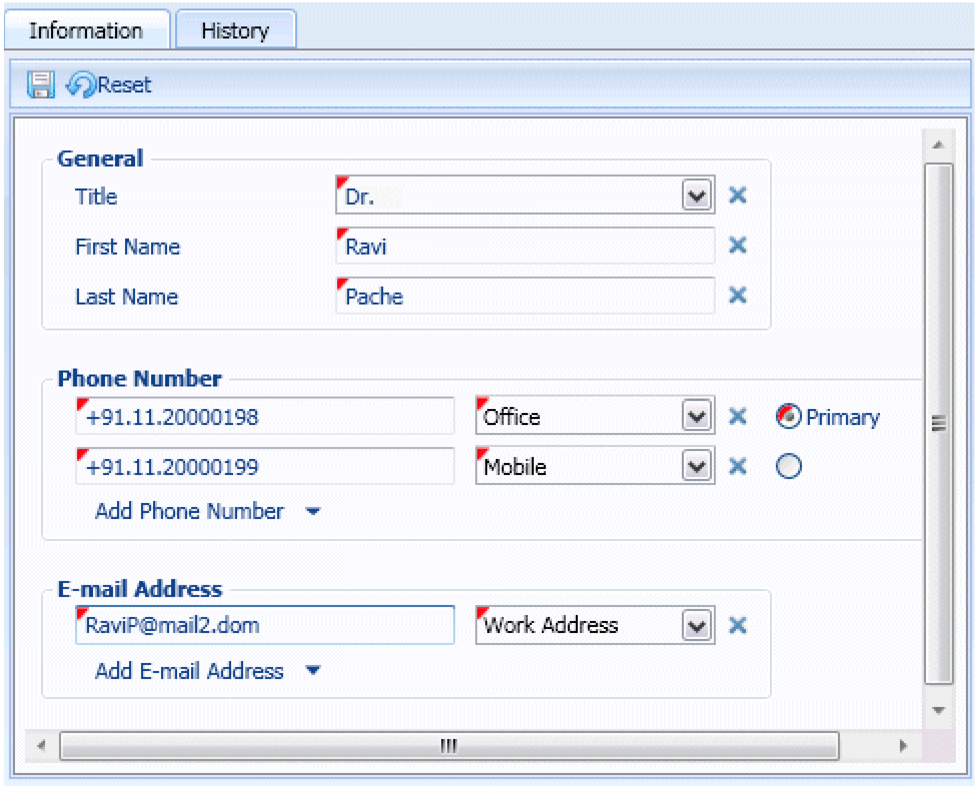


Figure 71: Contact Information tab

2. Enter the contact information in the fields. A small red triangle appears in the top left-hand corner of the text field to indicate that the information is not saved.
3. Do one of the following:
   - Click the Save icon to save the information in the contact database.

   - Click the Reset icon to clear any unsaved changes from the Add Contact view.

4. If you want to add additional phone numbers and e-mail addresses for the new contact, click the `Add Phone Number` or `Add E-mail Address` link. A new set of fields is added, into which you can enter this information.
5. To specify a phone number or e-mail address as the primary contact number or address, click the `Primary` radio button beside the phone number or e-mail address that you want to specify as the primary number or address (respectively) for the contact.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Procedure: Merging contacts

Purpose: To combine two contacts in the contact database.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. If there are two contact entries in the contact database for the same contact, you can merge the two entries into a single entry. To merge a contact, you first must find the contact in the contact database (refer to the Procedure: Using the Team Communicator feature to find a contact, on page 49) and select it in the contact directory (see Figure 72).

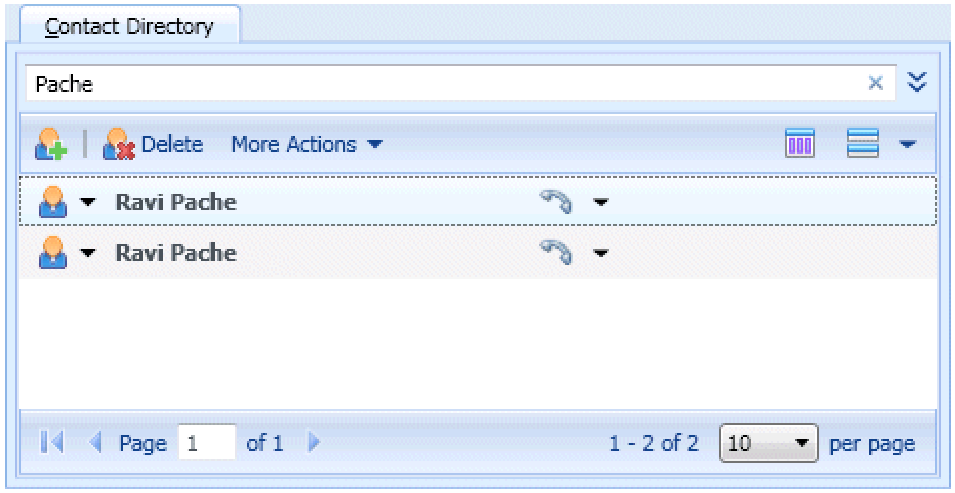


Figure 72: Two Contact Entries for the Same Contact in the Contact Directory

2. Click the `More Actions` menu and select `Merge` (see Figure 73).

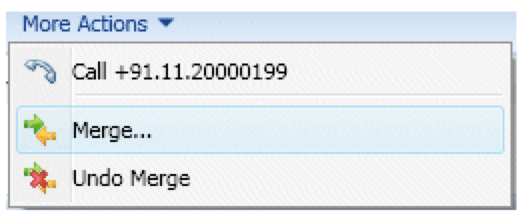


Figure 73: Contact Directory More Actions Menu

3. The `Merge Contact` dialog box is displayed (see Figure 74).

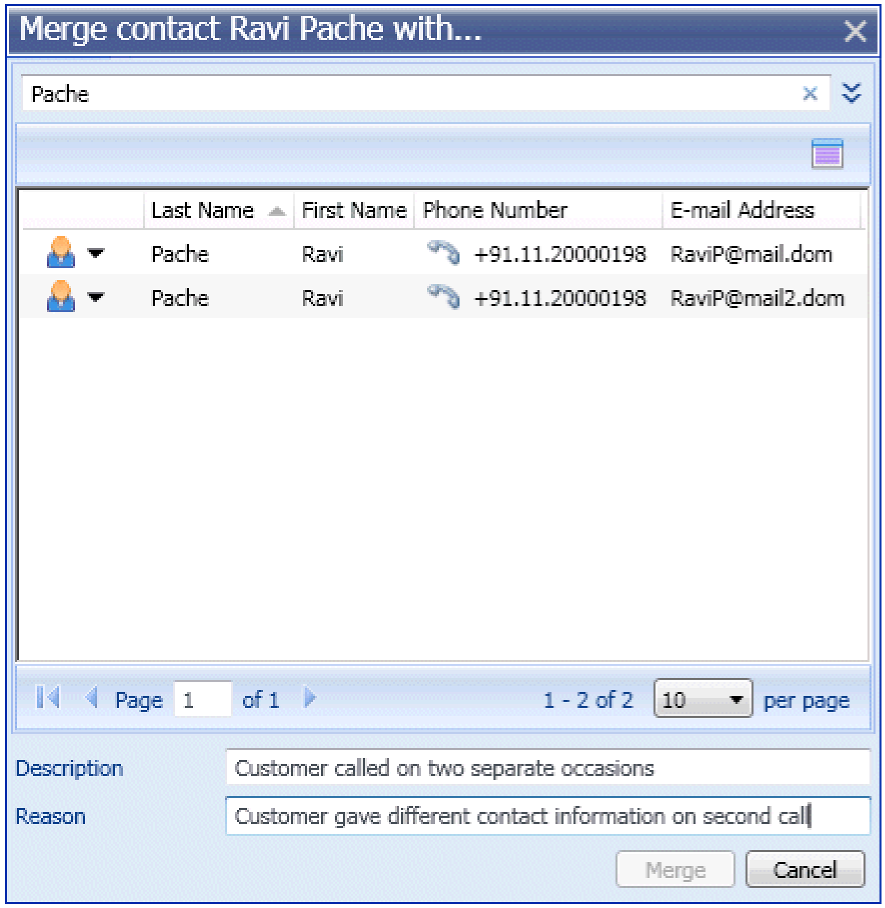


Figure 74: Merge Contact <name> With Dialog Box

Use the search tools to find the duplicate contact.

4. Select the duplicate contact.
5. If you are required to enter a description and/or reasons for the merge, use the fields after selecting the duplicate contact.
6. Do one of the following:
   - Click `Merge` to complete the merge of the two selected contact entries.
   - Click `Cancel` to cancel the merge and return to the Main Window.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.

- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Procedure: Unmerging contacts

Purpose: To unmerge into their original contact entries two contact entries in the contact database that have previously been merged.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. First, find the contact in the contact database (refer to the Procedure: Using the Team Communicator feature to find a contact, on page 49).
2. In the contact directory, select the contact who is to be unmerged.
3. In the `More Actions` menu, select `Undo Merge`.
4. A confirmation dialog box is displayed.
   - Click `Yes` to unmerge into the original two contact entries.
   - Click `No` to keep the contact merged.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.

- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

14 Task: View KPIs and Statistics

Interaction Workspace provides two views of performance: `My Statistics` and `Contact Center Statistics`. The `My Statistics` view lists your Key Performance Indicators (KPIs). The `Contact Center Statistics` view displays statistics about the Switches, Routing Points, queues, and other objects.

This chapter contains the following sections:

Viewing Your KPIs

There are three ways to view the `My Statistics` view:

- From the `My Statistics` tab of the Main Window Workspace (see "Viewing Your KPIs" on page 131)
- From the `My Statistics` window of the Gadget (refer to the *Interaction Workspace 8.0 Context-Sensitive Help*)
- From the Statistics Gadget (see "Viewing Statistics by Using the Statistics Gadget" on page 136)

The `My Statistics` view displays your KPIs. Your system administrator configures the KPIs that are displayed to you. The following columns of information are available for each KPI:

- `Error/Warning Level`—The error or warning level, if either is exceeded
- `Key Performance Indicator`—A description of the statistic

- `Personal`— Your value for the statistic
- `<Agent Group Name>`— The value for the statistic for the agent groups to which you belong.

Procedure: Viewing Your Key Performance Indicators (KPIs)

Purpose: To determine if you are meeting the performance targets that have been set for you by your contact center.

The `My Statistics` tab displays your current KPIs and agent group KPIs. The `My Statistics` tab enables you to compare your performance with other members of your team. Warning and error icons are displayed to indicate which KPIs require your attention.

Prerequisites

- You are configured to view your KPIs.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You are using the Main Window view, not the Gadget. To view the `My Statistics` window from the Gadget, select it from the `Main Menu` (refer to the *Interaction Workspace 8.0 Context-Sensitive Help*).

Start of procedure

1. In the Main Window view, click `Workspace`.

   The Main Window Workspace view opens below the Team Communicator (refer to Figure 75).

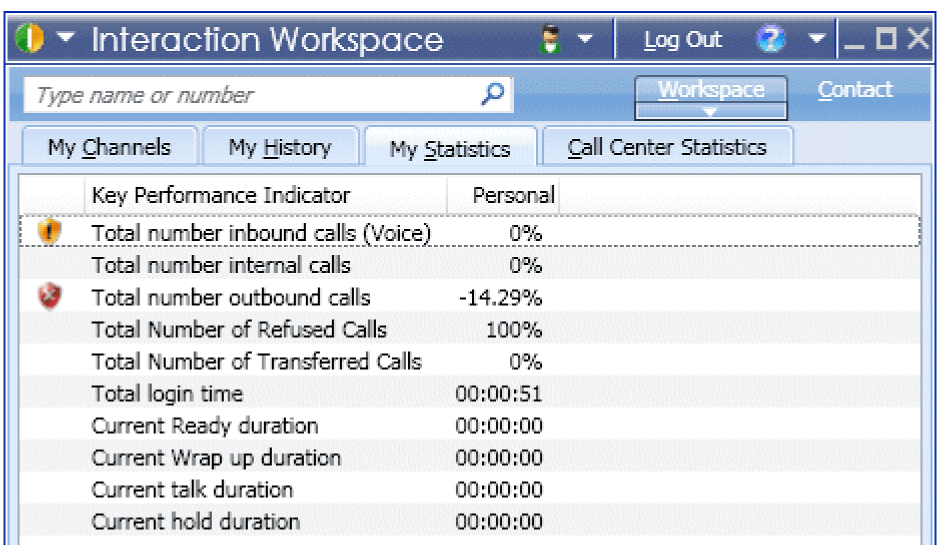


Figure 75: Main Window Workspace view

2. In the Main Window Workspace view, click the `My Statistics` tab.

   The list of your Key Performance Indicators (KPIs) is displayed (refer to Figure 76). This view is updated constantly so that you can view your current statistics.

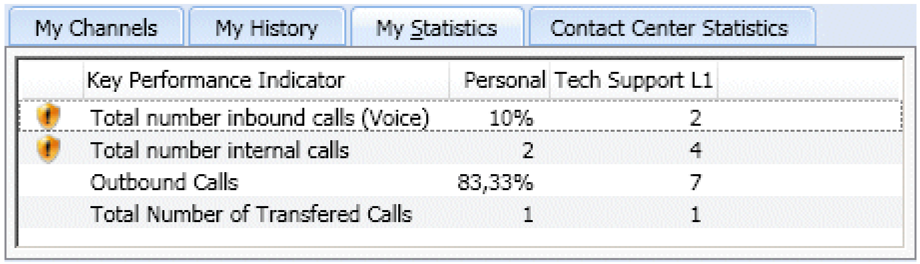


Figure 76: The My Statistics tab in the Main Window Workspace view

3. You can perform the following functions in the `My Statistics` tab:
   - Click column heads to change the sort order of the KPIs.
   - Right-click the `My Statistics` tab to access the shortcut menu that enables you to do the following:
     — Show or hide columns
     — Show or hide KPIs
     — Turn KPI filtering on or off to show only items that have warnings
4. To close the Workspace view, click `Workspace`.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Viewing Contact Center Statistics

There are three ways to view the `Contact Center Statistics` view:

- From the `Contact Center Statistics` tab of the Main Window Workspace (see "Viewing Contact Center Statistics" on page 134)
- From the `Contact Center Statistics` window of the Gadget (refer to the *Interaction Workspace 8.0 Context-Sensitive Help*)
- From the Statistics Gadget (see "Viewing Statistics by Using the Statistics Gadget" on page 136)

The `contact center Statistics` view displays statistics that summarize the state of various conditions that are monitored by your call center, such as the percentage of abandoned calls, the average call-waiting time, and the number of interactions in a queue. Your system administrator defines which statistics and objects are displayed to you. The following columns of information are available for each monitored object:

- **Error/Warning Level**—The error or warning level if either is exceeded
- **Call Center Resource**—A description of the type of object, such as a queue or a Routing Point
- **Description**—A description of the statistic
- **Value**—The value of the statistic

Procedure:
Viewing statistics about call center resources

Purpose: To view statistics that summarize the states of various conditions that are monitored by your call center, such as the percentage of abandoned calls, the average call-waiting time, and the number of interactions that are in a queue.

Prerequisites

- You are configured to view statistics for your contact center.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You are using the Main Window view, not the Gadget. To view the `Contact Center Statistics` window from the Gadget, select it from the `Main Menu` (refer to the *Interaction Workspace 8.0 Context-Sensitive Help*).

Start of procedure

1. In the Main Window view, click `Workspace`.

   The Main Window Workspace view opens below the Team Communicator (refer to Figure 77).

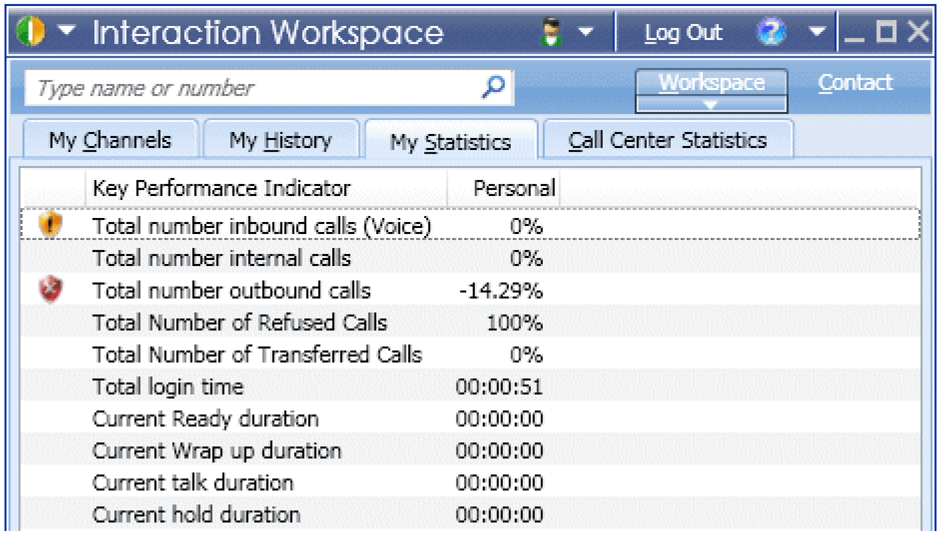


Figure 77: Main Window Workspace view

2. In the Main Window Workspace view, click the `Contact Center Statistics` tab.

   The list of statistics about objects in your call center is displayed (refer to Figure 78). This view is updated constantly so that you can view statistics from minute to minute.

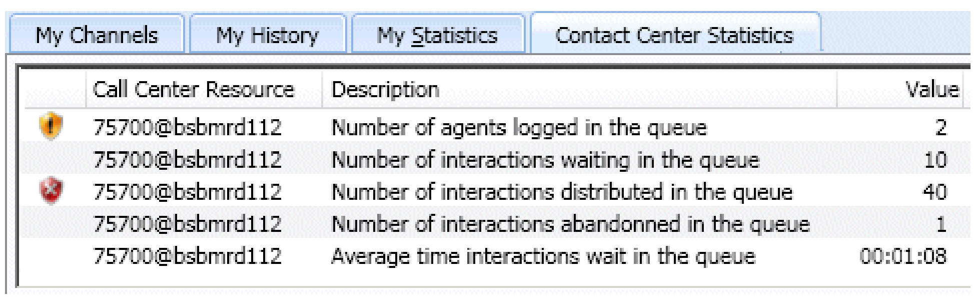


Figure 78: Main Window Workspace view Contact Center Statistics tab

   Statistics about switches, Routing Points, queues, and other objects, are displayed in the `Contact Center Statistics` tab. You can drag column headings to change the order or the columns. Also, you can click a column heading to sort the objects based on the value of the column.

3. You can perform the following functions in the `Contact Center Statistics` tab:

- Click column heads to change the sort order of the statistics.
- Right-click the `Contact Center Statistics` tab to access the shortcut menu that enables you to do the following:
  - Show or hide columns
  - Show or hide statistics
  - Turn statistics filtering on or off to show only items that have warnings

4. To close the Workspace view, click `Workspace`.

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Viewing Statistics by Using the 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 is a view of statistics that you can leave open all the time.

The Statistics Gadget displays statistics in two ways:

- In a statistics ticker
- In a Tagged Statistics view

The advantage of the Statistics Gadget is that you can view your KPIs and Contact Center Statistics continuously, without opening your Workspace and clicking back and forth between tabs.

Procedure:
Viewing your KPIs and Contact Center Statistics continuously by using the Statistics Gadget

Purpose: To view your KPIs and Contact Center Statistics continuously without opening your Workspace and clicking back and forth between tabs.

Prerequisites

- You are configured to view your KPIs and/or you are configured to view statistics for your contact center.
- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. To show the Statistics Gadget, select `Show Statistics Gadget` from the Main Menu in the Main Window or the Gadget.

   The Statistics Gadget is displayed (see Figure 79).

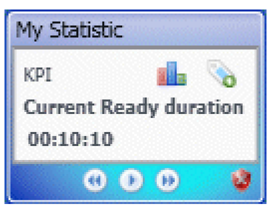


Figure 79: Interaction Workspace Statistics Gadget

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

2. Use the buttons at the bottom of the Statistics Gadget to control the view (see Figure 79):
   - To stop the ticker at a specific statistic, click the `Stop` button.
   - To start the ticker, click the `Play` button.
   - To view the next statistic, click the `Forward` button.
   - To view the previous statistic; click the `Back` button.
3. Warning and error icons are displayed if one or more statistics exceed or drop below threshold values that are configured by your administrator.
   - Click a warning or error icon to scroll immediately to the next statistics that is in a warning or error state.

4. The Statistics Gadget enables you to tag specific statistics in a static view that is displayed below the ticker.
   - When a statistic is displayed in the ticker that you want to tag, click the `Tag` button:

     The Tagged Statistics view is displayed below the Statistics Gadget ticker view (see Figure 80).

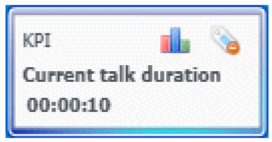


Figure 80: Interaction Workspace Statistics Gadget Tagged Statistic view

5. You can tag more than one statistic at a time. The Tagged Statistics view expands to accommodate several statistics in a single view (see Figure 81).

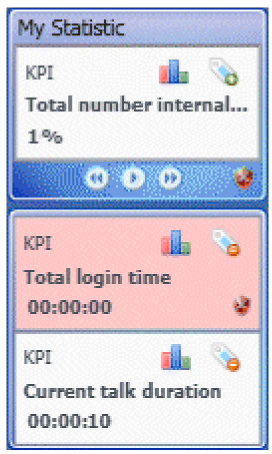


Figure 81: Interaction Workspace Tagged Statistic View stack

The default maximum size of the Tagged Statistics view is five statistics; however, this value might be set to a different size by your administrator. If you have tagged more than the maximum number of stacked statistics, click the Up and Down arrow buttons at the bottom of the Tagged Statistics view stack to scroll up and down through your tagged statistics.

6. To untag a statistic, click the `Untag` button:

7. You can view your KPIs either as a graph or as text.
   - Click the `Graph View` button to view the statistic as a graph:

   - Click the `Text View` button to view the statistic as text:

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See "Finding an Internal Target or a Contact" on page 46.
- Manage contact records—See Chapter 13, "Task: Manage Contacts," on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, "Task: Use Internal Instant Messaging," on page 83.

Chapter

15 Task: Receive Business and System Messages

Interaction Workspace provides functionality that enables you to receive, preview, and view messages that are directed to you, your group, or your role.

This chapter contains the following section:

Receiving and Viewing Messages

Messages are displayed to you in four interfaces:

- The `My Messages` interactive notification
- The `My Messages` window
- The `My Messages` bar in the Main Window (refer to the *Interaction Workspace Context-Sensitive Help*)
- The `My Messages` area in the Main Window

Procedure:
Receiving and viewing messages on your desktop by using the Main Window

Purpose: To receive messages of varying importance that are directed to you, your group, or your role by your supervisor or administrator.

Prerequisites

- You are configured to receive broadcast messages.

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You are using the Main Window view, not the Gadget.

Start of procedure

1. In the Main Window view, click the Message area at the bottom of the Main Window to view any system or business messages that you might already have received.

   The messages are displayed in a scrolling list with the most recent message at the top. Messages that are displayed in bold have not been read (see Figure 82).

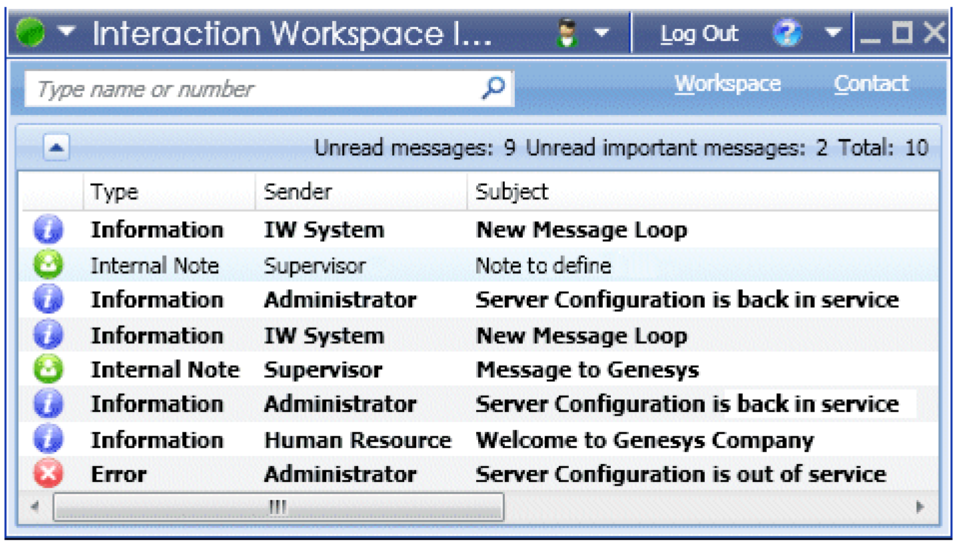


Figure 82: Interaction Workspace Main Window showing the Message Area open and displaying current messages

2. To read a message that is displayed in the Message Area, do one of the following:
   - Hover your mouse pointer over the message to view a pop-up that displays the content of the message.
   - Double-click the message to open the `My Messages` window.
3. If a new message is directed to you, the `My Message` interactive notification is displayed on your desktop (see Figure 83).

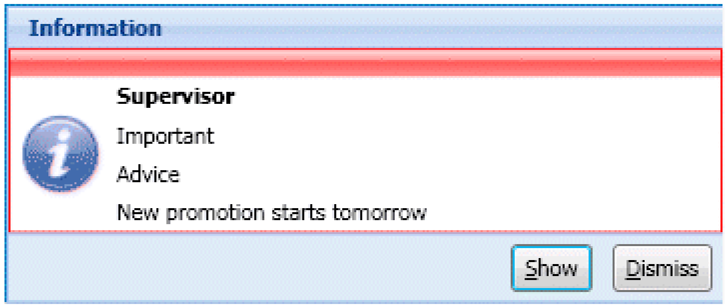


Figure 83: Interaction Workspace My Messages interactive notification

Do one of the following:

- Click `Show`—Displays the Message window. The message is also displayed in the Messages Area of the Main Window. The message is marked as Read.
- Click `Dismiss`—Closes the interactive notification. The message is displayed in the Messages Area of the Main Window. The message is marked as Unread (displayed in bold in the Message Area).
- Do nothing—The interactive notification is dismissed automatically after a time interval that is defined by your system administrator; the message is displayed in the Messages Area of the Main Window. The message is marked as Unread (appears in boldface in the Message Area).

4. If you clicked `Show`, the Message window is displayed (see Figure 84).

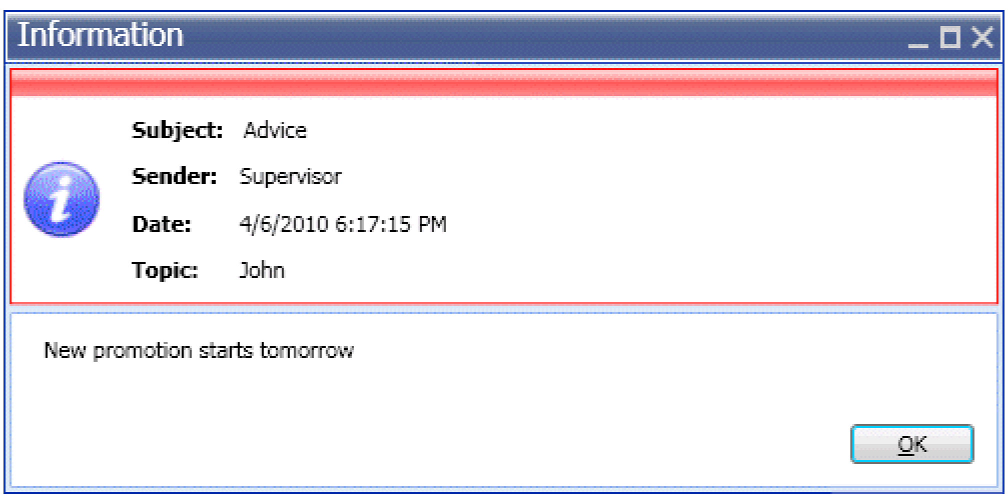


Figure 84: Interaction Workspace Business Message window

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

- **Message Type**—This information might be conveyed by text, the title bar, and/or an icon.

- **Subject**—Information about the content of the message.
- **Sender**—The identity of the sender of the message.
- **Priority**—This information might be conveyed by text and/or by the color of the border that surrounds the information about the message.
- **Date**—The date and time that the message was sent.
- **Topic**—The target audience of the message.
- Other data that is defined by your administrator

Click `OK` to close the Message window.

5. If you clicked `Dismiss`, or if you allowed the interactive notification to time-out by not clicking either button, the Message window is not displayed. To view the contents of the message, you must open the Message Area in the Main Window (see Figure 82).

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Procedure: Receiving and viewing messages on your desktop by using the Gadget

Purpose: To receive messages of varying importance that are directed to you, your group, or your role by your supervisor or administrator.

Prerequisites

- You are configured to receive broadcast messages.

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).
- You are using the Gadget, not the Main Window view.

Start of procedure

1. In the Gadget, select `My Messages` from the Gadget Main Menu.

   The messages are displayed in the `My Messages` view. This view contains a scrolling list, with the most recent message at the top. Messages in that are displayed in bold have not been read (see Figure 85).

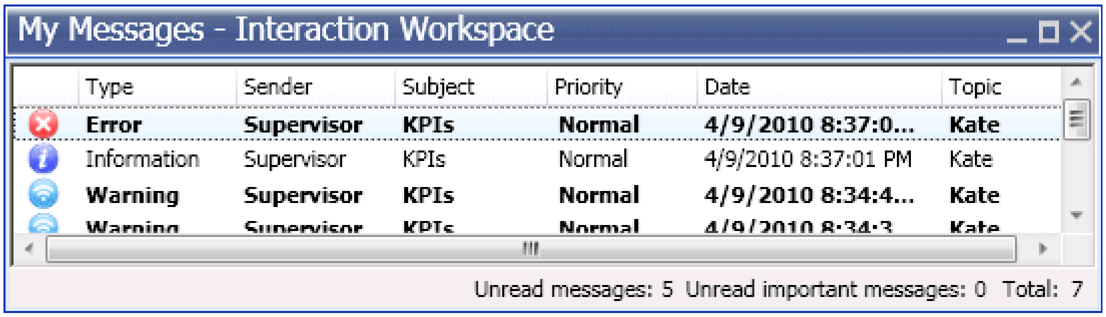


Figure 85: Interaction Workspace My Messages window displaying current messages

2. To read a message that is displayed in the `My Messages` view, do one of the following:
   - Hover your mouse pointer over the message to view a pop-up that displays the content of the message.
   - Double-click the message to open the `Message` window.
3. If a new message is directed to you, the `My Message` interactive notification is displayed on your desktop (see Figure 83).

   Do one of the following:
   - Click `Show`—Displays the `Message` window. The message is also displayed in the `My Messages` tab of the Main Window. The message is marked as `Read`.
   - Click `Dismiss`—Closes the interactive notification. The message is displayed in the `My Messages` window if it is open. The message is marked as `Unread` (appears in boldface in the `Message Area`).
   - Do nothing—The interactive notification is dismissed automatically after a time interval that is defined by your system administrator; the message is displayed in the `My Messages` window if it is open. The message is marked as `Unread` (appears in boldface in the `Message Area`).
4. If you clicked `Show`, the `Message` window is displayed (see Figure 84).

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

- **Message Type**—This information might be conveyed by text, the title bar, and/or an icon.
- **Subject**—Information about the content of the message.
- **Sender**—The identity of the sender of the message.
- **Priority**—This information might be conveyed by text and/or by the color of the border that surrounds the information about the message.
- **Date**—The date and time that the message was sent.
- **Topic**—The target audience of the message.
- Other data that is defined by your administrator

Click `OK` to close the `Message` window.

5. If you clicked `Dismiss`, or if you allowed the interaction notification to time-out by not clicking either button, the `Message` window is not displayed. To view the contents of the message, you must select `My Messages` from the Gadget `Main Menu` to display the `My Messages` window (see Figure 85).

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to find a contact or an internal target—See “Finding an Internal Target or a Contact” on page 46.
- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Chapter

16 Task: Personalize Your Workspace

You can change the appearance of the Interaction Workspace interface by choosing a predefined appearance from the `Change Theme` submenu.

This chapter contains the following section:

Changing the Appearance of Interaction Workspace

You can change the way that the Interaction Workspace looks by using a simple menu selection. Interaction Workspace provides the default theme and an alternate theme called `Royale`. Your system administrator might also have created additional themes for you to use.

Procedure:
Changing the appearance of the agent interface

Purpose: To alter the way in which the Interaction Workspace interface is displayed on your desktop.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging In to Interaction Workspace, on page 27).

Start of procedure

1. The blue appearance of Interaction Workspace is the default color scheme; it is called the `Default Theme` (see Figure 86).

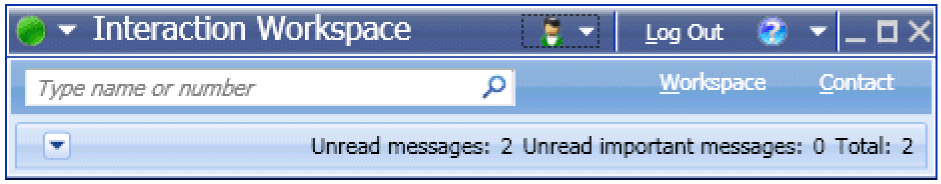


Figure 86: Main Window, displaying the Default theme

To change the color scheme of Interaction Workspace, in the Main Window or in the Gadget, open the `Main Menu` (see Figure 87).

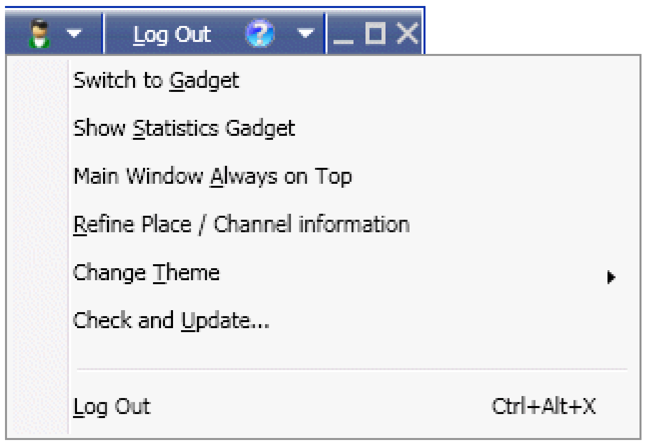


Figure 87: Main Window Main menu

2. Select a different theme from the `Change Theme` submenu (see Figure 88).

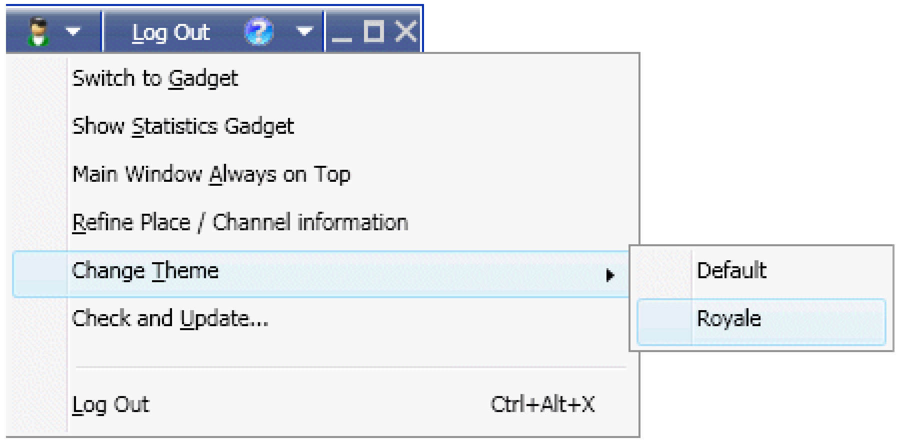


Figure 88: Main Window Main Menu, displaying Change Theme to Royale option

Interaction Workspace provides a second theme, called `Royale`. Your system administrator might have configured additional theme options from which you can choose.

3. The Main Window and all the other windows of Interaction Workspace are displayed with the new theme (see Figure 89).

Figure 89: Main Window displaying the Royale theme

End of procedure

Next Steps

- Set your status to `Ready` to received inbound voice interactions—See Procedure: Going Ready in the Interaction Workspace Main Window, on page 31.
- Handle inbound voice interactions—See Procedure: Handling an Inbound Voice Interaction, on page 39.
- View your Key Performance Indicators (KPIs)—See Procedure: Viewing Your Key Performance Indicators (KPIs), on page 132.
- View the system statistics—See Procedure: Viewing statistics about call center resources, on page 134.
- Use the Team Communicator to contact an internal target—See Procedure: Using the Team Communicator feature to find an internal target, on page 46.

- Manage contact records—See Chapter 13, “Task: Manage Contacts,” on page 105.
- Send or receive an internal Instant Message (IM)—See Chapter 10, “Task: Use Internal Instant Messaging,” on page 83.

Supplements

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

Interaction Workspace

- The *Interaction Workspace 8.0 Developer's Guide,* which ships on the Genesys Documentation Library DVD and describes how to customize Interaction Workspace with buttons, menus, and other features.
- Documentation about Tomcat, connectors, and other Apache components, which is available on the Apache Foundation website at:
  - `http://www.apache.org`
  - `http://jakarta.apache.org` (for Apache Java-platform projects)
- Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at `http://genesyslab.com/support`.
- The *eServices 8.0 Deployment Guide,* which introduces the architecture, required components, and procedures relevant to the deployment of a Genesys eServices (Multimedia) solution.
- The *Genesys 8.0 Security Deployment Guide* describes Genesys security features and detailed instructions for deploying them. These features provide for secure data transfer between Genesys components, protection against unauthorized access, and protection against data loss in case of component failure.

Genesys

- *Genesys Technical Publications Glossary,* which ships on the Genesys Documentation Library DVD and which provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms used in this document.

- *Genesys Migration Guide*, which ships on the Genesys Documentation Library DVD, and which provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.
- Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at http://genesyslab.com/support.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Environment Reference Manual*
- *Genesys Supported Media Interfaces Reference Manual*

Consult these additional resources as necessary:

- *Genesys Hardware Sizing Guide,* which provides information about Genesys hardware sizing guidelines for the Genesys 8.x releases.
- *Genesys Interoperability Guide,* which provides information on the compatibility of Genesys products with various Configuration Layer Environments; Interoperability of Reporting Templates and Solutions; and Gplus Adapters Interoperability.
- *Genesys Licensing Guide,* which introduces you to the concepts, terminology, and procedures relevant to the Genesys licensing system.

For additional system-wide planning tools and information, see the release-specific listings of System Level Documents on the Genesys Technical Support website, accessible from the `system level documents by release` tab in the Knowledge Base `Browse Documents` Section.

Genesys product documentation is available on the:

- Genesys Technical Support website at http://genesyslab.com/support.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

80fr_ref_06-2008_v8.0.001.00

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the product graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the product GUI; the error would not be corrected in any accompanying text.

Type Styles

Table 1 describes and illustrates the type conventions that are used in this document.

Table 1: Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets on page 154).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .

Table 1: Type Styles (Continued)

Type Style	Used For	Examples
Monospace font (Looks like teletype or typewriter text)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the Show variables on screen check box. In the Operand text box, enter your formula. Click OK to exit the Properties dialog box. T-Server distributes the error messages in EventError events. If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls. Enter exit on the command line.
Square brackets ([ ])	A particular parameter or value that is optional within a logical argument, a command, or some programming syntax. That is, the presence of the parameter or value is not required to resolve the argument, command, or block of code. The user decides whether to include this optional information.	smcp_server -host [/flags]
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	smcp_server -host <confighost>

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