Genesys

Interaction Workspace 8.1

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 8.1 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 371.

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 and editing case information 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, see the *Interaction Workspace 8.1 .NET API Reference* and the dedicated *docs.genesyslab.com* wiki at http://docs.genesyslab.com/wiki/index.php?title=Category:Interaction_Workspace.

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 should 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.

Document Version 8.1.301.00

The following topics have been added or have changed significantly since the previous 8.1.202.00 release:

- Information about agent ready status was added to Step 7 of the Procedure: Logging in to Interaction Workspace, on page 47.

- Chapter 10, “Task: Handle Web Callback Interactions,” on page 115 was added.
- The “Resending a Previously Sent E-mail Interaction” section was added to Chapter 13, “Task: Handle an E-Mail Interaction,” on page 157.
- The “Printing and Print Preview” section was added to Chapter 13, “Task: Handle an E-Mail Interaction,” on page 157.
- The “E-Mail Quality Assurance (QA) Review” section was added to Chapter 13, “Task: Handle an E-Mail Interaction,” on page 157.
- Information about chat nicknames was added to Step 4 of the Procedure: Handling an inbound chat interaction, on page 179.
- A note about limitations to switching supervisor modes was added to “Switching Team Supervisor Modes” on page 368.

Document Version 8.1.202.00

The following topic has changed since the 8.1.201.00 edition of this guide:

- Send Direct Message was added to Procedure: Handling an inbound Twitter interaction, on page 210.

New in this Release

The following changes are associated with 8.1.202.00 edition of this guide:

- Chapter 18, “Task: Handle a Twitter Interaction,” on page 209 was updated with new features as follows:
  - The ability to cut and paste selected text was added to Procedure: Handling an inbound Twitter interaction, on page 210.
  - The Follow/Unfollow icons changed as shown in Figure 162 on page 213.
  - The steps and interface for following/unfollowing a user changed (see page 214).
  - Actionability and Sentiment can now be “undeclared.” Interaction Workspace can display an icon to that effect (see page 214).
- Chapter 19, “Task: Handle a Facebook Interaction,” on page 217 was updated as follows:
  - Added the ability click `Show more` to show more comments (see page 221)
  - Added the ability to cut and paste selected text to Procedure: Handling an inbound Facebook interaction, on page 218.
  - Actionability and Sentiment can now be “undeclared.” Interaction Workspace can display an icon to that effect (see page 221).
  - Added the ability to delete a comment (see page 222).
- Chapter 20, “Task: Handle an RSS Interaction,” on page 225 was added to the document.

Document Version 8.1.201.00

The following topics have been added or have changed significantly since the previous 8.1.101.00 release:

- The section "Using Favorites" on page 65 was added to Chapter 5, "Task: Find a Contact or an Internal Target," on page 59.
- The Procedure: Initiating an e-mail forward to an external resource, on page 170 was added to Chapter 13, "Task: Handle an E-Mail Interaction," on page 157.
- Chapter 18, "Task: Handle a Twitter Interaction," on page 209 was added to the document.
- Chapter 19, "Task: Handle a Facebook Interaction," on page 217 was added to the document.
- Chapter 26, "Task: Record Interactions," on page 285 was added to the document.
- Information about the Tree View (viewing interactions by thread) was added to Chapter 28, "Task: Manage Contacts," on page 291.
- Chapter 35, "Task: Monitor, Coach, and Barge-in Interactions," on page 355 was added to the document.

Document Version 8.1.101.00

The following topics have been added or have changed significantly since the previous 8.1.000.02 release:

- Chapter 11, "Task: Handle Outbound-Campaign Voice Interactions," on page 121
- Chapter 21, "Task: Handle an SMS Interaction," on page 231
- Chapter 22, "Task: Transfer an SMS Interaction," on page 243
- The "Click to Blend" on page 265 section, was added to Chapter 23, "Task: Blend Different Media into a Single Conversation," on page 247.
- The Procedure: Searching the Standard Response Library for a suggested response, on page 327, was added to Chapter 29, "Task: Using the Standard Response Library," on page 319.
- Chapter 30, "Task: Edit Case Information and Record Information," on page 329
- Chapter 33, "Task: Using the Interaction Bar," on page 347

Document Version 8.1.001.02

The following topics have been added or have changed significantly since the previous 8.1 release:

- The Procedure: Directly dialing a contact, on page 81, was added to Chapter 6, “Task: Handle Voice Interactions,” on page 71.
- The section “Receiving a Voice Consultation” on page 88, was added to Chapter 7, “Task: Handle a Voice Consultation,” on page 85.
- The section “Sending and Receiving Consultation Instant Messages” on page 150, was added to Chapter 12, “Task: Handle Internal Instant Messaging,” on page 145.
- Chapter 16, “Task: Transfer a Chat Interaction,” on page 193.
- The Procedure: Receiving a chat conference, on page 201, was added to Chapter 17, “Task: Conference a Chat Interaction,” on page 199.
- Chapter 23, “Task: Blend Different Media into a Single Conversation,” on page 247.
- The Procedure: Finding and viewing an interaction in the contact view of the Interaction window, on page 296, was added to Chapter 28, “Task: Manage Contacts,” on page 291.

Document Version 8.1.001.00

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

- Check and uncheck eServices media channels, such as chat, e-mail, and workitems, such as fax, at login on page 49
- Chapter 8, “Task: Transfer a Voice Call,” on page 93
- Chapter 9, “Task: Conference a Voice Call,” on page 103
- Chapter 23, “Task: Blend Different Media into a Single Conversation,” on page 247
- Chapter 13, “Task: Handle an E-Mail Interaction,” on page 157
- Chapter 14, “Task: Handle a Chat Interaction,” on page 179
- Chapter 15, “Task: Handle a Chat Consultation,” on page 187
- Chapter 24, “Task: Handle a Workitem Interaction,” on page 271
- Chapter 25, “Task: Using Workbins,” on page 277
- Chapter 29, “Task: Using the Standard Response Library,” on page 319

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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 information or specifying a disposition code.

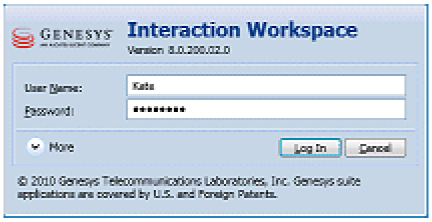
Some atomic views, such as the Case Information view, are displayed in separate windows. Other atomic views are part of a composite view, such as the Voice Interaction window; these are displayed in one window along with other atomic views.

See the *Interaction Workspace 8.1 Help* for details on the functionality in each window and view.

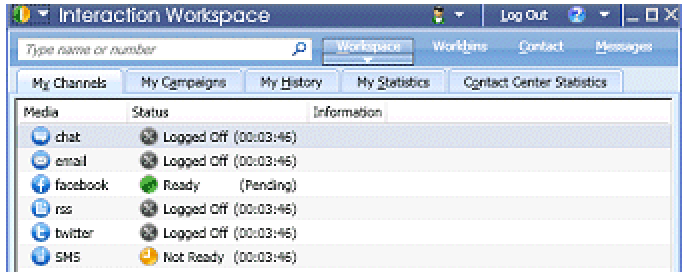
Composite Views

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

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

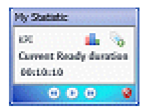


- **Main Window**—Enables you to manage your status, contacts, and settings; view your Key Performance Indicators (KPIs) and system messages; and launch new interactions (see “Interaction Workspace Main Window” on page 28).

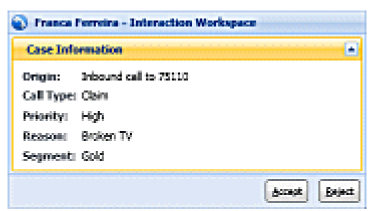


- **Gadget**—Enables you to manage your status and contacts, create new interactions, and access information about interactions that are currently active (see "Interaction Workspace Gadget" on page 29).

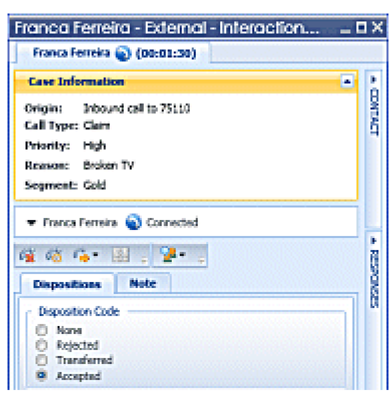
- **Statistics Gadget**—Enables you to view your KPIs and Contact Center Statistics in a permanent view. Statistics can be viewed in a ticker and/or in a static view (see "Statistics Gadget" on page 40).



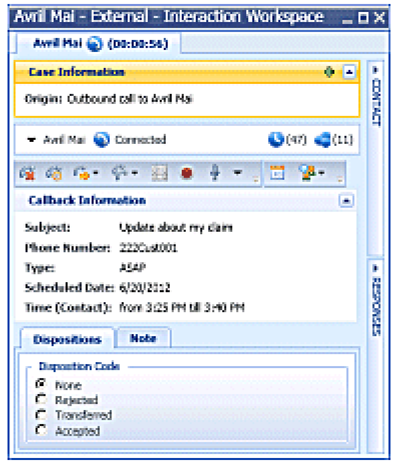
- **Interaction Preview**—Displays an interactive notification of a new inbound interaction. The preview includes case information to enable you to decide whether to accept, reject, or redirect the interaction (see Chapter 6).



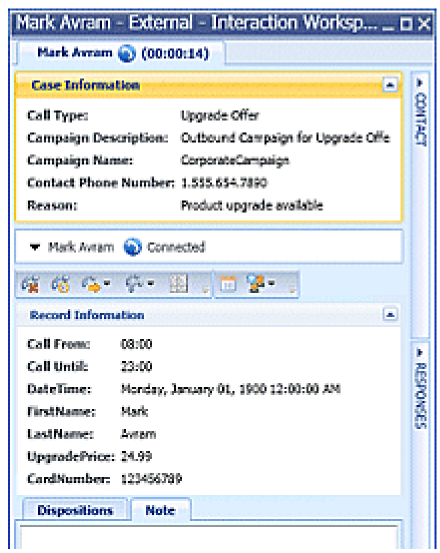
- **Voice Interaction Window**—Enables you to view all of the information that is necessary to handle a voice interaction with a contact (see "Interaction Workspace Voice Interaction Window" on page 30). This window also contains information about contacts and the Team Communicator (see "Atomic Views" on page 26).



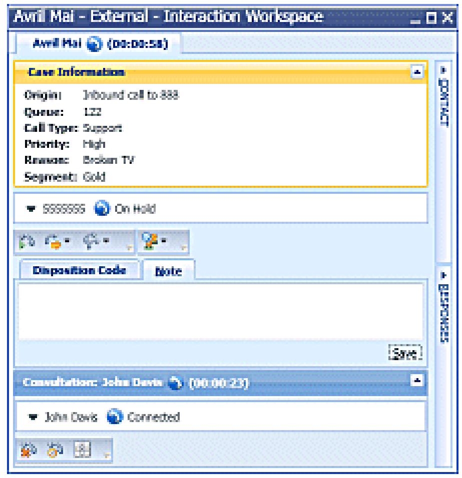
- **Web Callback**—Enables you to view all of the information that is necessary to handle a Web Callback voice interaction with a contact.



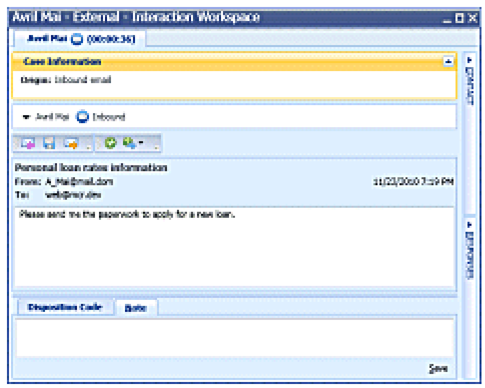
- **Outbound Campaign**—Enables you to view all of the information that is necessary to handle an Outbound Campaign voice interaction with a contact.



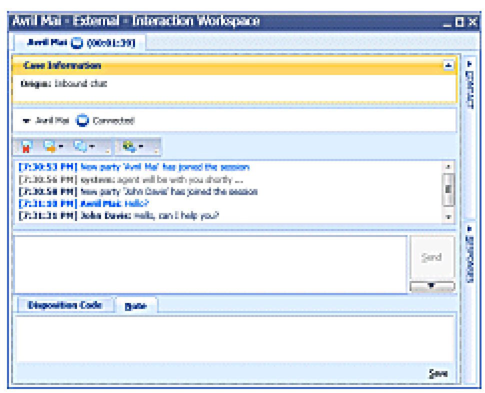
- **Consultation**—Enables you to initiate a call to an internal expert or support person. It is part of the Team Communicator functionality (see “Atomic Views”).



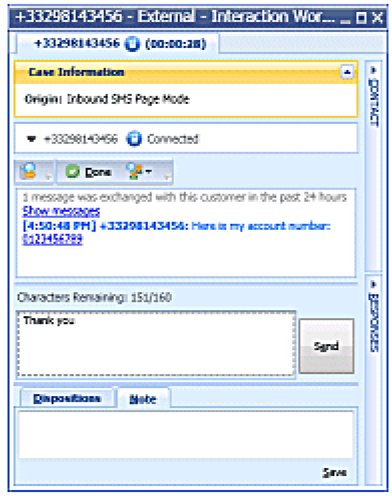
- **E-Mail**—Enables you to view all of the information that is necessary to handle an e-mail interaction with a contact.



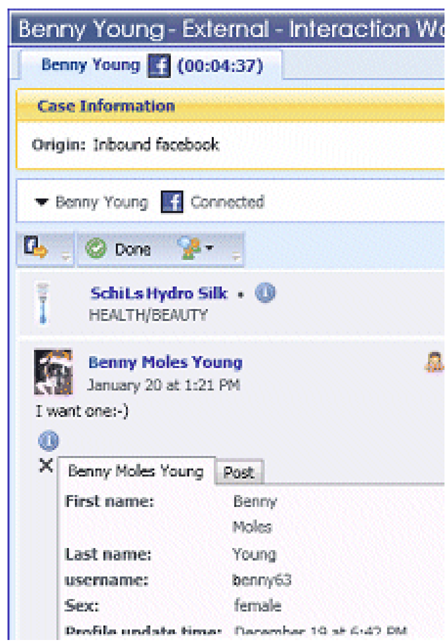
- **Chat**—Enables you to view all of the information that is necessary to handle a chat interaction with a contact.



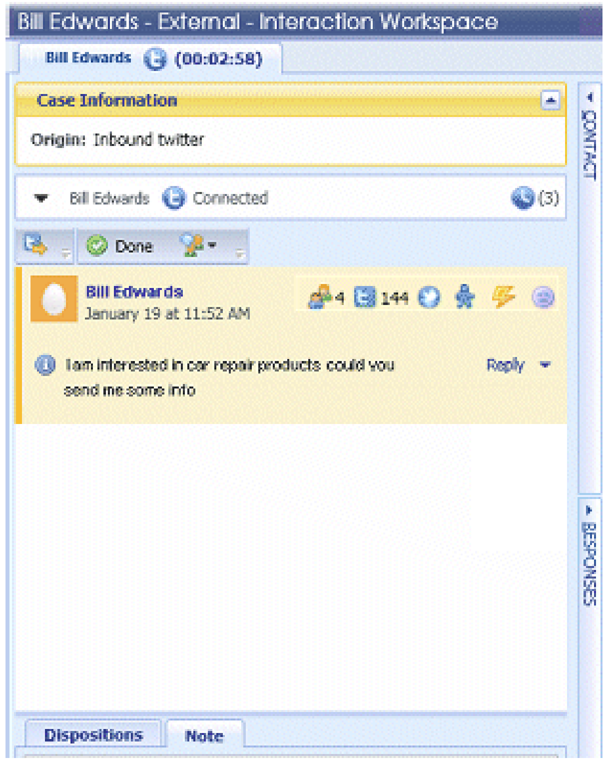
- **SMS**—Enables you to view all of the information that is necessary to handle an SMS Page interaction or an SMS Session interaction with a contact.



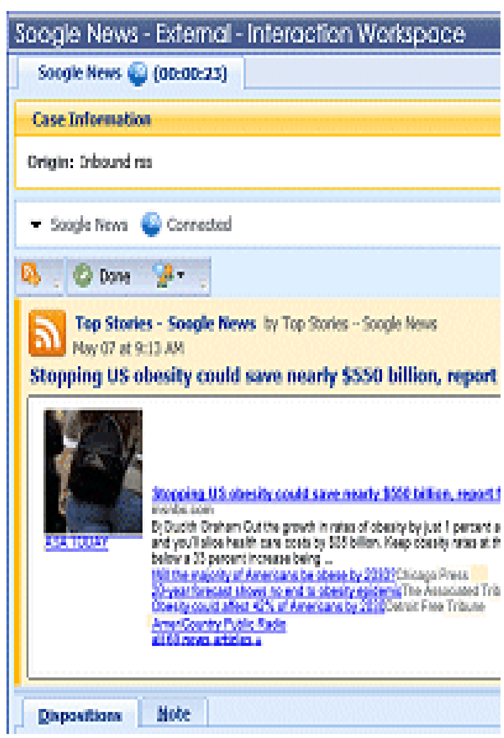
- **Facebook**—Enables you to view all of the information that is necessary to handle a Facebook Page interaction with a contact.



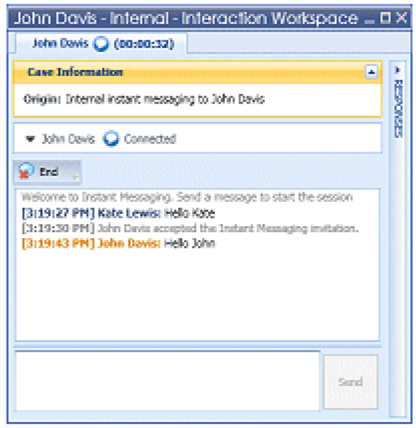
- **Twitter**—Enables you to view all of the information that is necessary to handle a Twitter Page interaction with a contact.



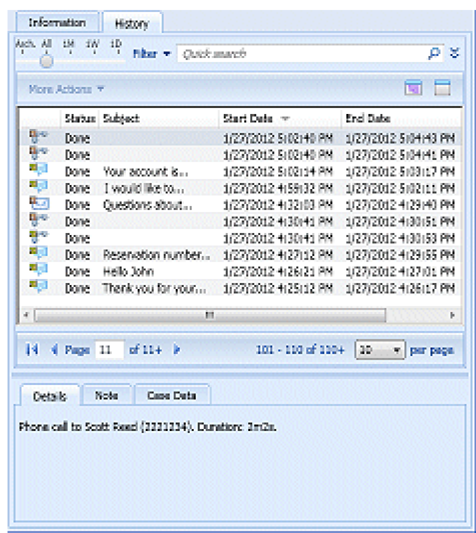
- **RSS**—Enables you to view all of the information that is necessary to handle a RSS Web Feed interaction with a contact.



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



- **History**—Enables you to view case data (business context of the case). Compiles the attached data that is associated with the main interaction of the case into a Case History (see Chapter 28). It is part of Interaction Workspace functionality for processing voice interactions as well as other media types.



Atomic Views

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

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

- **Case Information**—Provides you with critical information about the active interaction. The information that is provided is configured by your system administrator.
- **Contact Summary**—Provides you with critical information about the contact who is involved in the active interaction.
- **Voice Media**—Enables you to control the active voice interaction or start a new interaction.
- **Voice Internal**—Enables you to control the active internal voice interaction or start a new internal interaction.
- **Case Toolbar**—Enables you to hold, connect, and end current interactions.
- **Dispositions**—Enables you to assign one or more codes to an ongoing or terminated interaction to qualify or characterize the outcome of the interaction, and a call result for outbound campaign interactions.
- **Notepad View**—Enables you to record information about the current interaction.
- **History List**—Enables you to view the history of interactions with the selected contact.
- **History Interaction Details**—Enables you to view the details of previous interactions with the selected contact.
- **Contact Record**—Enables you to view information about contacts that has been collected by your contact center.
- **Responses**—Enables you to access a database of prewritten standard responses for your interactions. You can insert these responses as replies into any e-mail or chat message, or you can read them to the contact during a phone interaction. You might be configured to use suggested responses that are rated according to their relevancy to the content of the inbound interaction.
- **Team Communicator**—Enables you to call an internal target or contact, start a conference, or transfer the current interaction.
- **Child Interaction Navigator**—Enables you to view and select any **“**child**”** interactions that you have initiated that relate to the current customer interaction (the parent interaction), such as an internal consultation call or a chat with another agent.
- **IM Media**—Enables you to initiate or receive Instant Messaging (IM) interactions.

- **My Status**—Enables you to monitor the status of your media channels.
- **My Messages**—Provides you with up-to-date information about the status of your contact-center, changes that are related to your activities, and business messages that your leads send to you.
- **Workbins**—Enables you to store e-mail and other interactions that are to be handled later. Interactions that are stored in a workbin can be accessed in any order. Items that are stored in a workbin are owned by the owner of the workbin.
- **Preferences**—Enables you to control the appearance of various Interaction Workspace interface components.
- **Recent Items**—Enables you to select a recent contact from a drop-down list.
- **My Campaigns**—Provides you with a list of all of your active Outbound Campaigns. If you are part of a pull-preview campaign, you can get a new campaign record.
- **My History**—Enables you to view a record of your recent activity.
- **My Statistics**—Enables you to view your Key Performance Indicators (KPIs).
- **Contact Center Statistics**—Enables you to view the statistics of your contact center.
- **Schedule a Callback**—Enables you to set a later date and/or time to callback a contact from a campaign list.

Interaction Workspace Main Window

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

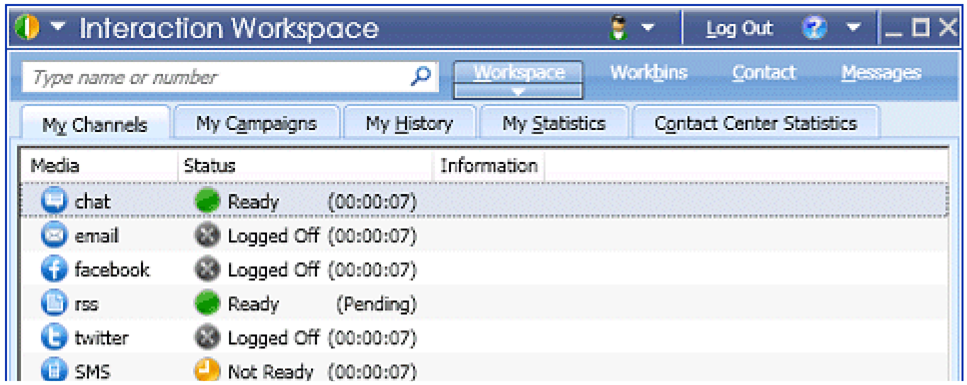


Figure 1: Interaction Workspace Main Window

For more information about 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 5
- **Call an Internal Target or a Contact**—Chapter 6
- **IM an Internal Target**—Chapter 12
- **E-Mail a Contact**—Chapter 13
- **Manage Workbins**—Chapter 25
- **Manage Contacts**—Chapter 28
- **View Statistics**—Chapter 31
- **Receive Messages**—Chapter 32
- **Change the Appearance of Interface**—Chapter 34

Interaction Workspace Gadget

The Interaction Workspace Gadget (see Figure 2) is a module that acts as a simplified version of the Interaction Workspace Main Window (see "Interaction Workspace Main Window" on page 28). 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.

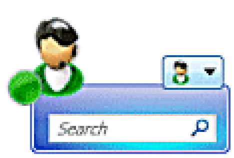


Figure 2: Interaction Workspace Gadget

For more information about 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 5
- **Call an Internal Target or a Contact**—Chapter 6
- **IM an Internal Target**—Chapter 12
- **E-Mail a Contact**—Chapter 13
- **Manage Workbins**—Chapter 25
- **View Statistics**—Chapter 31
- **Receive Messages**—Chapter 32
- **Change the Appearance of Interface**—Chapter 34

Interaction Workspace Voice Interaction Window

The Voice Interaction window (see Figure 3, "Interaction Workspace Voice Interaction window," on page 31) and the Web Callback Interaction window enable you to view all of the information that is required to handle a voice interaction with a contact or an internal target.

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

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

- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Start a Voice or IM Consultation**—Chapter 7
- **Transfer to an Internal Target or a Contact**—Chapter 8
- **Conference with an Internal Target or a Contact**—Chapter 9
- **Transition an IM Consultation to a Voice Consultation**—Chapter 23
- **Record a Call**—Chapter 26
- **Set a Disposition Code**—Chapter 27
- **Manage Contacts, Contact Case History, and Set a Note**—Chapter 28
- **Use Standard Responses**—Chapter 29

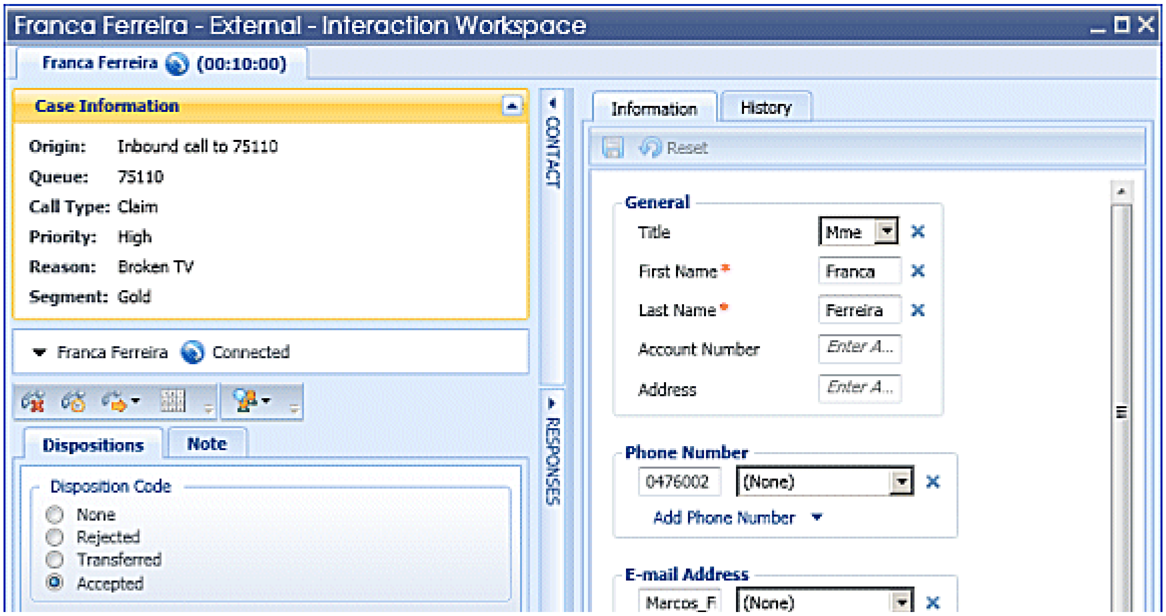


Figure 3: Interaction Workspace Voice Interaction window

Interaction Workspace Web Callback Interaction Window

The Web Callback Interaction window enables you to view all of the information that is required to handle a web callback interaction with a contact (see Figure 4, “Interaction Workspace Voice Interaction window,” on page 32) .

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

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

- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Handle a Web Callback interaction**—Chapter 10
- **Start a Voice or IM Consultation**—Chapter 7
- **Transfer to an Internal Target or a Contact**—Chapter 8
- **Conference with an Internal Target or a Contact**—Chapter 9
- **Transition an IM Consultation to a Voice Consultation**—Chapter 23
- **Record a Call**—Chapter 26
- **Set a Disposition Code**—Chapter 27
- **Manage Contacts, Contact Case History, and Set a Note**—Chapter 28
- **Use Standard Responses**—Chapter 29

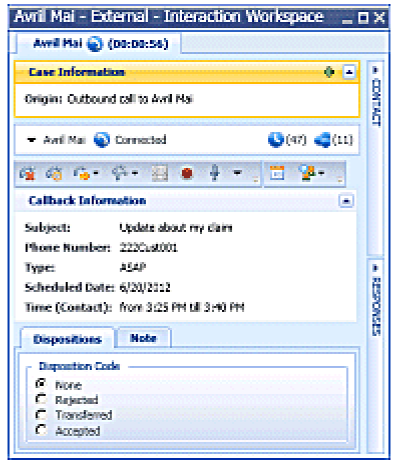


Figure 4: Interaction Workspace Voice Interaction window

Interaction Workspace Outbound Campaign Voice Interaction Window

The Outbound Campaign Voice Interaction window (see Figure 5, "Interaction Workspace Outbound Campaign Voice Interaction window," on page 33) enables you to view all of the information that is required to handle an Outbound Campaign voice interaction with a contact.

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

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

- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Transfer to an Internal Target or a Contact**—Chapter 8
- **Conference with an Internal Target or a Contact**—Chapter 9
- **Handle an Outbound Campaign Voice Interaction (including Rescheduling a call)**—Chapter 11
- **Record a Call**—Chapter 26
- **Set a Disposition Code**—Chapter 27
- **Manage Contacts and Contact Case History**—Chapter 28
- **Use Standard Responses**—Chapter 29

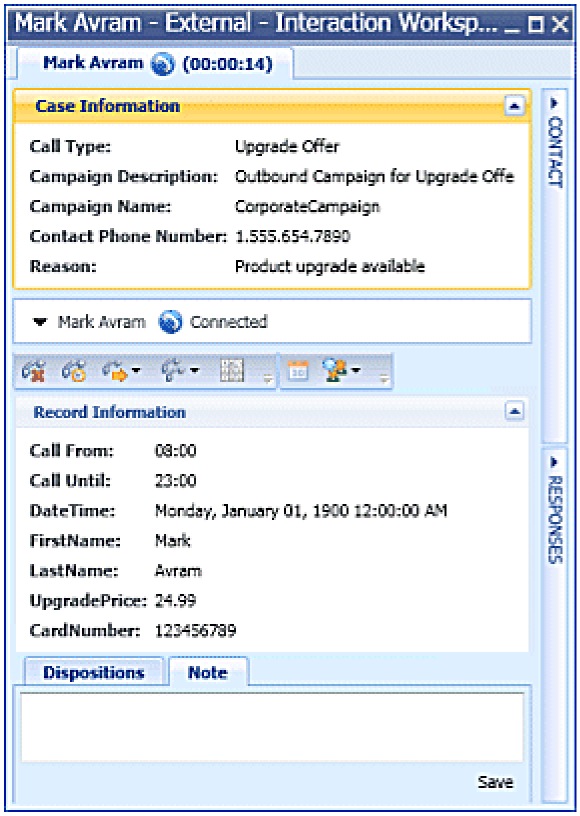


Figure 5: Interaction Workspace Outbound Campaign Voice Interaction window

Interaction Workspace E-Mail Interaction Window

The E-Mail Interaction window (see Figure 6, "Interaction Workspace E-Mail Interaction window," on page 34) enables you to view all of the information that is required to handle an e-mail interaction with a contact.

You can view information about the e-mail, history, and case data. You can reply to the interaction, save to a workbin, transfer the interaction, start a conference, and enter notes about the interaction.

For more information about the functions that are available in the E-Mail Interaction window, see the following chapters:

- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Start a Voice or IM Consultation**—Chapter 7
- **Transfer to an Internal Target or a Contact**—Chapter 8
- **Transition an IM Consultation to a Voice Consultation**—Chapter 23
- **Set a Disposition Code**—Chapter 27
- **Manage Contacts and Contact Case History**—Chapter 28
- **Use Standard Responses**—Chapter 29

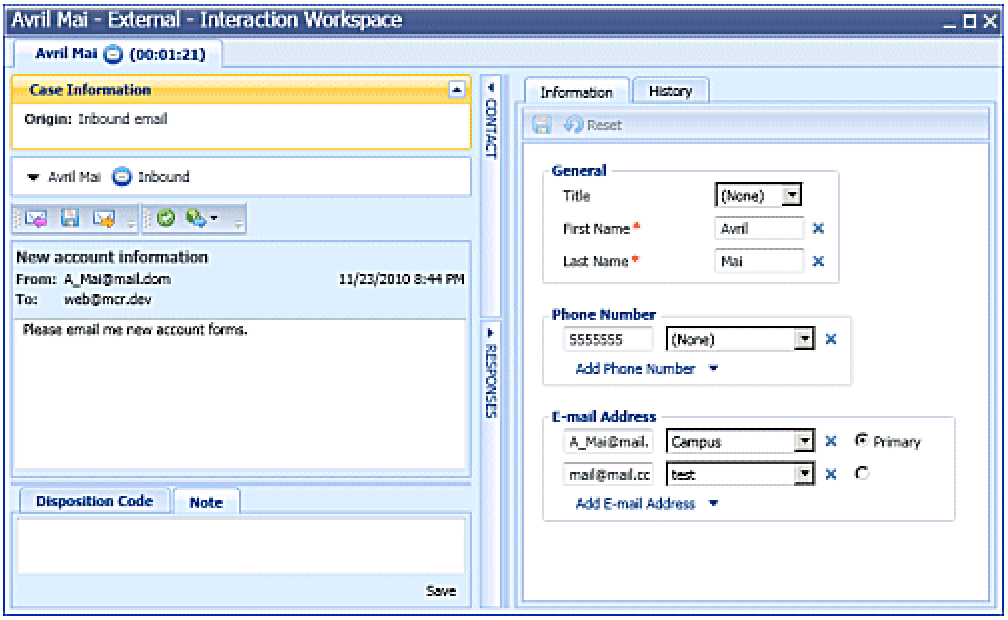


Figure 6: Interaction Workspace E-Mail Interaction window

Interaction Workspace Chat Interaction Window

The Chat Interaction window (see Figure 7, “Interaction Workspace Chat Interaction window,” on page 35) enables you to view all of the information that is required to handle a chat interaction with a contact.

You can view chat status, history, and case data. You can control the interaction, start a conference, transfer the interaction, and enter notes about the interaction.

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

- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Start a Voice or IM Consultation**—Chapter 7
- **Transfer to an Internal Target or a Contact**—Chapter 8
- **Conference with an Internal Target or a Contact**—Chapter 9
- **Transition an IM Consultation to a Voice Consultation**—Chapter 23
- **Set a Disposition Code**—Chapter 27
- **Manage Contacts and Contact Case History**—Chapter 28
- **Use Standard Responses**—Chapter 29

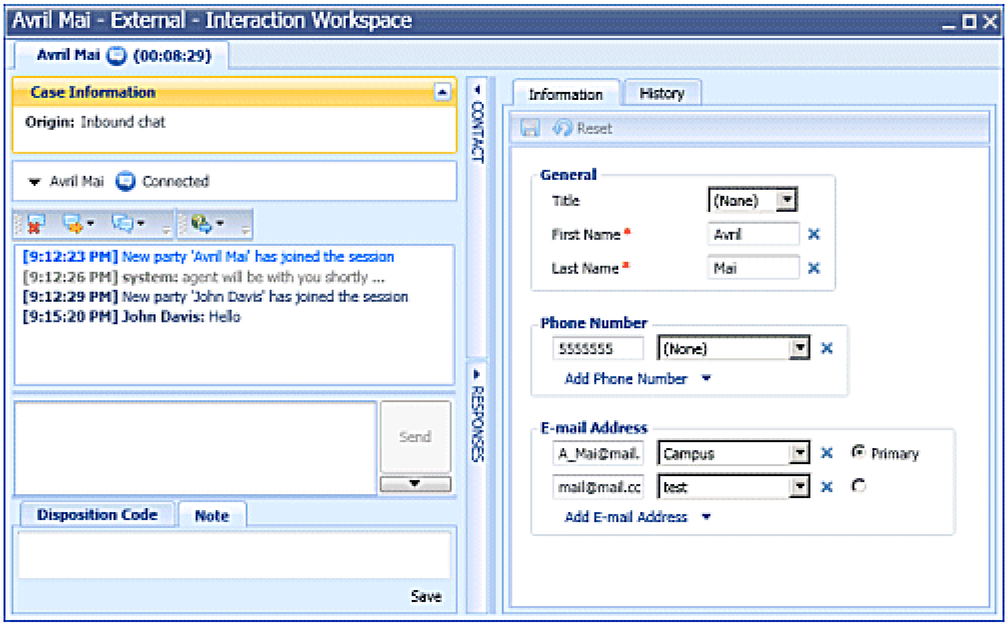


Figure 7: Interaction Workspace Chat Interaction window

Interaction Workspace Twitter Interaction Window

The Twitter Interaction window (see Figure 8, "Interaction Workspace Twitter Interaction window," on page 36) enables you to view all of the information that is required to handle a Twitter social media interaction (Tweet).

You can view information about the interaction such as the user profile, history, and case data. You can reply to the interaction, transfer the interaction, start a conference, and enter notes about the interaction.

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

- **Twitter-Specific Functionality**—Chapter 18
- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Reply to a Tweet Using Another Supported Media, such as Voice** (Chapter 6), E-mail (Chapter 13), or SMS (Chapter 21).
- **Start a Voice or IM Consultation**—Chapter 7
- **Transfer to an Internal Target or a Contact**—Chapter 8
- **Set a Disposition Code**—Chapter 27
- **Manage Contacts and Contact Case History**—Chapter 28
- **Use Standard Responses**—Chapter 29

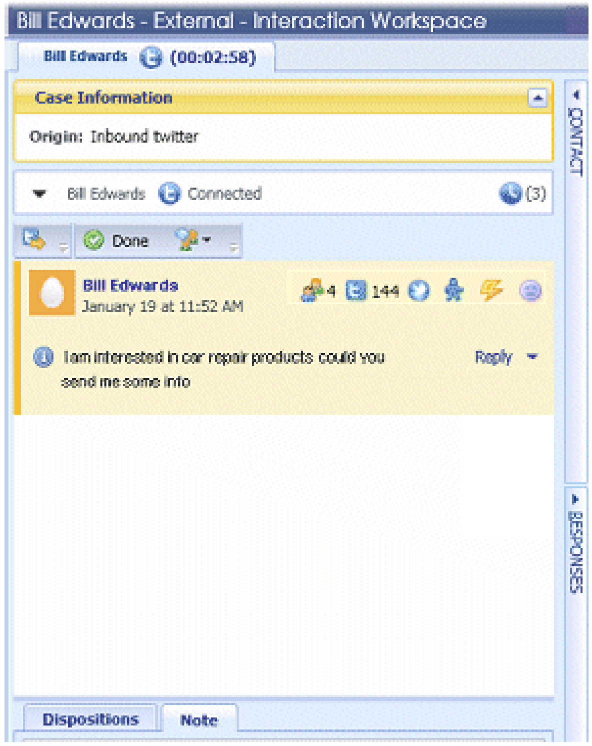


Figure 8: Interaction Workspace Twitter Interaction window

Interaction Workspace Facebook Interaction Window

The Facebook Interaction window (see Figure 9, "Interaction Workspace Facebook Interaction window," on page 37) enables you to view all of the information that is required to handle a Facebook social media interaction (post or comment).

You can view information about the interaction such as the user profile, history, and case data. You can reply to the interaction, transfer the interaction, start a conference, and enter notes about the interaction.

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

- **Facebook-Specific Functionality**—Chapter 19
- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Reply to a Facebook Post or Comment Using Another Supported Media, such as Voice (**Chapter 6), E-mail (Chapter 13), or SMS (Chapter 21).
- **Start a Voice or IM Consultation**—Chapter 7
- **Transfer to an Internal Target or a Contact**—Chapter 8

- **Set a Disposition Code**—Chapter 27
- **Manage Contacts and Contact Case History**—Chapter 28
- **Use Standard Responses**—Chapter 29

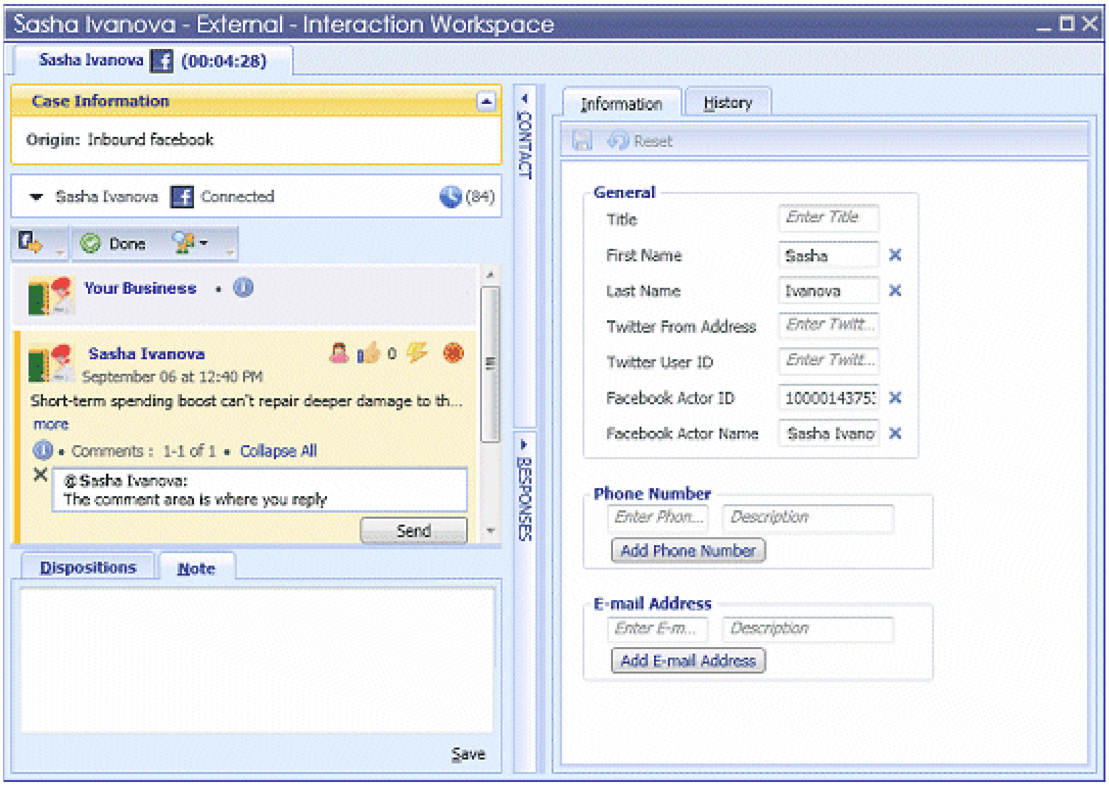


Figure 9: Interaction Workspace Facebook Interaction window

Interaction Workspace RSS Interaction Window

The RSS Interaction window (see Figure 10, "Interaction Workspace RSS Interaction window," on page 38) enables you to view all of the information that is required to handle an RSS web feed interaction.

You can view information about the interaction such as the source of the web feed, the headline, content, history, and case data. You can transfer the interaction, start a consultation, and enter notes about the interaction.

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

- **RSS-Specific Functionality**—Chapter 20
- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Start a Voice or IM Consultation**—Chapter 7
- **Transfer to an Internal Target or a Contact**—Chapter 8

- **Set a Disposition Code**—Chapter 27
- **Manage Contacts and Contact Case History**—Chapter 28

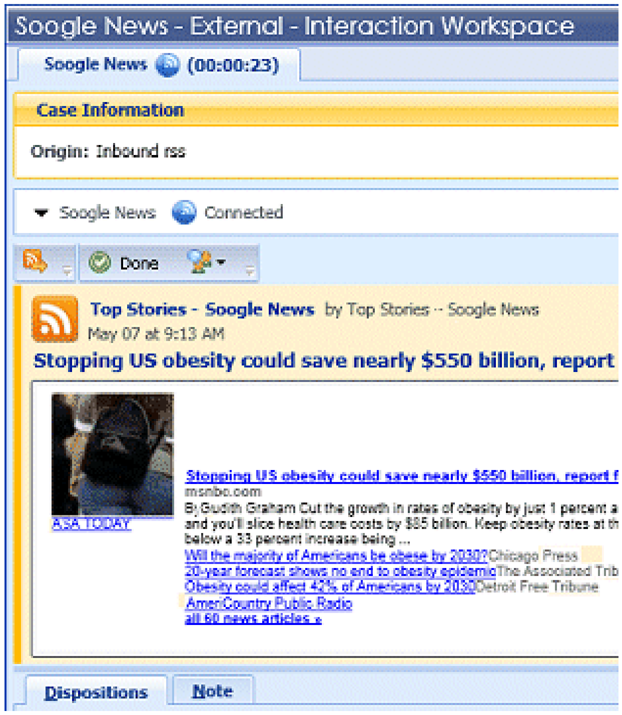


Figure 10: Interaction Workspace RSS Interaction window

Interaction Workspace SMS Interaction Window

The SMS Interaction window (see Figure 11, "Interaction Workspace SMS Interaction window," on page 39) enables you to view all of the information that is required to handle an SMS Page interaction or an SMS Session interaction with a contact.

You can view SMS status, history, and case data. You can control the interaction, transfer the interaction, and enter notes about the interaction.

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

- **Find an Internal Target or a Contact**—Chapter 5
- **Call an Internal Target or a Contact**—Chapter 6
- **Handle an SMS Interaction**—Chapter 21
- **Transfer to an Internal Target or a Contact**—Chapter 22
- **Set a Disposition Code**—Chapter 27
- **Manage Contacts and Contact Case History**—Chapter 28
- **Use Standard Responses**—Chapter 29

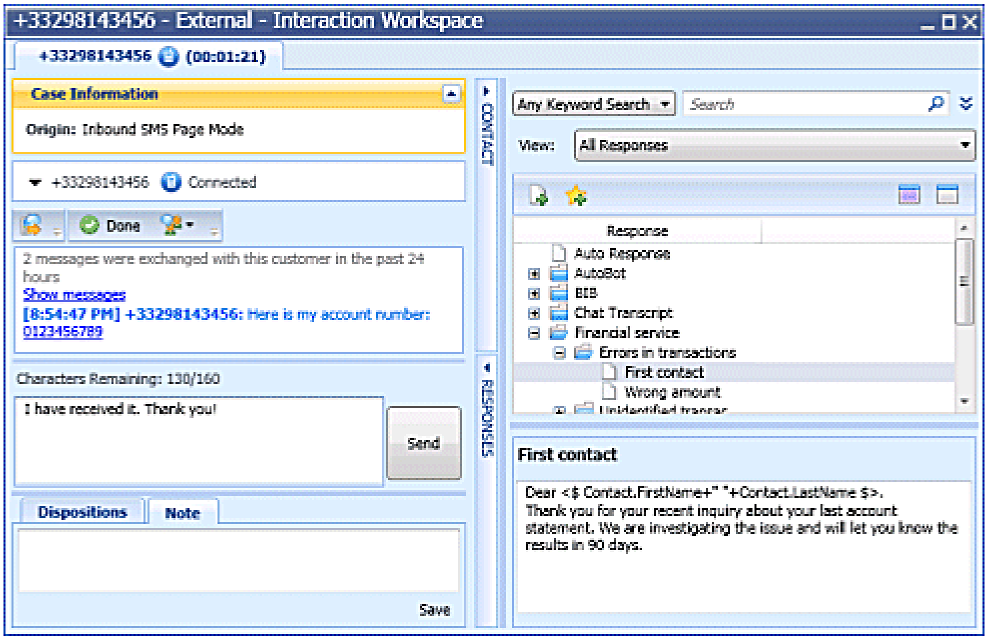


Figure 11: Interaction Workspace SMS Interaction window

Interaction Workspace IM Interaction Window

The Instant Messaging (IM) Interaction window (see Figure 12, "Interaction Workspace Instant Messaging (IM) Interaction window," on page 40) enables you to view all of the information that is required to handle an IM interaction with an internal target.

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

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

- **IM an Internal Target**—Chapter 12
- **Transition an IM Consultation to a Voice Consultation**—Chapter 23

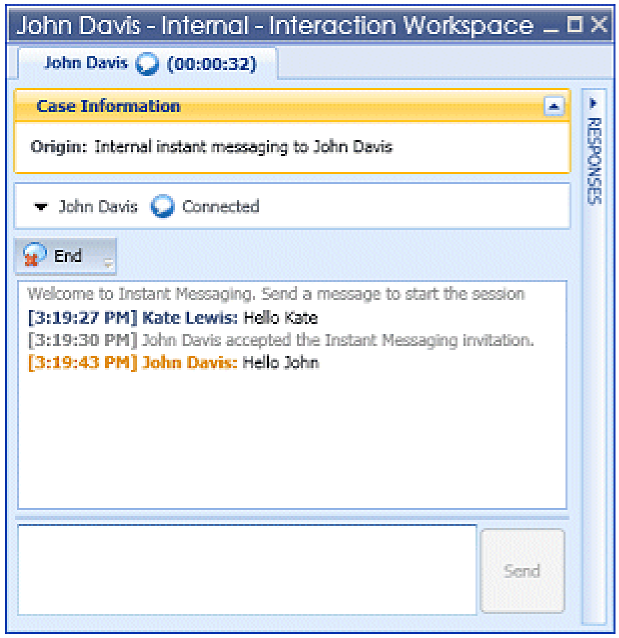


Figure 12: Interaction Workspace Instant Messaging (IM) Interaction window

Statistics Gadget

Statistics can be viewed either in the Main Window by selecting the `My Statistics` tab or the `Contact Center Statistics` tab in your Workspace, or by using the Statistics Gadget (see Figure 13).

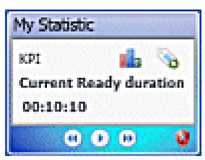


Figure 13: Statistics Gadget displaying Contact Center Statistics

The Statistics Gadget displays statistics in two ways:

- A statistics ticker
- A tagged-statistic view

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

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

- **View Statistics**—Chapter 31

Team Communicator Overview

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

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

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

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

Finding Contacts, Internal Targets, and Interactions

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

- Grid mode
- List mode

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

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

The following views employ the grid-mode search:

- **Contact History view/My History view**—See:
  - Chapter 28, “Task: Manage Contacts,” on page 291.

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

List Mode List mode performs a “keyword” search that searches each field of the contact database for the word or words (name, phone number, e-mail address, or other criteria) that you provide in the search field. 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 41.
  - “Finding an Internal Target or a Contact” on page 59.
  - “Sending and Receiving Internal Instant Messages” on page 146.
- **Voice Interaction Window**—See:
  - “Starting a Voice Conference” on page 103.
  - “Transferring a Voice Call” on page 93.
  - “Blending a voice consultation with an IM consultation” on page 261.
- **E-Mail Interaction Window**—See:
  - “Starting a Voice Conference” on page 103.
  - “Transferring a Voice Call” on page 93.
  - “Blending a voice consultation with an IM consultation” on page 261.
- **Chat Interaction Window**—See:
  - “Starting a Voice Conference” on page 103.
  - “Transferring a Voice Call” on page 93.
  - “Blending a voice consultation with an IM consultation” on page 261.
- **Workitem Interaction Window**—See:
  - “Starting a Voice Conference” on page 103.
  - “Transferring a Voice Call” on page 93.
  - “Blending a voice consultation with an IM consultation” on page 261.
- **Contact History view/My History view**—See:
  - Chapter 28, “Task: Manage Contacts,” on page 291.

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

Definition: Role-Based

The Genesys 8 suite of products implements role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which role privileges (see “Definition: Role Privilege” on page 43) 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. For example, you might be configured for voice and chat but not e-mail; you might be configured to transfer interactions and consult with other agents, but not to initiate new outbound interactions.

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

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

Definition: Role Privilege

The Genesys 8 suite of products implement role-based access to functionality (role privileges). Users are categorized by their role. The role that is assigned to you determines which tasks you are enabled to perform. A role privilege is a single functionality or set of functionalities that are required to complete a Use Case (see “Basic Use-Case Summary” on page 43).

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

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

Basic Use-Case Summary

The purpose of this user’s guide is to enable you to learn the *basic* functionality of Interaction Workspace. See the *Interaction Workspace 8.1 Help* for more details about each user-interface component. To access the context-sensitive Help from any window in the Interaction Workspace interface, open the Help menu, or press the `F1` key on your keyboard.

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

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 interactions. For more information, see the Inactivity Timeout topic in the *Interaction Workspace 8.1 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 47).
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 51).

   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 72
   - Procedure: Handling a web callback interaction, on page 115
   - Procedure: Receiving an Instant Messaging session, on page 149
   - Procedure: Handling an inbound e-mail interaction, on page 158

- Procedure: Handling an inbound chat interaction, on page 179
- Procedure: Handling an inbound SMS interaction, on page 232
- Procedure: Handling an inbound workitem interaction, on page 271
- Procedure: Handling a predictive or progressive Outbound-Campaign voice interaction, on page 124

Or, retrieve an interaction from a workbin. See:

- Procedure: Accessing and handling interactions that are stored in a workbin, on page 277).

7. Handle each inbound interaction. This step can include any or all of the following functions:
   - Start a voice, IM or chat consultation (see Procedure: Starting a voice conference, on page 104 or Procedure: Starting a chat consultation, on page 188).
   - Transfer the call (see Procedure: Starting a voice transfer, on page 93).
   - Conference the call (see Procedure: Starting a voice conference, on page 104).
   - Update the Contact History (see "Managing Contact History" on page 291).
   - Update the Notepad (see "Managing Contact History" on page 291).
   - Send or receive an internal Instant Message (IM) (see "Instant Messaging Overview" on page 145).
   - Employ a Standard Response (see "Inserting a Standard Response into an E-Mail Interaction" on page 319).
8. Complete the interaction.
9. If required, enter a disposition code (see "Assigning Disposition Codes" on page 287).
10. Click `Mark Done`.
11. Complete any required aftercall work.
12. Click the close box to close the corresponding Interaction window.
13. Set your status to `Ready` (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
14. View your Key Performance Indicators (KPIs) or the KPI status of your group (see Chapter 31, "Task: View KPIs and Statistics," on page 333).
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 interactions, you first must be authenticated on your network, and then you must log in to your system. The following procedure describes how to start Interaction Workspace and authenticate yourself on the system.

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. (SIP only) Plug in your USB headset.

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

2. Start the Interaction Workspace application by doing one of the following steps:
   - Double-click the Interaction Workspace icon on your workstation desktop.

   - Open the `Start` menu and choose `Interaction Workspace` from the `Genesys Telecommunications Laboratories` program group.
   - Select the Interaction Workspace ClickOnce web link that was provided to you by your system administrator.
3. In the Login view, enter your user name and password (see Figure 14).

Figure 14: Initial login view

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

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

4. Click `Log In` to log in, or click `Cancel` to stop logging in; this closes the Login view.

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

Additional information that you might have to specify includes your Place, your queue, your agent login, your agent password, your phone number, and the media (such as Voice, Instant Messaging, or workitems, such as faxes) that you want to use. Figure 15 shows an example of a secondary login view. The view that is displayed on your screen might be different.

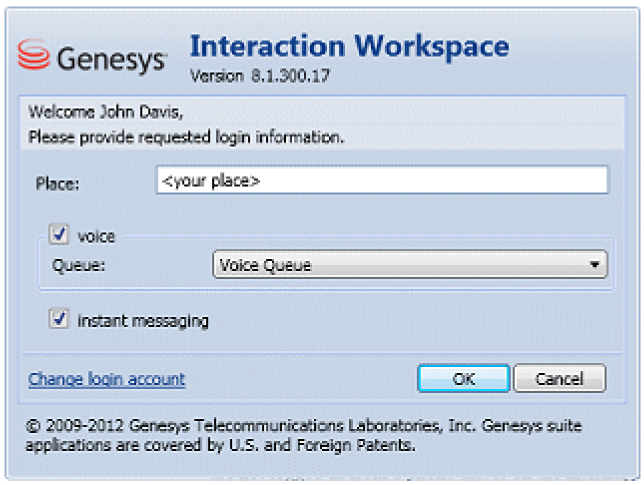


Figure 15: Example of the System Parameters login view. Your view might be different.

- You might be configured to check and uncheck eServices media channels, such as chat, SMS, e-mail, social media (for example, Facebook and Twitter), and workitems (such as fax). Upon login, unchecking media channels for which you are configured means that you will not be logged into those channels when Interaction Workspace starts. You will have to login to those channels manually from the Workspace view in the Main Window or Gadget.

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

- If your company is using a SIP Server, you might be configured to log in by using a remote phone number at which you can be reached if you are not logged in from a phone that is on the internal phone system of your company (see Figure 16).

  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.

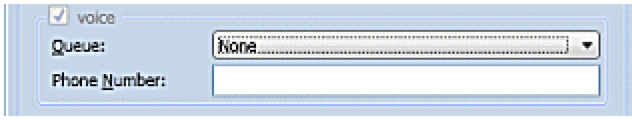


Figure 16: Remote phone number field in the System Parameters login view

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

   Your system administrator specifies what your status is for each channel when you login. If you are configured to be `Not Ready` for one or more channels, your system administrator might specify a `Not Ready Reason` for the channel. To start receiving interactions on a Not Ready channel, you must change the status to `Ready`.

End of procedure

Next Steps

- Set your status to `Ready`. See Procedure: Going Ready in the Interaction Workspace Main window, on page 51.

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, see the Inactivity Timeout chapter in the *Interaction Workspace 8.1Help*.

Going Ready

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

Procedure: Going Ready in the Interaction Workspace Main window

Purpose: To set your status to `Ready`, so that you can receive interactions.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

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

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

Start 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 17), so that inbound interactions can be routed to you.

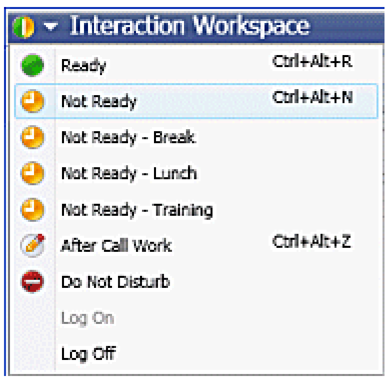


Figure 17: Example of a Status menu

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

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

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

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

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

3. You can check your ready status by placing your mouse pointer over the Status icon (see Figure 18).

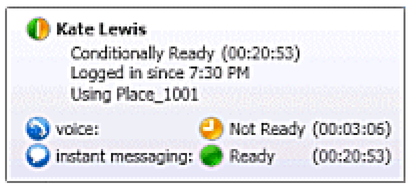


Figure 18: Status Summary ToolTip

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

4. If you are logged in to more than one channel, you can manage the ready status of each channel individually by using either the `My Channels` tab in the Workspace of the Main Window or the My Channels window, which is opened from the Gadget.
   a. In the Main Window, click `Workspace`.
   b. Click the `My Channels` tab (see Figure 19).

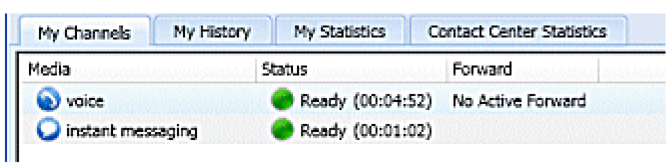


Figure 19: My Channels tab

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

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

End of procedure

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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 and to cancel a forward.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

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 20).

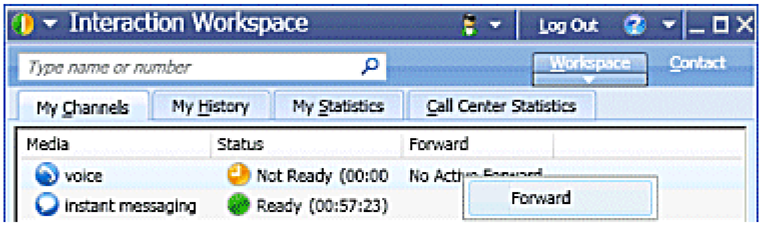

Figure 20: Main Window Workspace My Channels Forward menu

The `Forward` dialog box is displayed (see Figure 21).

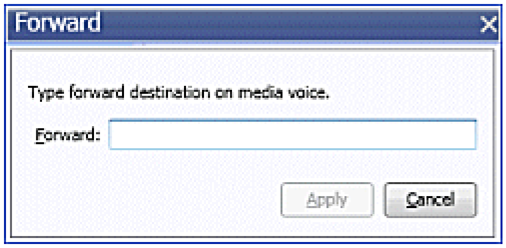

Figure 21: Forward dialog box

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 22).

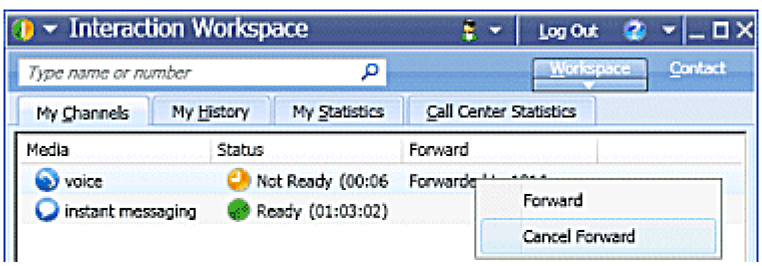

Figure 22: Main Window Workspace My Channels Forward menu selecting Cancel Forward

The `Cancel Forward` dialog box is displayed (see Figure 23).

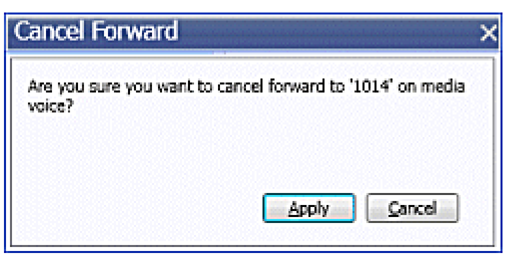

Figure 23: Cancel Forward dialog box

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

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Chapter

5 Task: 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.

This chapter contains the following section:

Finding an Internal Target or a Contact

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

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

The procedures in this chapter demonstrate using the Team Communicator to start a voice interaction; however, the procedures are applicable to any media that an agent is configured to use.

This section contains the following procedures:

- Procedure: Using the Team Communicator feature to find an internal target, on page 60
- Procedure: Using the Team Communicator feature to find a contact, on page 62

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

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 51).

Start of procedure

1. In the Main Window or in the Gadget, click in the Team Communicator `Quick Search` field (see Figure 24).

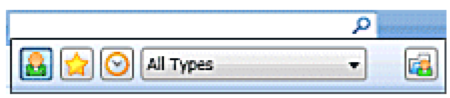


Figure 24: Main Window Team Communicator control and Quick Search field

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

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

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

   As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (see Figure 25). A pop-up view lists potential contacts and indicates the status of each internal target.

   Click the `X` to clear the search field.

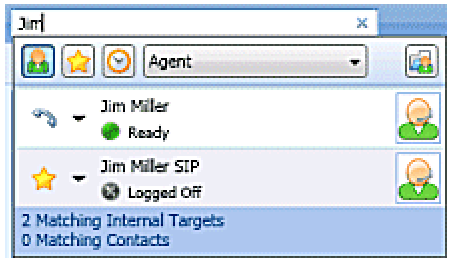


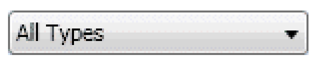
Figure 25: Example of Team Communicator search results with agent filtering

Below the `Quick Search` field are the following five controls (see Figure 24), from left to right:

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

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.

— `Interaction Queue`—Show only interaction queues that contain the specified search criteria.

— `Routing Point`—Show only Routing Points that contain the specified search criteria.

- Toggle sorting by type/category on or off by clicking the `Sort Results by Type/Categories` folder icon:

4. Click the `Action Menu` drop-down list that is displayed next to the icon of the internal target for whom you are searching (see Figure 26).

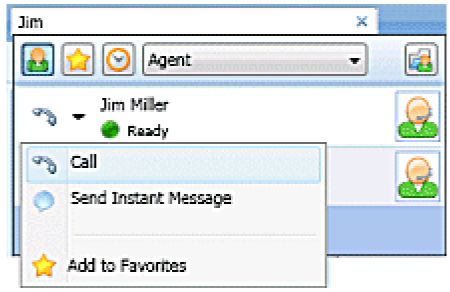


Figure 26: Internal target Action menu

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 77)
    - — Instant Messaging (IM) interaction (see Chapter 12, "Task: Handle Internal Instant Messaging," on page 145)
- Select `Add to Favorites` to add the contact to your list of favorite contacts.
- Place your mouse pointer over the contact icon to view additional contact information.

End of procedure

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 47).
- 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 (see Figure 27).

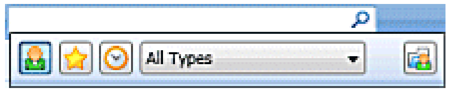


Figure 27: Main Window Team Communicator control and Quick Search field

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

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

   As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (see Figure 28). A pop-up view lists potential contacts.

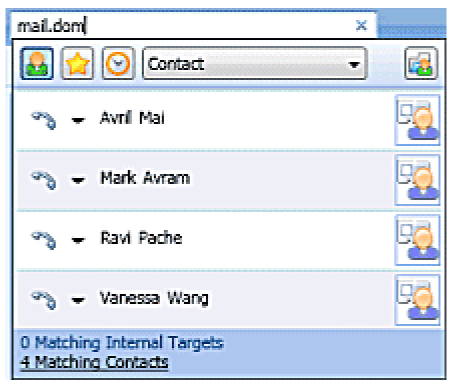


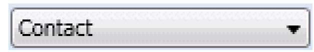
Figure 28: Example of Team Communicator search results with Contacts filtering

Below the `Quick Search` field are the following five controls (see Figure 27), from left to right:

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

3. Do one of the following to find the contact:

- Use the `Filter Type` drop-down list to view only contacts by selecting `Contact`.

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

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

4. Click the `Action Menu` drop-down list that is next to the contact for whom you are searching (see Figure 29).

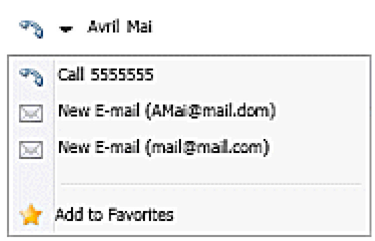


Figure 29: Contact Action menu

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 79).
- Select the e-mail address to launch a new e-mail interaction (see Procedure: Creating and sending a new e-mail interaction to a contact, on page 166).
- Select the SMS number to launch an SMS interaction (see Procedure: Creating an outbound SMS interaction, on page 237).

- Select `Add to Favorites` to add the contact to your list of favorite contacts.
- Place your mouse pointer over the contact icon to view additional contact information.

End of procedure

Using Favorites

You can designate internal targets and contacts as "favorites" by using the `Action Menu` of the Team Communicator. A *favorite* is an internal target or contact whom you call frequently, or whom you want to be able to find quickly.

When you designate an internal target or contact as a favorite, you might be configured to assign that contact to a favorite category. Favorite categories might be pre-defined by your administrator, or you might be configured to create your own categories. Corporate favorites are read-only.

If you are using the Team Communicator in an interaction window, the corporate favorites that you see might be different from the corporate favorites that are displayed in the Team Communicator in the Main Window or the Gadget. Your administrator might configure your system to display corporate favorites that are related to the interaction.

Procedure: Creating and using favorites in the Team Communicator

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. Find an internal target or contact (refer to Figure 30) by using the Team Communicator (see Procedure: Using the Team Communicator feature to find a contact, on page 62).

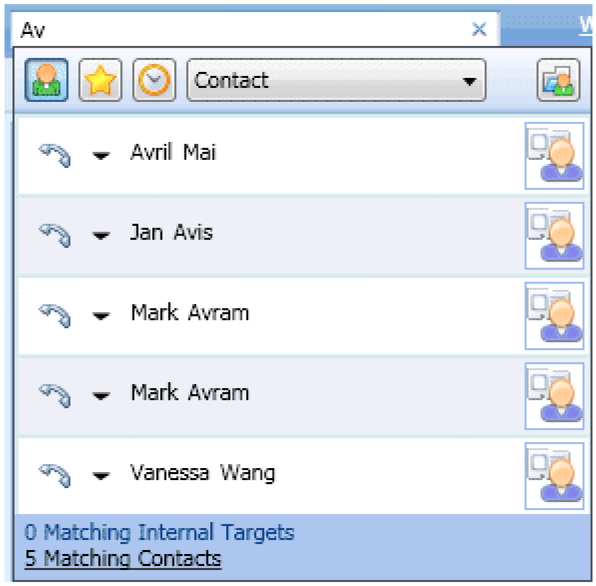


Figure 30: Finding a contact by using Team Communicator

2. Open the internal target or contact `Action Menu` and select `Add to Favorites` (refer to Figure 31).

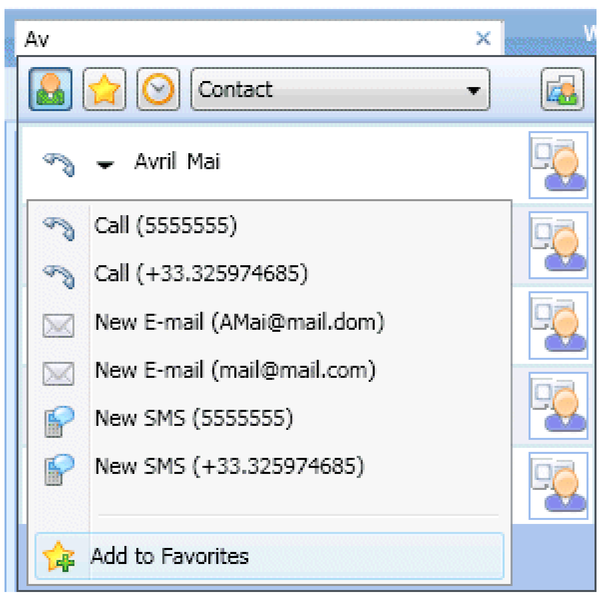


Figure 31: Contact Action Menu Add to Favorites option

The `New Favorite` dialog box is displayed (refer to Figure 32).

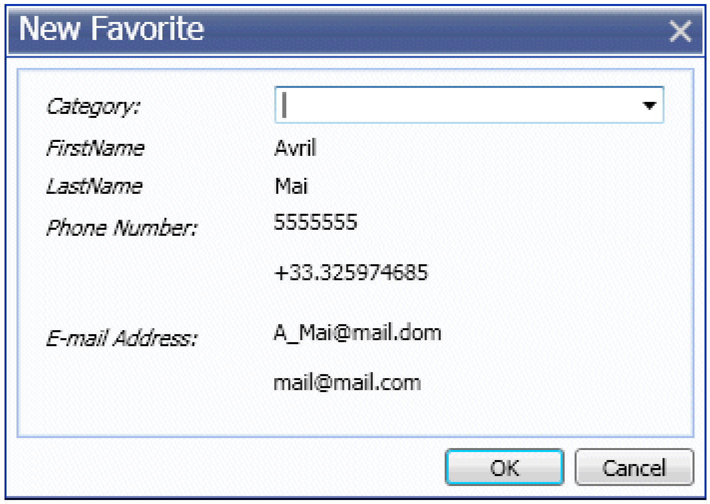


Figure 32: New Favorite dialog box

3. (Optional) The `New Favorite` dialog box enables you to specify a category for your new favorite. Do one of the following:
   - Select a pre-defined category from the `Category` drop-down list (refer to Figure 33). Pre-defined categories might be defined by your administrator, or you might have created one previously.
   - Create a new favorite category. In the `Category` drop-down list (refer to Figure 33), enter a new category name.

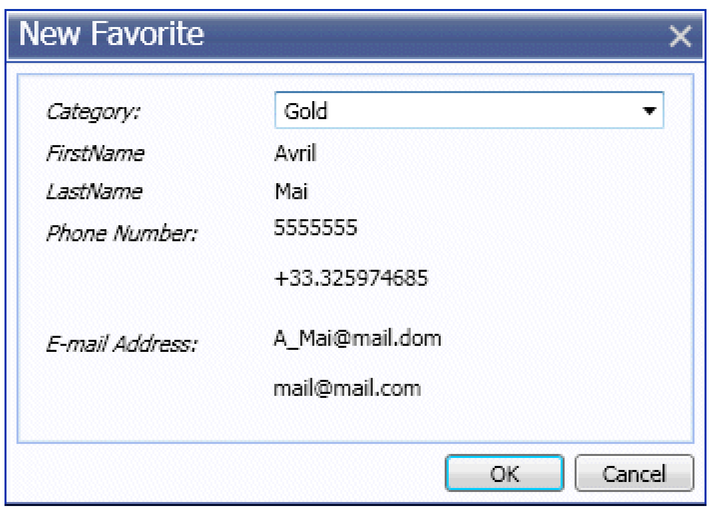


Figure 33: Specifying a category in the New Favorite dialog box

4. Click `OK` to create a new favorite. Click `Cancel` to close the `New Favorite` dialog box without creating a new favorite. If you created a new favorite, she or he will be displayed with a gold star next to the name of the internal target or contact (refer to Figure 34).

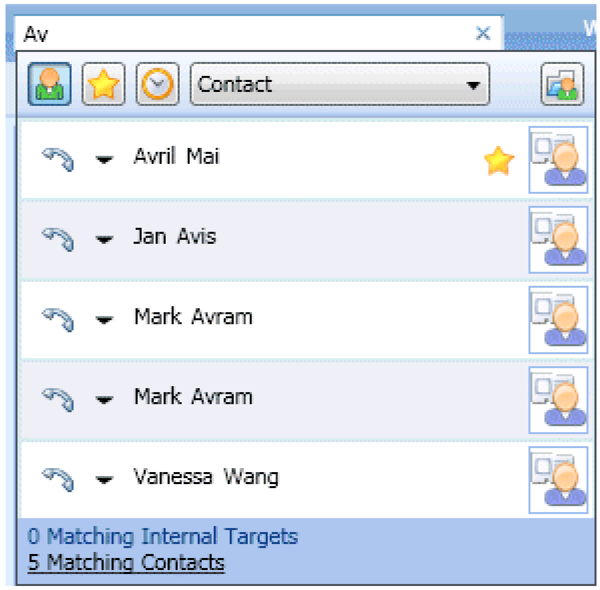


Figure 34: Contact designated as a favorite in the Team Communicator

5. In the Team Communicator, to view only favorites whom you have specified ( ) or who have been specified by your administrator ( ), click the `Favorites` filter button ( ) in the Team Communicator control panel (refer to Figure 35).

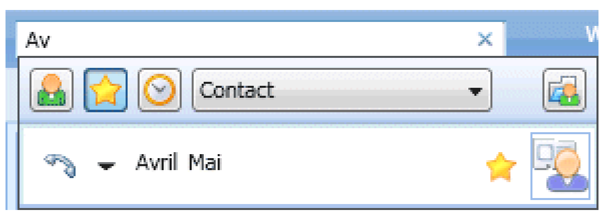


Figure 35: Favorite filtering in the Team Communicator

6. To view your favorites by category, click both the `Favorites` filter button and the `Categories` button ( ). The favorites are sorted into the categories that either you or your administrator has defined (refer to Figure 36).

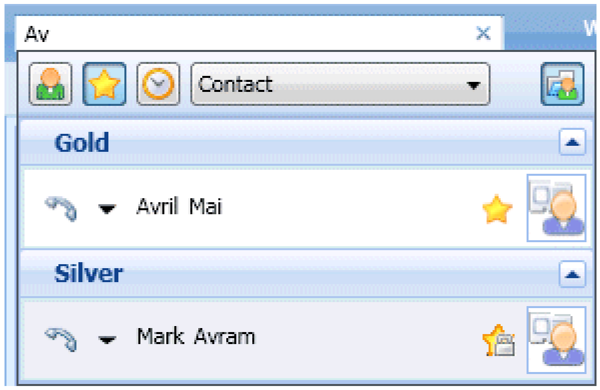


Figure 36: Favorites sorted by category in the Team Communicator

End of procedure

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Chapter

6

Task: Handle Voice Interactions

In this chapter, you will learn how to accept an inbound voice interaction by using Interaction Workspace. Also, you will learn how to use the Team Communicator feature to call a contact or an internal target.

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

This chapter contains the following sections:

Note: Refer to Chapter 11, "Task: Handle Outbound-Campaign Voice Interactions," on page 121, to use the Voice interaction view to handle Outbound Campaign calls.

Receiving a Voice Interaction

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

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 51).
- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- 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 (see Figure 37).

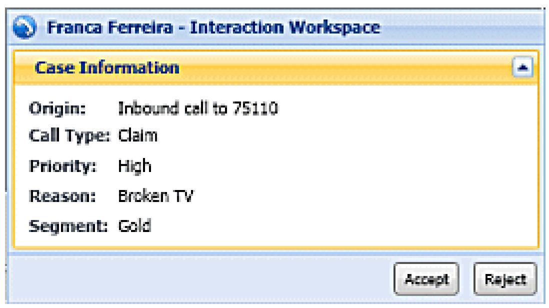

Figure 37: Voice Interaction Preview interactive notification

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

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 window is displayed (see Figure 38).

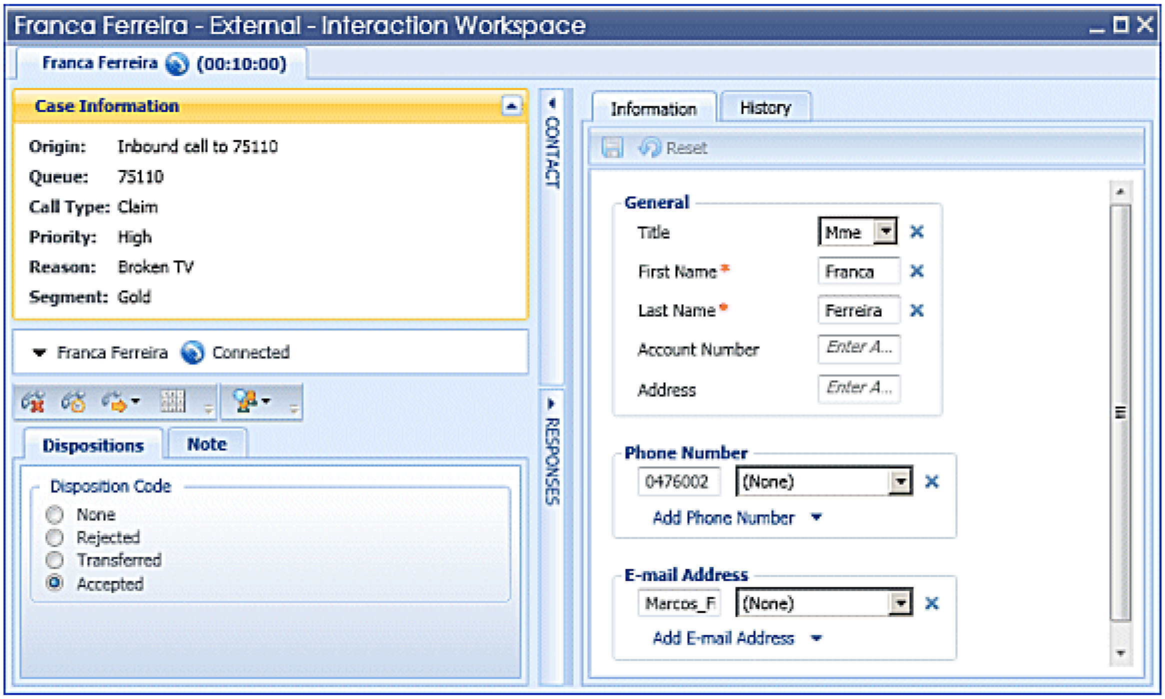

Figure 38: Voice Interaction window

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

- View contact records. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- View contact history. See “Managing Contact History” on page 291.
- Launch the Team Communicator. See “Starting a Voice Conference” on page 103, “Transferring a Voice Call” on page 93, and “Blending a voice consultation with an IM consultation” on page 261.
- Set a disposition code. See “Assigning Disposition Codes” on page 287.
- Use the Notepad to add information about the interaction to the interaction history. See “Managing Contact History” on page 291.
- View and edit the case information for the interaction. See “Managing Contact History” on page 291.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 39). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.

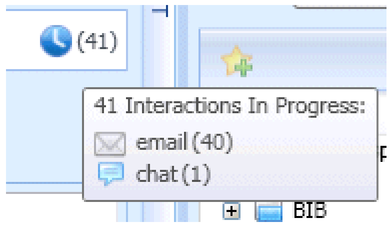

Figure 39: Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 40). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

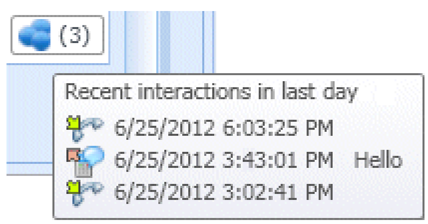

Figure 40: Recent interactions matrix displaying the list of interactions with the current contact within the last day

5. If you connect with the contact successfully, you can do any of the following:
   - Terminate the call (see Step 6).
   - Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
   - Use the keypad to send DTMF to the contact.
   - Start a voice or IM consultation.
   - Conference the call (see "Starting a Voice Conference" on page 103).
   - Transfer the call (see "Transferring a Voice Call" on page 93).
   - View and read standard responses (see Chapter 29, "Task: Using the Standard Response Library," on page 319).
   - For SIP enabled agents, additional call actions are available:

— Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
— Mute and unmute the call.
— Adjust the microphone and speaker volumes.

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

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

   If you want to terminate the call, click the `End Call` button.
7. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `disposition code` drop-down list or radio button list in the Disposition Code view (see "Assigning Disposition Codes" on page 287).
8. Click `Mark Done`.
9. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
10. Complete your after-call work.

End of procedure

Next Steps

- Set your status to `Ready`. See Procedure: Going Ready in the Interaction Workspace Main window, on page 51.

Procedure: Dealing with a stuck interaction

Purpose: To close the Interaction window if the interaction 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 51).
- You are unable to close the Interaction window because the interaction has become stuck in the system

Start of procedure

1. If you are unable to close the Interaction window because the interaction has become stuck in the system, right-click the tab in the Interaction window that represents the interaction (see Figure 41).

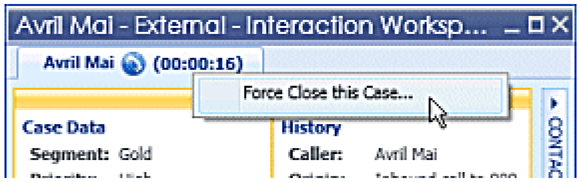

Figure 41: Force Close This Case menu

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

2. In the `Close Case` dialog box, confirm that you want to force-close the interaction (see Figure 42):

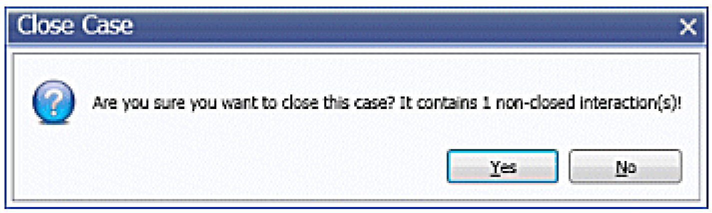

Figure 42: Close Case dialog box

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

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

3. Complete your after-call work.

End of procedure

Making a Voice Call

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

Note: Refer to Chapter 11, “Task: Handle Outbound-Campaign Voice Interactions,” on page 121 to use the Voice interaction view to handle Outbound Campaign calls.

This section contains the following procedures:

- Procedure: Calling an internal target, on page 77
- Procedure: Calling a contact, on page 79
- Procedure: Directly dialing a contact, on page 81

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 47).
- 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 60).

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 60), the Voice Interaction window opens. The status is `Establishing` (see Figure 43).

   Wait for the internal target to accept your invitation.

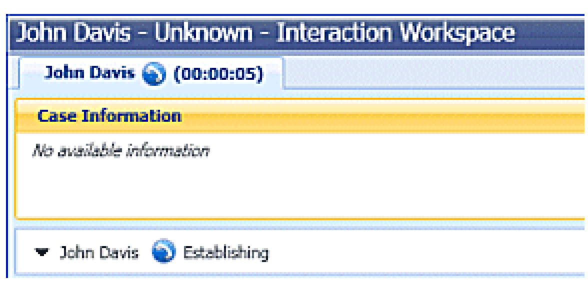

Figure 43: Voice Interaction window displaying status as Establishing

2. If the internal target accepts your invitation, the status in the Interaction window changes to `Connected` (see Figure 44). You are now connected to the internal target.

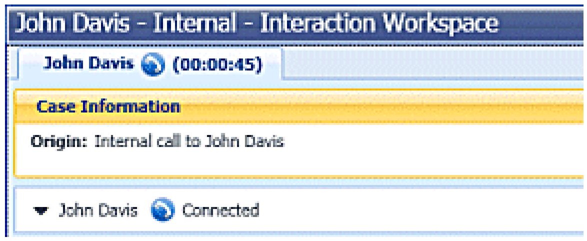

Figure 44: Voice Interaction window displaying status as Connected

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

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

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.
   - Start a voice or IM consultation.
   - Conference the call (see "Starting a Voice Conference" on page 103).
   - Transfer the call (see "Transferring a Voice Call" on page 93).
   - For SIP-enabled agents, additional call actions are available:
     — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
     — Mute and unmute the call
     — Adjust the microphone and speaker volumes

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

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 (see Figure 45).

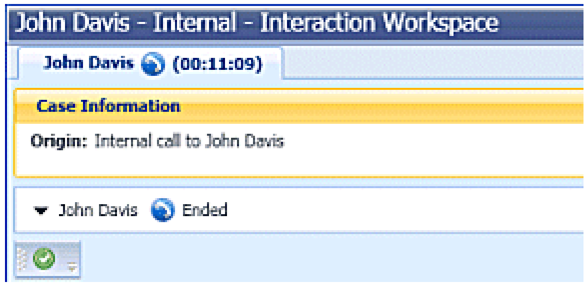

Figure 45: Voice Interaction window displaying status as Ended

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. See “Assigning Disposition Codes” on page 287 for more information about Disposition Codes.

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

End of procedure

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 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 47).
- 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 62).

Start of procedure

1. When you choose to call a contact (see Procedure: Using the Team Communicator feature to find a contact, on page 62), the Voice Interaction window is displayed. The Status is `Establishing` (see Figure 46).

   Wait for the contact to accept your invitation.

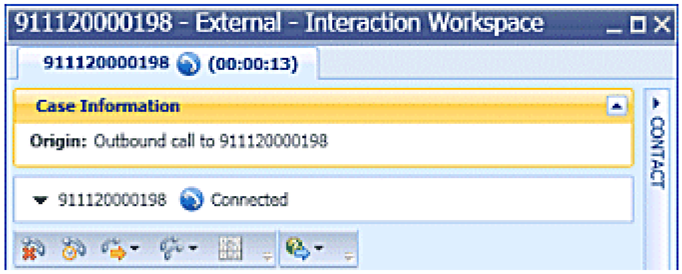

Figure 46: Voice Interaction window displaying status as Establishing

2. If the contact accepts your invitation, the status in the Voice Interaction window changes to `Connected` (see Figure 47). You can now talk to the contact.

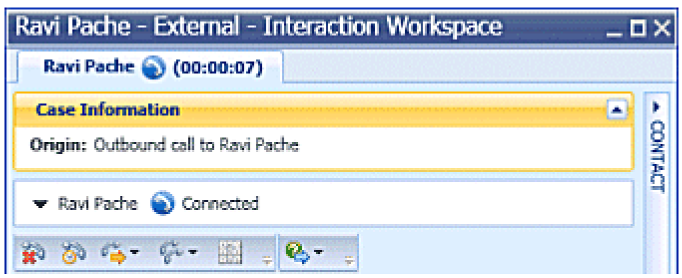

Figure 47: Voice Interaction window displaying status as Connected

   If the contact rejects or fails to accept your invitation, the call status changes to `Ended` (see Figure 48). To try to call the contact again; or, to call a different contact, repeat Step 1.

3. If you connect with the contact successfully, you can do one of the following:
   - Terminate the call (see Step 4).
   - Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
   - Use the keypad to send DTMF to the contact.
   - Start a voice or IM consultation.
   - Conference the call (see "Starting a Voice Conference" on page 103).
   - Transfer the call (see "Transferring a Voice Call" on page 93).
   - For SIP-enabled agents, additional call actions are available:
     — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
     — Mute and unmute the call.

— Adjust the microphone and speaker volumes.

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

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 (see Figure 48).

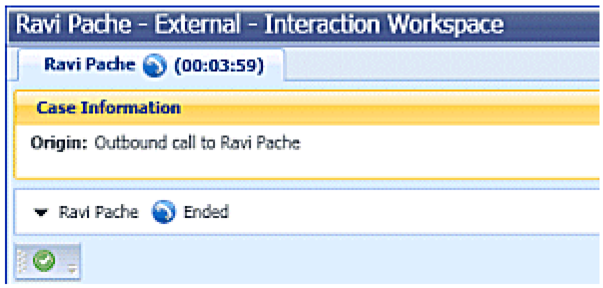

Figure 48: Voice Interaction window displaying status as Ended

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

     Note: Your system might be configured so that you cannot click `Mark Done` until you have selected a disposition code. See “Assigning Disposition Codes” on page 287 for more information about Disposition Codes.

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

End of procedure

Procedure: Directly dialing a contact

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

When you choose to call a contact, the Voice Interaction window is displayed. It enables you to view all the information that is necessary to handle a voice interaction with a contact.

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have the number of the party that you want to call.
- You have found the contact and have selected an External Voice Interaction (see Procedure: Using the Team Communicator feature to find a contact, on page 62).

Start of procedure

1. In the Main Window, Gadget, or an interaction window, click in the Team Communicator `Quick Search` field (see Figure 49).

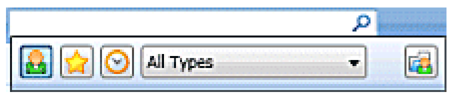

Figure 49: Main Window Team Communicator control and Quick Search field

2. Enter the telephone number that you want to directly dial (see Figure 50).

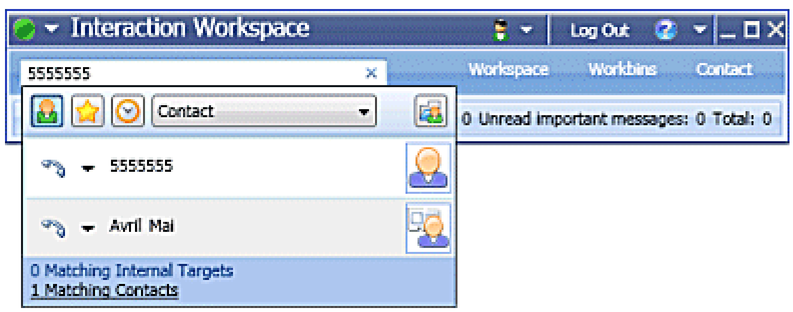

Figure 50: Team Communicator displaying a directly dialed number

As you enter text, Interaction Workspace searches the internal and contact database and lists potential matches (see Figure 50). A pop-up view lists potential contacts and internal targets.

Click the `X` to clear the search field.

If the number that you enter corresponds to a phone number that is in the contact database, the `Action` menu for the contact is displayed in the Team Communicator search results list (see Figure 50).

If the number that you enter does not correspond to a phone number in the contact database, no contact information is displayed in the Team Communicator search results list (see Figure 51).

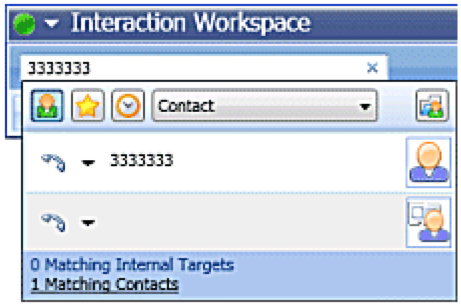

Figure 51: Team Communicator displaying an unknown directly dialed number

3. To dial the number, click the phone icon that is next to the number that you entered in the `Action` menu. If the party is reached, the Voice Interaction window is displayed (see Figure 52).

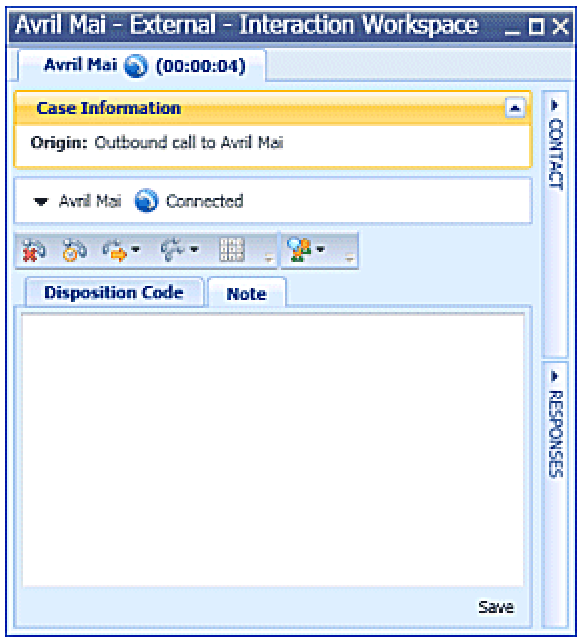

Figure 52: Voice Interaction window for a directly dialed call

4. Handle and complete your call (see Procedure: Calling a contact, on page 79).

End of procedure

Chapter

7 Task: Handle a Voice Consultation

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 consultation from an interaction window, such as voice, e-mail, and chat. You can also use the first procedure in this chapter to find a contact and start a voice consultation. The second section demonstrates how to handle a Voice Consultation request.

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

This chapter contains the following sections:

Starting a Voice Consultation

The Interaction Workspace Voice, E-Mail, and Chat Interaction windows enable you to start a voice, chat, or instant messaging consultation with an internal target or a contact about your current interaction (see Chapter 6, “Task: Handle Voice Interactions,” on page 71), e-mail interaction (see Chapter 13, “Task: Handle an E-Mail Interaction,” on page 157), or chat interaction (see Chapter 14, “Task: Handle a Chat Interaction,” on page 179).

Interaction Workspace also enables you to instantly transfer or conference your call with an internal target or a contact. You can do this with or without first starting a consultation. For instant transfers, the call is transferred as soon as the other party accepts the interaction. For instant conferences, the conference starts as soon as the other party accepts the interaction.

Procedure: Starting a voice consultation

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see "Receiving a Voice Interaction" on page 71, "Receiving and Handling an Inbound E-Mail Interaction" on page 157, or "Receiving and Handling an Inbound Chat Interaction" on page 179).

Start of procedure

1. In the active interaction window, click the Start Consultation button to open the Team Communicator (see Figure 53 for an example of a voice interaction).

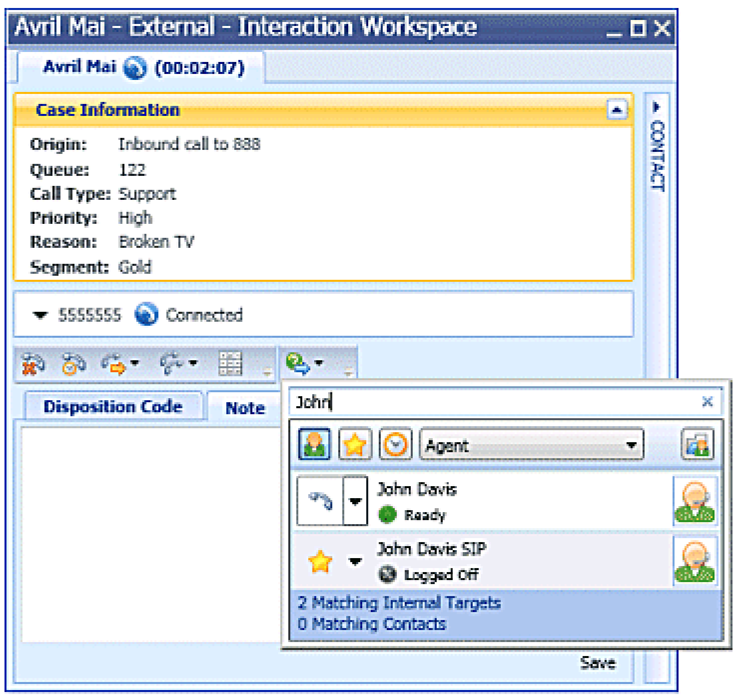

Figure 53: Finding an internal target for a voice consultation in the active Voice Interaction window

2. Use the Team Communicator to find the internal target with whom you want to start a consultation (see the Procedure: Using the Team Communicator feature to find an internal target, on page 60).

3. Click the `Action Menu` drop-down list is displayed next to the name of the internal target with whom you want to consult, and then select `Start Voice Consultation` (see Figure 54). The contact is put on hold. When the internal target accepts the interaction request, you can speak to the internal target agent.

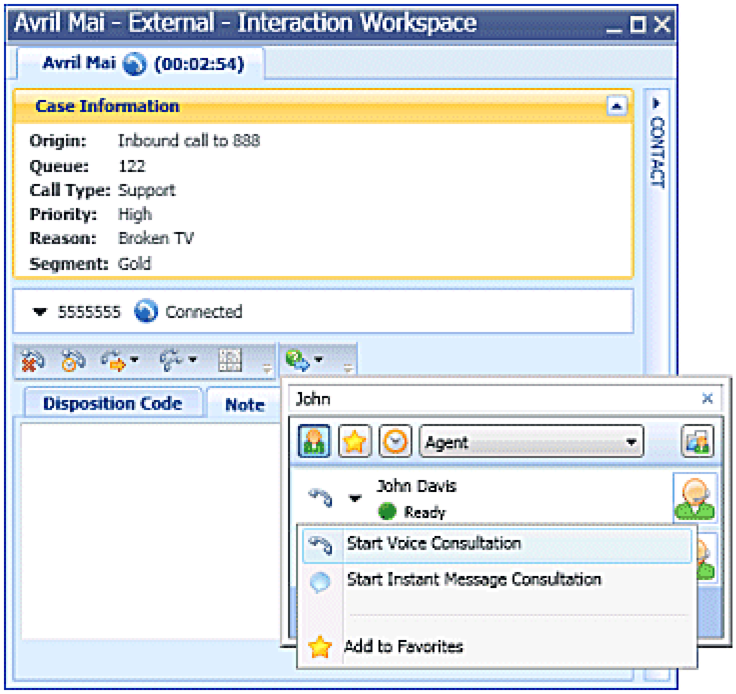

Figure 54: Start Voice Consultation menu option

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

4. When you are connected to your consultation target, the internal target is added to the Interaction Workspace Interaction window (see Figure 55).

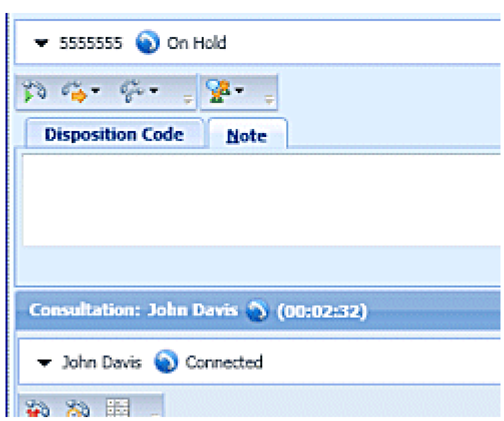

Figure 55: Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold

5. During your consultation, you can alternate between the contact and the consulting party by clicking the `Resume Call` button. Doing this puts the active party on hold and connects you to the other party.

   During your consultation, you can start a conference with your consultation target or another target (see "Starting a Voice Conference" on page 103).

6. To end your consultation, click `End Call`. Your consultation target might also end the call.

End of procedure

Receiving a Voice Consultation

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

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

Procedure:
Receiving a voice consultation request

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target for the voice consultation 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 window (see Figure 56).

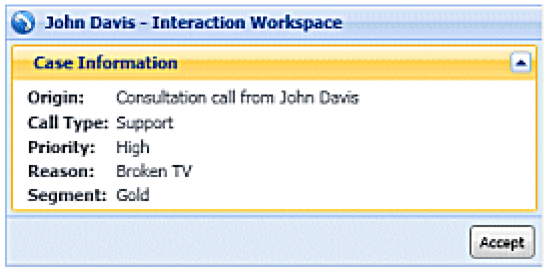

Figure 56: Voice Interaction Consult Preview interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to answer the consultation interaction.
   - Do nothing. The interaction will time-out.

3. If you accept the interaction, the call is answered in your hard phone or soft phone, and the Voice Consultation Interaction window is displayed (see Figure 57).

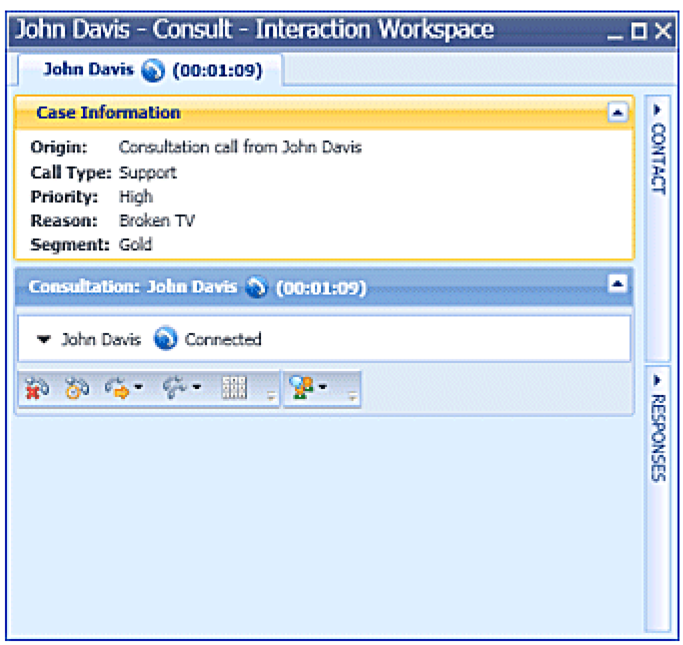

Figure 57: Voice Consultation Interaction window

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

- View contact records. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- View contact history. See "Managing Contact History" on page 291.
- Launch the Team Communicator. See "Starting a Voice Conference" on page 103, "Transferring a Voice Call" on page 93, and "Blending a voice consultation with an IM consultation" on page 261.
- View the case data for the interaction. See "Managing Contact History" on page 291.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

4. If you connect successfully with the agent that is requesting a consultation, you can do any of the following:

- Terminate the call (see Step 5).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice or IM consultation.
- Conference the call (see "Starting a Voice Conference" on page 103).
- Transfer the call (see "Transferring a Voice Call" on page 93).
- View and read standard responses (see Chapter 29, "Task: Using the Standard Response Library," on page 319).
- For SIP enabled agents, additional call actions are available:
  - — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
  - — Mute and unmute the call.
  - — Adjust the microphone and speaker volumes.

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

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

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

6. The Voice Interaction window closes automatically. You do not have to click `Mark Done` or set a disposition for a consultation call that you have received.

End of procedure

Next Steps

- Set your status to `Ready`. See Procedure: Going Ready in the Interaction Workspace Main window, on page 51.

Chapter

8 Task: 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:

Transferring a Voice Call

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

This section contains the following procedures:

Procedure: Starting a voice transfer

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see “Receiving a Voice Interaction” on page 71).

Start of procedure

1. In the active voice interaction, click the `Instant Voice Transfer` button to open the Team Communicator (see Figure 58) to find the internal target to whom you want to transfer the current interaction (see the Procedure: Using the Team Communicator feature to find an internal target, on page 60).

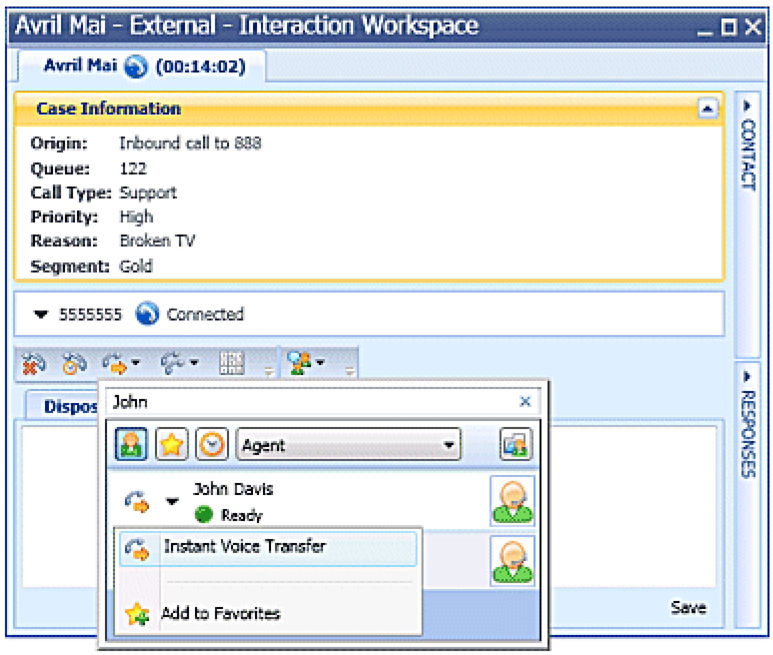

Figure 58: Finding an internal target for a voice transfer in the active Voice Interaction window

2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and select `Instant Voice Transfer`. The contact is put on hold. When the internal target accepts the interaction request, the interaction is instantly transferred to the transfer target. The interaction window on your desktop closes.

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

3. Complete your after-call work.

4. Set your status to `Ready`.

End of procedure

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 might 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 47).

Start of procedure

1. If another agent wants to transfer a voice interaction to you, they can choose between an instant transfer and a transfer from a consultation. You are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (see Figure 59).

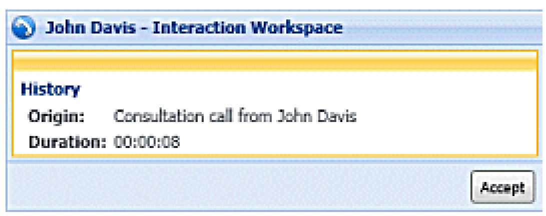

Figure 59: Interaction Preview interactive notification, informing you of a transfer request

Click `Accept` to accept the transfer or to consult first with the calling agent:
- If the calling agent initiated an instant transfer, the call is immediately transferred to you. Go to Step 3 on page 96.
- If the calling agent initiated a consultation transfer, the Interaction Workspace Voice Interaction window is displayed. It shows your status as connected to the calling agent.

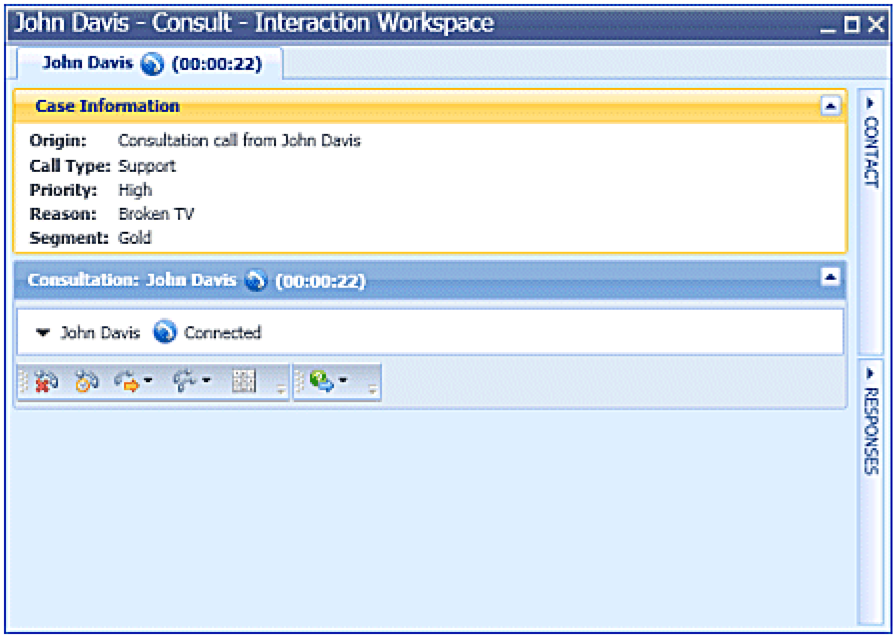

Figure 60: Voice Interaction window, displaying your status as connected to the calling agent

2. If the transferring agent used a consultation transfer, the Interaction Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, before you accept the transferred call:
   - Speak privately with the calling agent about the call, before the call is transferred to you.
   - End the call—This function ends your participation in the consultation call; the call is not transferred to you.
   - Put the call on hold and retrieve the call.
   - Send DTMF by using the keypad.
   - Conference the call.
   - Transfer the call.
   - For SIP enabled agents, additional call actions are available:
     — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
     — Mute and unmute the call.
     — Adjust the microphone and speaker volumes.

     For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
3. If the calling agent completes the transfer to you, the Interaction Workspace Voice Interaction window is updated to display the status of the party to whom you are talking. The status changes to `Connected` (see Figure 61).

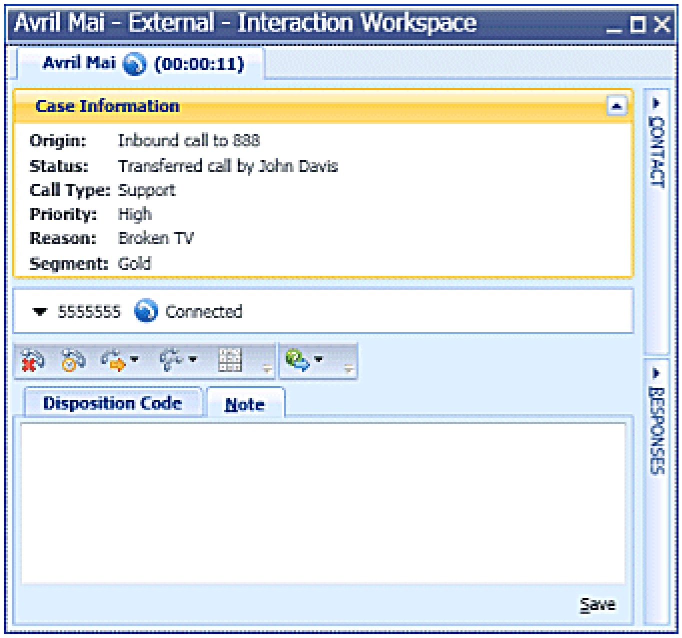

Figure 61: Voice Interaction window, displaying your status as connected to the transferred contact

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 72).

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

   The Interaction Workspace Voice Interaction window is updated to display the status of the call as `Ended` (see Figure 62).

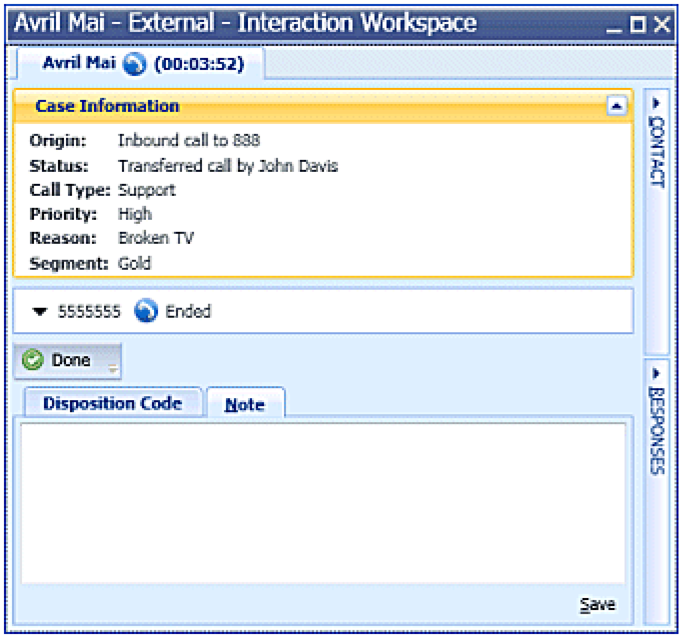

Figure 62: Voice Interaction window, displaying the status at the end of a conference call

If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see “Assigning Disposition Codes” on page 287).

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

Transferring an Interaction to an Active Consultation

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

Procedure:
Transfer to an active consultation

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see "Receiving a Voice Interaction" on page 71).
- You have an active consultation with another party (see Procedure: Starting a voice consultation, on page 86).

Start of procedure

1. During your active consultation (see Figure 63), you can perform any of the following functions by using the Voice Consult toolbar.
   - Alternate (toggle) between the contact and the internal target by clicking the `Resume Call` button alternately on the toolbar for the respective call. The other party is put on hold until you toggle back or complete the conference.
   - End the call to the internal target and resume the call with the contact.
   - Send DTMF to the internal target.
   - For SIP-enabled agents, additional call actions are available:
     — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
     — Mute and unmute the call.
     — Adjust the microphone and speaker volumes.

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

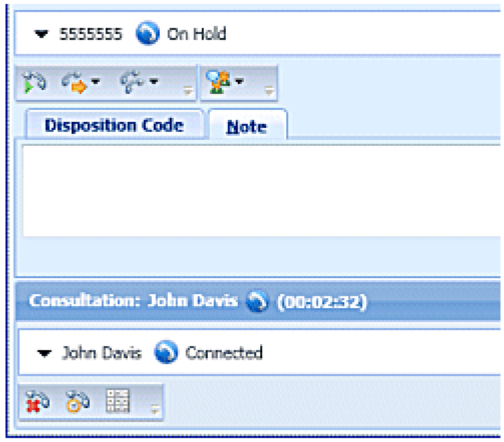

Figure 63: Voice Interaction window, displaying a consultation call that is connected to the internal target while the contact party is on hold

2. To transfer your active interaction to your consultation target, click the `Instant Transfer` button. The Team Communicator is displayed showing a list of your active consultations (see Figure 64).

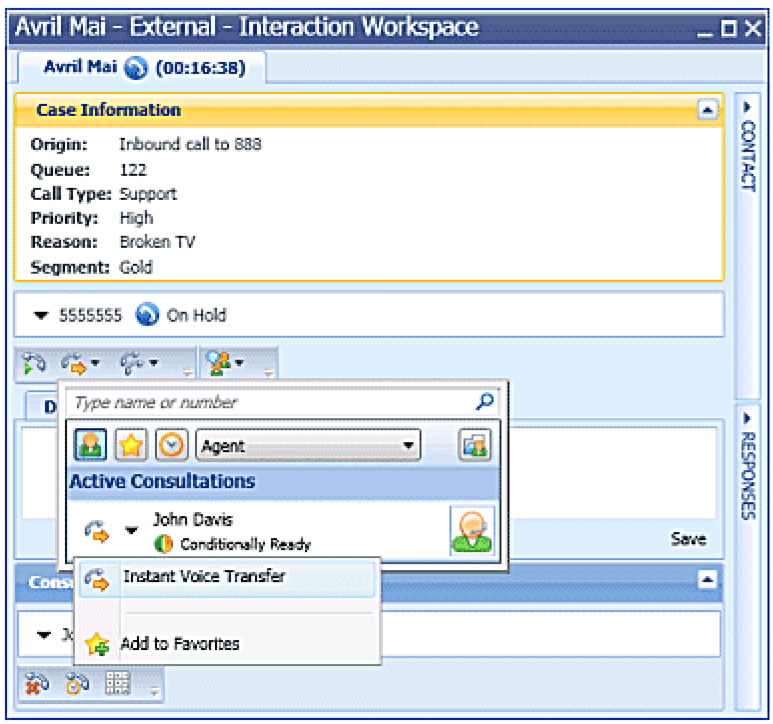

Figure 64: Voice Interaction window, displaying an instant voice transfer from a consultation call

3. Complete the transfer by clicking the `Instant Voice Transfer` button that is beside the name of the target to whom you want to transfer the interaction.

   The contact is transferred to the consulting target. The call status changes to `Ended` (see Figure 65).

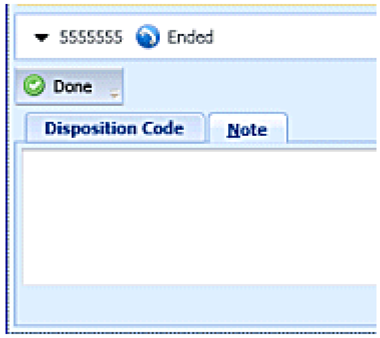

Figure 65: Voice Interaction window, displaying status as Ended

4. After a call is released, one or more of the following actions might be available to you, depending on your assigned role:
   - Click `Mark Done` to close the Voice Interaction window.
   - Select a disposition (see "Assigning Disposition Codes" on page 287).

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

End of procedure

Chapter

9 Task: Conference a Voice Call

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 from an interaction window, such as voice, e-mail, and chat. 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 consultation, or transfer a call.

This chapter contains the following sections:

Starting a Voice Conference

The Interaction Workspace Voice, E-Mail, and Chat Interaction windows enable you to conference your current voice, chat, or instant messaging interaction with an internal target or a contact about your current interaction (see Chapter 6, “Task: Handle Voice Interactions,” on page 71), e-mail interaction (see Chapter 13, “Task: Handle an E-Mail Interaction,” on page 157), or chat interaction (see Chapter 14, “Task: Handle a Chat Interaction,” on page 179).

Interaction Workspace also enables you to instantly transfer or conference your call with an internal target or a contact. You can do this with or without first starting a consultation. For instant conferences, the conference starts as soon as the other party accepts the interaction.

This section contains the following procedures:

- Procedure: Starting a voice conference, on page 104

- Procedure: Receiving a conference call, on page 106
- Procedure: Starting a Conference with an Consultation, on page 111

Procedure: Starting a voice conference

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

You can also call a contact to initiate a conference.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see "Receiving a Voice Interaction" on page 71, "Receiving and Handling an Inbound E-Mail Interaction" on page 157, or "Receiving and Handling an Inbound Chat Interaction" on page 179).

Start of procedure

1. In the active interaction window, click the `Instant Voice Conference` button to open the Team Communicator (see Figure 58 on page 94) to find the target to whom you want to conference with the current interaction (see Figure 66 for an example of a voice interaction).

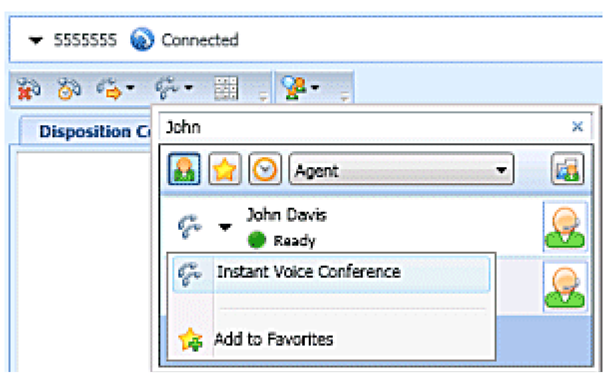

Figure 66: Initiating a conference from an active interaction

2. Complete the conference by clicking the `Instant Voice Conference` button beside the name of the target, or open the `Action` menu and select `Instant Voice Conference`.

   The conference begins as soon as the internal target accepts the interaction request. Depending on the configuration of your system, this option might not be available. You, the contact, and the internal target agent are placed into a three-way conference (see Figure 67).

Figure 67: Voice Interaction window, displaying a conference with a contact and a second agent

During the conference call you can perform the following actions:

- Use the Conference Party Action Menu (next to the Party Status) to do one of the following:
  — **Delete from Conference**—Terminate the connection to the party. This action ends the call to the party, but continues the call with the other party.
  — **Prevent Listening**—Disable listening for the selected party. The party can still talk, but the party cannot hear what you and the other party say
  — **Allow Listening**—Enable listening for that party. The party can hear what the other two parties are saying
- End the Call—Both lines are disconnected (go to Step 4).
- Put both parties on hold.
- Instantly transfer the call to another target.
- Instantly conference the call with another target.
- Send DTMF to the internal target.
- For SIP-enabled agents, additional call actions are available:
  — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
  — Mute and unmute the call.
  — Adjust the microphone and speaker volumes.

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

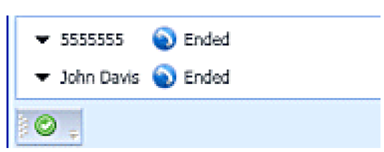

Figure 68: Voice Interaction window displaying an ended conference with a contact and a second agent

3. The internal target agent can choose to release the call. If this happens, the internal target agent is disconnected, but you remain connected to the contact. You can complete your call with the contact, transfer the contact, or start a new conference call.
4. If you have completed your call and the internal target agent is still connected, when you click the `End Call` button, the call is transferred automatically to the internal target agent. Go to Step 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.
5. During your consultation, you can transfer the call to your consultation target, or to another target. You can also start a conference with your consultation target or another target.

End of procedure

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.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the voice media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).

Start of procedure

1. If another agent wants to conference with you and a contact about their current interaction the agent can initiate a voice conference.

   If the other agent is handling a voice interaction and initiates a voice conference request, you are notified of the request by the Interaction Workspace Interaction Preview interactive notification (see Figure 69).

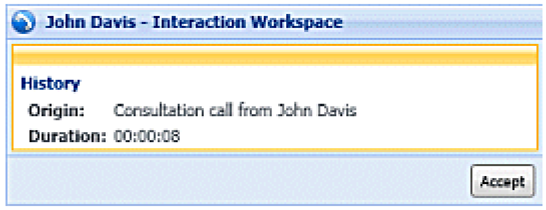

Figure 69: Interaction Preview interactive notification, informing you of a conference request

Click `Accept` to connect to the conference:

- If the calling agent initiated an instant conference, you are immediately in the conference with the contact. Go to "Remaining Connected After the Conferencing Agent Disconnects" on page 109.
- If the calling agent initiated a voice consultation conference, the Interaction Workspace Voice Interaction window is displayed and shows your status as connected to the calling agent (see Figure 70).

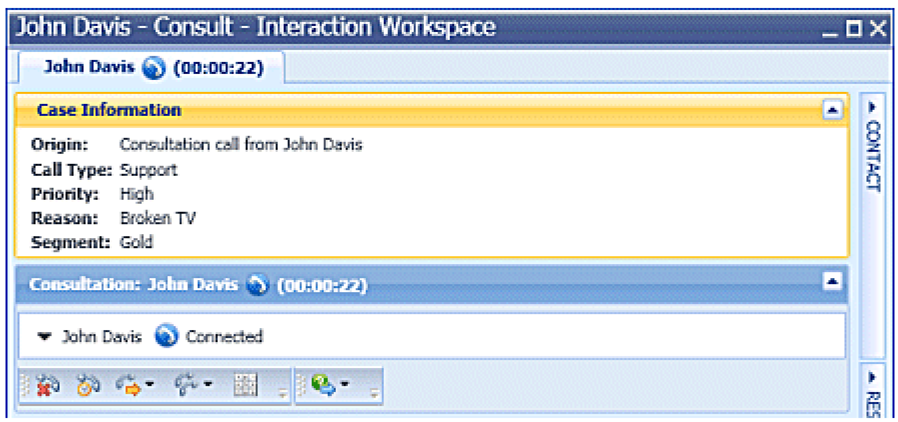

Figure 70: Voice Interaction window, displaying your status as Connected to the calling agent

2. The Interaction Workspace Voice Interaction window enables you to perform the following functions while you are speaking to the calling agent, prior to joining the conference call:
   - Speak privately with the calling agent about the conference prior to joining the conference.
   - End the call—This function ends your participation in the consultation call; you are not joined to the conference.
   - Put the call on hold and resume the call.
   - Send DTMF by using the keypad.
   - Start a conference call.
   - Transfer the call to a different internal target.
   - For SIP-enabled agents, additional call actions are available:
     — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).

— Mute and unmute the call.

— Adjust the microphone and speaker volumes.

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

3. If the calling agent joins you to the conference, all three parties can hear and speak to one another. The Interaction Workspace Voice Interaction window is updated to display the status of the parties to whom you are talking. The status changes to `Connected` (see Figure 71).

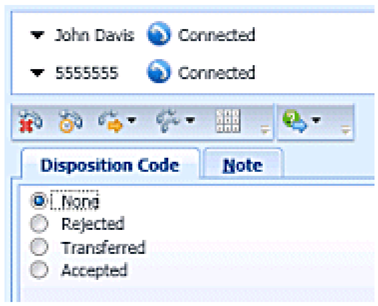

Figure 71: Voice Interaction window, displaying Conferenced status

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

- Use the Conference Party Action Menu (adjacent to the Party Status) to do the following:
  — **Delete From Conference**—Terminate the connection to the party.
  — **Prevent Listening**—Disable listening for the selected party. The party can still talk, but the party cannot hear what you and the other party say.
  — **Allow Listening**—Enable listening for that party. The party can now hear what the other two parties are saying.
- For SIP-enabled agents, additional call actions are available:
  — Record the call (see Chapter 26, "Task: Record Interactions," on page 285).
  — Mute and unmute the call.
  — Adjust the microphone and speaker volumes.

  For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
- End the call—Terminates your connection to the conference. The calling agent remains connected to the contact.
- Set a disposition code for the call.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new

browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

Remaining Connected After the Conferencing Agent Disconnects

If the calling agent releases the call, the calling agent is disconnected, but you remain connected to the contact (see Figure 72). You can complete your call with the contact, transfer the contact, or start a new conference call.

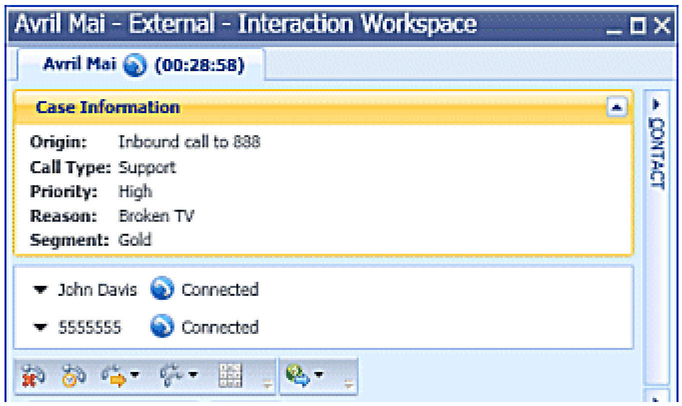

Figure 72: Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

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

   The Interaction Workspace Voice Interaction window is updated to display the status of the conference as `Ended` (see Figure 73).

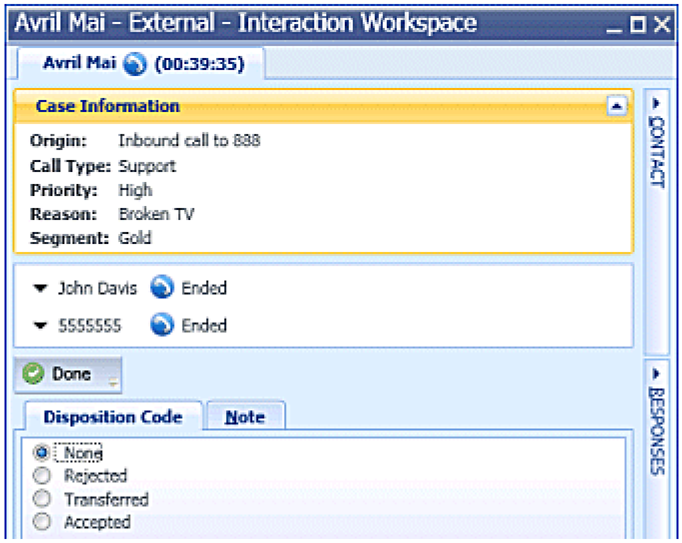

Figure 73: Voice Interaction window, displaying the status at the end of a conference call

If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see “Assigning Disposition Codes” on page 287).

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

Start a Conference with an Active Consultation

You can add your consultation target to your current interaction by starting a conference with the target.

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

Procedure: Starting a Conference with an Consultation

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see “Receiving a Voice Interaction” on page 71, “Receiving and Handling an Inbound E-Mail Interaction” on page 157, or “Receiving and Handling an Inbound Chat Interaction” on page 179).
- You have an active consultation with an internal target (see Procedure: Starting a voice consultation, on page 86 or Procedure: Receiving a voice consultation request, on page 88).

Start of procedure

1. To transition an active consultation to a conference, click the `Instant Call Conference` button on the main interaction toolbar (see Figure 74).

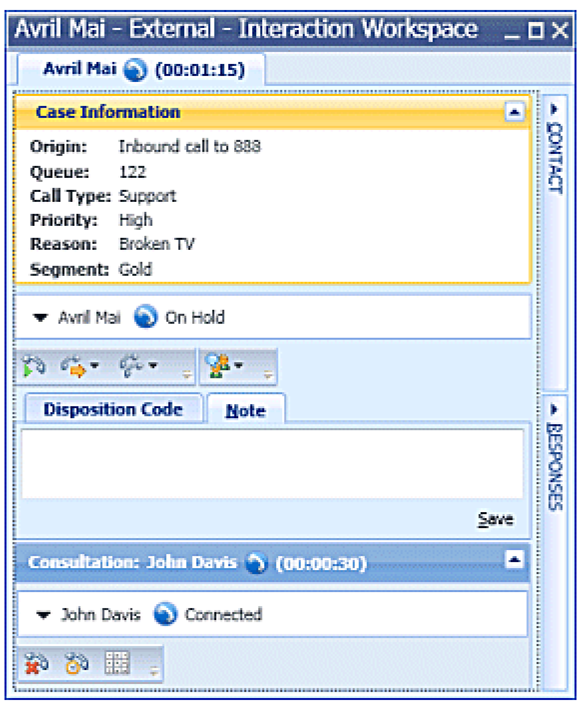

Figure 74: Interaction window displaying an active interaction and an active voice consultation

2. The Team Communicator opens and displays your active consultations (see Figure 75). Click the `Instant Call Conference` button in the `Action` menu that is next to the name of the consult party with whom you want to start a conference call.

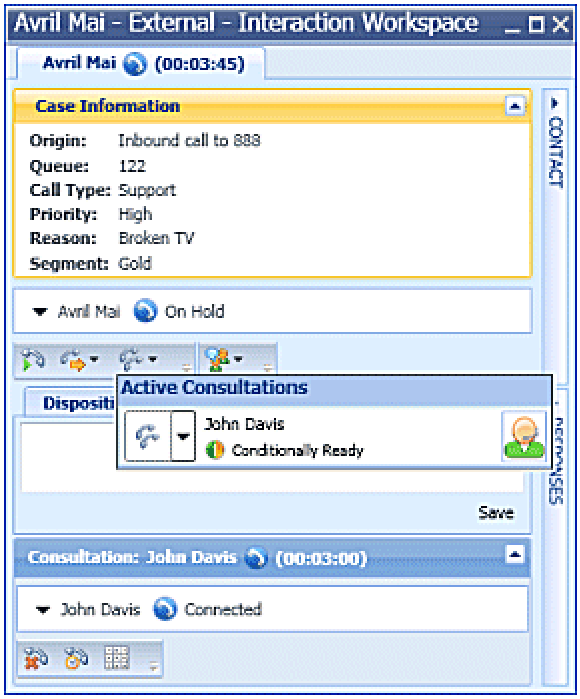

Figure 75: Team Communicator in the active interaction window, displaying the Active Consultations

The consultation interaction is closed and the consultation target is added to the conference call (see Figure 76).

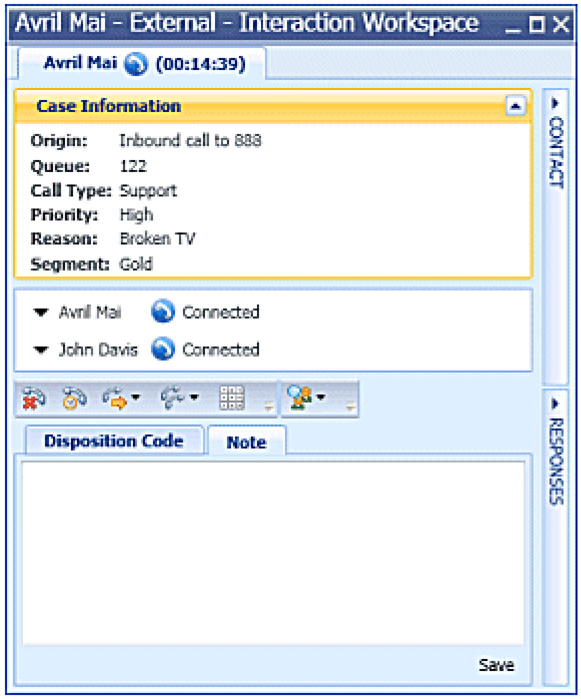

Figure 76: Interaction window displaying a conference call with two parties.

3. Complete the conference call by following Procedure: Starting a voice conference, on page 104.

End of procedure

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Chapter

10 Task: Handle Web Callback Interactions

In this chapter, you will learn how to accept a web callback voice interaction by using Interaction Workspace.

This chapter contains the following sections:

Receiving a Web Callback Interaction

A web callback interaction is initiated when a contact visits your company's web site and submits a request for an agent to telephone the contact at a time that the contact specifies.

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

The Web Callback Interaction window is similar to the Voice Interaction window (refer to "Receiving a Voice Interaction" on page 71). It enables you to view all the information that is necessary to handle a web callback interaction with a contact who has requested a callback from your company web page.

Procedure: Handling a web callback interaction

Purpose: To handle a web callback voice interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the web callback-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- 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 (see Figure 77).

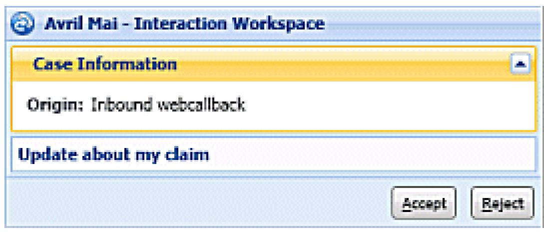

Figure 77: Web callback Interaction Preview interactive notification

   The Interaction Preview contains a summary of call information, including contact information and call metrics. The Interaction Preview might also contain Case Information, which is part of the case data regarding the call. The case data might include information that the contact entered in a form on your company's web page.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to answer the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will timeout and be redirected.
3. If you accept the interaction, the Web Callback interaction window is displayed on your desktop. The window contains Case Information, call controls, and Callback Information (see Figure 78).

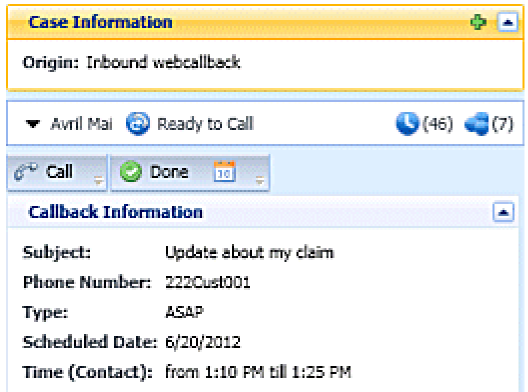

Figure 78: Web Callback interaction window case and callback information.

Callback Information provides you with the subject of the call, the number provided by the contact, and the scheduled date and time for the call.

The status of the call is `Ready to Call`. In this state, you can review the Case Information and the Callback Information before you connect the call to the contact.

You can use the Web Callback Interaction window to do the following:

- View contact records. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- View contact history. See "Managing Contact History" on page 291.
- Launch the Team Communicator. See "Starting a Voice Conference" on page 103, "Transferring a Voice Call" on page 93, and "Blending a voice consultation with an IM consultation" on page 261.
- Schedule a different callback time. See the Procedure: Scheduling a callback, on page 141.
- Set a disposition code. See "Assigning Disposition Codes" on page 287.
- Use the Notepad to add information about the interaction to the interaction history. See "Managing Contact History" on page 291.
- View and edit the case information for the interaction. See "Managing Contact History" on page 291.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.

If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 79). Place your mouse pointer over the icon to display the number and type of interactions in progress (except voice interactions) for the current contact.

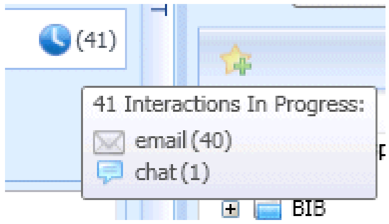

Figure 79: Dynamic Contact History Matrix displaying the number and type of interactions in progress for the current contact

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 80). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

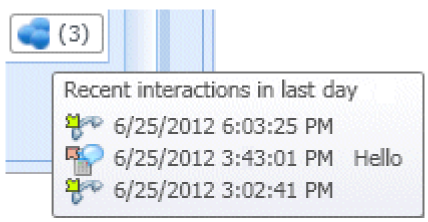

Figure 80: Recent interactions matrix displaying the list of interactions with the current contact within the last day

4. Click `Call` to connect with the contact.

   The call status changes to `Establishing` until the contact answers the call. If the call times out because the line is busy or the contact does not answer, the status returns to `Ready to Call`.

5. If you connect with the contact successfully, the call status changes to `Connected`. You can do any of the following:
   - Terminate the call (see Step 6).
   - Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
   - Use the keypad to send DTMF to the contact.
   - Start a voice or IM consultation.
   - Conference the call (see "Starting a Voice Conference" on page 103).
   - Transfer the call (see "Transferring a Voice Call" on page 93).

- View and read standard responses (see Chapter 29, “Task: Using the Standard Response Library,” on page 319).
- For SIP-enabled agents, additional call actions are available:
  — Record the call (see Chapter 26, “Task: Record Interactions,” on page 285).
  — Mute and unmute the call.
  — Adjust the microphone and speaker volumes.

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

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

   If you want to terminate the call, click the `End Call` button. The call status returns to `Ready to Call`.

7. If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `disposition code` drop-down list or radio button list in the Disposition Code view (see “Assigning Disposition Codes” on page 287).
8. Click `Done`.
9. If the Web Callback Interaction window does not close automatically, close the Web Callback Interaction window after you have clicked `Done` for each of the active interactions.
10. Complete your after-call work.

End of procedure

Next Steps

- Set your status to `Ready`. See Procedure: Going Ready in the Interaction Workspace Main window, on page 51.

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Chapter

11 Task: Handle Outbound-Campaign Voice Interactions

In this chapter, you will learn how to handle an outbound-campaign voice interaction by using Interaction Workspace.

This chapter contains the following sections:

Outbound Campaigns

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

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

There are two delivery modes of outbound calls, manual and automatic. Your supervisor determines in which mode you will work.

In manual mode, you make outbound calls by requesting an interaction from a preset calling list. Manual delivery has one dialing mode:

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

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

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

Starting and Stopping an Outbound Campaign

If your supervisor or someone else at your company loads into Genesys Outbound Contact Manager an Outbound Campaign to which you are assigned, you will receive a warning message that informs you that a specific campaign has begun and that you are assigned to that campaign (see Figure 81).

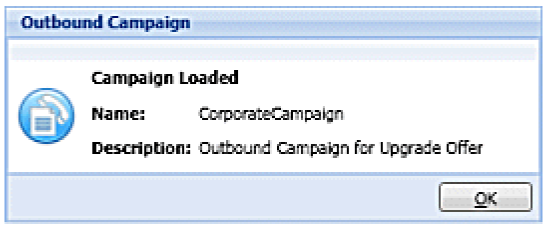


Figure 81: Outbound Campaign Loaded message box

The message box contains information about the Outbound Campaign. Your administrator determines the content of the message box and the information that is provided to you.

Click `OK` to close the message box.

When the Outbound Campaign begins and outbound interactions are going to be directed to your desktop (or made available to you in the case of Preview campaigns), the `Campaign Started` message is displayed on your desktop (see Figure 82).

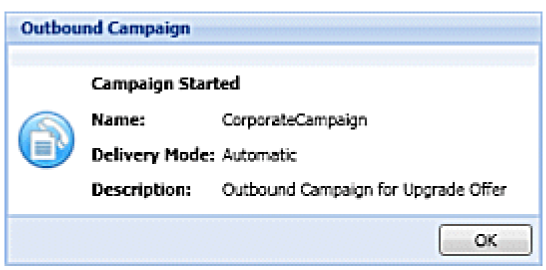


Figure 82: Outbound Campaign Started message box

Click `OK` to close the message box.

When the Outbound Campaign ends and no more outbound interactions are going to be directed to your desktop, the `Campaign Stopped` message is displayed on your desktop (see Figure 83).

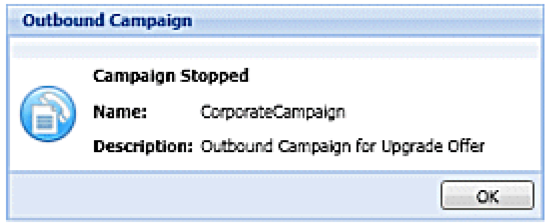


Figure 83: Outbound Campaign Stopped message box

Click `OK` to close the message box.

When your administrator unloads the Outbound Campaign from Genesys Outbound Contact Manager, the `Campaign Unloaded` message box is displayed (see Figure 84). You will no longer receive interactions from the unloaded campaign unless it is loaded and started again.

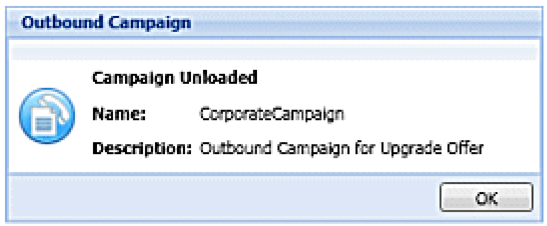


Figure 84: Outbound Campaign Unloaded message box

Click `OK` to close the message box.

Handling an Outbound-Campaign Voice Interaction

This section shows you how to handle interactions for the four types of Outbound Campaign that are supported by Interaction Workspace. The agent workflow for Predictive and Progressive campaigns are identical; only the timing of the arrival of the interaction on your desktop and the connection to the contact are different.

In Preview interactions (also called pull-preview), you must request the next contact record. In push-preview interactions you are given the opportunity to view the Outbound Campaign interaction and connect manually to the contact or send the record back to the calling list.

This section contains the following procedures:

- Procedure: Handling a predictive or progressive Outbound-Campaign voice interaction, on page 124
- Procedure: Handling an ASM predictive or progressive Outbound-Campaign voice interaction, on page 127
- Procedure: Handling a preview Outbound-Campaign voice interaction, on page 131

- Procedure: Handling a push-preview Outbound-Campaign voice interaction, on page 136
- Procedure: Scheduling a callback, on page 141

Procedure: Handling a predictive or progressive Outbound-Campaign voice interaction

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are *not* logged in to the Instant Messaging channel.
- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are part of a predictive or progressive Outbound Campaign.
- You have been notified that the campaign is loaded and running (see "Starting and Stopping an Outbound Campaign" on page 122).

Start of procedure

1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 85).

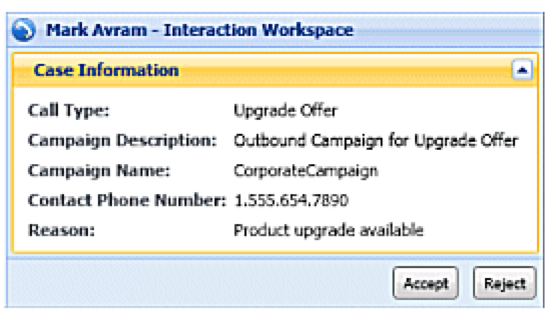


Figure 85: Outbound Predictive/Progressive Voice Interaction Preview interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to call the contact.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see Figure 86).

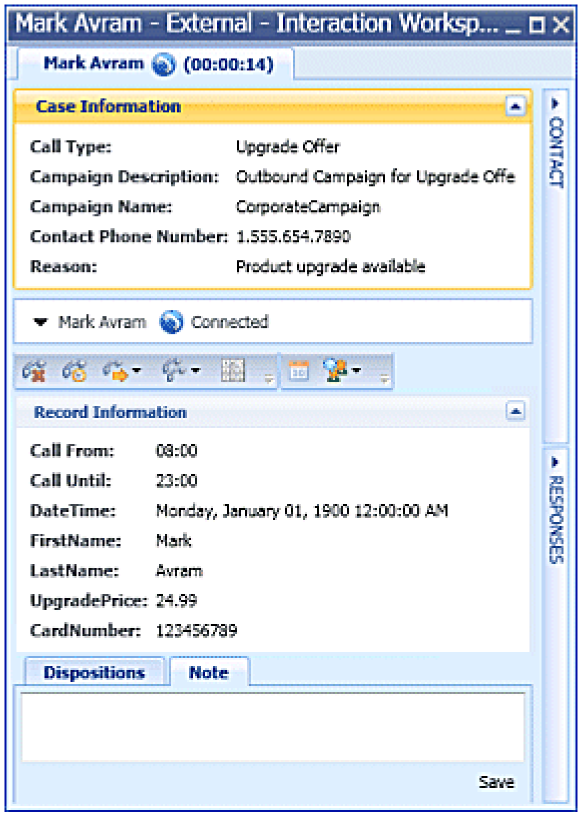


Figure 86: Predictive/Progressive Outbound Campaign Voice Interaction window

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

- View contact records (see Procedure: Finding and viewing an interaction in the contact database, on page 292).
- View contact history (see “Managing Contact History” on page 291).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 5).
- Use the Notepad to add information about the interaction to the interaction history (see “Managing Contact History” on page 291.

- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Chapter 29, "Task: Using the Standard Response Library," on page 319).
- Terminate the call (see Step 4).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see "Starting a Voice Consultation" on page 85).
- Transfer the call (see "Transferring a Voice Call" on page 93).

  Note: When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the Outbound Campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.
- Schedule a callback (see Procedure: Scheduling a callback, on page 141).

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

4. 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.

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

a. Click the `Dispositions` tab to make it active.

b. (Optional) In the `Call Result` drop-down list, select a call result (see Figure 87).

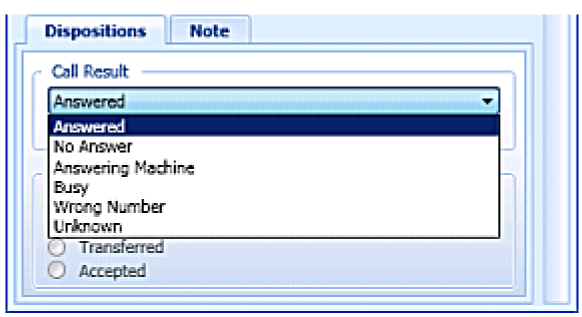


Figure 87: Outbound Campaign Interaction window Call Result drop-down list

c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see Figure 88 and also "Assigning Disposition Codes" on page 287).

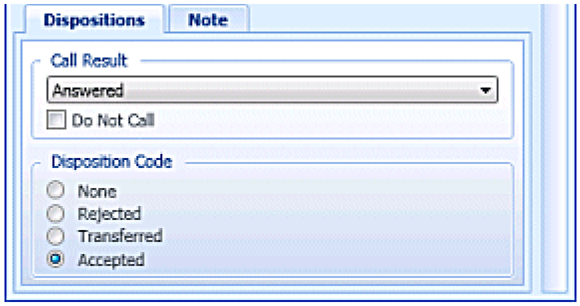


Figure 88: Outbound Campaign Interaction window Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see Figure 88).

6. Click `Mark Done`. This step might be performed for you automatically when you end the call or set a disposition code.
7. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
8. Complete your after-call work.
9. Set your status on the Voice channel to `Ready` to receive the next call.

End of procedure

Next Steps

- Set your status to `Ready`. See Procedure: Going Ready in the Interaction Workspace Main window, on page 51.

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

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are *not* logged in to the Instant Messaging channel.

- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are part of an ASM predictive or progressive Outbound Campaign.
- You have been notified that the campaign is loaded and running (see “Starting and Stopping an Outbound Campaign” on page 122).

Start of procedure

1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 89).

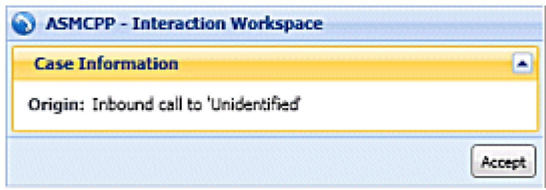


Figure 89: Outbound ASM mode Predictive/Progressive Voice Interaction Preview interactive notification

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

2. You can choose to accept or redirect the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to call the contact.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the Outbound ASM voice-interaction window is displayed (see Figure 90). The call is in `Establishing` state, which means that the call is not yet connected to the contact. However, you are connected to the call and are reserved for the call.

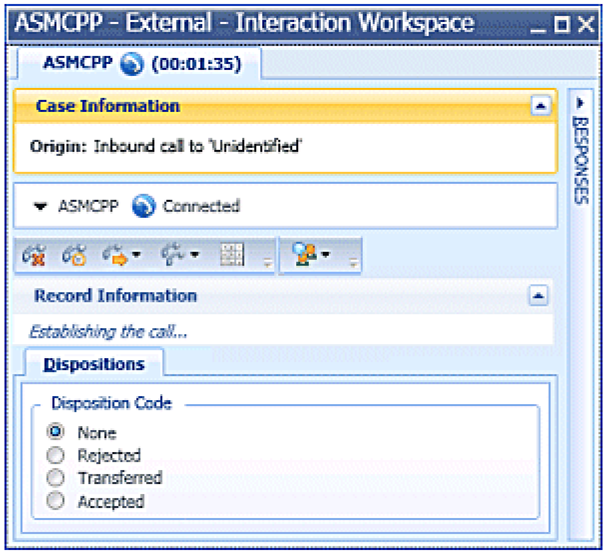


Figure 90: Outbound ASM Voice Interaction Window in Establishing state

4. As soon as the contact answers you are connected to the contact. The call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see Figure 91).

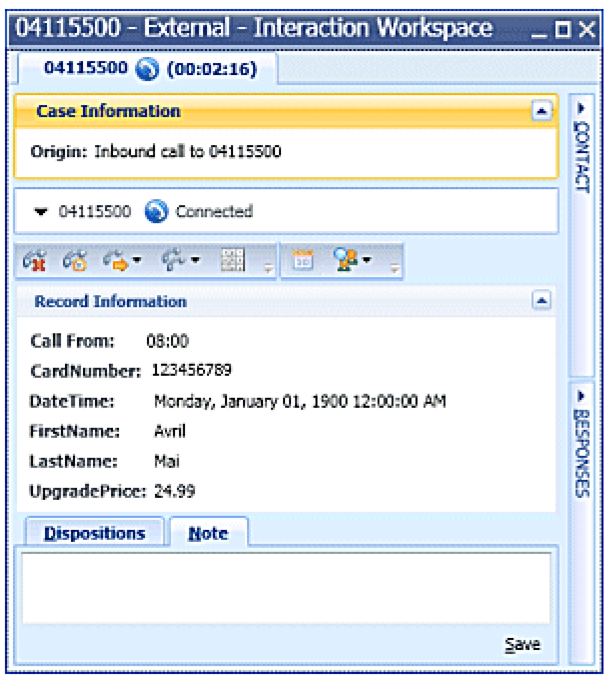


Figure 91: Predictive/Progressive Outbound ASM Campaign Voice Interaction window

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

- View contact records (see Procedure: Finding and viewing an interaction in the contact database, on page 292).

- View contact history (see "Managing Contact History" on page 291).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 5).
- Use the Notepad to add information about the interaction to the interaction history (see "Managing Contact History" on page 291.
- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Chapter 29, "Task: Using the Standard Response Library," on page 319).
- Terminate the call (see Step 4).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see "Starting a Voice Consultation" on page 85).
- Transfer the call (see "Transferring a Voice Call" on page 93).

  Note: When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.
- Schedule a callback (see Procedure: Scheduling a callback, on page 141).

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

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

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

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

   a. Click the `Dispositions` tab to make it active.

   b. (Optional) In the `Call Result` drop-down list, select a call result (see Figure 92).

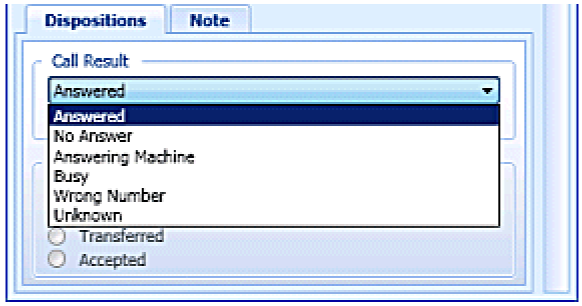


Figure 92: Outbound Campaign Interaction window Call Result drop-down list

c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see Figure 93 and also "Assigning Disposition Codes" on page 287).

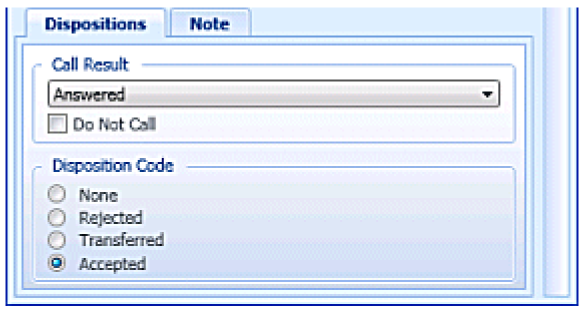


Figure 93: Outbound Campaign Interaction window Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see Figure 93).

7. Click `Mark Done`. This step might be performed for you automatically when you end the call or set a disposition code.
8. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
9. Complete your after-call work.
10. Set your status on the Voice channel to `Ready` to receive the next call.

End of procedure

Procedure: Handling a preview Outbound-Campaign voice interaction

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are *not* logged in to the Instant Messaging channel.
- You are part of a preview Outbound Campaign.
- You have been notified that the campaign is loaded and running (see "Starting and Stopping an Outbound Campaign" on page 122).

Start of procedure

1. When a Preview Outbound Campaign is started, you are notified by an interactive message (see Figure 94).

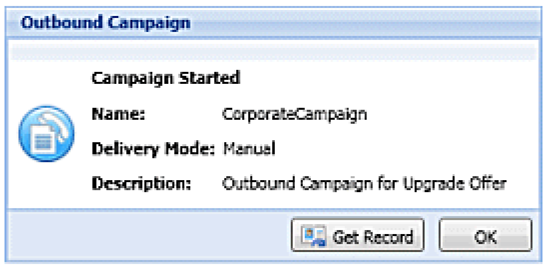


Figure 94: Outbound Campaign Started message box for Preview mode campaigns

   Perform one of the following steps:
   - Click `Get Record` to retrieve and preview the next available campaign record (see Step 6).
   - Click `OK` to close the message box (see Step 2).
   - Do nothing. The message box closes after a specified time interval (see Step 2).

2. When you are ready to get a contact record, open your Workspace view (refer to the *Interaction Workspace Help* to learn about how to display your Workspace view from the Main Window or the Gadget).
3. Select the `My Campaigns` view (see Figure 95).

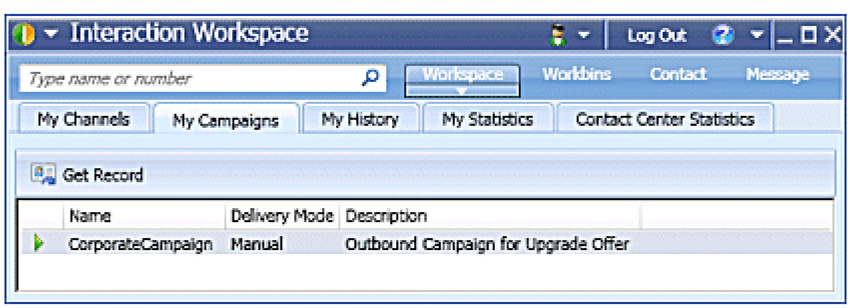


Figure 95: My Campaigns view in the Main Window

4. Select the Preview campaign to which you are assigned (see Figure 95).

5. Click `Get Record`.
6. A preview of the outbound interaction is displayed on your workstation desktop (see Figure 96).

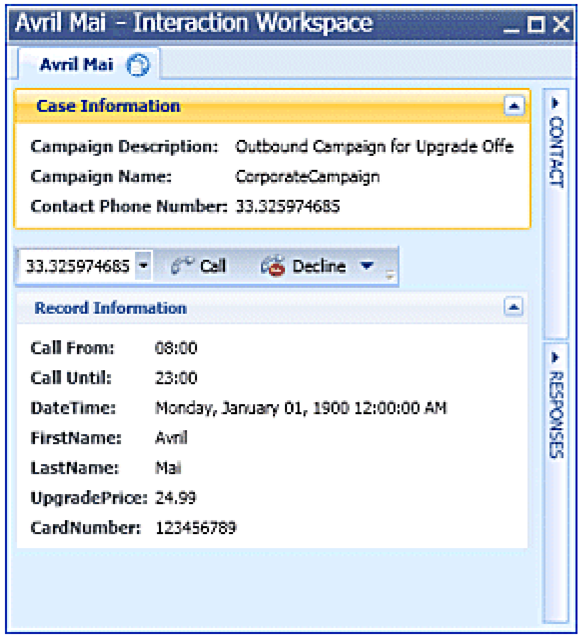


Figure 96: Outbound Preview Voice Interaction Preview window

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

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

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

8. If you choose to call the contact, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see Figure 97).

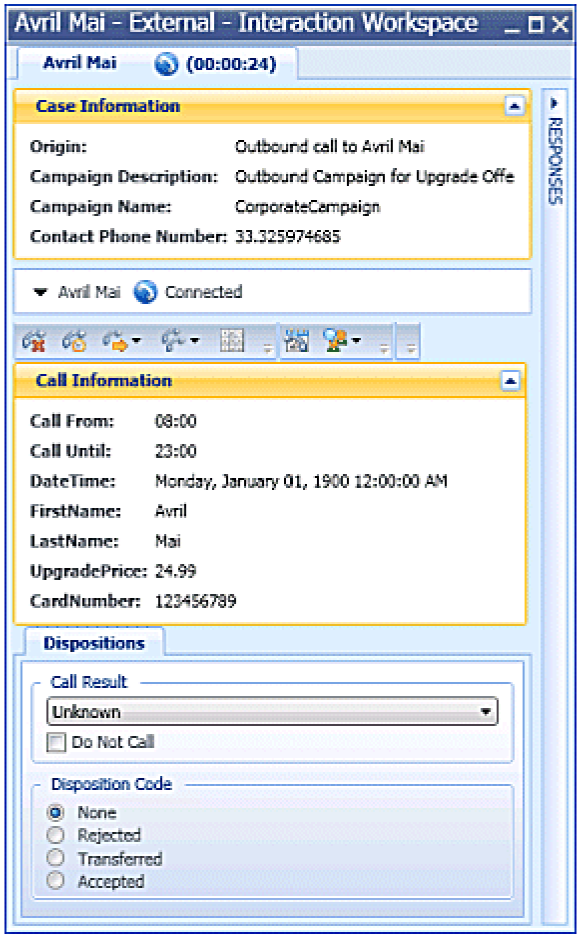


Figure 97: Outbound Campaign Voice Interaction window

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

- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 10).
- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.
- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Chapter 29, "Task: Using the Standard Response Library," on page 319).
- Terminate the call (see Step 9).
- Put the call on hold and retrieve the call. The call status changes to `On Hold`, and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.

- Start a voice consultation (see “Starting a Voice Consultation” on page 85).
- Transfer the call (see “Transferring a Voice Call” on page 93).

  Note: When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.
- Conference the call (see “Starting a Voice Conference” on page 103).
- Schedule a callback (see Procedure: Scheduling a callback, on page 141).

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

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

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

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

    a. Click the `Dispositions` tab to make it active.

    b. (Optional) In the `Call Result` drop-down list, select a call result (see Figure 98).

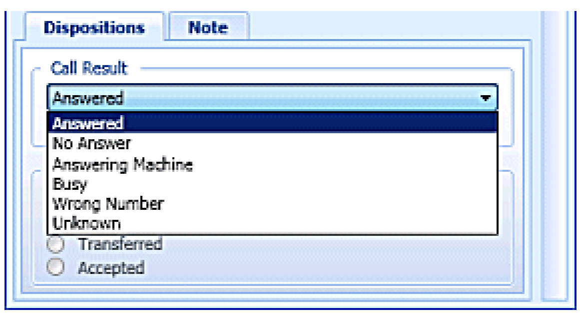


Figure 98: Outbound Campaign Interaction window Call Result drop-down list

    c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see Figure 99 and also “Assigning Disposition Codes” on page 287).

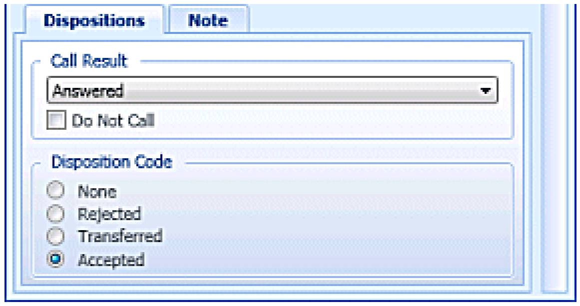
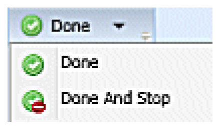


Figure 99: Outbound Campaign Interaction window Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see Figure 99).

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



- Click `Done` to mark the interaction as Done, and to get the next record from the campaign calling list.
- Click `Done and Stop` to mark the interaction as Done, and not have another record open automatically. To get a new record, see Step 2.

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

13. 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 51.

Procedure: Handling a push-preview Outbound-Campaign voice interaction

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are *not* logged in to the Instant Messaging channel.
- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are part of a push-preview Outbound Campaign.
- You have been notified that the campaign is loaded and running (see "Starting and Stopping an Outbound Campaign" on page 122).

Start of procedure

1. Your hard phone or soft phone rings, and a preview of the outbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 100).

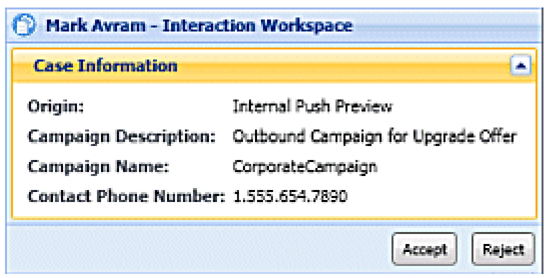


Figure 100:Outbound Push-Preview Voice Interaction Preview interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to call the contact.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, a preview of the outbound interaction is displayed on your workstation desktop (see Figure 101).

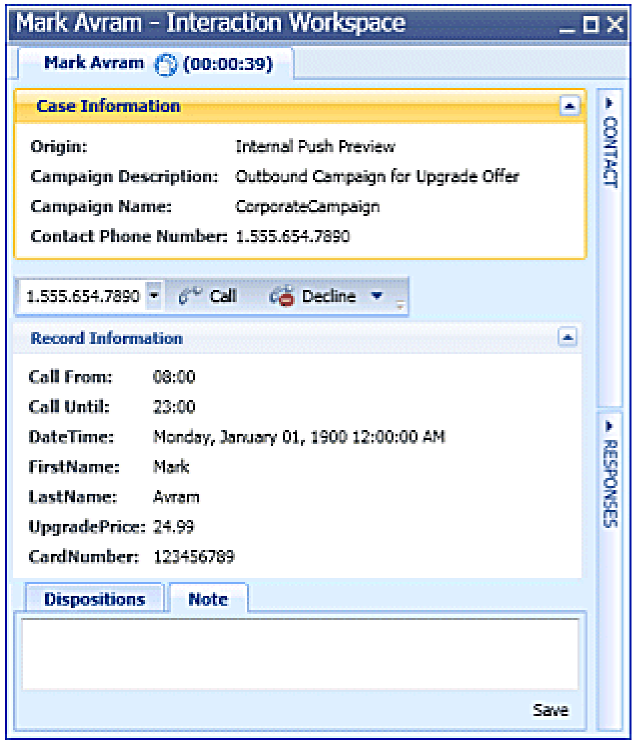


Figure 101:Outbound Preview Voice Interaction Push-Preview window

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

4. You can choose to do any of the following:

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

Click `Done` to get the next record from the campaign calling list.

- View contact records (see Procedure: Finding and viewing an interaction in the contact database, on page 292).
- View contact history (see “Managing Contact History” on page 291).

5. If you choose to call the contact, the call is connected in your hard phone or soft phone, and the Outbound Voice Interaction window is displayed (see Figure 102).

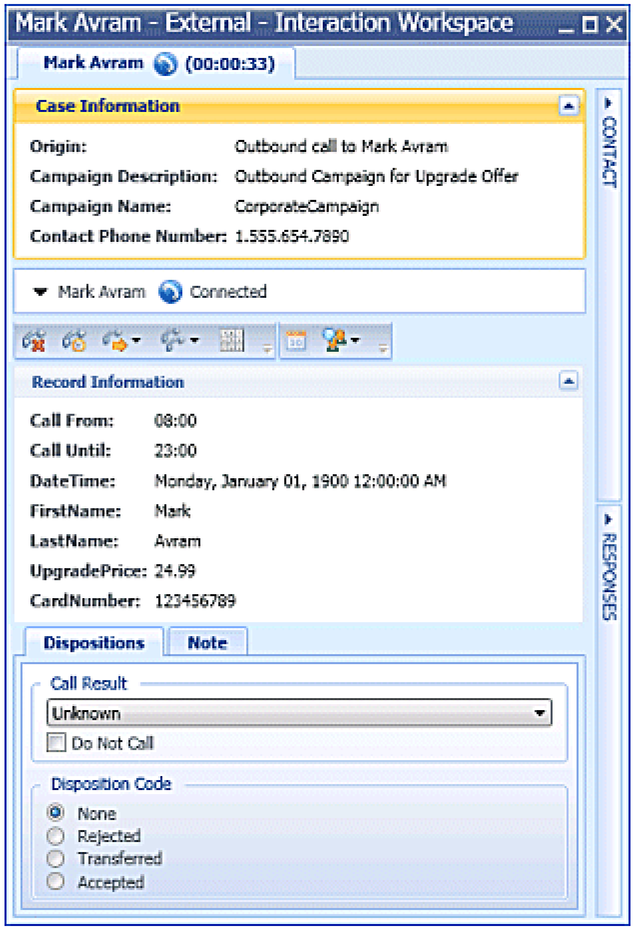


Figure 102:Push-Preview Outbound Campaign Voice Interaction window

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

- View contact records (see Procedure: Finding and viewing an interaction in the contact database, on page 292).
- View contact history (see “Managing Contact History” on page 291).
- Set a call result and a disposition code, or add the contact to the Do Not Call list (see Step 7).
- Use the Notepad to add information about the interaction to the interaction history (see “Managing Contact History” on page 291.
- View and edit the Case Information—Summary information about the campaign. It might contain the name of the campaign, a description of the campaign, the phone number of the contact, and so on.

- View and edit the Record Information—Specific information about the record. It might contain a range of time for which the contact has indicated availability, the name of the contact, or information about the nature of the call.
- View and read responses (see Chapter 29, "Task: Using the Standard Response Library," on page 319).
- Terminate the call (see Step 6).
- Put the call on hold and retrieve the call. The call status changes to `On Hold` and then back to `Connected` when you retrieve the call.
- Use the keypad to send DTMF to the contact.
- Start a voice consultation (see "Starting a Voice Consultation" on page 85).
- Transfer the call (see "Transferring a Voice Call" on page 93).

  Note: When you transfer an ASM call, the outbound record is also transferred. The ownership of the record might also be transferred to the transfer target if this agent is also part of the campaign. If the agent is not part of the Outbound Campaign, the ownership of the record stays with you.
- Conference the call (see "Starting a Voice Conference" on page 103).
- Schedule a callback (see Procedure: Scheduling a callback, on page 141).

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

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

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

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

   a. Click the `Dispositions` tab to make it active.

   b. (Optional) In the `Call Result` drop-down list, select a call result (see Figure 103).

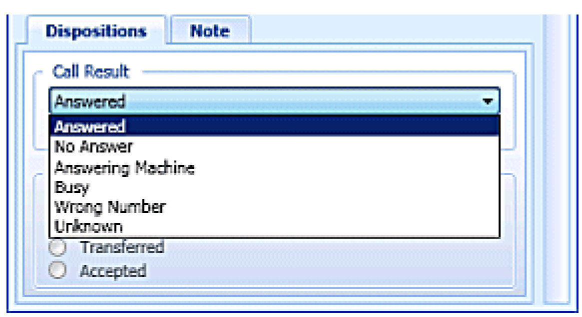


Figure 103:Outbound Campaign Interaction window Call Result drop-down list

c. (Optional) Select an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see Figure 104 and also "Assigning Disposition Codes" on page 287).

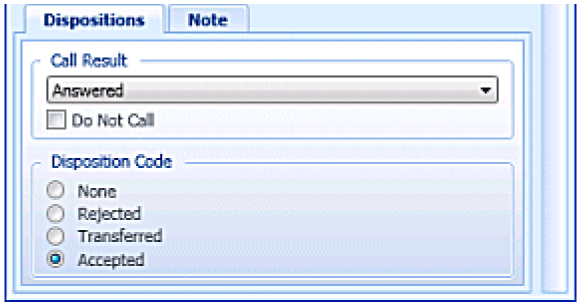


Figure 104:Outbound Campaign Interaction window Call Result and Disposition Code views

d. (Optional) If the contact requests to be put on the Do Not Call list, select `Do Not Call` in the `Call Result` view (see Figure 104).

8. Click `Mark Done`. This step might be performed for you automatically when you end the call or set a disposition code.
9. If the Voice Interaction window does not close automatically, close the Voice Interaction window after you have clicked `Mark Done` for each of the active interactions.
10. Complete your after-call work.
11. Set your status on the Voice channel to `Ready` to receive the next call.

End of procedure

Next Steps

- Set your status to `Ready`. See Procedure: Going Ready in the Interaction Workspace Main window, on page 51.

Procedure: Scheduling a callback

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

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

Prerequisites

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

Start of procedure

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

   In the Outbound Campaign voice interaction window, in the call-action toolbar, click `Schedule a Callback`.

   The Schedule a Callback view is displayed (see Figure 105).

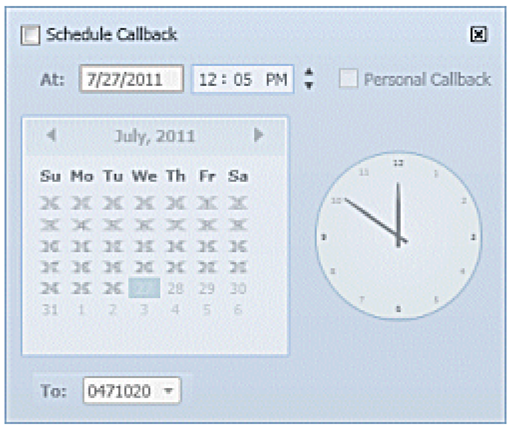


Figure 105:Schedule a Callback view

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

7. To add a new number that is to be used for the callback call, click the `To` drop-down list and select `New phone number`.

   The New Phone Number view is displayed (see Figure 106).

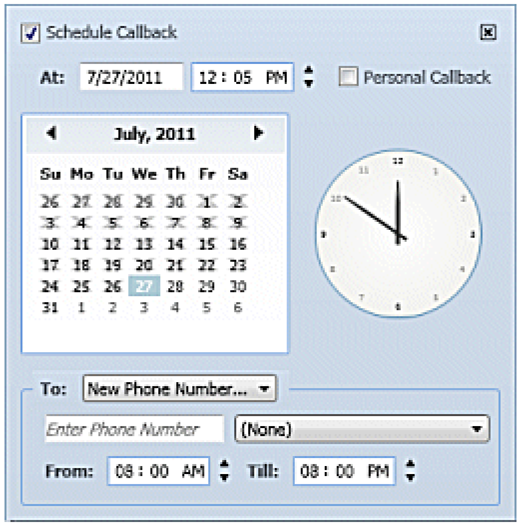


Figure 106:New phone number controls in the Schedule a Callback view

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

    Click `End Call` to disconnect the call.
12. Click `Mark Done` to schedule the callback.

End of procedure

Chapter

12 Task: Handle 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:

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

Instant Messaging Overview

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

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

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

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

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

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

Sending and Receiving Internal Instant Messages

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

Note: Interaction Workspace supports only internal IM sessions.

This section contains the following procedures:

- Procedure: Initiating an Instant Messaging session, on page 146
- Procedure: Receiving an Instant Messaging session, on page 149

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 47).

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 (see Chapter 5).
2. Select `Send an Instant Message` from the `Action Menu` drop-down list next to the name of the internal target in the Team Communicator pop-up result-list (see Figure 107).

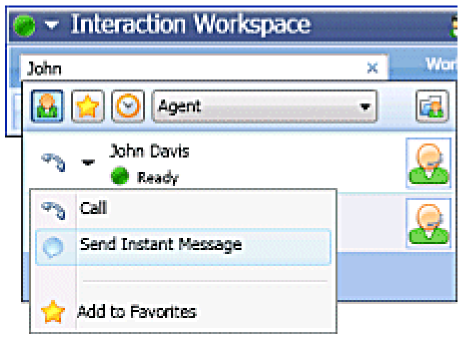


Figure 107:The Send an Instant Message option of the Team Communicator Action menu

The IM interaction window is displayed.

3. Enter a message to your target. The session starts in the Interaction window (see Figure 108) 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.

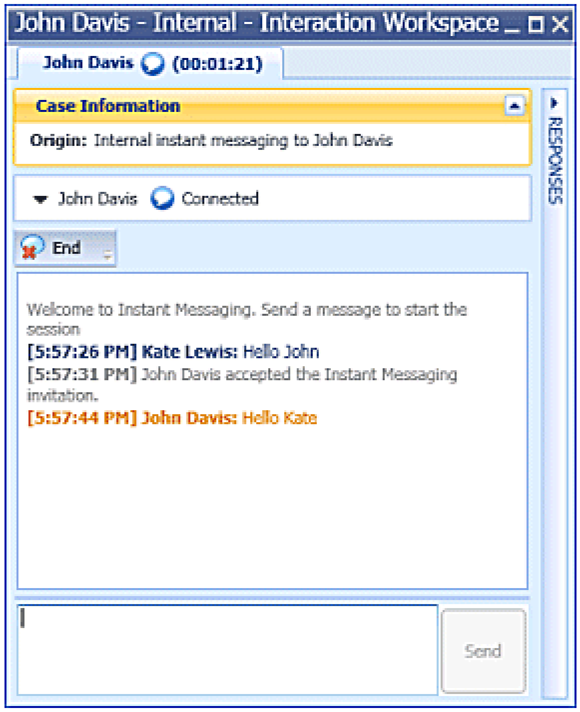


Figure 108:An Instant Messaging session in the Interaction window

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

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

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

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

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

   Each message is tagged with a timestamp (see Figure 108).

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

End of procedure

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 47).

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 109).

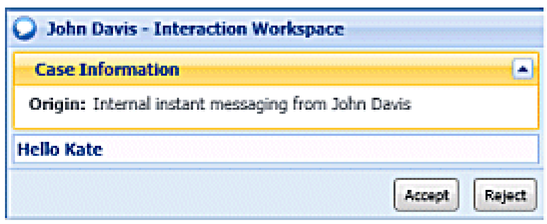


Figure 109:Instant Messaging interactive notification

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

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

   The status of the connection: `Not Connected`, `Connected`, or `Ended`, is displayed near the top of the Interaction window.

   The large text field contains a transcript of the IM session. Your logon and the logon of the internal caller are displayed above your messages in different colors to help you to identify who is writing. Each entry is marked with a timestamp. Messages are displayed in the order in which they are sent and received (see Figure 110).

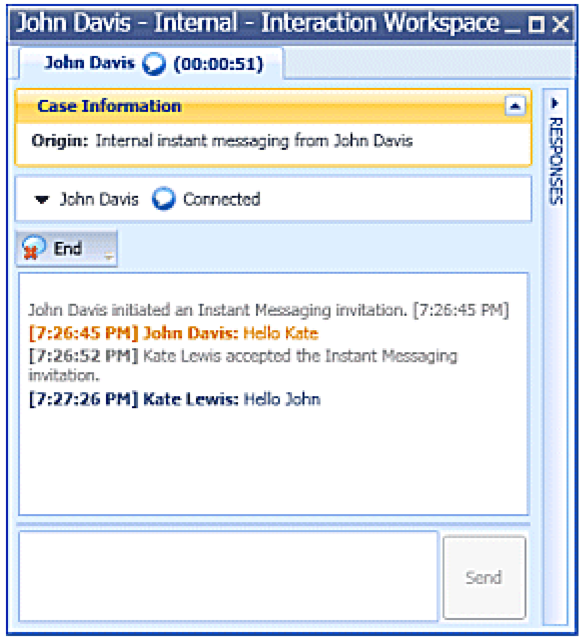


Figure 110:Interaction window displaying an Instant Messaging session that was initiated by another agent

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

End of procedure

Sending and Receiving Consultation Instant Messages

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

Note: Interaction Workspace supports only internal IM sessions.

This section contains the following procedures:

- Procedure: Starting a Consultation IM session from an active interaction, on page 151

- Procedure: Receiving a Consultation IM session from an active interaction and transitioning to a Voice Consultation, on page 153

Procedure:
Starting a Consultation IM session from an active interaction

Purpose: To start a Consultation IM session from an active interaction.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see "Receiving a Voice Interaction" on page 71, "Receiving and Handling an Inbound E-Mail Interaction" on page 157, or "Receiving and Handling an Inbound Chat Interaction" on page 179).

Start of procedure

1. On your active Interaction view, click `Start Consultation` to open the Team Communicator (see Figure 111) to find the internal target with whom you want to start an IM session.
2. Enter the name, e-mail address, or phone number of the internal target (see Figure 111).
3. From the internal target `Action` menu, select `Start Instant Message Consultation` (see Figure 111).

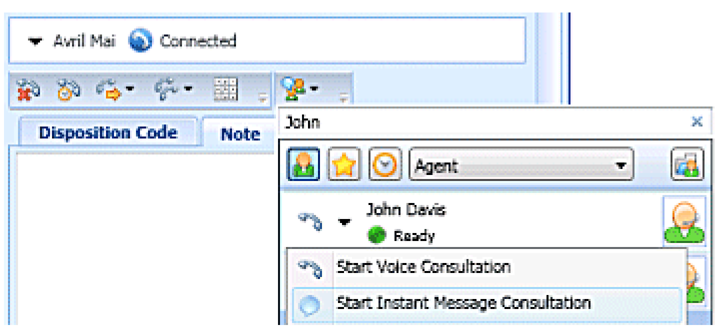


Figure 111:Start Consultation Team Communicator in an active interaction

4. A new Internal IM message view is displayed in the active interaction view. The status is `Not Connected` (see Figure 112).
   - To initiate an Internal IM session, enter a message and click `Send`.
   - To cancel the IM session, click the `Done` button.

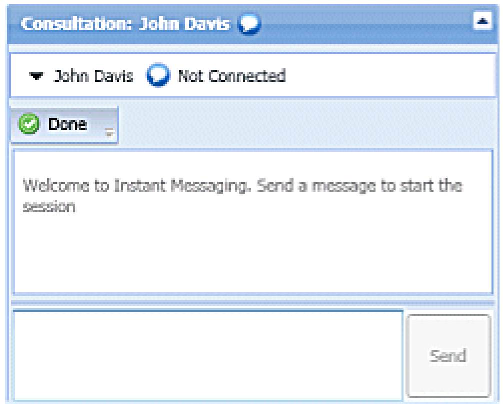


Figure 112:Internal IM message view in an active interaction window

5. If you sent a message (see Figure 113), the internal target receives an interactive notification of your instant message that includes your initial message (see Figure 115).

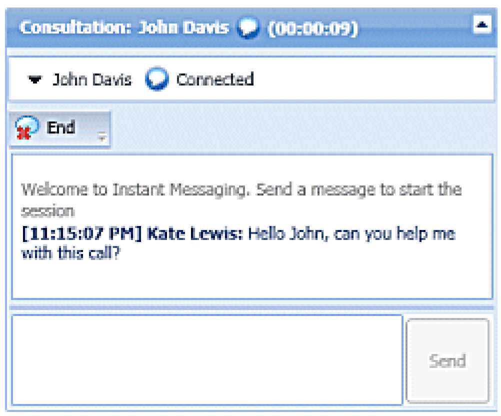


Figure 113:Initial message sent to IM Consultation target

6. If the internal target accepts your invitation, you and the target are engaged in an internal IM session (see Figure 114).

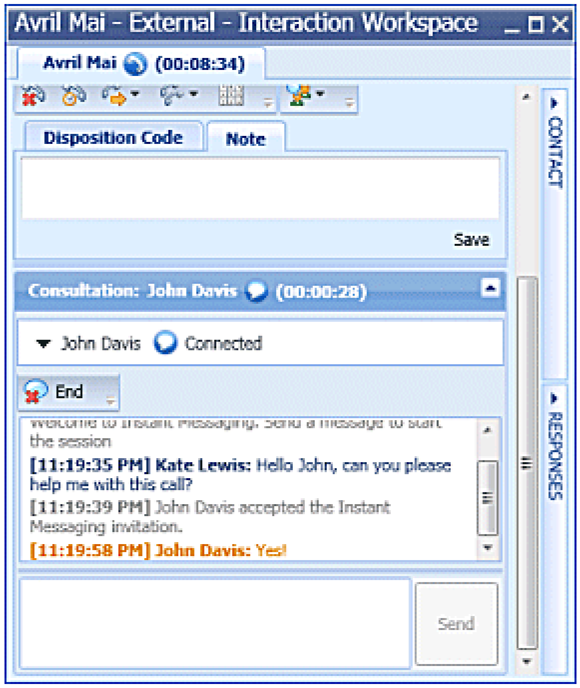


Figure 114:Active IM Consultation session in an active interaction window

All the Case Information about the interaction with the contact is displayed in the IM interaction window of your internal target (see Figure 116). The Contact Information and Contact History tabs enable your internal target to view information about your contact and to search the contact history database. The Information tab is read-only.

You can do the following in the Consultation IM interaction window:

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

End of procedure

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

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the voice-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target for the IM consultation interaction.

Start of procedure

1. If another agent, who is handling an interaction, selects you as an internal target for an IM consultation session, an interactive notification is displayed that invites you to accept or reject the invitation to join the IM consultation session (see Figure 115).

   The notification displays the invitation message from the agent and the case information for the interaction that the agent is handling.

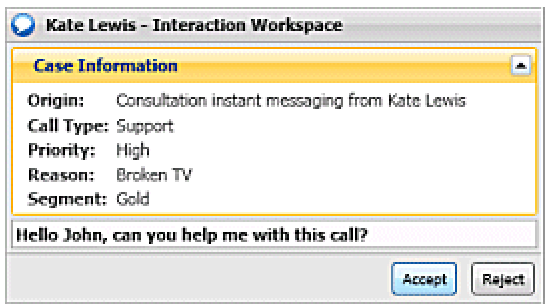


Figure 115:Instant Messaging consultation interactive notification

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

3. If you clicked `Accept`, the session starts in your Interaction window.

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

   The status of the connection: `Not Connected`, `Connected`, or `Ended`, is displayed near the top of the Interaction window.

   The large text field contains a transcript of the IM session. Your logon and the logon of the internal caller are displayed above your messages in different colors to help you to identify who is writing. Each entry is marked with a timestamp. Messages are displayed in the order in which they are sent and received (see Figure 116).

   All the Case Information about the interaction with the contact is displayed in the IM interaction window of your internal target (see Figure 116). The Contact Information and Contact History tabs enable you to view information about the contact and to search the contact history database. The Information tab is read-only.

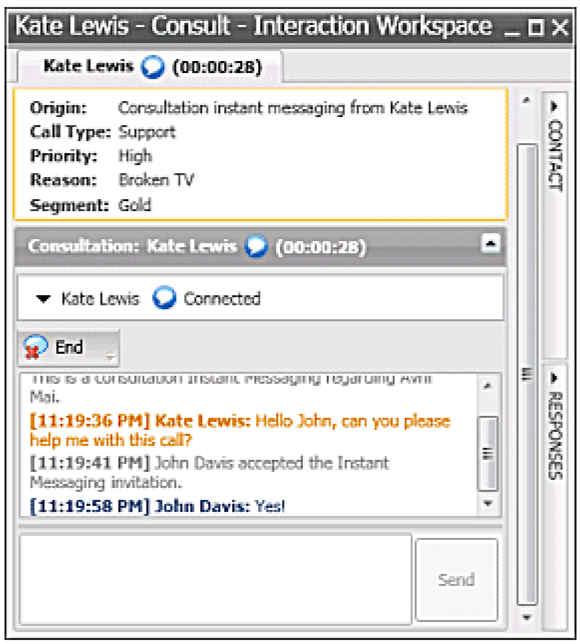


Figure 116:Interaction window displaying an Instant Messaging session that was initiated by another agent

4. Reply to the calling agent by entering your message in the field that is displayed next to the `Send` button (see Figure 116).

   The IM consultation session can be transitioned to a Voice consultation (see “Blending Internal Voice Interactions and Internal IM Interactions” on page 255).

5. Click `Send` or press the `Enter` key on your keyboard to send your message to the internal caller (see Figure 116).

6. When your session is complete, click the `End IM` button to end the IM session. The caller might also do this (see Figure 116).

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

End of procedure

Chapter

13 Task: Handle an E-Mail Interaction

In this chapter, you will learn how to handle inbound e-mail interactions and launch outbound e-mail interactions.

This chapter contains the following sections:

Receiving and Handling an Inbound E-Mail Interaction

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

Note: You might be configured to have your outbound e-mail interactions sent to your team lead or supervisor for a Quality Assurance (QA) review prior to sending the e-mail interaction to your contact. Refer to "E-Mail Quality Assurance (QA) Review" on page 175.

Procedure:
Handling an inbound e-mail interaction

Purpose: To handle an inbound e-mail interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is Ready for the e-mail-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target for the inbound interaction.

Start of procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 117).

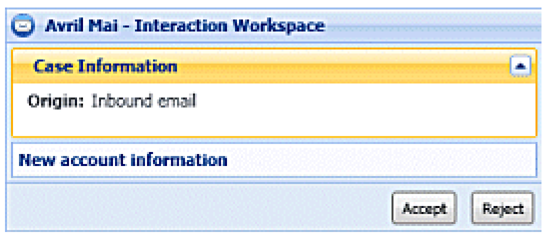


Figure 117:E-Mail Interaction interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click Accept to display the interaction.
   - Click Reject to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound E-Mail Interaction window is displayed (see Figure 118).

   The Inbound E-Mail Interaction window provides the following functionality:
   - Reply or Reply All to the sender of the e-mail message and other recipients. See Procedure: Replying to a inbound e-mail interaction, on page 161.
   - Save the e-mail in the In Progress workbin and close the E-Mail Interaction window. See "Managing Contact History" on page 291.

- Transfer the e-mail message to another internal target or forward it to an external resource. See “Transferring or Forwarding an E-Mail Interaction” on page 167.
- Select `Mark Done` for the current interaction, save the e-mail message in the contact history and close the E-Mail Interaction window; the processing of the corresponding e-mail thread with the contact is complete.
- Consult with an internal target or with a contact. See “Starting a Voice Conference” on page 103 or Procedure: Initiating an Instant Messaging session, on page 146.
- Set a disposition code. See “Assigning Disposition Codes” on page 287.
- Use the Notepad to attach a note to the interaction history. See “Managing Contact History” on page 291.
- View and edit Case Information for the current interaction. Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- Call the sender by clicking the `Action` menu that is displayed next to the contact name. See “Making a Voice Call” on page 76
- View and manage contact history. See “Managing Contact History” on page 291
- View and manage contact information. See Procedure: Finding and viewing an interaction in the contact database, on page 292
- View the Standard Response Library if you decide to call the sender instead of replying to the e-mail. See “Inserting a Standard Response into an E-Mail Interaction” on page 319.
- Print the e-mail message. See “Printing and Print Preview” on page 173.

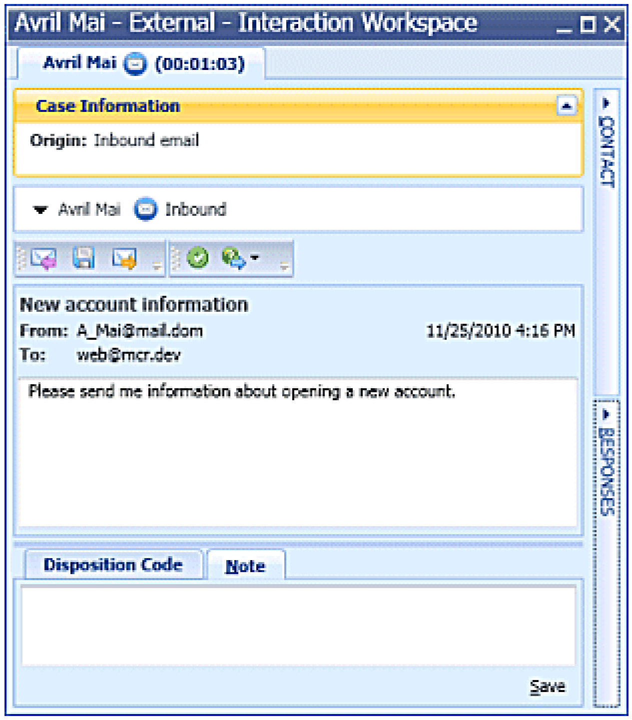


Figure 118:Inbound E-Mail Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 119). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.

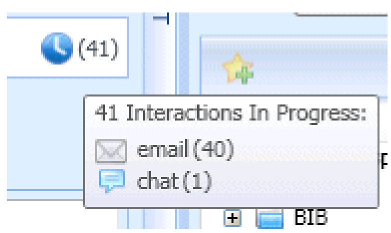


Figure 119:Dynamic Contact History Matrix displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 120). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

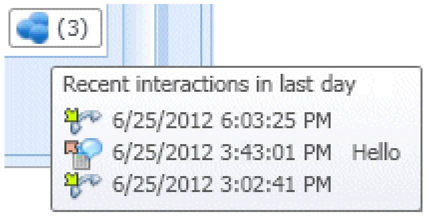


Figure 120:Recent interactions matrix displaying the list of interactions with the current contact within the last day

End of procedure

Creating and Handling a New or Reply E-Mail Interaction

You can create new e-mail interactions in two ways by replying to an inbound e-mail interaction (see Procedure: Handling an inbound e-mail interaction, on page 158) and by using the Team Communicator (see Procedure: Using the Team Communicator feature to find a contact, on page 62) or Contact Directory (see Procedure: Finding and viewing your interactions in the contact database, on page 303) to find a contact and select the contact as the target of a new outbound e-mail interaction.

Procedure: Replying to a inbound e-mail interaction

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have accepted the inbound or transferred e-mail interaction.
- You have clicked `Reply` or `Reply All` in the inbound E-Mail Interaction window (see Procedure: Receiving and Handling an Inbound E-Mail Interaction, on page 157).

Start of procedure

1. If you clicked `Reply` or `Reply All` in the inbound E-Mail Interaction window, the outbound E-Mail Interaction window is displayed (see Figure 121).

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

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

- `Send`—Sends your response to the sender and other recipients, and saves a copy in the Contact History. The corresponding inbound interaction is marked done automatically.
- `Send Interim`—Sends your response, closes the outbound E-Mail Interaction window. The inbound e-mail interaction is reopened in the same window. You can create a second reply e-mail message, or you can consult about the reply with another party. If you close the inbound E-Mail Window, you can re-open it from the In-Progress workbin (see "Using Workbins to Access Stored Interactions" on page 277).
- `Save`—Store what you have written so far.
- `Save in Draft Workbin`—Store what you have written in the Draft workbin (see "Using Workbins to Access Stored Interactions" on page 277) and close the outbound E-Mail Interaction window.
- `Add Attachments`—Open an Explorer window and navigate to a file that is to be sent with the outbound e-mail.
- `Delete`—Discard the outbound reply without saving a copy in the Contact History or the In-Progress workbin. The inbound E-Mail Interaction window is displayed again on your desktop. The interaction is not marked done.
- `Consultation (Voice/IM)`—Launches a consultation session with another party. Use the Team Communicator to start a voice or IM session with another party (see "Starting a Voice Conference" on page 103 or Procedure: Initiating an Instant Messaging session, on page 146). The consultation interaction is displayed at the bottom of the outbound E-Mail Interaction window.
- Print the e-mail message. See "Printing and Print Preview" on page 173.

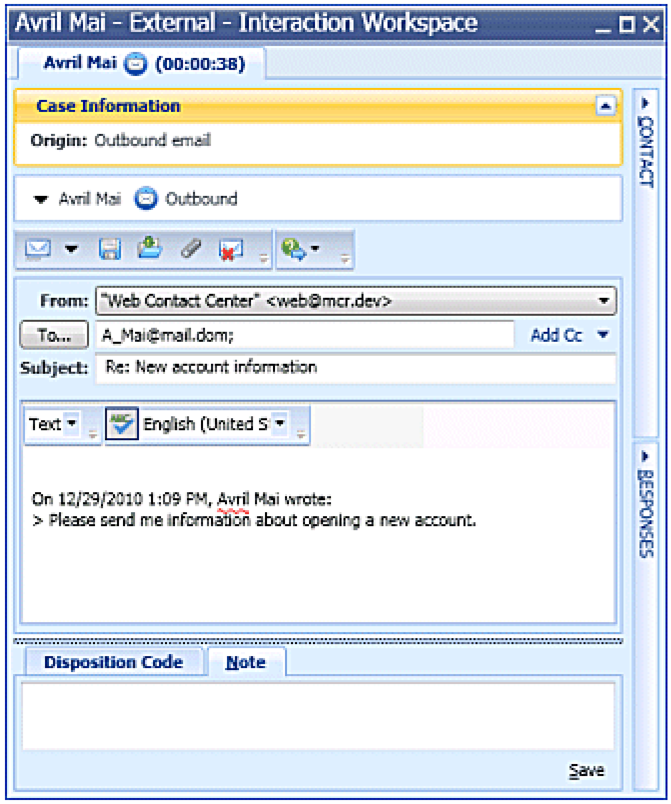


Figure 121:Outbound E-Mail Interaction window, displaying text content type

2. You can edit any of the outbound e-mail parameters before you send the e-mail.
   - To change the name of the sender, click the `From` drop-down menu and select an alternate sender.
   - To change the target of the outbound e-mail, click the `To` button.

     The `Contact Search` dialog box is displayed (see Figure 122).

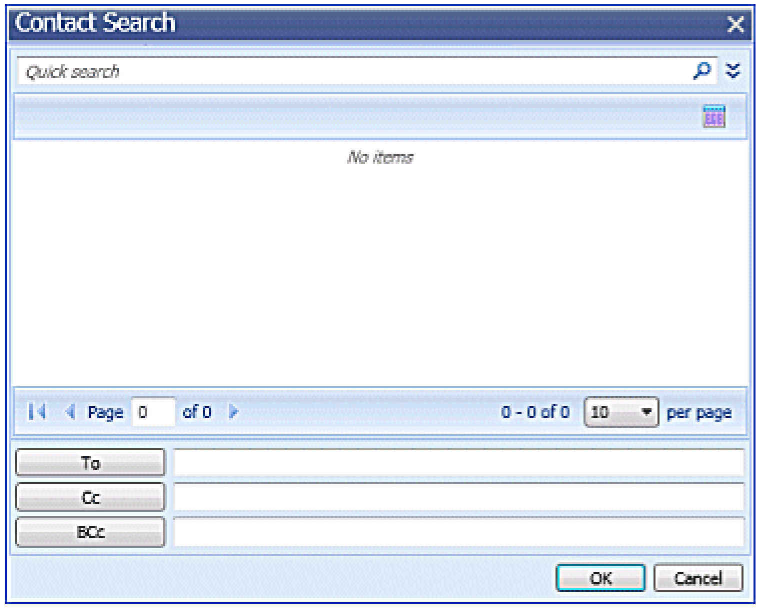


Figure 122:Contact Search dialog box

- **i.** Enter the name, phone number, or e-mail address of a target and then click the magnifying glass.
- **ii.** Select the target in the results table. For more information about contact search, see Procedure: Finding and viewing your interactions in the contact database, on page 303.
- **iii.** Click `To`, `Cc`, or `Bcc` to specify that the target is the primary recipient, a copied recipient, or a blind copied recipient.
- **iv.** When you have finished adding recipients, click `OK`. Click `Cancel` to return to the outbound E-Mail Interaction window without changing the recipient(s).

- You can also add carbon copy (Cc) and blind copy (Bcc) recipients by clicking the `Add Cc` drop-down menu and selecting `Add Cc` or `Add Bcc` respectively.

  A new Cc or Bcc field is added in the recipient area. Click in the text field to open the Team Communicator and select a recipient, or click `Cc` or `Bcc` to open the `Contact Search` dialog box (see Figure 122 on page 164). You can remove `Cc` and `Bcc` fields by clicking the `X` that is displayed next to the field.

  You can edit the `To`, `Cc`, and `Bcc` fields by typing directly into the fields. The Team Communicator is displayed to enable you to select a recipient from the contact database.
- You can edit the default subject of the e-mail. By default, the subject of the inbound e-mail is used.

3. You can add content to the e-mail in three ways:

- Enter your text at the insertion point.

- Paste text into the text field from another document.
- Insert a standard response (see Chapter 29, “Task: Using the Standard Response Library,” on page 319).

4. You can check the spelling of the content of your reply by using the Spelling Check functionality (see Procedure: Using Spelling Check to find potentially misspelled words in an outbound e-mail message, on page 172).
5. You can choose to send your reply as plain text or as HTML-formatted text.

   To change between plain text and HTML, in the e-mail content area, select either `Text` or `HTML` in the format toolbar.

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

   Formatting is applied to either selected text, or any text that you enter or paste at the insertion point after you have set formatting parameters.
7. You can call (see “Making a Voice Call” on page 76) or send a new e-mail (see Procedure: Creating and sending a new e-mail interaction to a contact, on page 166) to the sender by clicking the `Action` menu drop-down list that is displayed next to the contact name.
8. You can set a disposition code. See “Assigning Disposition Codes” on page 287.
9. You can use the Notepad to attach a note to the interaction history. See “Managing Contact History” on page 291.
10. When you have completed composing, formatting (optional), and checking the spelling of your response, click the `Send` drop-down menu and select `Send` or `Send Interim` to send the reply e-mail message to the recipient(s).

End of procedure

Procedure:
Creating and sending a new e-mail interaction to a contact

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your role enables you to send new e-mail.

Start of procedure

1. There are multiple ways to create a new e-mail interaction:
   - From the Team Communicator, find a contact (see Procedure: Using the Team Communicator feature to find a contact, on page 62), and select `New E-Mail` from the `Action` menu.
   - From an open interaction (voice, e-mail, chat, or workitem), select `New E-Mail` from the `Action` menu drop-down list that is displayed next to the contact name (see Figure 123).

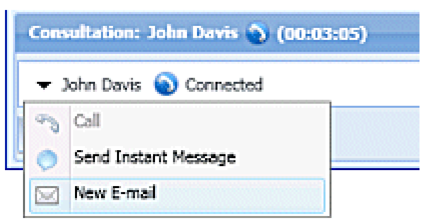


Figure 123:New E-Mail option in the Action menu drop-down list that is displayed next to an active contact name

   - From the Contact Directory, find a contact, and select `New E-Mail` from the E-Mail `Action` menu or from the `More Actions` menu.

   A new E-Mail Interaction window is displayed on your desktop (see Figure 124). The name of the contact is specified in the `To` field, and your default sender address that is displayed in the `From` drop-down list.

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

The new E-Mail Interaction window has the same functionality as the reply E-Mail Interaction window (see Procedure: Replying to a inbound e-mail interaction, on page 161), except that the `Notepad` tab is not available.

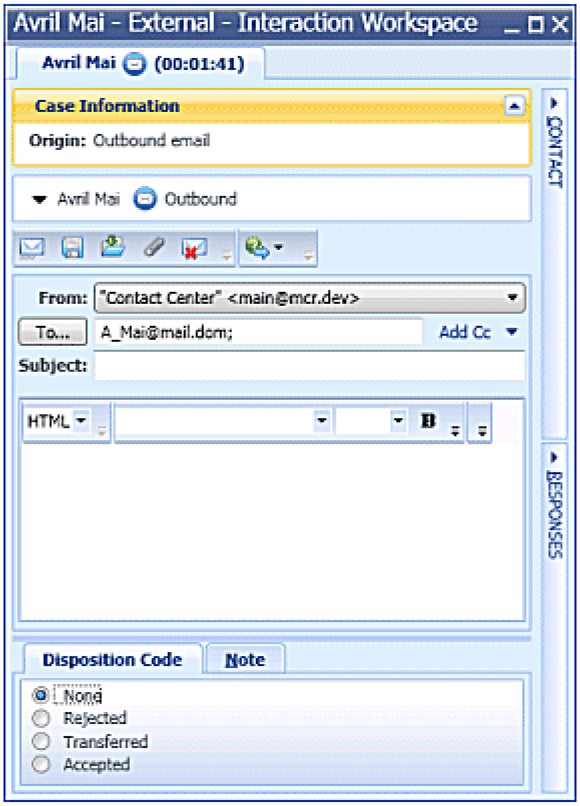


Figure 124:New E-Mail Interaction window

2. When you have completed composing, formatting (optional), and checking the spelling (see Procedure: Using Spelling Check to find potentially misspelled words in an outbound e-mail message, on page 172) of your new e-mail, click the `Send` button to send the new e-mail to the recipient(s).

End of procedure

Transferring or Forwarding an E-Mail Interaction

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

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

This section contains the following procedures:

- Procedure: Initiating an e-mail transfer, on page 168
- Procedure: Initiating an e-mail forward to an external resource, on page 170

Procedure: Initiating an e-mail transfer

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see "Receiving and Handling an Inbound E-Mail Interaction" on page 157).

Start of procedure

1. To transfer the e-mail message, in the active E-Mail Interaction window, click `Transfer` to open the Team Communicator (see Figure 125) to find the internal target to whom you want to transfer the current interaction (see Procedure: Using the Team Communicator feature to find an internal target, on page 60).

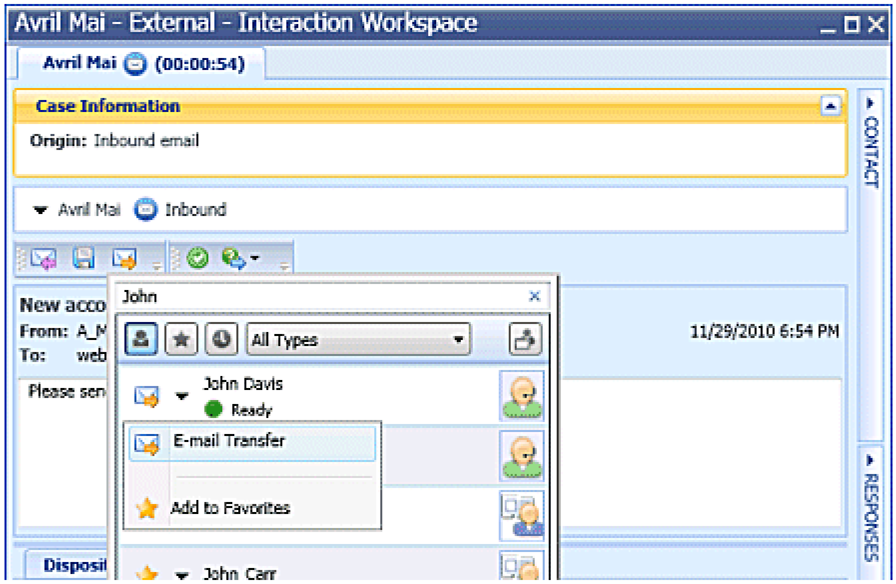


Figure 125:Finding an internal target for an e-mail transfer in the active E-Mail Interaction window

2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction, and then select `E-Mail Transfer`.

   An invitation is sent to the target to accept the e-mail transfer. If the target accepts the interaction transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target. If the target does not accept the interaction transfer request, the E-Mail Interaction window remains displayed on your desktop and an error is displayed both at the top of the window (see Figure 126) and in the Interaction Workspace My Messages interactive notification.

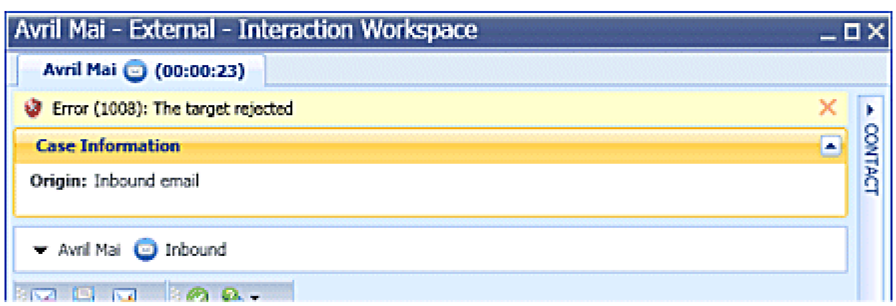


Figure 126:Interaction Workspace E-Mail Interaction window displaying a message that the transfer target rejected the transfer request

End of procedure

Procedure:
Initiating an e-mail forward to an external resource

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see "Receiving and Handling an Inbound E-Mail Interaction" on page 157).

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

Start of procedure

1. To forward the e-mail message to an external resource, click `Forward the email to External Resource` ( ) on the active inbound e-mail window toolbar to open the Team Communicator.
2. Enter the valid e-mail address or find a contact to which the e-mail message is to be forwarded.
3. Click the `Action Menu` drop-down list that is displayed next to the name of the external resource to whom you want to forward the interaction, and then select `E-Mail Forward to External Resource`.

   The interaction window closes on your desktop and the e-mail message is forwarded to the in-box of the external resource.

End of procedure

Resending a Previously Sent E-mail Interaction

You can use the Contact History view (refer to "Managing Contact History" on page 291) to resend a previously sent outbound e-mail to the original contact to follow-up with the contact about the interaction. The status of the outbound interaction must be `Done`. You can edit the contents of the e-mail interaction before you send it.

Procedure:
Resending a previously sent e-mail interaction

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- There is an outbound e-mail interaction in the Contact History that has already been sent to the contact and is now marked as `Done`. The e-mail interaction might be a new outbound e-mail interaction, or it might be a reply e-mail interaction.

Start of procedure

1. In the Main Window or Gadget, or in the Contact Directory of an active interaction window, open the Contact History (refer to Procedure: Finding and viewing an interaction in the contact database, on page 292).
2. Find the e-mail interaction that you want to resend and select it.
3. Click `Resend` ().

   The E-mail Interaction window is displayed. The message text of the original outbound e-mail interaction and any attachments are copied to the new interaction. The `To`, `From`, and `CC` fields are copied from the original outbound e-mail interaction.
4. Add the new message text (your follow-up message) in the e-mail text field. You can add content to the e-mail in three ways:
   - Enter your text at the insertion point.
   - Paste text into the text field from another document.
   - Insert a standard response (see Chapter 29, "Task: Using the Standard Response Library," on page 319).

   Refer to Procedure: Replying to a inbound e-mail interaction, on page 161 and Procedure: Creating and sending a new e-mail interaction to a contact, on page 166 for information about the options that are available in the outbound E-mail Interaction window.
5. You can check the spelling of the content of your follow-up message by using the Spelling Check functionality (see Procedure: Using Spelling Check to find potentially misspelled words in an outbound e-mail message, on page 172).

6. When you have completed composing, formatting (optional), and checking the spelling of your e-mail interaction, click the `Send` button to send the e-mail interaction to the recipient(s).

End of procedure

Spelling Check

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

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

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

Prerequisites

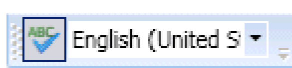
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active e-mail interaction (see "Receiving and Handling an Inbound E-Mail Interaction" on page 157 or "Creating and Handling a New or Reply E-Mail Interaction" on page 161).

Start of procedure

1. Begin entering text in the composition area of a new (Procedure: Creating and sending a new e-mail interaction to a contact, on page 166) or a reply (Procedure: Replying to a inbound e-mail interaction, on page 161) outbound e-mail message.

   You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response (Chapter 29, "Task: Using the Standard Response Library," on page 319).

2. The Spelling Check functionality is controlled by the Spell Check toolbar (you might have to expand the E-Mail Interaction window to see the toolbar).

   - Click the `Spell Check` button to turn Spelling Check functionality on and off.

- From the `Language` drop-down list, select the spelling dictionary (language) that you want to use.

3. When the Spelling Check functionality is on, words in the text composition area that are not in the specified dictionary are underlined by a wavy, red line. Figure 127 shows an e-mail message that contains two words that are not in the `English (United States)` dictionary. The first is the name of the contact and the second is the word `order`, which is misspelled as `ordder`.

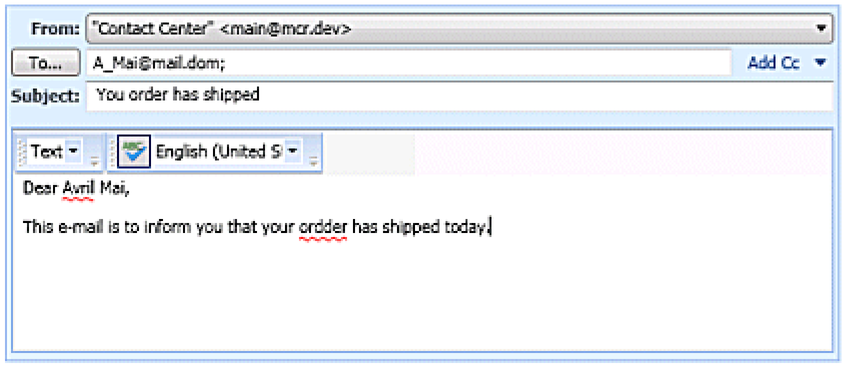


Figure 127:E-mail composition area displaying a misspelled word that is underlined in red

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

End of procedure

Printing and Print Preview

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

Procedure:
Formatting and printing e-mail interactions

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

Start of procedure

1. From an active `E-Mail Interaction` window, click `Print`.

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

   You can change these view settings at any time while you have the `Print Preview` window displayed.
3. From the `Destination` drop-down list, select a destination printer from the list of available printers on your network.
4. Specify which pages to print:
   - `All`—Click `All` to print the entire e-mail interaction.
   - `Page Range`—Enter one or both of the following in the `Page Range` text field:
     — A range of page numbers, for example: `2-6`
     — Individual page numbers that are separated by commas., for example: `1,3,4`.
5. Specify the number of copies to print in the `Copies` field.
6. Specify a `Portrait` or `Landscape` layout.
7. Specify the page margins:
   - Select `Uniform Margins` to make all the margins match the value that you specify for the top margin.
   - To specify different margins for the top, left, right, and bottom margins, de-select `Uniform Margins`.

   Margin units are determined by your local settings.
8. Select `Add Page Numbers` to add page numbers to the printout.

9. Print the e-mail interaction by applying the layout that you specify:

- Click `Print` to print the specified layout.
- Click `Cancel` to close the `Print Preview` window.

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

End of procedure

E-Mail Quality Assurance (QA) Review

You might be configured to have your outbound e-mail interactions sent to your team lead or supervisor for a QA review prior to sending the e-mail interaction to your contact (refer to "Receiving QA Feedback"), or you might be configured to be a QA reviewer (refer to the Procedure: QA Review of E-Mail Interactions, on page 176).

Receiving QA Feedback

Your QA reviewer might return the e-mail interaction to you to be updated, or the reviewer might accept the e-mail and allow it to be sent. The review process might require more than one iteration.

E-mail interactions that are sent for review might be directed to the reviewer or it might be stored in a workbin that is specifically for reviews. The reviewed e-mail interaction might be returned to you directly or it might be stored in a workbin that is specifically for e-mail interactions that are to be updated or reworked.

The status of the review is displayed in the `Case Information` view for the interaction so that you know whether you have to update the e-mail interaction content or not. If the status is `Rejected` (or some other disposition that is defined by your system administrator), then the e-mail interaction was not sent to the contact.

The reviewer might update the content of the e-mail or the reviewer might add instructions for you in the `Notepad` view.

After you have completed the updates to the e-mail interaction, click `Send` to deliver the e-mail interaction back to the reviewer for approval or rejection. Refer to "Receiving and Handling an Inbound E-Mail Interaction" on page 157, "Creating and Handling a New or Reply E-Mail Interaction" on page 161, and the *Interaction Workspace 8.1 Help* for information about using the E-Mail Interaction window.

Providing E-Mail QA Feedback

You might be configured to review outbound e-mail interactions created by agents that you supervise, lead, or review, for Quality Assurance (QA) purposes. If you are a reviewer, outbound e-mails are directed to you prior to being sent to a contact.

As a reviewer, you might be configured to receive e-mail interactions for review by an interaction preview or you might be configured to retrieve outbound e-mail interactions from a workbin (refer to Chapter 25, "Task: Using Workbins," on page 277).

Procedure:
QA Review of E-Mail Interactions

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the e-mail-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target for the outbound interaction.

Start of procedure

1. When an e-mail interaction for review is directed to you, an interaction preview is displayed on your desktop.
   - Click `Accept` to display the interaction
   - Click `Reject` to return the interaction to the queue.

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

- The `QA Review Status` field is editable. It contains attached data that specifies the status of the review.
- The `Party Action` menu displays the e-mail monitoring icon ( ) to indicate that the agent is under review.
- The `Interim Send` button is not available for review e-mail interactions.

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

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

3. In the `Review E-mail Interaction` window, you can do the following tasks:
   - Update the `Review Status` in the `Case Information` view
   - Edit the content of the e-mail interaction
   - Set a disposition
   - Add text to the `Note` tab
   - Use other standard E-mail Interaction window functions (refer to “Receiving and Handling an Inbound E-Mail Interaction” on page 157)
4. When your review is complete, set the status to one of the following states:
   - `Accepted`—The e-mail interaction is sent to the contact when you click `Send`.
   - `Rejected`—The e-mail interaction is sent back to the agent or to a workbin that contains reviewed interactions when you click `Send`. The `QA Review Status` in the `Case Information` is updated to `Rejected`.
   - `Unknown`—The e-mail interaction is sent back to the review queue or to a review workbin when you click `Send`.
5. Click `Send`.

End of procedure

Chapter

14 Task: Handle a Chat Interaction

In this chapter, you will learn how to handle inbound chat interactions, and how to check the spelling of your chat messages before you send them.

This chapter contains the following sections:

Receiving and Handling an Inbound Chat Interaction

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

Procedure: Handling an inbound chat interaction

Purpose: To handle an inbound chat interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the chat-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).

- You are the internal target for the inbound interaction.

Start of procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 128).

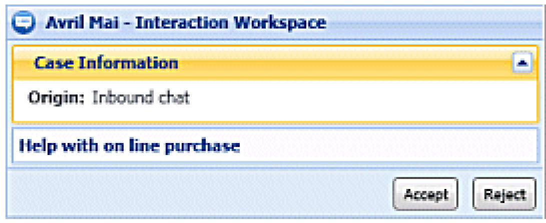


Figure 128:Chat Interaction interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.

3. If you accept the interaction, the inbound Chat Interaction window is displayed (see Figure 129).

   The Inbound Chat Interaction window provides the following functionality:
   - Compose a message/response.
   - Check the spelling of your message/response (see Procedure: Using Spelling Check to find potentially misspelled words in a chat message, on page 184).
   - Send a message/response.
   - Select, verify, and send a URL (see the *Interaction Workspace 8.1 Help*).

   The message-transcript area of the Chat Interaction window contains color-coded, time-stamped message lines from your company's system, as well as the messages that are sent by the contact and your replies (see Figure 129). A different color is designated for each message type. The colors are defined by your system administrator.

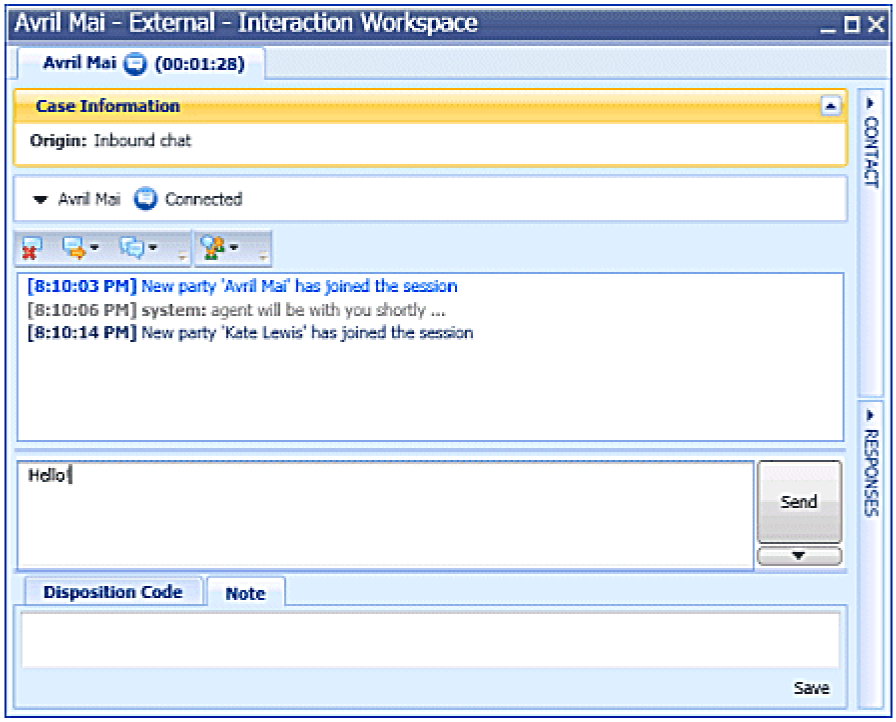


Figure 129:Chat Interaction window

4. To begin interacting with your contact, enter a message in the message area, and then click `Send`.

   Your message is displayed to the contact in the chat interface that the contact is using to communicate with you. Your message is also added to the transcript area of the Chat Interaction window.

   Your system administrator configures how your name appears to your contacts. It might be your real name, your user name, or a nickname.

5. Messages that are sent by your contact are displayed together with your messages in the message transcript area (see Figure 130).

   When you receive a message from the contact, a small progress bar is displayed near the top of the Chat Interaction window, on the Chat icon. The progress bar expands from left to right. It begins as green, changes to yellow, and finally changes to red, to indicate that a response is expected from you. See the *Interaction Workspace 8.1 Help* for more information about the behavior of the Chat Interaction window.

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

   - Use the Notepad to attach a note to the interaction history. See “Managing Contact History” on page 291.
   - View and edit Case Information for the current interaction.
   - View and manage contact history. See “Managing Contact History” on page 291.

- View and manage contact information. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- View the Standard Response Library if you decide to call the sender instead of replying to the e-mail. See “Inserting a Standard Response into an E-Mail Interaction” on page 319.
- Call the sender by clicking the `Action` menu drop-down list that is displayed next to the contact name (see Figure 123 on page 166).

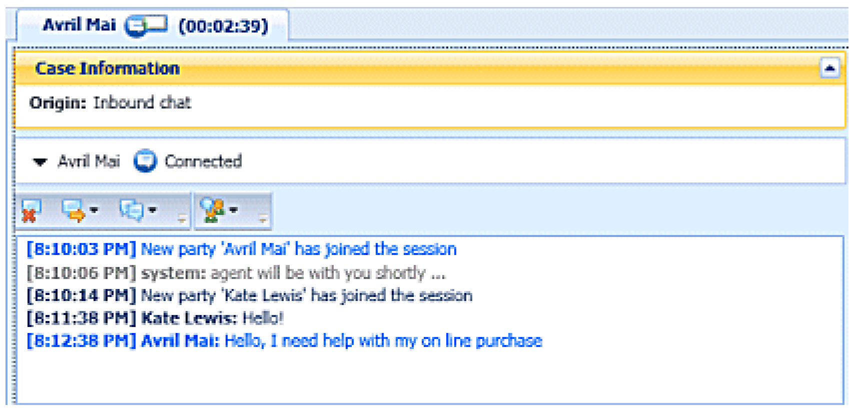


Figure 130:Chat Interaction window progress bar and message area

6. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 131). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.

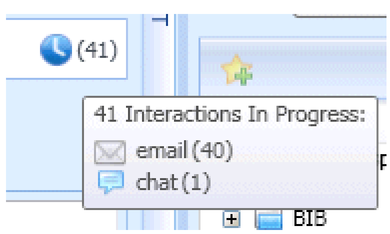


Figure 131:Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 132). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

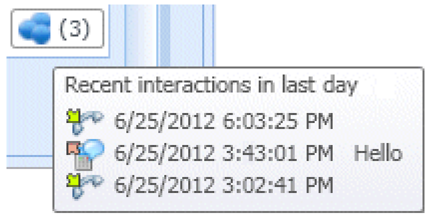


Figure 132:Recent interactions matrix displaying the list of interactions with the current contact within the last day

7. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
   - Instant Transfer the chat to another internal target. See “Transferring a Chat Interaction” on page 193).
   - Start a consultation with another party:
     - Start an Instant Messaging consultation. See Procedure: Initiating an Instant Messaging session, on page 146.
     - Start a Voice consultation. See “Starting a Voice Conference” on page 103.
     - Start a Chat Consultation. See “Starting or Receiving a Chat Consultation” on page 187.
8. When you are finished interacting with your contact, click `End Chat` to stop the current chat interaction.

   After you or the contact has ended the chat session, you can perform the following functions:
   - Select `Mark Done` for the current interaction. The transcript is saved in the contact history and the Chat Interaction window is closed.
   - Set a disposition code. See “Assigning Disposition Codes” on page 287.

End of procedure

Spelling Check

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

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

Purpose: To verify the spelling of the content of an outbound chat message.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active Chat interaction (see "Receiving and Handling an Inbound Chat Interaction" on page 179).

Start of procedure

1. Begin entering text in the message area of a Chat Interaction window (see Procedure: Handling an inbound chat interaction, on page 179).

   You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response (Chapter 29, "Task: Using the Standard Response Library," on page 319).

2. When Spelling Check is on, words in the message area that are not in the specified dictionary are underlined by a red, wavy line. Figure 133 shows a chat message that contains a word that is not in the `English (United States)` dictionary (the default dictionary for this user). The misspelled word is `happening`, which is misspelled as `happppening`.

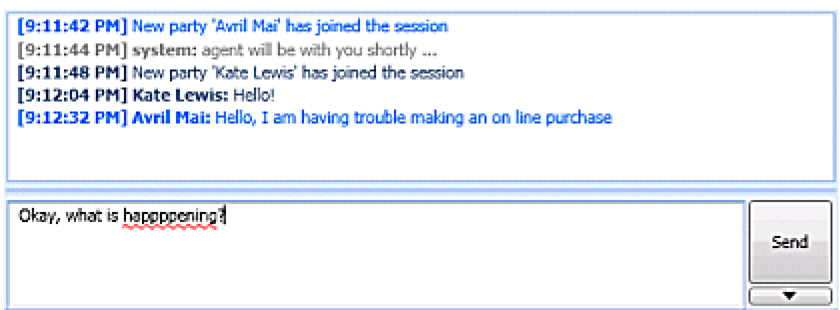


Figure 133:Chat message composition area, displaying a misspelled word that is underlined in red

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

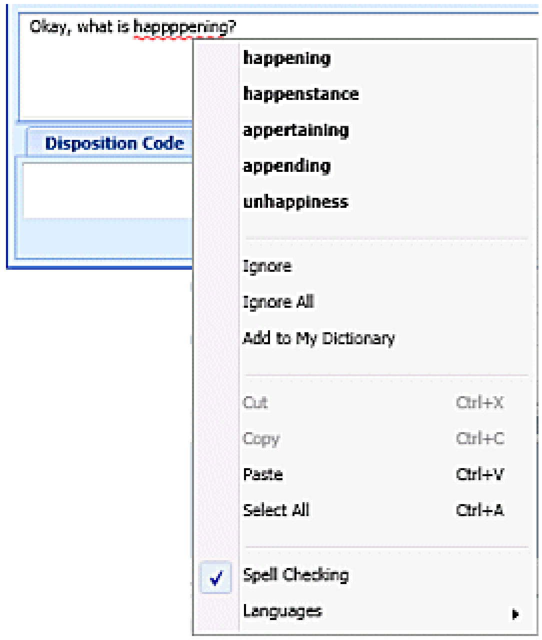


Figure 134:Chat Interaction window Spelling Check menu

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

End of procedure

Genesys

Chapter

15 Task: Handle a Chat Consultation

In this chapter, you will learn how to use the Team Communicator feature to find an internal agent and start a chat consultation.

A chat conference enables an internal target to participate in the current chat session with you and your contact. A chat consultation enables an internal target to view the chat transcript between you and your contact, and to chat with you privately in a second chat session in the same Chat Interaction window.

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

This chapter contains the following section:

Starting or Receiving a Chat Consultation

The Interaction Workspace Chat Interaction window enables you to consult with an internal target about your current chat interaction. Your internal target can see the messages that you exchange with your contact, but the contact does not see the messages that you exchange with your internal target.

Chat consultation is only available from an active Chat interaction. A chat consultation between two agents is ended if the chat with the contact is ended.

This section contains the following procedures:

- Procedure: Starting a chat consultation, on page 188
- Procedure: Receiving a chat consultation request, on page 190

Procedure:
Starting a chat consultation

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active Chat interaction with a contact (see Procedure: Handling an inbound chat interaction, on page 179).

Start of procedure

1. In the active Chat Interaction window, click the `Start Consultation` button and then use the Team Communicator (see Figure 135) to find the internal target with whom you want to start a consultation (see the Procedure: Using the Team Communicator feature to find an internal target, on page 60).

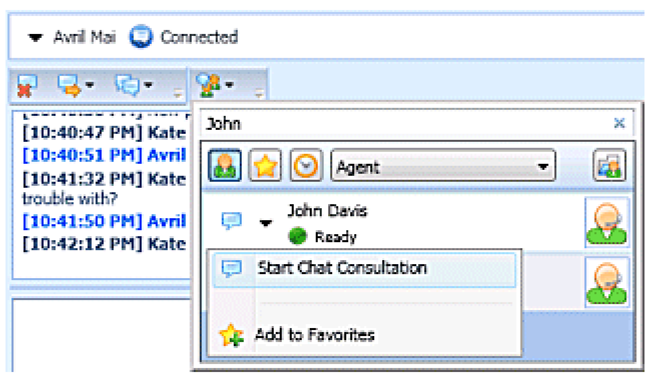


Figure 135:Finding an internal target for a chat consultation in the active Chat Interaction window

2. Click the `Action` menu drop-down list that is displayed next to the name of the internal target with whom you want to consult, and then select `Start Chat Consultation`. An interaction notification is displayed on the desktop of your target.

   When the internal target accepts the interaction request, you can chat with the internal target agent without the contact reading the messages that you exchange.

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

3. When you are connected to your consultation target, the chat interaction with the internal target is added to the Chat Interaction window below the interaction with your contact (see Figure 136).

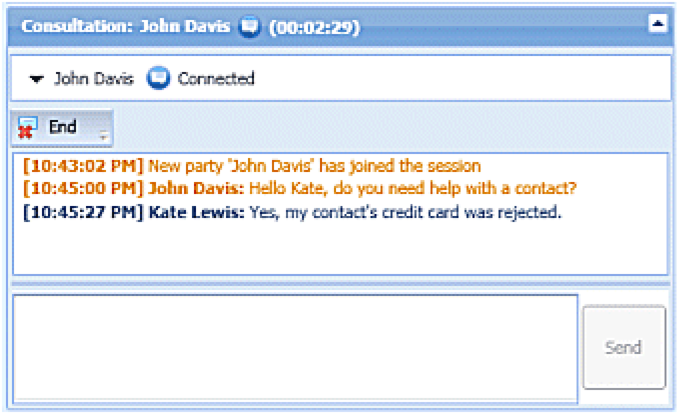


Figure 136:Chat Interaction window, displaying a consultation chat with an internal target below the chat interaction with the contact

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

- End the consultation.
- Call the internal target by using the `Action` menu drop-down list next to the party name.
- IM the internal target by using the `Action` menu drop-down list next to the party name.
- Mark Done the chat consultation.

4. The transcript of your interaction with the contact, and any notes you might have recorded, are displayed in the Chat Interaction window on the desktop of your consultation target. However, the consultation target cannot interact with your contact (see Figure 138).
5. The internal target agent can choose to release the consultation. If this happens, the internal target agent is disconnected, but you remain connected to the contact.
6. If you click the `End` button and the internal target agent is still connected, the session is transferred automatically to the internal target agent.

   If you have completed your chat interaction and the internal target agent has already disconnected from the conference, go to Step 8 of the Procedure: Handling an inbound chat interaction, on page 179.

End of procedure

Procedure:
Receiving a chat consultation request

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the chat media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).

Start of procedure

1. If another agent wants to consult with you about a chat interaction, they will initiate a chat consultation. You are notified of the consultation request by the Interaction Workspace Interaction Preview (see Figure 137).

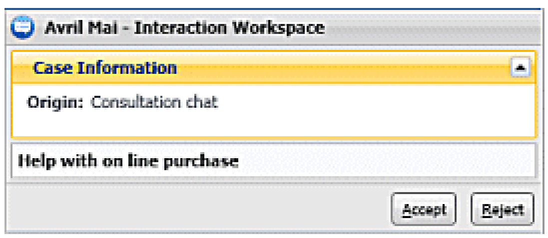


Figure 137:Consultation Interaction Notification that is displayed on your desktop

   Click `Accept` to connect to the chat interaction.

2. The Interaction Workspace Chat Consultation Interaction window (see Figure 138) enables you to perform the following functions while you are chatting with the agent who initiated the consultation:
   - View the transcript of the chat session between the contact and the agent who initiated the consultation.
   - Send messages to the agent who initiated the consultation.
   - Receive messages from the agent who initiated the consultation.
   - End the consultation.
   - Call the agent who initiated the consultation.
   - Mark Done the chat consultation.

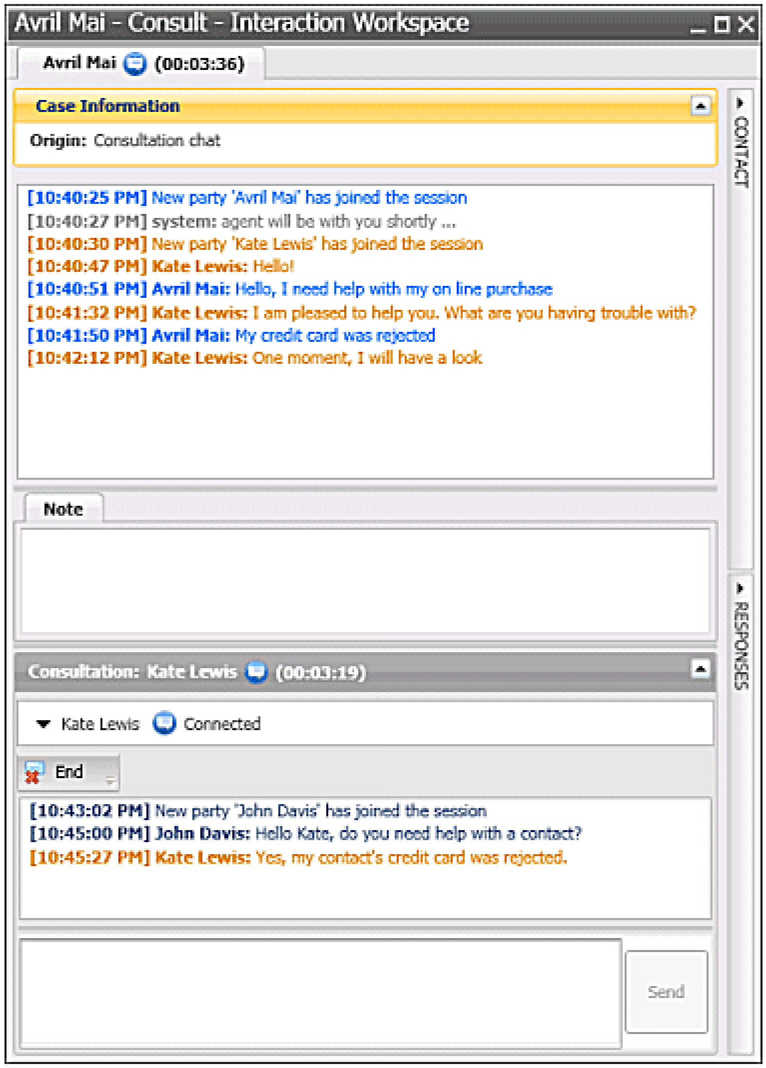


Figure 138:Chat Consultation Interaction window

End of procedure

Chapter

16 Task: Transfer a Chat Interaction

In this chapter, you will learn how to transfer chat interactions to an internal target.

This chapter contains the following section:

Transferring a Chat Interaction

The Interaction Workspace Chat Interaction window enables you to transfer your current chat interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer a chat interaction to an internal target.

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

This section contains the following procedure:

Procedure:
Starting an instant chat transfer

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see Procedure: Handling an inbound chat interaction, on page 179).

Start of procedure

1. In the active Chat Interaction window, click `Transfer` to open the Team Communicator (see Figure 139) to find the internal target to whom you want to transfer the current interaction (see the Procedure: Using the Team Communicator feature to find an internal target, on page 60).

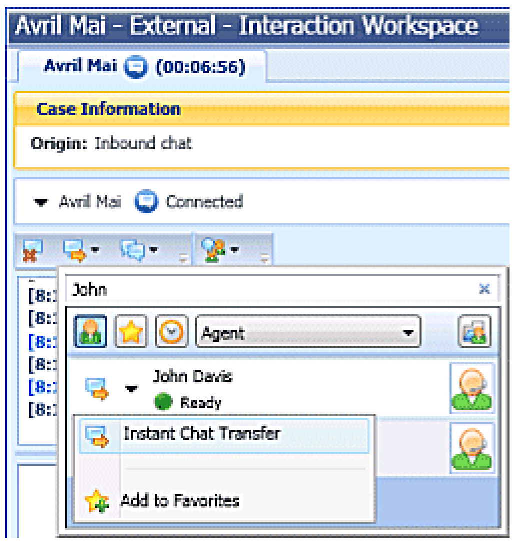


Figure 139:Finding an internal target for a chat transfer in the active Chat Interaction window

2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and then select `Instant Chat Transfer`.

   An invitation is sent to the target to accept the chat transfer. If the target accepts the interaction transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target (see Figure 140).

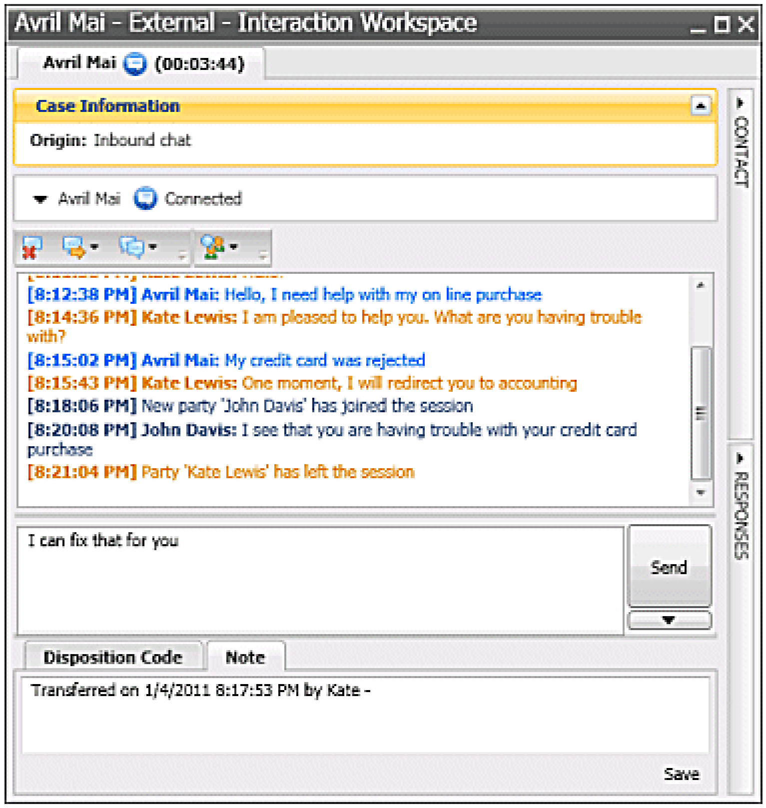


Figure 140:Transferred Chat Interaction window displayed on the desktop to the transfer target

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

End of procedure

Procedure: Receiving a transferred chat

Purpose: To receive a transferred chat interaction from another agent.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the chat media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).

Start of procedure

1. If another agent wants to transfer a chat interaction to you, they can choose between an instant transfer and a transfer from a consultation. You are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (see Figure 141).

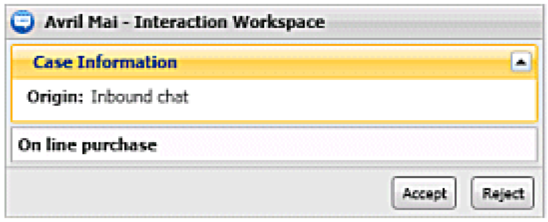


Figure 141:Interaction Preview interactive notification, informing you of a transfer request

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

- If the calling agent initiated an instant transfer, the call is immediately transferred to you. Go to Step 3 on page 180 of the Procedure: Handling an inbound chat interaction.
- If the calling agent initiated a consultation transfer, the Interaction Workspace Chat Interaction window is displayed. It shows your status as connected to the calling agent.

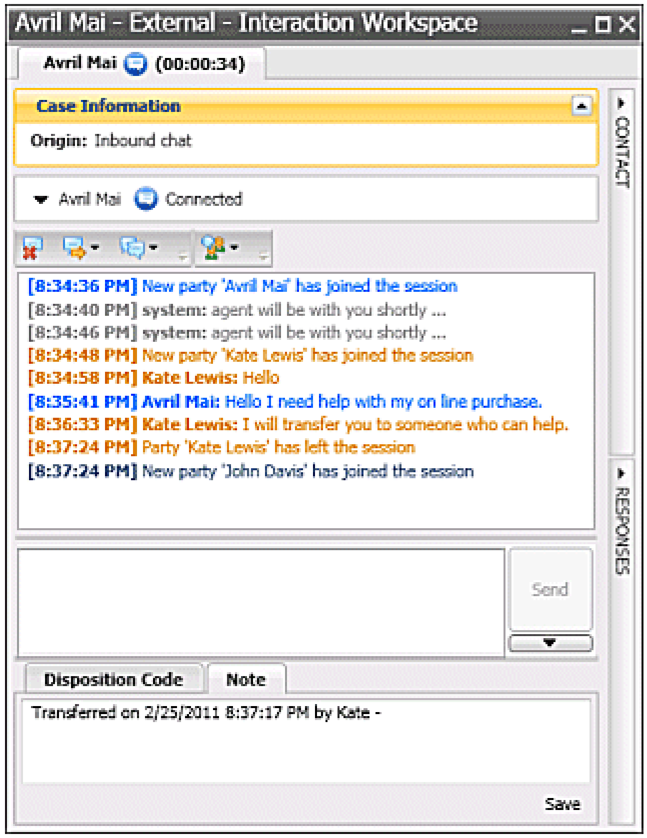


Figure 142:Chat Interaction window, displaying your status as connected to the chat party

2. You are now the owner of the chat interaction. Refer to Step 3 on page 180 of Procedure: Handling an inbound chat interaction, for information about handling a chat interaction.

End of procedure

Starting a Chat Transfer to an Active Consultation

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

Procedure:
Starting a chat transfer to an active consultation

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see Procedure: Handling an inbound chat interaction, on page 179).
- You have an active consultation with an internal target (see Procedure: Starting a chat consultation, on page 188).

Start of procedure

1. In the active Chat Interaction window, click `Instant Chat Transfer` to open the Team Communicator (see Figure 143). The Team Communicator is displayed showing a list of your active consultations.

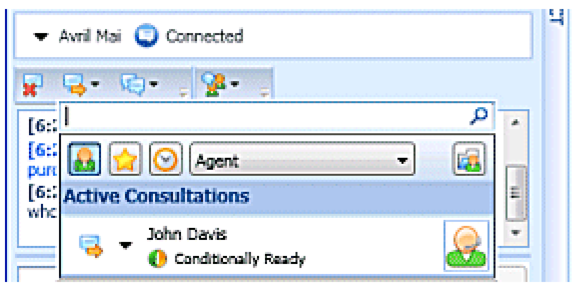


Figure 143: Team communicator displaying current consultation party as default for Instant Transfer

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

   The interaction is transferred to the target. The interaction window closes.

End of procedure

Chapter

17 Task: Conference a Chat Interaction

In this chapter, you will learn how to transfer chat interactions.

This chapter contains the following section:

Starting a Chat Conference

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

This section contains the following procedure:

- Procedure: Starting an instant chat conference, on page 200
- Procedure: Receiving a chat conference, on page 201
- Procedure: Starting a chat conference with an active consultation, on page 204

Procedure:
Starting an instant chat conference

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

Start of procedure

1. In the active Chat Interaction window, click the `Instant Conference` button to open the Team Communicator (see Figure 144).

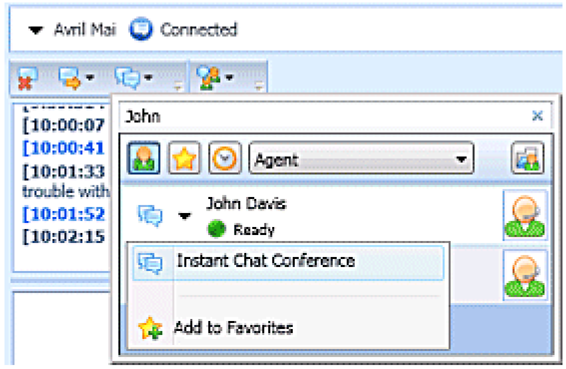


Figure 144:Finding an internal target for a chat conference in the active Chat Interaction window

2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target with whom you want to conference, and then select `Instant Chat Conference`. When the internal target accepts the interaction request, a Chat Interaction window opens on the desktop of the conference target. The Chat Interaction window displays the entire transcript of the chat session between you and the contact (see Figure 145).

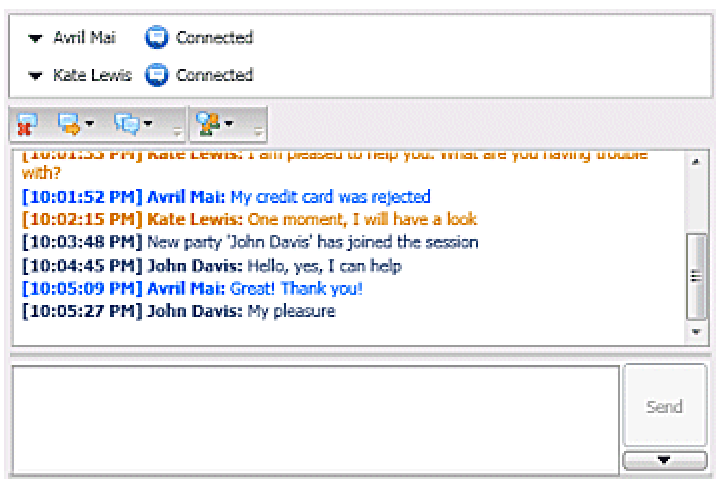


Figure 145:Chat Interaction window on the desktop of your conference target displaying the chat transcript and connection status

The internal target is added to the chat session in your Chat Interaction window. You, the contact, and the internal target can each see what is sent by the others (see Figure 146).

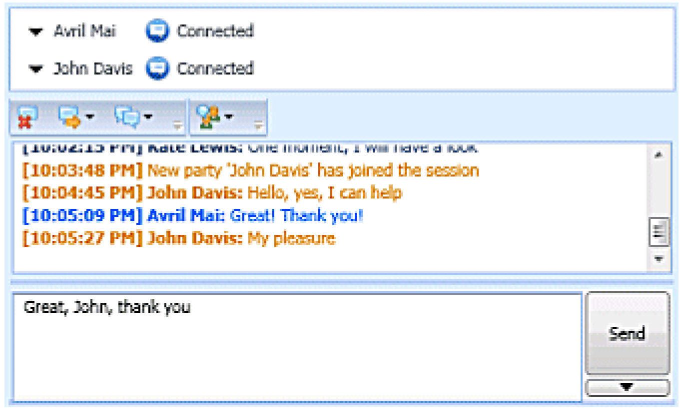


Figure 146:Chat Interaction window displaying the chat transcript and connection status of your conference

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

3. If you click the `End` button and the internal target agent is still connected, the session is transferred automatically to the internal target agent.

   If you have completed your chat interaction and the internal target agent has already disconnected from the conference, go to Step 8 of the Procedure: Handling an inbound chat interaction, on page 179.

End of procedure

Procedure: Receiving a chat conference

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the chat media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).

Start of procedure

1. If another agent wants to chat conference with you and a contact about their current interaction, the agent can start a chat conference.

   If the other agent is handling a chat interaction and initiates a chat conference request, you are notified of the request by the Interaction Workspace Interaction Preview interactive notification (see Figure 147).

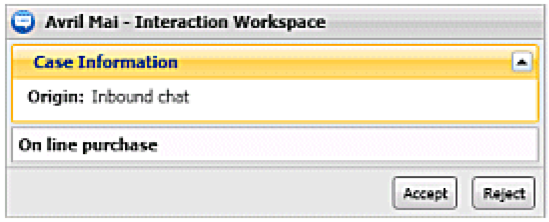


Figure 147:Interaction Preview interactive notification, informing you of a conference request

Click `Accept` to connect to the conference. The Chat Interaction window is displayed (see Figure 148).

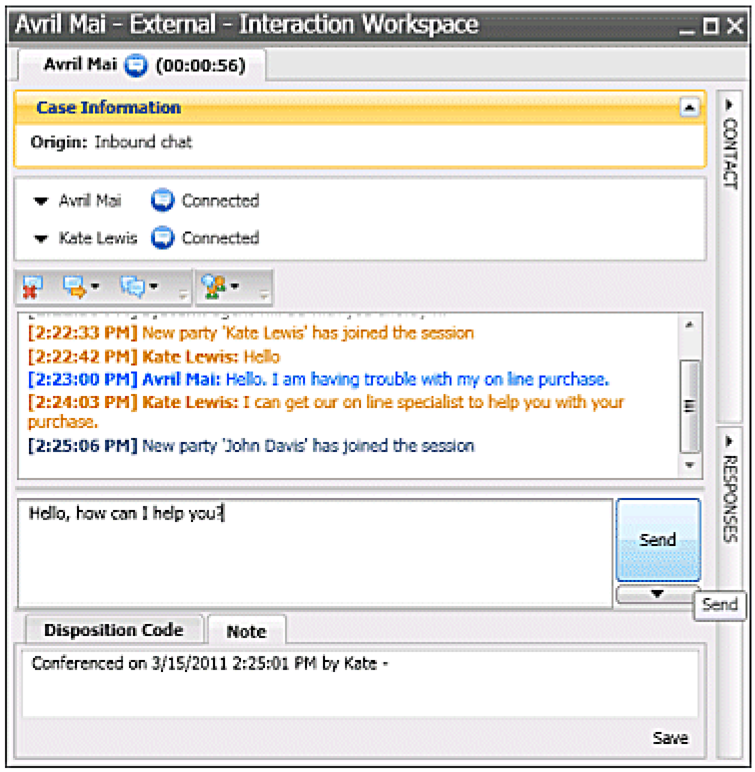


Figure 148:Chat Interaction window, displaying your status as Connected to the conferencing agent

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

- Transfer the chat to a different internal target.

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

When you join the conference, all three parties will see any text that you enter into the Chat Interaction window. Your status is `Connected` (see Figure 148).

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

- Use the `Conference Party Action Menu` (adjacent to the Party Status—see Figure 149) to do the following:
  - **Call**—Start a voice call to the party.
  - **Start Instant Message Consultation**—Start an IM consultation with the party.
  - **New E-mail**—Terminate the connection to the party.
  - **Delete From Conference**—Terminate the connection to the party.

  For information about how to use the functionality in the interaction window, see the *Interaction Workspace 8.1 Help*.
- End the chat—Terminates your connection to the conference. The conferencing agent remains connected to the contact.
- Set a Disposition Code for the chat.

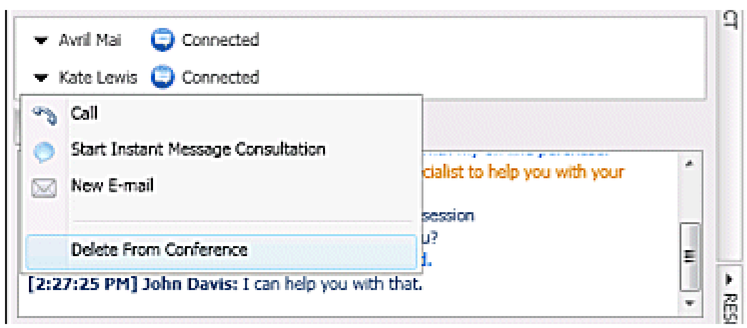


Figure 149:Conference Party Action Menu

Remaining Connected After the Conferencing Agent Disconnects

If the conferencing agent releases the chat, the conferencing agent is disconnected, but you remain connected to the contact (see Figure 150). You can complete your interaction with the contact, transfer the contact, or start a new conference.

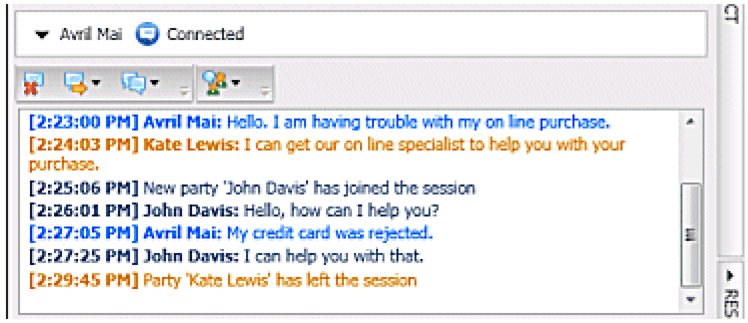


Figure 150:Voice Interaction window showing that the calling agent has left the conference, but you remain connected to the contact

3. Click `End the Chat` to terminate your connection to the conference.

   The Interaction Workspace Chat Interaction window is updated to display the status of the conference as `Ended`.

   If required by your configuration, specify a disposition code that qualifies the outcome of the interaction by selecting an outcome from the `Disposition Code` drop-down list or radio-button list in the Disposition Code view (see "Assigning Disposition Codes" on page 287).
4. Click `Done`.
5. Close the Chat Interaction window.
6. Complete your after-call work.
7. Set your status to `Ready`.

End of procedure

Starting a Chat Conference with an Active Consultation

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

Procedure:
Starting a chat conference with an active consultation

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see Procedure: Handling an inbound chat interaction, on page 179).

Start of procedure

1. In the active Chat Interaction window, click the `Start Consultation` button and then use the Team Communicator (see Figure 151) to find the internal target with whom you want to start a consultation (see the Procedure: Using the Team Communicator feature to find an internal target, on page 60).

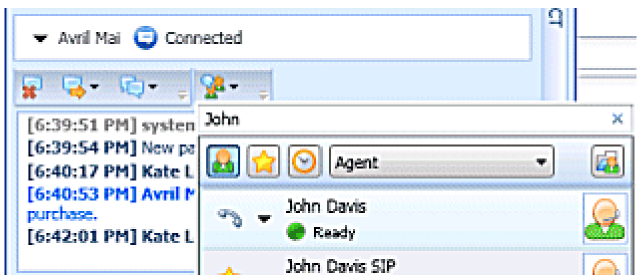


Figure 151:Finding an internal target for a chat consultation in the active Chat Interaction window

2. Click the `Action` menu drop-down list that is displayed next to the name of the internal target with whom you want to consult, and then select `Start Chat Consultation` (see Figure 152). An interaction notification is displayed on the desktop of your target.

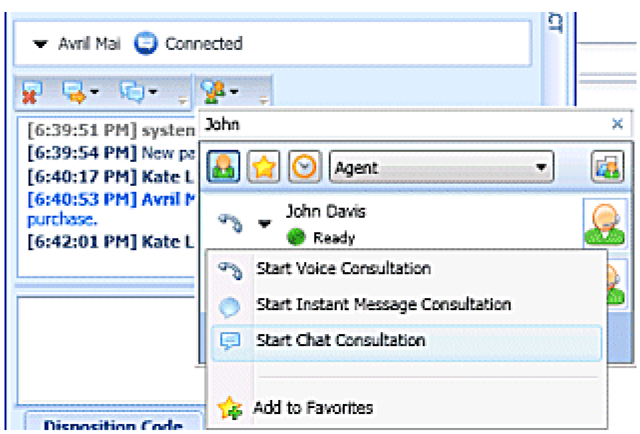


Figure 152:Team Communicator displaying a list of available consultation media

The chat consultation interaction is added to your active chat interaction window (see Figure 153).

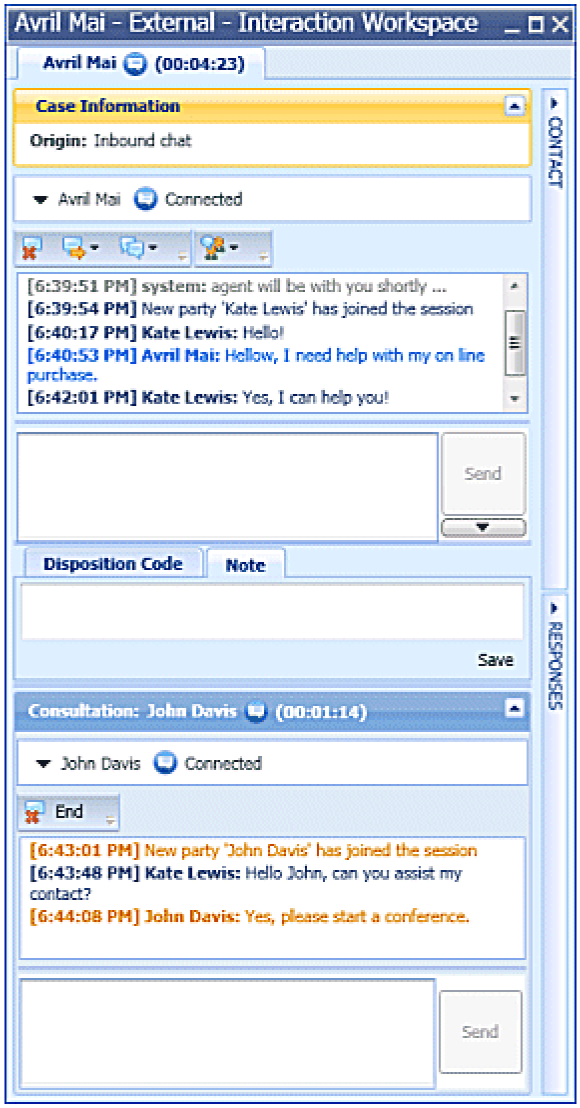


Figure 153:Chat Interaction window displaying an active chat interaction and a chat consultation

3. To transition your active chat consultation to a chat conference, click the `Instant Chat Conference` button on the main interaction toolbar (see Figure 154).

   The Team Communicator opens and displays your active consultations (see Figure 154).

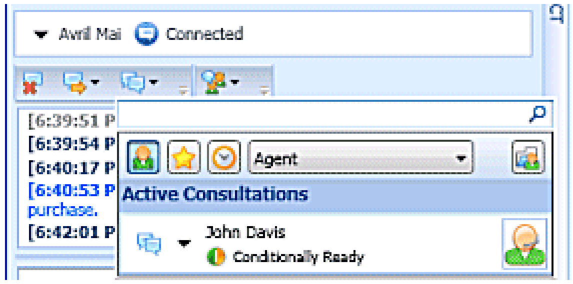


Figure 154:Team Communicator displaying the list of active consultations

4. Click the `Instant Chat Conference` button in the `Action` menu that is next to the name of the consult party with whom you want to conference with your chat interaction (see Figure 155).

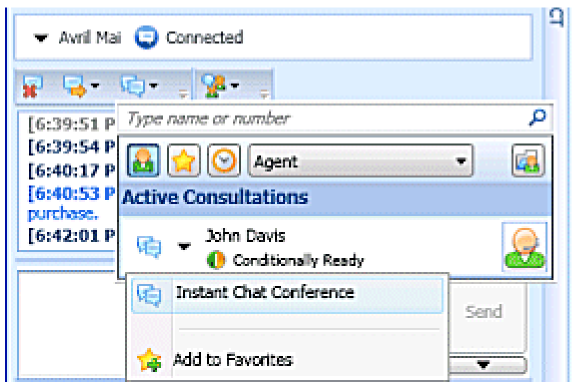


Figure 155:Team Communicator displaying the Instant Chat Conference option

An invitation to join the chat is sent to your conference target. If the target accepts the invitation, the consultation chat ends (seeFigure 156) and the target is conferenced with you and your contact (seeFigure 156).

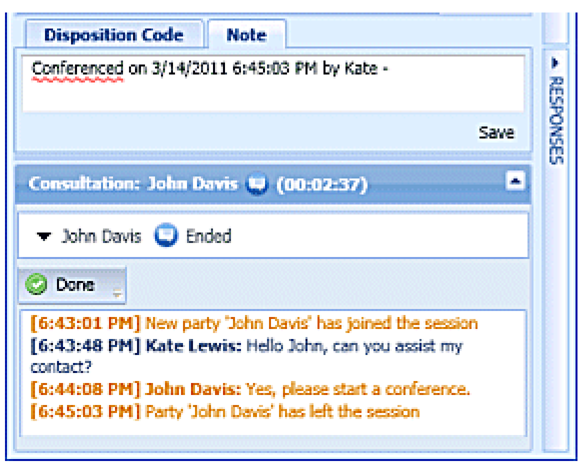


Figure 156:Status of the chat consultation interaction after the consultation party has been conferenced to a chat interaction

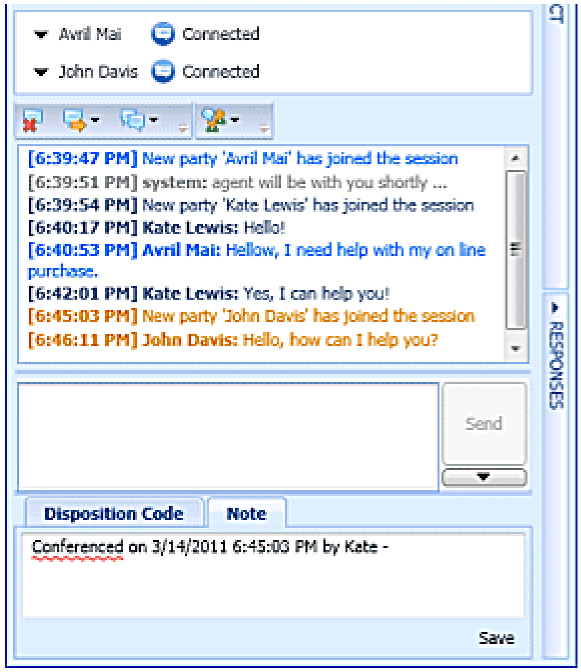


Figure 157: The Chat Interaction window displaying an active chat interaction with a conferenced party that was transitioned from a chat consultation.

5. Complete your chat conference (see Procedure: Starting an instant chat conference, on page 200).

End of procedure

Chapter

18 Task: Handle a Twitter Interaction

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

This chapter contains the following sections:

About Twitter

Twitter is an online social networking service and micro-blogging service that enables its users to send and read text-based posts of up to 140 characters, known as *Tweets*. It has been described as "the SMS of the Internet." These messages are posted to the user's Twitter profile or their blog, sent to their *followers*, and are searchable on Twitter search.

Twitter also has a suite of advertising products to help brands and businesses promote their content within the Twitter experience. Businesses can use Tweets to reach users while they search for their interests on Twitter.

Receiving and Handling an Inbound Twitter Interaction

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

Procedure:
Handling an inbound Twitter interaction

Purpose: To handle an inbound Twitter interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the Twitter-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target of the inbound interaction.

Start of procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 158).

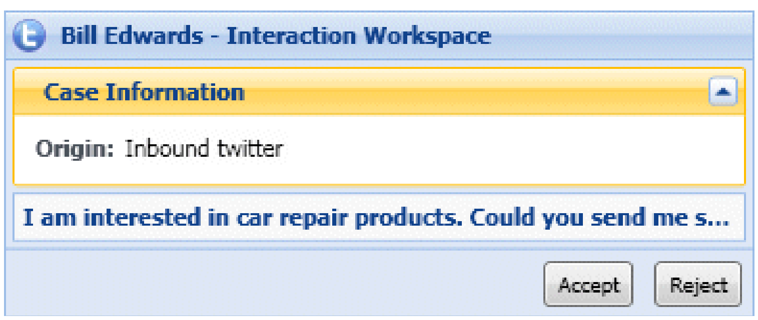


Figure 158:Twitter Interaction interactive notification

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

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

- Click `Accept` to display the interaction.
- Click `Reject` to return the interaction to the queue.
- Do nothing. The interaction will time out and be redirected.

3. If you accept the interaction, the inbound Twitter Interaction window is displayed. Figure 159 shows the window after clicking the down arrow to reply.

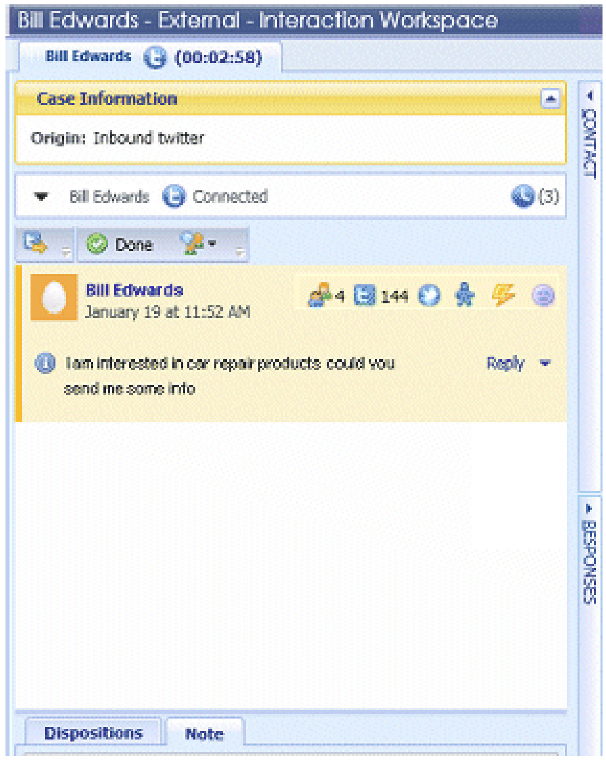


Figure 159:Twitter Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 160). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.

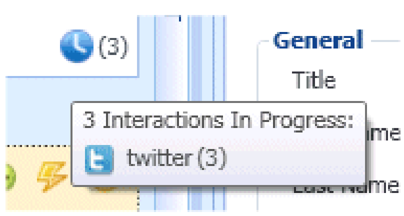


Figure 160:Dynamic Contact History Matrix displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 161). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

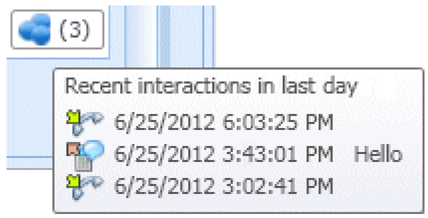


Figure 161:Recent interactions matrix displaying the list of interactions with the current contact within the last day

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

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

End of procedure

Next Steps

- You may wish to use some of the "Twitter-Specific Functionality" described below. For example, you may wish to update the Twitter classification or follow/unfollow the Twitter-user. You may also wish to use some of the features in described in "Interaction Workspace

Functionality" on page 215. When you are finished, click `Done` to stop the current interaction.The information is saved in the contact history and the Twitter Interaction window is closed.

Twitter-Specific Functionality

The Twitter Interaction window provides some Twitter-specific functionality.

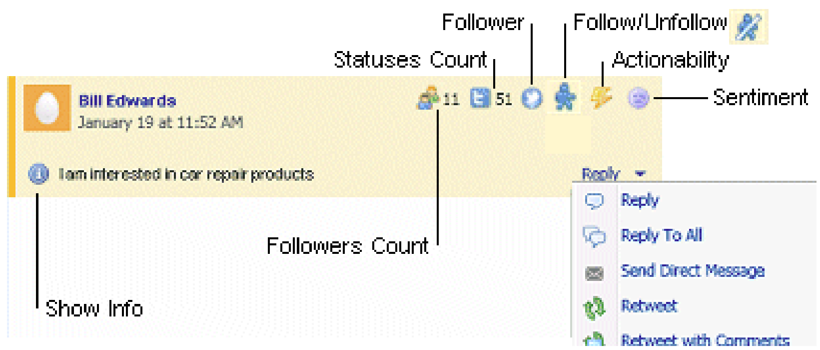


Figure 162:Buttons and Icons for Twitter-Specific Functionality

You can:

- Display Twitter-user profile information. Click the `Show Info` button to display the user profile information. You can also click the user name to open the Twitter page that contains user profile information (see Figure 162).
- Display the number of Twitter-user Tweets. The number after the Statuses Count icon indicates the number of user Tweets (see Figure 162).
- Display the Actionability and Sentiment of the Twitter interaction. When a Twitter interaction arrives, you can view Actionability and Sentiment icons (see Figure 162), which could have one of the following values or be undeclared:
  - Actionability—Can be actionable, not actionable, or undeclared.
  - Sentiment —Can be Positive, Negative, Neutral, or undeclared.

  Actionable Tweets are colored yellow and non-actionable Tweets are colored in gray. Actionability and Sentiment are based on the classification and screening results that are described in the *eServices 8.1 User's Guide*.
- Update the Actionability and Sentiment of the Twitter interaction. While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.
- Display the Followers Count. The number after the Follower Count icon (see Figure 162 on page 213) indicates the number of Twitter users following this account.

- Display the designation that the user is a Follower. The Follower icon (see Figure 162 on page 213) indicates that the user is a Twitter follower.
- Follow/Unfollow a Twitter user. You can become or stop being a follower of an author of the Twitter message. Click the Followed button to unfollow this account (see Figure 162 on page 213). A menu appears where you can select Unfollow. The button changes to Not Followed (see Figure 162 on page 213). Or, in case you change your mind, click the Not Followed button. The menu re-appears where you can select Follow.
- Automatic insertion of *mentions*. An @ sign and mention are automatically inserted into replies. The @ sign is used to call out usernames in Tweets, like this: Hello @JoeBelow! When a user name is preceded by the @ sign, it becomes a link to a Twitter-user profile.
- Reply to all participants in the current Tweet thread. Click `Reply`, or click the down arrow after `Reply`. A drop-down menu is displayed. Select `Reply to All`.
- Send a direct message to an author of a Tweet message. When the Twitter message author is a follower, you can send a direct message to the author as a form of reply.
- Retweet. Click the down arrow after `Reply`, select `Retweet` from the menu, and enter your Retweet. Right-click, select `Spell Checking` from the menu, correct any spelling errors, and then click `Send`.
- Retweet with comments. You can make a new Tweet, including the text of current message, and add additional comments. A Retweet indicator (RT) is automatically inserted at the start of the message text. Click down arrow arrow after `Reply`, select `Retweet with Comments`, enter the comment text (you can copy and paste selected text), and click `Send Retweet with Comments`.
- Open a clickable shortened URL. Twitter messages are limited to 140 characters. If you enter a URL in a Twitter message, a lot of the available characters for your reply are already taken. To overcome this problem, Twitter, in its web interface for creating messages, converts very long URLs into short URLs. In a short URL, the long URL is replaced by a shorter URL in the form of an automatically generated combination of letters and digits. Interaction Workspace supports shortened URLs.
- Open a Twitter user profile page by using clickable mentions. The @ sign is used to call out user names in Tweets, like this: Hello @JoeBelow! Click a user name preceded by the @ sign to link to a Twitter user profile.
- Perform a search in Twitter by using a clickable *#hashtag*. Twitter uses the # symbol, called a hashtag, to mark keywords or topics in a Tweet. Hashtags help you to find Tweets of interest. You can use the hashtag symbol # before relevant keywords in Tweets to categorize those Tweets to display more prominently in a Twitter Search. Clicking on a hashtagged word in any message shows you all other Tweets in that category. Hashtags can occur anywhere in the Tweet.

- Display In-Reply to Tweet. If the delivered Tweet interaction is a reply to another Tweet, Interaction Workspace enables you to view the original Tweet by clicking on the user name located after "In Reply to". A new browser window opens to display the parent Tweet in Twitter.

Interaction Workspace Functionality

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

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

- Use the Notepad to attach a note to the interaction history. See "Managing Contact History" on page 291.
- View Case Information for the current interaction.
- View and manage contact history. See "Managing Contact History" on page 291
- View and manage contact information. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- Use the Standard Response Library for pre-written text for replies and comments. Click the vertical `Responses` button in the middle of the window to open the library. You can search by keywords or open folders and view response text. Also see "Task: Using the Standard Response Library" on page 319.
- Cross over into another media channel. If, as an agent, you learn other contact information (not Twitter-specific), such as a contact's phone number or e-mail address, you can manually enter this information on the `Information` tab. The corresponding choice for other media channels is then displayed when you click the `Party Action` menu that is next to the name of the contact. You can then reply by using a voice call, an e-mail, an SMS message, or any other supported media channel for a Twitter contact. Interaction Workspace displays a drop-down list of available channels to access a contact.
- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
    - Instant-transfer the interaction to another internal target. See Procedure: Starting an instant SMS transfer, on page 243, which is similar to the Twitter procedure.
    - Start a consultation with another party:
        - Start an Instant Messaging consultation. See Procedure: Initiating an Instant Messaging session, on page 146.

    - Start a Voice consultation. See “Starting a Voice Consultation” on page 85.
- When you are finished interacting with your contact, click `Done` to stop the current interaction.
  - The information is saved in the contact history and the Twitter Interaction window is closed.
  - Set a disposition code. See “Assigning Disposition Codes” on page 287.

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Chapter

19 Task: Handle a Facebook Interaction

In this chapter, you will learn how to handle inbound Facebook interactions, how to check the spelling of your messages before you send, and other Facebook-specific functionality.

This chapter contains the following sections:

About Facebook

Facebook is a social networking service and website. Users must register before using the site, after which they may create a personal profile, add other users as friends, and exchange messages, including automatic notifications, when they update their profile.

Businesses can use Facebook to reach their target customers, and choose their audience by location, age and interests. Businesses can also promote their Facebook page or website, use Facebook's "Like" button to increase their advertising influence, and build a community around their business.

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

Receiving and Handling an Inbound Facebook Interaction

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

Procedure: Handling an inbound Facebook interaction

Purpose: To handle an inbound Facebook interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the Facebook-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target of the inbound interaction.

Start of procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 163).

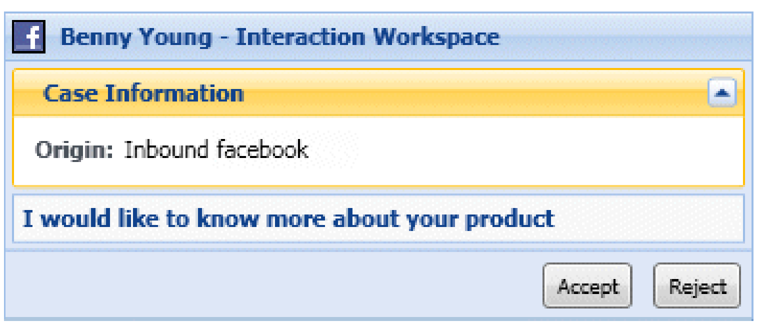

Figure 163:Facebook Interaction interactive notification

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

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

- Click `Accept` to display the interaction.
- Click `Reject` to return the interaction to the queue.
- Do nothing. The interaction will time out and be redirected.

3. If you accept the interaction, the inbound Facebook Interaction window is displayed. Figure 164 shows the window after clicking the information button to display a user profile.

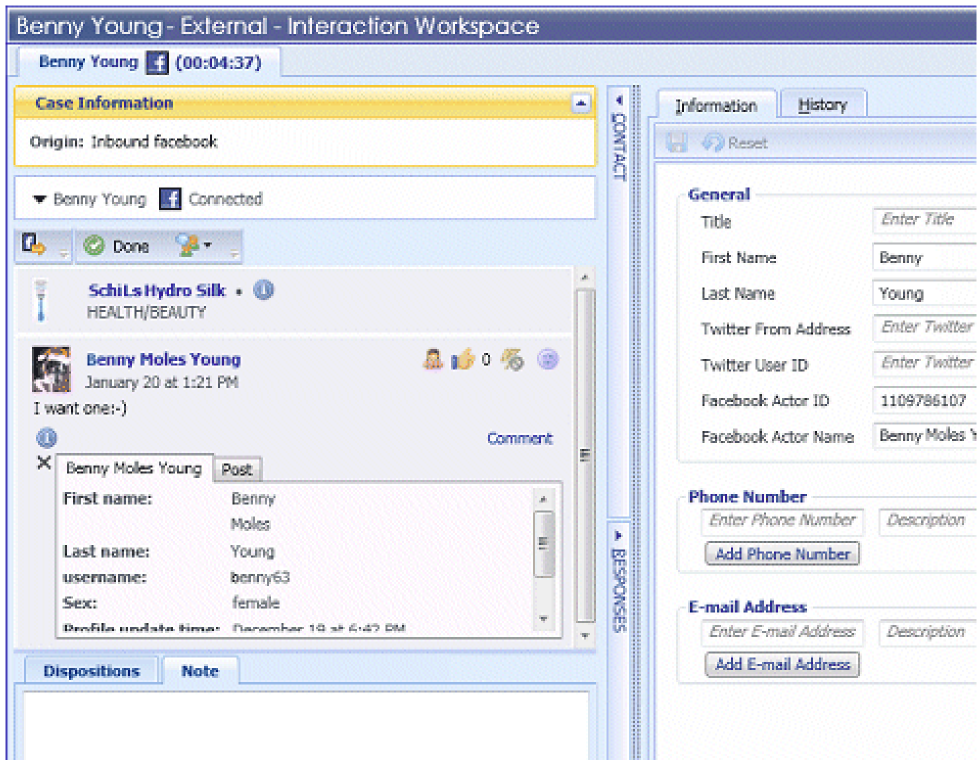

Figure 164:Facebook Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed next to the connection status of the interaction (see Figure 165). Place your mouse pointer over the icon to display the number and type of interactions in progress (except voice interactions) for the current contact.

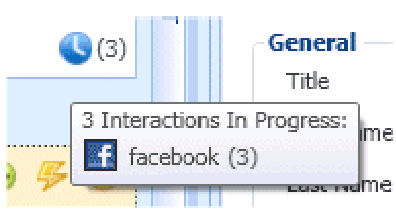

Figure 165:Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 166). Place your mouse pointer over the icon to display the number and type of recent interaction(s) for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

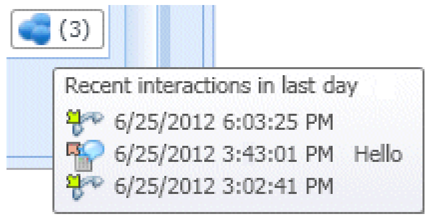

Figure 166:Recent interactions matrix displaying the list of interactions with the current contact within the last day

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

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

End of procedure

Next Steps

- You may wish to use some of the "Facebook-Specific Functionality" described below. For example, you may wish to update the Facebook classification. You may also wish to use some of the features in described in "Interaction Workspace Functionality" on page 222. When you are finished, click `Done` to stop the current interaction.The information is saved in the contact history and the Facebook Interaction window is closed.

Facebook-Specific Functionality

The Facebook Interaction window provides some Facebook-specific functionality.

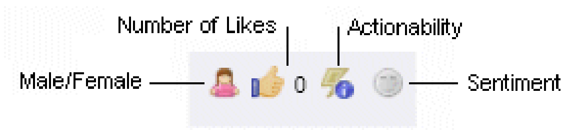

Figure 167:Buttons and Icons for Facebook-Specific Functionality

You can:

- Display Facebook-user profile information. Click `Show Info` to open a user profile tab. You can also click the user name to open the Facebook page with user profile information. The author's gender appears in the user profile and also displays as an icon (see Figure 167).
- Display the number of Facebook *likes*. The number next to the thumbs-up icon indicates the number of likes.
- Expand or collapse the Comments view. You can expand the comments by clicking `View`. After clicking `View`, `Hide` appears so you can close up the comment. You can also select `Expand All` or `Collapse All` in the Comments view to view/hide all comments at once.
- View the total number of comments and show more comments. Click the `Show Info` button to open the user profile then click the `Post` tab to view the total comments count. Total comments also appears above the original post. Your administrator configures the number of comments to display per page. If the number of comments exceeds the configured number, `Show more` appears. Click `Show more` to view additional comments.
- Display the Actionability and Sentiment of the Facebook interaction. When an Facebook interaction arrives, you can view Actionability and Sentiment icons (see Figure 167), which could have one of the following values or be undeclared:
  - Actionability—Can be actionable, not actionable, or undeclared
  - Sentiment —Can be Positive, Negative, Neutral or undeclared

  Actionable Facebook posts are colored yellow and non-actionable posts are colored gray. Facebook comments are automatically expanded and colored yellow if they are actionable, and collapsed and colored gray if they are non-actionable. Each Facebook comment has its own Actionability and Sentiment icon, which can be updated if necessary. Actionability and Sentiment are based on the classification and screening results as described in the *eServices 8.1 User's Guide*.
- Update the Actionability and Sentiment of the Facebook classification. While you are processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.
- Reply to the original routed Facebook post including checking the spelling (see Procedure: Handling an inbound Facebook interaction, on page 218).

- Reply to a Facebook comment. Subsequent comments are indented underneath the original post. Click the applicable comment, enter your reply (you can cut and paste text), have your reply spell-checked, and click `Send`.
- Automatic Insertion of *mentions*. You can use Facebook's mention feature. You can have an @ sign and a mention (examples: `@facebook_name or @company_name`) inserted into a reply when you click `Comment`.
- To delete a comment, click the down arrow after `Comment` and select `Delete` from the drop-down list. The comment can be deleted if this action is allowed by the author of the post.

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

Interaction Workspace Functionality

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

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

- Use the Notepad to attach a note to the interaction history. See “Managing Contact History” on page 291.
- View Case Information for the current interaction.
- View and manage contact history. See “Managing Contact History” on page 291
- View and manage contact information. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- Use the Standard Response Library for pre-written text for replies and comments.Click the vertical `Responses` button in the middle of the window to open the library. You can search by keywords or open folders and view response text. When you click `Comment,` an additional icon with a plus sign is displayed. Click this icon to add the standard response content to the reply message. Also see “Task: Using the Standard Response Library” on page 319.
- Cross over into another media channel. If, as an agent, you learn other contact information (not Facebook-specific), such as a contact's phone number or e-mail address, you can manually entered this on the `Information` tab. The corresponding choice for other media channels is

then available when you click the `Party Action` menu that is next to the name of the contact. You can reply using a voice call, an e-mail, an SMS or any other supported media channel for a Facebook contact. If a channel is not configured or if the contact information for this channel is absent, `No possible action` is displayed.

- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See Procedure: Starting an instant SMS transfer, on page 243), which is similar to the procedure for Facebook.
  - Start a consultation with another party:
    - Start an Instant Messaging consultation. See Procedure: Initiating an Instant Messaging session, on page 146.
    - Start a Voice consultation. See “Starting a Voice Consultation” on page 85.
- Set a disposition code. See “Assigning Disposition Codes” on page 287.
- When you are finished interacting with your contact, click `Done` to stop the current interaction. The transcript is saved in the contact history and the Facebook Interaction window is closed.

Chapter

20 Task: Handle an RSS Interaction

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

This chapter contains the following sections:

About RSS

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

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

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

Receiving and Handling an Inbound RSS Interaction

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

Procedure: Handling an inbound RSS interaction

Purpose: To handle an inbound RSS interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the RSS-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target of the inbound interaction.

Start of procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 168).

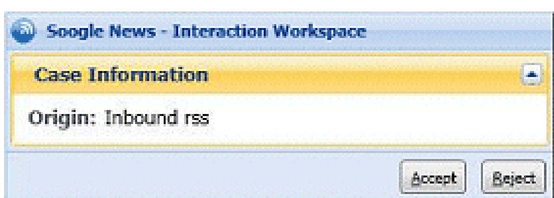

Figure 168:RSS Interaction interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time out and be redirected.

3. If you accept the interaction, the inbound RSS Interaction window is displayed. Figure 169 shows an example interaction.

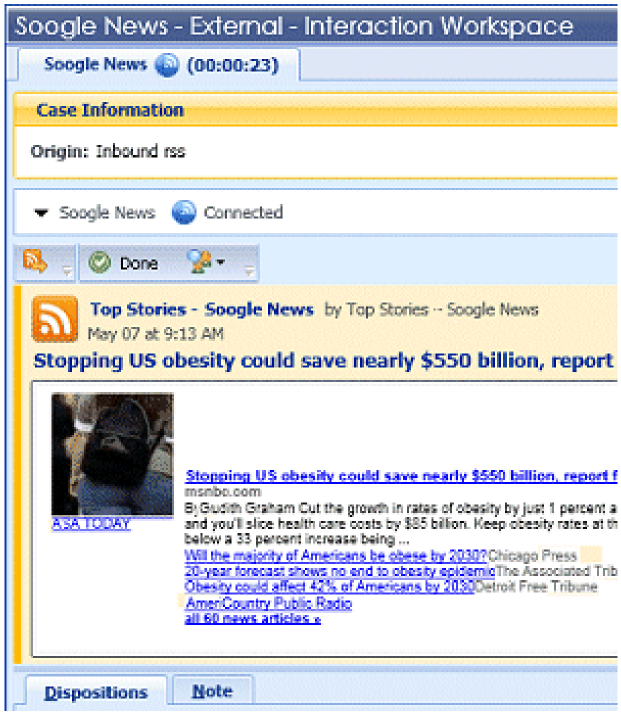

Figure 169:RSS Interaction window

The original-routed RSS interaction appears in the left pane under the RSS interaction toolbar (see Figure 169).

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 170).

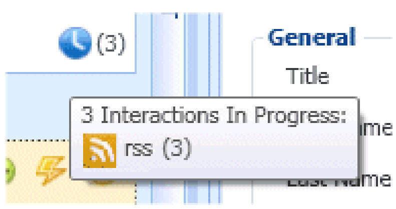

Figure 170:Dynamic Contact History Matrix displaying the number and type of interactions in progress

Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 171). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

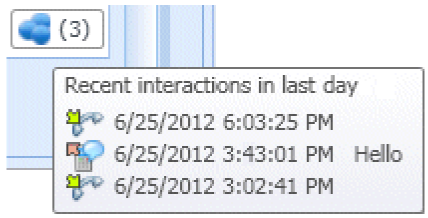

Figure 171:Recent interactions matrix displaying the list of interactions with the current contact within the last day

5. You can then view the source of the RSS interaction, the headline, and content (see Figure 169).

End of procedure

Next Steps

- You may wish to use some of the "RSS-Specific Functionality" described below. You may also wish to use some of the features in described in "Interaction Workspace Functionality" on page 229. When you are finished, click `Done` to stop the current interaction.The information is saved in the contact history and the RSS Interaction window is closed.

RSS-Specific Functionality

The RSS Interaction window provides some RSS-specific functionality.

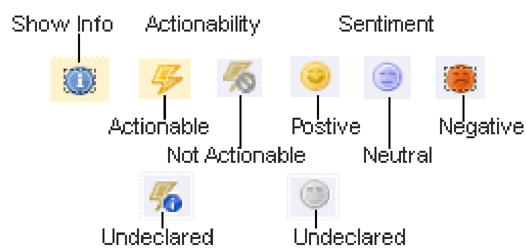

Figure 172:Buttons and Icons for RSS-Specific Functionality

You can:

1. View RSS Web Feed Source, Headline, and Content. The RSS interaction window lets you view the source of the web feed, the headline, and content. Click on the headline to go directly to the associated page on the website.

2. View Channel and Item Category information. Click the `Show Info` button (see Figure 172) to view the channel copyright, language, published date, and item category.
3. View the Actionability and Sentiment of the RSS interaction. When an RSS interaction arrives, you can view Actionability and Sentiment icons (see Figure 172), which could have one of the following values or be undeclared:
   - Actionability—Can be actionable, not actionable, or undeclared
   - Sentiment —Can be Positive, Negative, Neutral, or undeclared

   Actionable RSS interactions are colored yellow and non-actionable RSS interactions are colored in gray. Actionability and Sentiment are based on the classification and screening results that are described in the *eServices 8.1 User's Guide*.
4. Update the Actionability and Sentiment of the RSS Interaction. While processing the interaction, you have the option to change the value of the corresponding Actionability and Sentiment key by clicking the related icon and then choosing the correct value.

Interaction Workspace Functionality

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

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

- Use the Notepad to attach a note to the interaction history. See “Managing Contact History” on page 291.
- View Case Information for the current interaction.
- View and manage contact history. See “Managing Contact History” on page 291
- View and manage contact (web feed source) information. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See Procedure: Starting an instant SMS transfer, on page 243, which is similar to the RSS procedure.
  - Start a consultation with another party:
    - Start an Instant Messaging consultation. See Procedure: Initiating an Instant Messaging session, on page 146.

    - Start a Voice consultation. See “Starting a Voice Consultation” on page 85.
- When you are finished interacting with the item, click `Done` to stop the current interaction.
    - The information is saved in the contact history and the RSS Interaction window is closed.
    - Set a disposition code. See “Assigning Disposition Codes” on page 287.

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Chapter

21 Task: Handle an SMS Interaction

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

This chapter contains the following sections:

SMS is a text-messaging component of voice and internet communication. SMS enables the exchange of text messages between you and a contact through your computer. Typically, a contact will send you SMS from a mobile device, a web interface, or an e-mail client.

By definition, SMS are *short* messages. Interaction Workspace supports 160 characters per message. If you attempt to send a message that is longer than the character limit, additional messages, each up to 160 characters, will be sent so as to accommodate your entire message.

Interaction Workspace supports two SMS modes:

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

Receiving and Handling an Inbound SMS Interaction

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

Procedure: Handling an inbound SMS interaction

Purpose: To handle an inbound SMS interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the SMS-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target of the inbound interaction.

Start of procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 173).

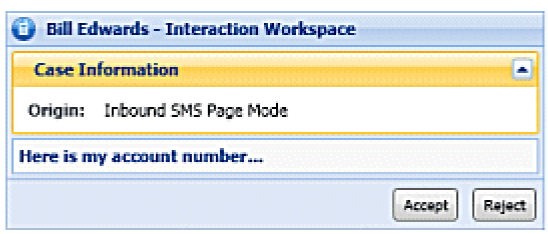


Figure 173:SMS Interaction interactive notification

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

The Interaction Preview informs you of whether the SMS was sent in Page Mode or in Session Mode:

- In Page Mode, you can reply to the message, transfer it, contact an internal target or contact to discuss it, or mark it as `Done`.

- In Session Mode, if you reply to the interaction, a chat session is started that uses the SMS channel to exchange non–real-time messages.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
- Click `Accept` to display the interaction.
- Click `Reject` to return the interaction to the queue.
- Do nothing. The interaction will time out and be redirected.

3. If you accept the interaction, the inbound SMS Interaction window is displayed (see Figure 174).

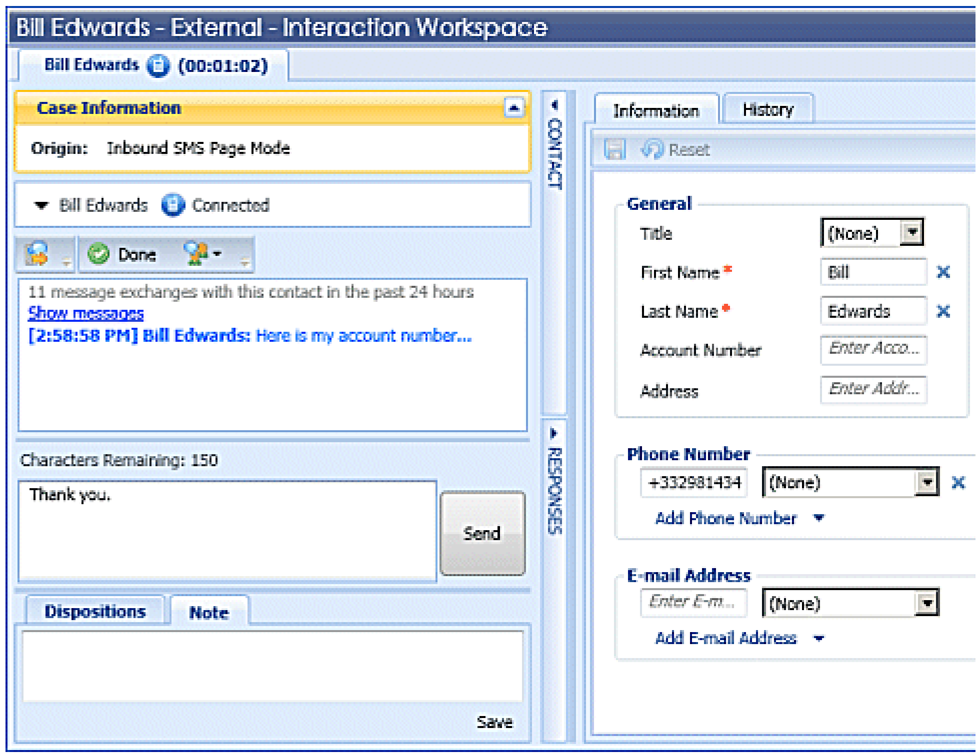


Figure 174:SMS Page Mode Interaction window

The Inbound SMS Interaction window provides the following functionality:
- Compose a message/response.
- Check the spelling of your message/response (see Procedure: Using Spelling Check to find potentially misspelled words in an SMS message, on page 240).
- Send a message/response.
- Call or e-mail the contact if the relevant information is available in the contact database.
- Transfer the interaction (see Step 7).
- Mark the interaction as `Done`.

- Set a disposition code for the interaction.
- Add a note to the interaction.
- View and edit Case Information for the current interaction.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- View and manage contact history. See “Managing Contact History” on page 291.
- View and manage contact information. See Procedure: Finding and viewing an interaction in the contact database, on page 292.

The message-transcript area of the SMS Interaction window contains color-coded, time-stamped message lines from your company’s system, as well as the messages that are sent by the contact (see Figure 174). If the interaction is in Session Mode, your replies are also displayed. A different color is designated for each message type. The colors are defined by your system administrator.

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 175). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.

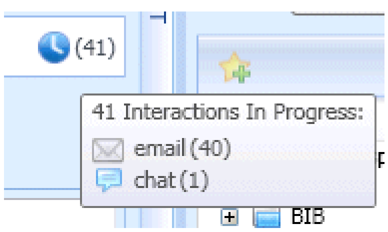


Figure 175:Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 176 on page 235). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

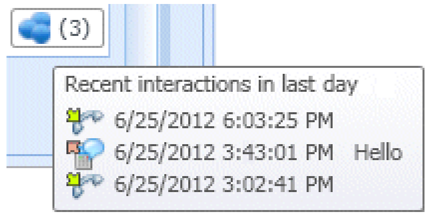


Figure 176:Recent interactions matrix displaying the list of interactions with the current contact within the last day

5. To reply to your contact, enter a message in the message area, and then click `Send`.

   Your message is displayed to the contact on the SMS device that the contact is using to communicate with you.

   If the interaction is in **Page Mode**, after you click `Send`, the interaction window is closed and the interaction is automatically marked as `Done`, unless you are configured to set a disposition code before you close an interaction window (see “Assigning Disposition Codes” on page 287). Go to Step 8.

   If the interaction is in **Session Mode**, your message is also added to the transcript area of the SMS Interaction window. After you click `Send`, the SMS Interaction window is minimized. You can restore the window in two ways:

   - By selecting the interaction from the Microsoft Windows taskbar
   - By clicking it in the Interaction Bar at the bottom of the Main Window (refer to Chapter 33, “Task: Using the Interaction Bar,” on page 347 for information about using the Interaction Bar)

6. In SMS Session Mode, messages that are sent by your contact are displayed together with your messages in the message-transcript area (see Figure 177).

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

   - Use the Notepad to attach a note to the interaction history. See “Managing Contact History” on page 291.
   - View and edit Case Information for the current interaction.
   - View and manage contact history. See “Managing Contact History” on page 291
   - View and manage contact information. See Procedure: Finding and viewing an interaction in the contact database, on page 292
   - View the Standard Response Library if you decide to call the sender instead of replying to the e-mail. See “Inserting a Standard Response into an E-Mail Interaction” on page 319.
   - Call the sender by clicking the `Action` menu drop-down list that is displayed next to the contact name (see Figure 123 on page 166).

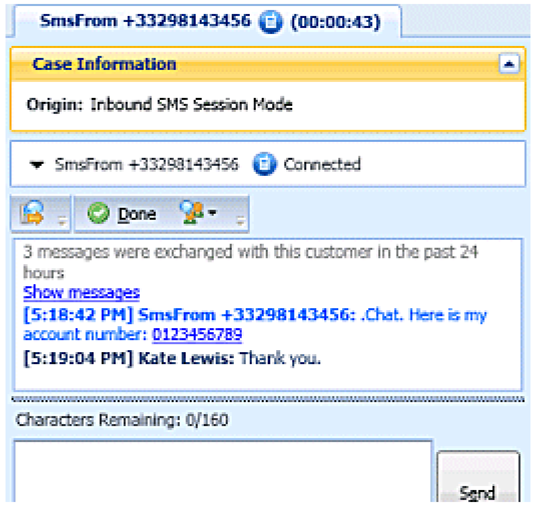


Figure 177:SMS Interaction window Case Information, Contact Action area, toolbar, and message area

7. If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
   - Instant-transfer the SMS to another internal target. See Procedure: Starting an instant SMS transfer, on page 243).
   - Start a consultation with another party:
     - Start an Instant Messaging consultation. See Procedure: Initiating an Instant Messaging session, on page 146.
     - Start a Voice consultation. See “Starting a Voice Conference” on page 103.
8. When you are finished interacting with your contact, click `Done` to stop the current SMS interaction.
   - The transcript is saved in the contact history and the SMS Interaction window is closed.
   - Set a disposition code. See “Assigning Disposition Codes” on page 287.

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

End of procedure

Creating an Outbound SMS Interaction

Interaction Workspace enables you to send an SMS to any device or system that is capable of receiving an interaction in this format. You can use the `Contact Action` menu of the Contact Directory or an active interaction to open the SMS Interaction window and create a new SMS interaction (see Figure 178).

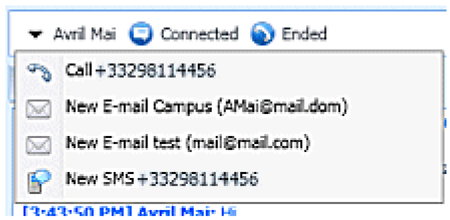


Figure 178:Contact Action menu in an active-interaction window

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

Procedure:
Creating an outbound SMS interaction

Purpose: To create an outbound SMS interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. From an active interaction, open the `Contact Action` menu (see Figure 179).

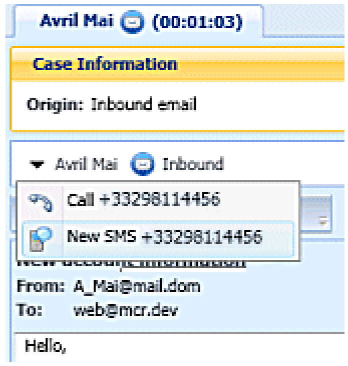


Figure 179:Contact Action menu in an active-interaction window

Alternately, from the Contact Directory, find a contact (Procedure: Using the Team Communicator feature to find a contact, on page 62), and then open the `Contact Action` menu (see Figure 180).

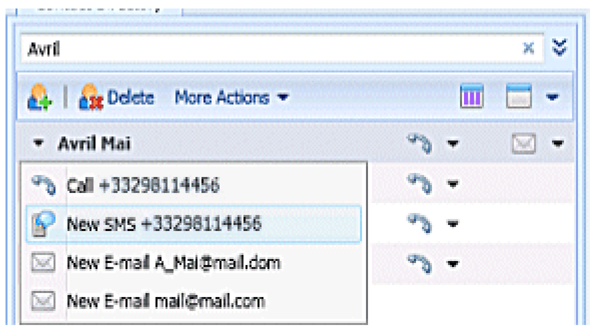


Figure 180:Contact Action menu in the Contact Directory

2. Select `New SMS`.
3. If you started a new SMS from an active interaction, the SMS view is displayed in the interaction window that is displayed below the active interaction (see Figure 181).

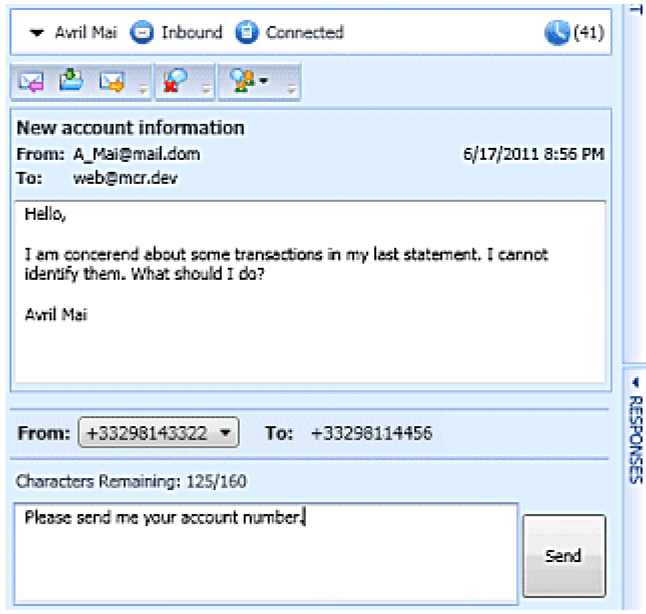


Figure 181:An SMS interaction, blended into an active e-mail interaction

If you started a new SMS from the Contact Directory, a new SMS Interaction window is displayed (see Figure 182).

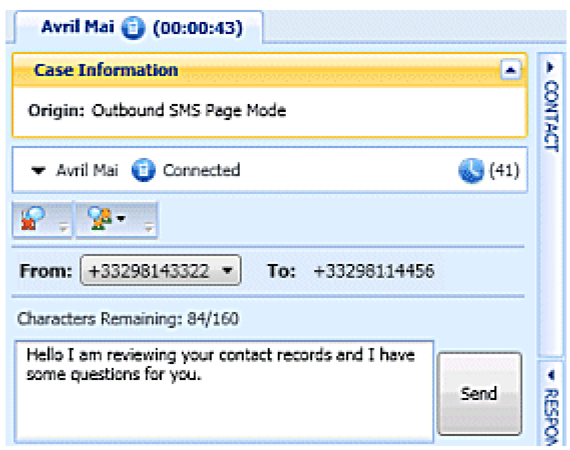


Figure 182:New SMS Interaction window

4. To send an SMS interaction (Page Mode), in the SMS text area, enter your message and then click `Send`.

   The message is sent to your contact and the SMS view or SMS Interaction window is closed.

End of procedure

Spelling Check

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

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

Purpose: To verify the spelling of the content of an outbound SMS message.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active SMS interaction (see "Receiving and Handling an Inbound SMS Interaction" on page 232 or "Creating an Outbound SMS Interaction" on page 237).

Start of procedure

1. Begin to enter text in the message area of an SMS Interaction window (see Procedure: Handling an inbound SMS interaction, on page 232 or Procedure: Creating an outbound SMS interaction, on page 237).

   You can enter text by typing at the insertion point, pasting content from another document, or inserting a standard response (Chapter 29, "Task: Using the Standard Response Library," on page 319).

2. When Spelling Check is on, words in the message area that are not in the specified dictionary are underlined by a red, wavy line. Figure 183 shows a chat message that contains a word that is not in the `English (United States)` dictionary (the default dictionary for this user). The behavior of Spelling Check is the same in all windows. The misspelled word is `happening`, which is misspelled as `happppening`.

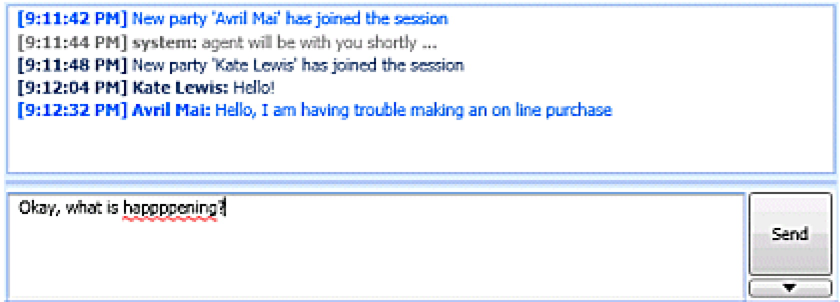


Figure 183:Chat message composition area, displaying a misspelled word that is underlined in red

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

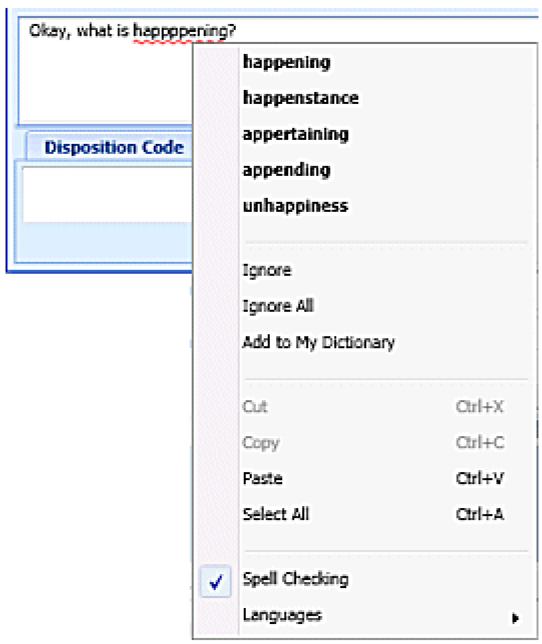


Figure 184:Chat Interaction window Spelling Check menu

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

- `Languages`—Select to open the list of available language dictionaries. You can select a different language dictionary.

End of procedure

Chapter

22 Task: Transfer an SMS Interaction

In this chapter, you will learn how to transfer SMS interactions to an internal target.

This chapter contains the following section:

Transferring an SMS Interaction

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

This section contains the following procedure:

- Procedure: Starting an instant SMS transfer, on page 243
- Procedure: Receiving a transferred SMS, on page 245

Procedure:
Starting an instant SMS transfer

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

- You have an active interaction with a contact (see Procedure: Handling an inbound SMS interaction, on page 232).

Start of procedure

1. In the active SMS Interaction window, click `Transfer` to open the Team Communicator (see Figure 185) to find the internal target to whom you want to transfer the current interaction (see the Procedure: Using the Team Communicator feature to find an internal target, on page 60).

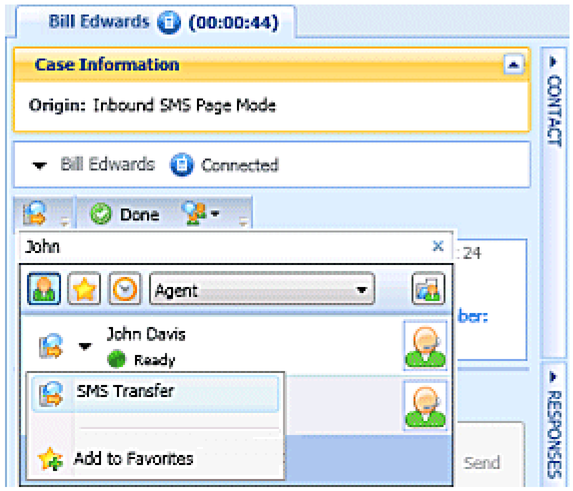


Figure 185:Finding an internal target of an SMS transfer in the active SMS Interaction window

2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and then select `SMS Transfer`.

   An invitation is sent to the target to accept the SMS transfer. If the target accepts the interaction-transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target (see Figure 186).

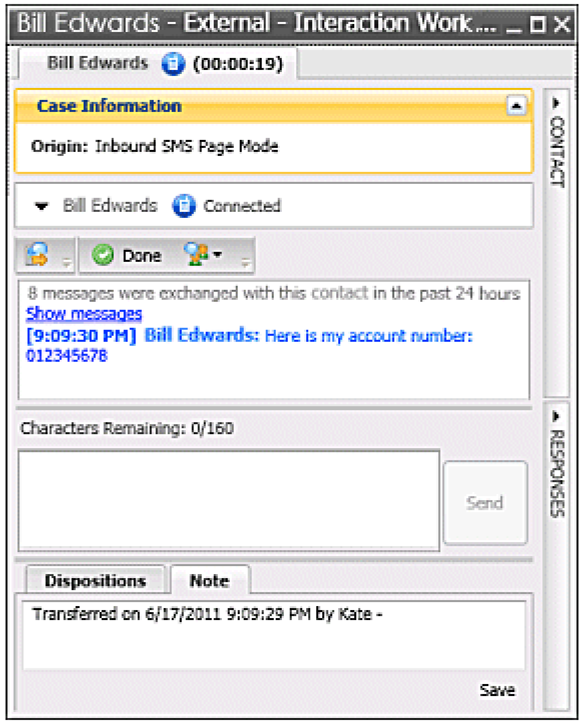


Figure 186:Transferred SMS Interaction window displayed on the desktop of the transfer target

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

End of procedure

Procedure: Receiving a transferred SMS

Purpose: To receive a transferred SMS interaction from another agent.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- Your status is `Ready` for the SMS media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).

Start of procedure

1. If another agent wants to transfer an SMS interaction to you, you are notified of the consultation request by the Interaction Workspace Interaction Preview interactive notification (see Figure 187).

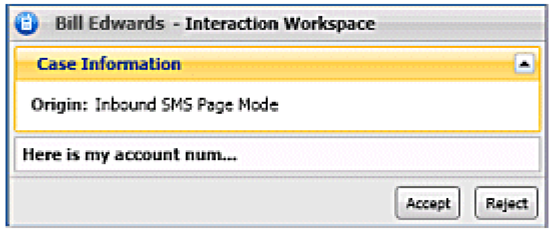


Figure 187:Interaction Preview interactive notification, informing you of a transfer request

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

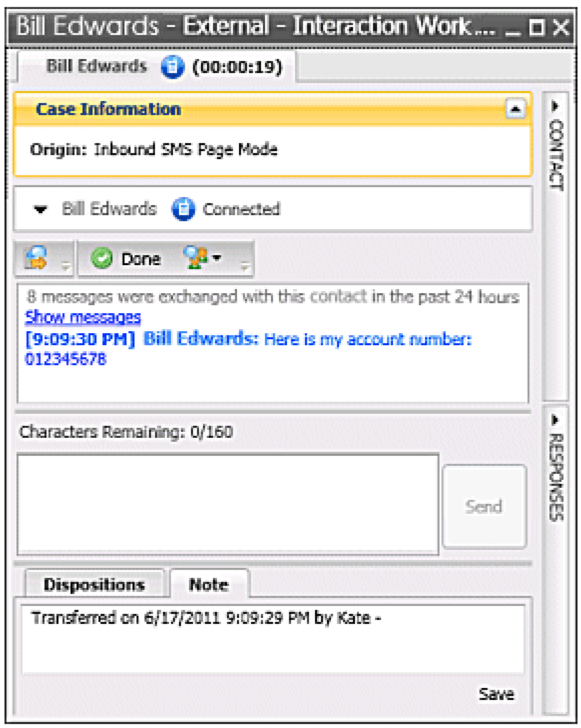


Figure 188:SMS Interaction window, displaying your status as connected to the SMS party

2. You are now the owner of the SMS interaction. Refer to Step 3 on page 233 of the Procedure: Handling an inbound SMS interaction, for information about how to handle an SMS interaction.

End of procedure

Chapter

23 Task: Blend Different Media into a Single Conversation

In this chapter, you will learn how to use the Interaction window to manage a conversation with a contact or other party by using different media types simultaneously.

Interaction Workspace enables you to blend more than one media type into your conversation. You can chat with a contact online, while simultaneously speaking together on the phone and composing an e-mail message to send information in writing. You can also manage a conference call with a contact and an internal party, while simultaneously conducting an IM session with the internal party. You can receive a phone number or e-mail address in an e-mail, chat, or SMS interaction, and then click it to launch a new interaction.

Interaction Workspace provides many ways to blend interaction media simultaneously. The following sections provide some examples of what you can do:

The procedures in this chapter demonstrate the principles of media blending; they do not show all the possible media-blending combinations.

Media Blending Overview

Interaction Workspace enables you to handle multiple, related interactions in a single window, and transition from one media type to another within the same window.

For example, if you are handling a chat interaction with a contact, you can start an IM consultation in the same window, and then you can add an e-mail interaction while you add a voice consultation.

When you are engaged in one or more consultations with another party, such as another agent or other internal target, Interaction Workspace displays a list of your active consultations (Figure 189) whenever you display the Team Communicator by clicking the `Instant Transfer`, `Instant Conference`, and `Start Consultation` buttons in the active interaction.

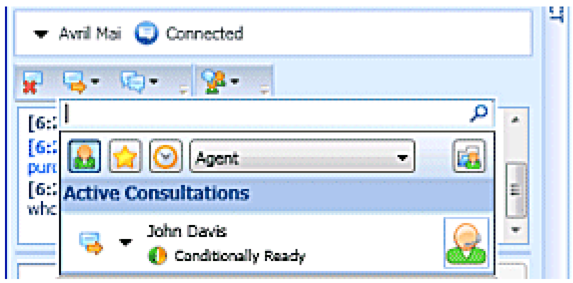


Figure 189:Team Communicator displaying active consultations

Table 1 lists some of the media blending combinations that are available from each media channel, including consultations. Table 2 lists the media blending combinations that are available for each consultation media-type.

Table 1: Some of the available media blending by type of interaction

Interaction	Media blending and consultation
Voice (Contact)	E-mail
	SMS
	Voice consultation
	IM consultation
Voice (Internal target)	IM
	Voice consultation
	IM consultation
IM (Internal target)	Voice (Internal target)

Table 1: Some of the available media blending by type of interaction (Continued)

Interaction	Media blending and consultation
E-mail (inbound from contact)	Voice
	SMS
	Voice consultation
	IM consultation
E-mail (outbound to contact)	Voice
	SMS
	Voice consultation
	IM consultation
Chat	Voice
	E-mail
	SMS
	Voice consultation
	IM consultation
	Chat consultation
SMS	Voice
	E-mail
Workitem	SMS

Table 2: Available consultation types and blending consultation types by interaction-type

Interaction	1st consult	1st transition consult	2nd transition consult
Voice	Voice consult	IM consult	X
E-mail	Voice consult	IM consult	X
	IM consult	Voice consult	X

Table 2: Available consultation types and blending consultation types by interaction-type (Continued)

Interaction	1st consult	1st transition consult	2nd transition consult
Chat	Voice consult	IM consult	Chat consult
		Chat consult	IM consult
	IM consult	Voice consult	Chat consult
		Chat consult	X
	Chat consult	Voice consult	IM consult
		IM consult	Voice consult

Blending One Media with Another

From an active interaction, to add a new media-type to a conversation, click on the `Action` menu that is next to the name of the party (see Figure 190).

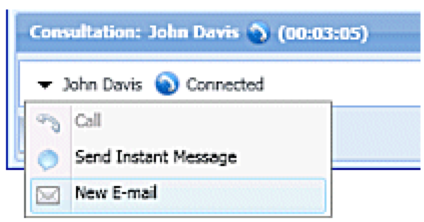


Figure 190:Active party Action menu displaying available media

The `Action` menu displays the media channels that are available for blending. The media that are available depends on several factors, including which media are available in your environment, what contact information is available, and to which media channels you are logged in.

The Team Communicator also displays the `Action` menu for each party with whom you have an active consultation when you click the `Start Consultation` button.

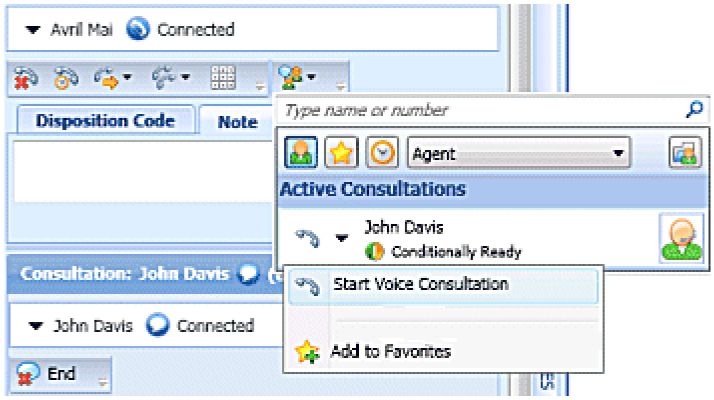


Figure 191:Active Consultations Action menu in Team Communicator

Blending an E-Mail Interaction with a Voice Interaction

You can e-mail a contact or other party with whom you are engaged in a voice interaction. The opposite scenario is also possible; you can call a contact from an active E-Mail Interaction window.

Procedure:
Blending an E-Mail interaction with a current Voice interaction

Purpose: To add a different type of media to an existing interaction.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see “Receiving a Voice Interaction” on page 71).

Start of procedure

1. During a call with a contact you might want to send an e-mail message to the contact. The Voice Interaction window (see Figure 192) enables you to add an e-mail interaction to the conversation in the same window.

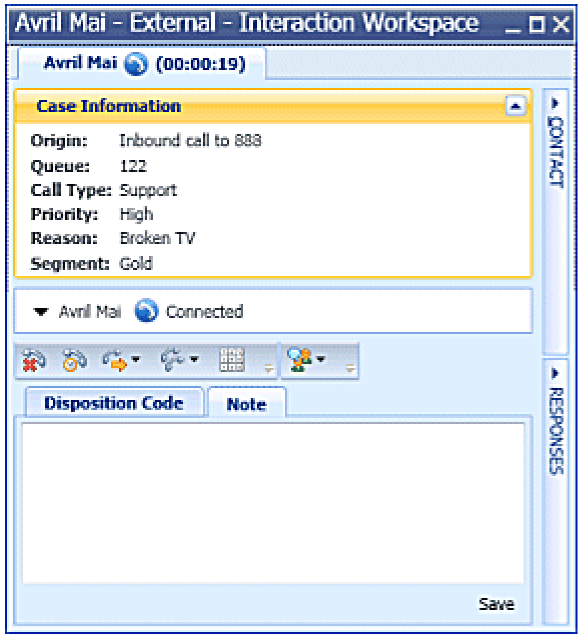


Figure 192:Voice Interaction Window

To open the list of available media for the contact, in the interaction window, click on the `Party Action` menu that is next to the name of the contact (see Figure 193).

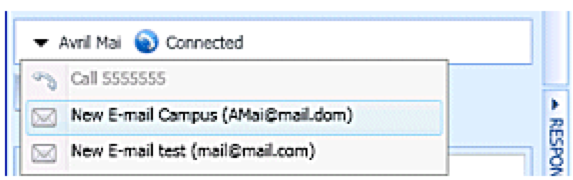


Figure 193:Interaction window Party Action menu

2. Select the e-mail address to which you want to send the e-mail message (see Figure 193).

   The E-Mail Interaction view is added to the Voice Interaction window (see Figure 194). You can now compose an e-mail message to the contact.

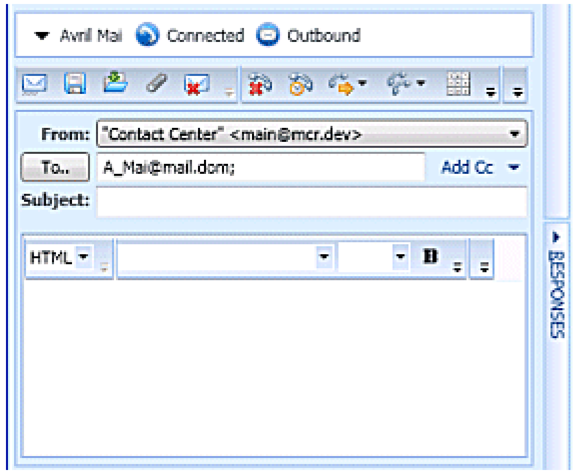


Figure 194:Voice interaction and e-mail interaction blended in the same window

3. Complete the e-mail (Procedure: Creating and sending a new e-mail interaction to a contact, on page 166) and voice (Procedure: Handling an inbound voice interaction, on page 72) interactions.

End of procedure

Blending a Voice Interaction with a Chat Interaction

You can call a contact or other party with whom you are engaged in a chat interaction. The opposite scenario is not possible; you cannot start a chat interaction from an active Voice Interaction window.

Procedure: Blending a voice interaction with a current chat interaction

Purpose: To add different media-types to an existing interaction.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see Procedure: Handling an inbound chat interaction, on page 179).

Start of procedure

1. During a chat with a contact you might want to call the contact. The Chat Interaction window (see Figure 195) enables you to add an voice interaction to the conversation in the same window.

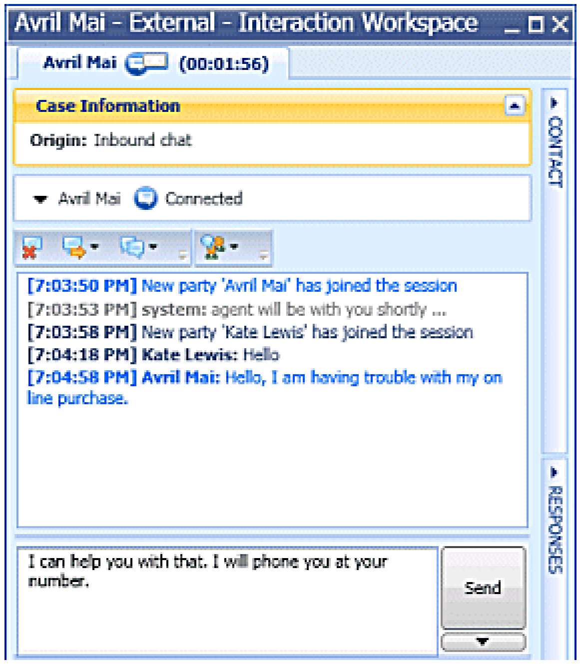


Figure 195:Chat Interaction Window

To open the list of available media for the contact, in the interaction window, click on the `Party Action` menu that is next to the name of the contact (see Figure 196).

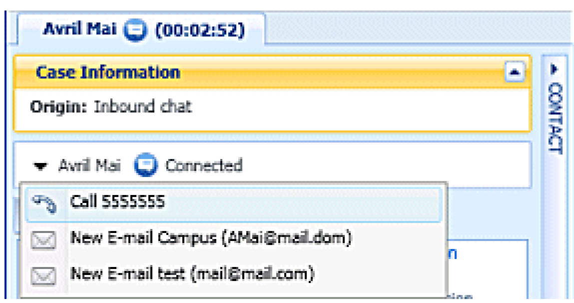


Figure 196:Interaction window Party Action menu

2. Select the phone number that you want to call (see Figure 196).

   The Voice Interaction view is added to the Chat Interaction window (see Figure 197). Both interactions have the `Connected` status. You can now speak with the contact.

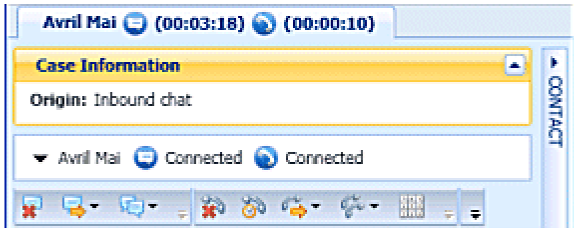


Figure 197:Chat interaction and voice interaction blended in the same window

3. Complete the chat (Procedure: Handling an inbound chat interaction, on page 179) and voice (Procedure: Handling an inbound voice interaction, on page 72) interactions.

End of procedure

Blending Internal Voice Interactions and Internal IM Interactions

Interaction Workspace enables you to blend media during internal interactions, whether you are calling agent-to-agent, or are consulting with another party while you are handling an interaction with a contact, you can add different media to your internal interactions.

This section contains the following procedures:

- Procedure: Blending an internal IM with an active internal voice interaction, on page 255
- Procedure: Blending an internal IM consultation with an active internal voice consultation, on page 258.
- Procedure: Blending a voice consultation with an IM consultation, on page 261.

Procedure: Blending an internal IM with an active internal voice interaction

Purpose: To add an internal IM interaction to an active internal voice interaction and handle both in the same window.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).

- You have an active call with an internal target (seeProcedure: Calling an internal target, on page 77).

Start of procedure

1. During a call with an internal target, you might want to blend an IM interaction into your conversation. The Voice Interaction window (see Figure 198) enables you to add multiple conversations in the same window.

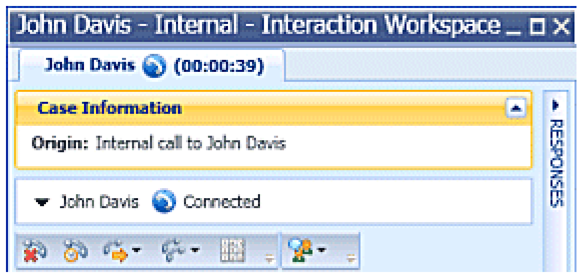


Figure 198:Active voice interaction, with an internal target

To add an IM interaction to your conversation, click the `Party Action` menu next to the name of your internal target and select `Send Instant Message` (see Figure 199).

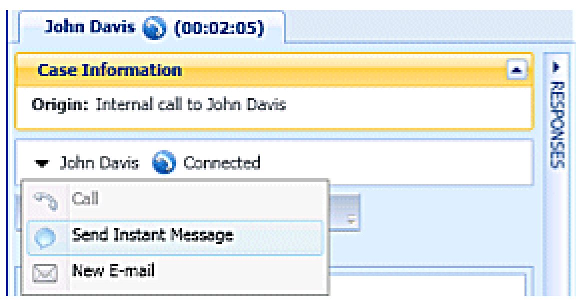


Figure 199:Party menu in the active Voice Interaction window

The IM interaction view is displayed in the active Voice Interaction window (seeFigure 200).

2. Enter a message to your target. The session starts in the interaction window (see Figure 200) 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.

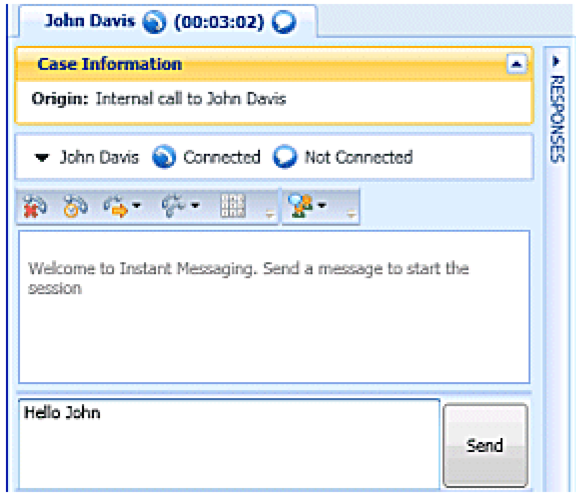


Figure 200:Starting an IM interaction in the active interaction window

3. If your target accepts your invitation, you can conduct an IM session by entering a text message to the internal target in the text field at the bottom of the view (see Figure 200). The transcript of your conversation is displayed in the message transcript area (see Figure 201).

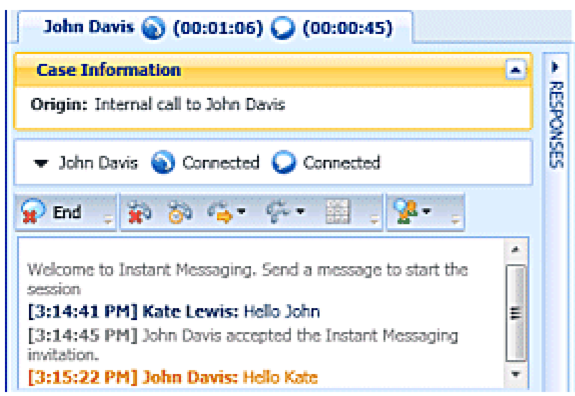


Figure 201:Message-transcript area of the IM interaction view

4. Complete your voice interaction by following Procedure: Calling an internal target, on page 77. Complete your IM interaction by following Procedure: Initiating an Instant Messaging session, on page 146. You can end either of the interactions while keeping the other active.

End of procedure

Procedure: Blending an internal IM consultation with an active internal voice consultation

Purpose: To add an internal IM consultation to an active internal voice consultation and handle both in the same window.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You have an active interaction with a contact (see “Receiving a Voice Interaction” on page 71).

Start of procedure

1. During a call with a contact you might want to start a voice consultation and then blend in an IM consultation. The Voice Interaction window (see Figure 202) enables you to add multiple consultation conversations in the same window.

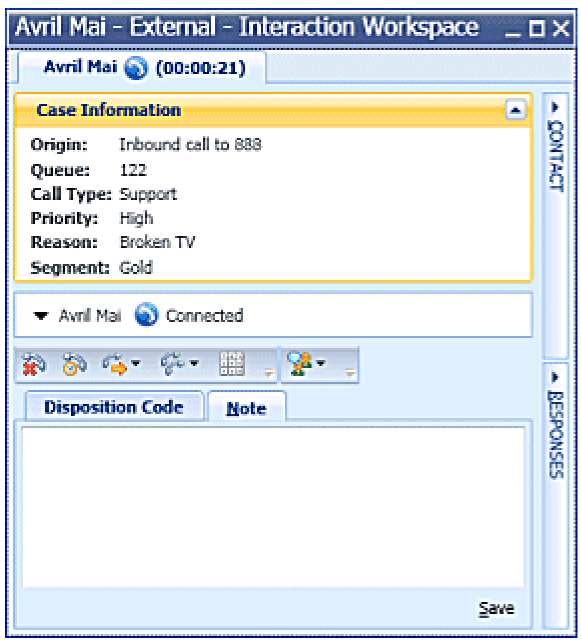


Figure 202:Voice Interaction Window

Start a consultation call with an internal target or other party by using the following Procedure: Starting a voice consultation, on page 86. The consultation is added to the current interaction window (see Figure 203).

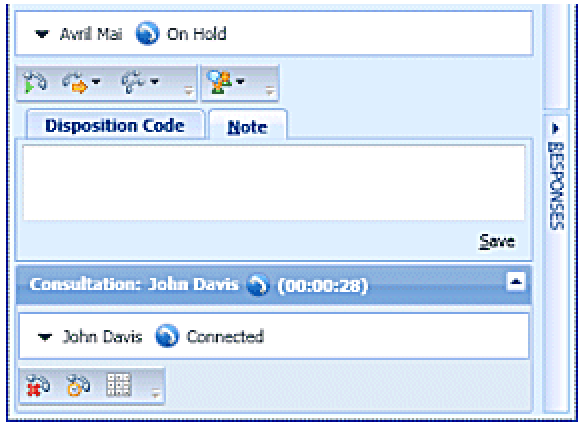


Figure 203:Voice Interaction window, with an added voice consultation

2. To add an IM consultation an active voice consultation, click the `Start Consultation` button on the main interaction toolbar (see Figure 204).

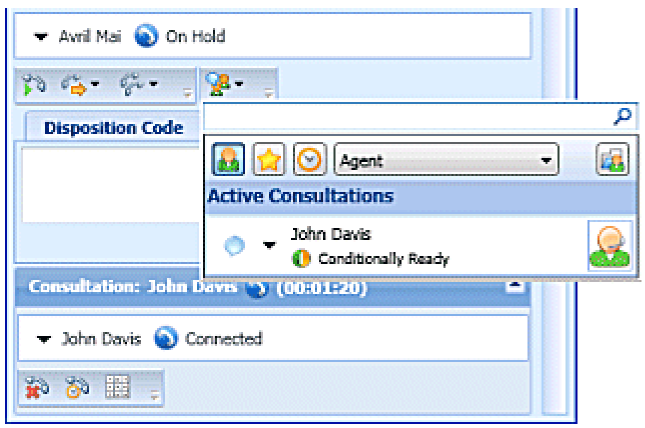


Figure 204:Team Communicator, displaying active consultations

The Team Communicator is displayed. It displays a list of your active consultations (see Figure 204).

3. Click the `Action` menu that is next to the name of the party with whom you want to start an IM consultation (see Figure 205) to display a list of available media for the party.

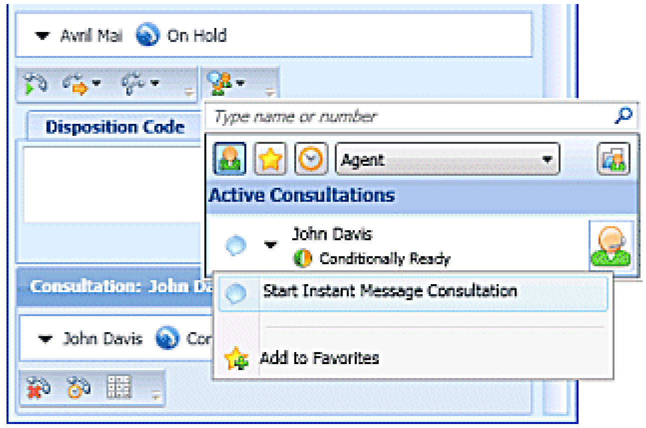


Figure 205:Active Consultation Action menu

4. Click `Start Instant Message Consultation` (see Figure 205).

   The IM interaction view is displayed in the active interaction window beneath your active voice consultation view (see Figure 206).

Figure 206:An Instant Messaging consultation added to the current voice consultation

5. Enter a message to your target. The session starts in the Interaction window (see Figure 206) when you send your first message.

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

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

6. If your target accepts your invitation, you can conduct an IM session by entering a text message to the internal target in the text field at the bottom of the view (see Figure 207).

   See the Procedure: Starting a Consultation IM session from an active interaction, on page 151, for information on how to handle an IM interaction.

   See the Procedure: Starting a voice consultation, on page 86, for information on how to handle a voice consultation.

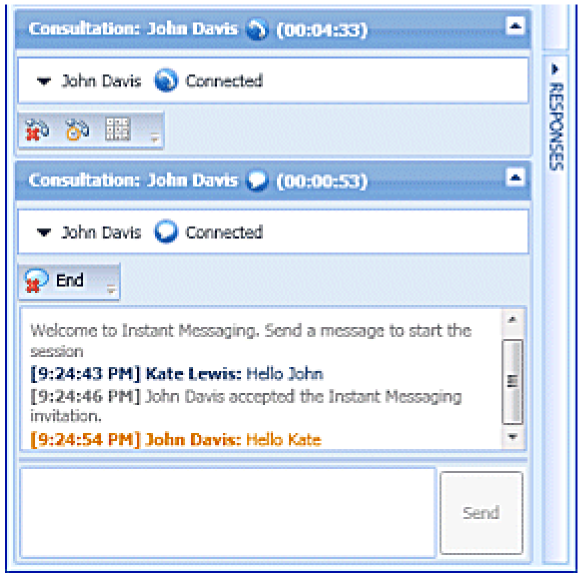


Figure 207:An Instant Messaging consultation added to a voice consultation in the Interaction window

End of procedure

Procedure: Blending a voice consultation with an IM consultation

Purpose: To add an internal voice interaction to an active internal IM interaction and handle both in the same window.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You have an active interaction with a contact (see “Receiving a Voice Interaction” on page 71).

Start of procedure

1. During a call with a contact you might want to start an IM consultation and then blend in a voice consultation. The Voice Interaction window (see Figure 208) enables you to add multiple consultation conversations in the same window.

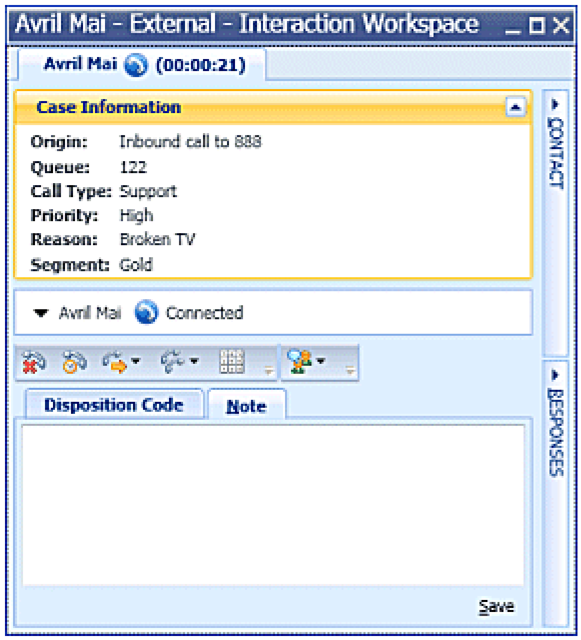


Figure 208:Voice Interaction Window

Start a consultation IM with an internal target or other party by using the following Procedure: Starting a Consultation IM session from an active interaction, on page 151. The consultation is added to the current interaction window (see Figure 209).

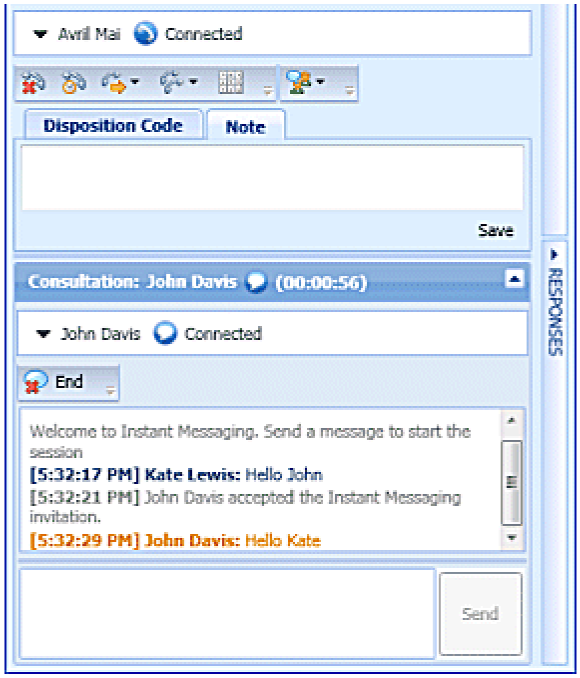


Figure 209:Voice Interaction window, with an added IM consultation

2. To add a voice consultation to an active voice consultation, click the `Start Consultation` button on the main interaction toolbar (see Figure 210).

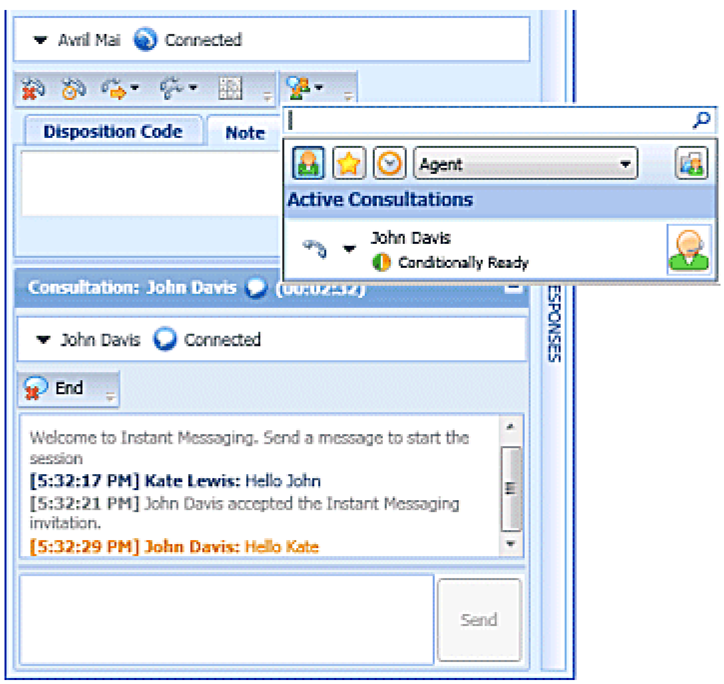


Figure 210:Team Communicator, displaying active consultations

The Team Communicator is displayed. It displays a list of your active consultations (see Figure 210).

3. Click the `Action` menu that is next to the name of the party with whom you want to start a voice consultation (see Figure 211) to display a list of available media for the party.

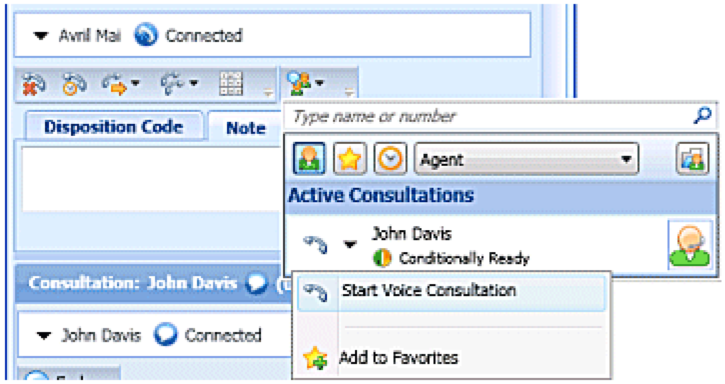


Figure 211:Active Consultation Action menu

4. Click `Start Voice Consultation` (see Figure 211).

   The voice interaction view is displayed in the active interaction window beneath your active IM consultation view (see Figure 212).

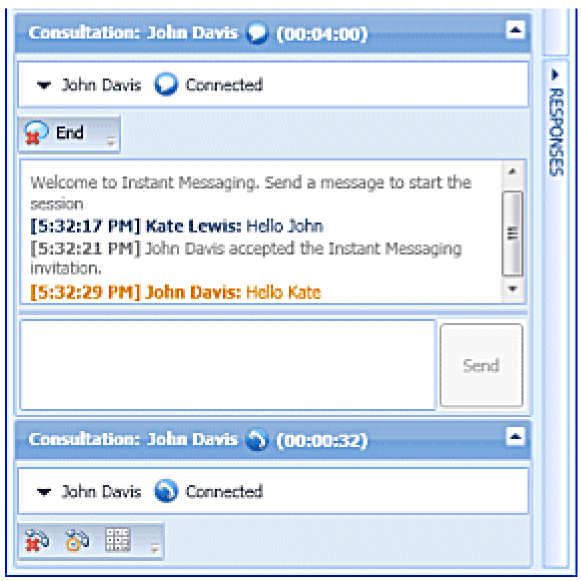


Figure 212:A voice consultation added to the current IM consultation

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

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

5. If your target accepts your invitation, you can speak with your voice consultation target.

   See the Procedure: Starting a voice consultation, on page 86, for information on how to handle a voice consultation.

   See the Procedure: Starting a Consultation IM session from an active interaction, on page 151, for information on how to handle an IM interaction.

End of procedure

Click to Blend

Interaction Workspace can recognize phone numbers and e-mail addresses in e-mail, chat, and SMS interactions. When Interaction Workspace recognizes an e-mail address or phone number in an interaction, it converts the information into a link. When you click a link, it can launch a new interaction.

Procedure:
Creating a new e-mail interaction by clicking an e-mail address link in a chat interaction

Purpose: To create a new e-mail interaction by clicking an e-mail address link in another interaction.

The principles of this procedure are applicable to e-mail links in chat, e-mail, and SMS interactions.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You have an active chat, e-mail, or SMS interaction.

Start of procedure

1. If you are handling a chat interaction (see Procedure: Handling an inbound chat interaction, on page 179), and your contact sends you an e-mail address in their message, Interaction Workspace will convert the e-mail address to an address link (see Figure 213). The link is underlined and highlighted in a color that is distinct from the other text.

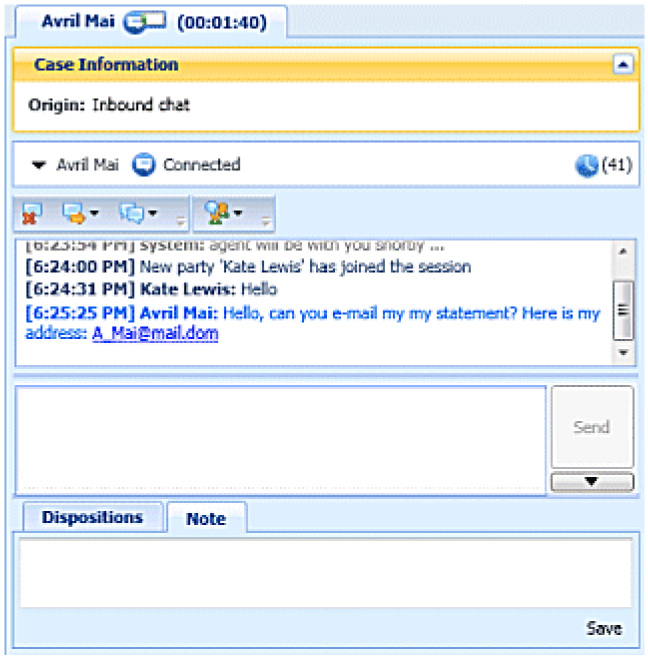


Figure 213:Chat interaction with a clickable e-mail link from the contact

2. To create an e-mail interaction, click the link.

   The E-Mail Interaction view is displayed within the Chat Interaction window (see Figure 214).

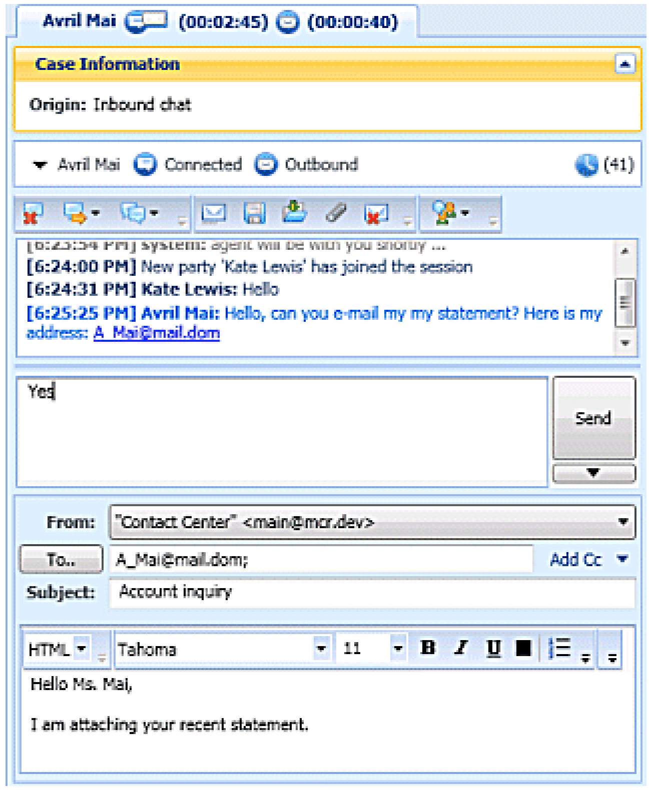


Figure 214:Chat Interaction window containing an E-Mail Interaction view that was added by clicking an e-mail address link in the chat transcript

3. Compose an e-mail message to the recipient (Procedure: Creating and sending a new e-mail interaction to a contact, on page 166). The controls for the e-mail interaction are displayed next to the chat controls (see Figure 214).
4. Click `Send` to send the e-mail interaction to the address that you clicked. You can also click `Save`, `Save In Draft workbin`, `Add Attachment`, or `Delete`—see “Creating and Handling a New or Reply E-Mail Interaction” on page 161.
5. Complete the chat interaction (see Procedure: Handling an inbound chat interaction, on page 179).

End of procedure

Procedure:
Creating a new voice interaction by clicking an phone number link in an SMS interaction

Purpose: To create a new voice interaction by clicking a phone number link in another interaction.

The principles of this procedure are applicable to phone number links in chat and SMS interactions.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You have an active chat or SMS interaction.

Start of procedure

1. If you are handling an SMS interaction (see Procedure: Handling an inbound SMS interaction, on page 232), and your contact sends you a phone number in their message, Interaction Workspace will convert the phone number to a link (see Figure 215). The link is underlined and highlighted in a color that is distinct from the other text.

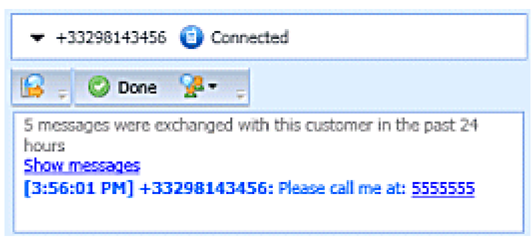


Figure 215:SMS interaction with a clickable phone number link from the contact

2. To create a voice interaction, click the link.

   The Voice Interaction controls are displayed within the SMS Interaction window and the connection status is added to the interaction-status view (see Figure 216).

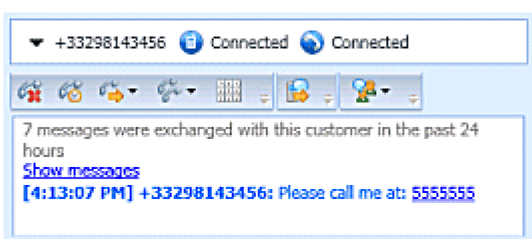


Figure 216:SMS Interaction window containing Voice Interaction controls that were added by clicking a phone number link in the SMS body

3. Complete the voice interaction (see Procedure: Calling a contact, on page 79).
4. Complete the SMS interaction (see Procedure: Handling an inbound SMS interaction, on page 232).

End of procedure

Chapter

24 Task: Handle a Workitem Interaction

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

This chapter contains the following sections:

Receiving and Handling an Inbound Workitem Interaction

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

This section contains the following procedure:

- Procedure: Handling an inbound workitem interaction, on page 271

Procedure: Handling an inbound workitem interaction

Purpose: To handle an inbound workitem interaction properly.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- Your status is `Ready` for the workitem-media channel (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are the internal target for the inbound interaction.

Start of procedure

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure 217).

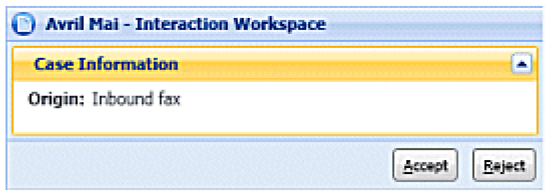


Figure 217:Workitem Interaction (in this case, a fax) interactive notification

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

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the followings steps:
   - Click `Accept` to display the interaction.
   - Click `Reject` to return the interaction to the queue.
   - Do nothing. The interaction will time-out and be redirected.
3. If you accept the interaction, the inbound Workitem Interaction window is displayed (see Figure 218).

   The Inbound Workitem Interaction window provides the following functionality:
   - Transfer (forward) the workitem to another internal target. See “Transferring a Workitem Interaction” on page 274.
   - Save the workitem in a workbin and close the Workitem Interaction window. See “Using Workbins to Access Stored Interactions” on page 277.
   - Select `Mark Done` for the current interaction to save the workitem in the contact history and close the Workitem Interaction window. See “Managing Contact History” on page 291.
   - Stat a voice or IM consultation with an internal target or with a contact. See “Starting a Voice Conference” on page 103 or Procedure: Initiating an Instant Messaging session, on page 146.

- Set a disposition code. See “Assigning Disposition Codes” on page 287.
- View and edit Case Information for the current interaction
- Initiate a voice consultation. See “Starting a Voice Conference” on page 103.
- Link to a web-page from a hyperlink in the Case Information view. The case information might contain a hyperlink to enable you to view a web-page that is related to the interaction, such as customer records. Click the hyperlink in the Case Information view to open a new browser window and view the link. Place your mouse pointer over the hyperlink to preview the web page from the Case Information view. The hyperlink might be a URL or highlighted anchor text.
- Call (or e-mail) the sender by clicking the `Action` menu that is displayed next to the contact name. See “Making a Voice Call” on page 76.
- View and manage contact history. See “Managing Contact History” on page 291.
- View and manage contact information. See Procedure: Finding and viewing an interaction in the contact database, on page 292.
- View the Standard Response Library if you decide to call the sender. See “Inserting a Standard Response into an E-Mail Interaction” on page 319.

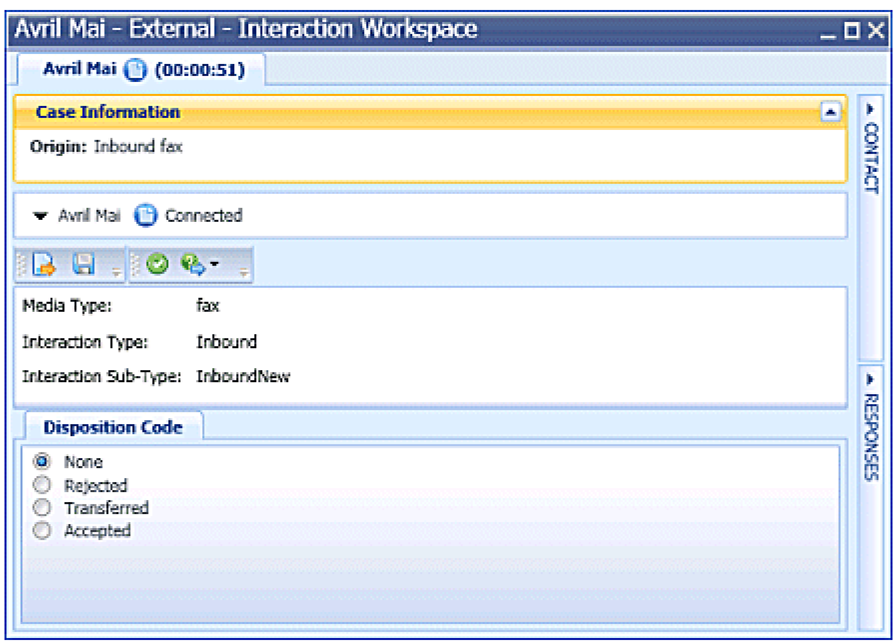


Figure 218:Inbound Workitem Interaction window

4. If there are interactions in progress for the current contact, the number of interactions is displayed beside the connection status of the interaction (see Figure 219). Place your mouse pointer over the icon to display the number and type of interaction(s) in progress (except voice interactions) for the current contact.

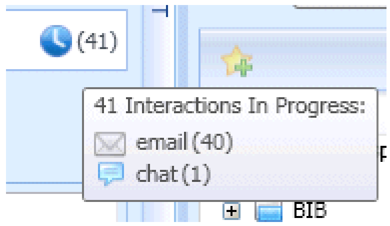


Figure 219:Dynamic Contact History Matrix, displaying the number and type of interactions in progress

You might be configured to be notified if there are recent interactions for the current contact; if so, the number of recent interactions is displayed beside the connection status of the interaction (see Figure 220). Place your mouse pointer over the icon to display the number and type of recent interactions for the current contact. If you click the icon, the Contact view is opened and the History tab is displayed. Your system administrator defines the contents as interactions during the last-specified number of days.

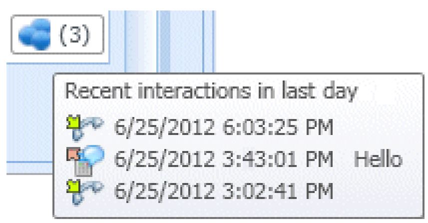


Figure 220:Recent interactions matrix displaying the list of interactions with the current contact within the last day

End of procedure

Transferring a Workitem Interaction

The Interaction Workspace Workitem Interaction window enables you to transfer your current workitem interaction to another party. In this section, you will learn how to use the Team Communicator feature to transfer a workitem interaction to an internal target or to a contact.

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

This section contains the following procedure:

- Procedure: Initiating a workitem transfer, on page 275

Procedure: Initiating a workitem transfer

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

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction with a contact (see "Receiving and Handling an Inbound Workitem Interaction" on page 271).

Start of procedure

1. In the active Workitem Interaction window, click `Transfer` to open the Team Communicator (see Figure 221) to find the internal target to whom you want to transfer the current interaction (see the Procedure: Using the Team Communicator feature to find an internal target, on page 60).

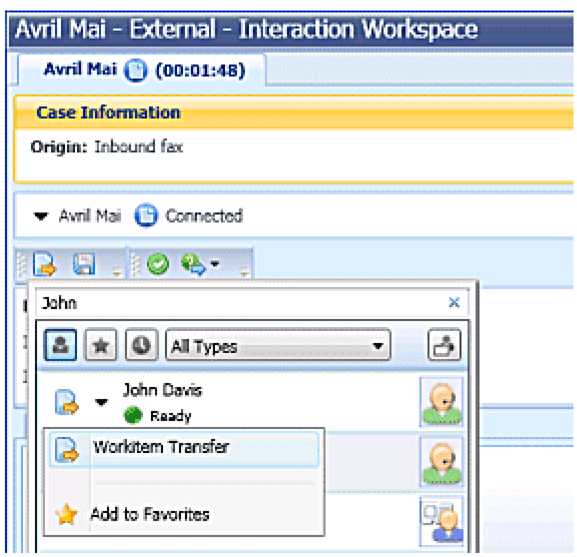


Figure 221:Finding an internal target for workitem transfer in the active Workitem Interaction window

2. Click the `Action Menu` drop-down list that is displayed next to the name of the internal target to whom you want to transfer the interaction and select `Workitem Transfer`.

   An invitation is sent to the target to accept the workitem transfer. If the target accepts the interaction transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target. If the target does not accept the interaction transfer request, the Workitem Interaction window remains displayed on your desktop and an error is displayed both at the top of the window and in the Interaction Workspace My Messages interactive notification.

End of procedure

Chapter

25 Task: Using Workbins

In this chapter, you will learn how to access interactions that are stored in a workbin and belong to you, your place, your agent group, or your place group.

A workbin is like a personal queue, in which you can store e-mail messages and other interactions that are to be handled later; however, unlike a queue, interactions that are stored in a workbin can be accessed in any order; they can be assigned to agents, places, agent groups, or place groups. Items that are stored in a workbin are owned by the owner of the workbin.

Open interactions can be saved to a workbin for future processing or collaborative processing by the agent, place, agent group, or place group. Interactions can also be distributed to workbins by Universal Routing Server.

This chapter contains the following section:

Using Workbins to Access Stored Interactions

Interactions can be routed to you, your place, your place group, or your agent group and stored in a workbin to be handled at any time.

Procedure: Accessing and handling interactions that are stored in a workbin

Purpose: To use a workbin to open an interaction.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You are the owner of the workbin in which the interaction is stored.

Start of procedure

1. To open the Workbin view from the Main Window, click the `Workbins` button (see Figure 222).

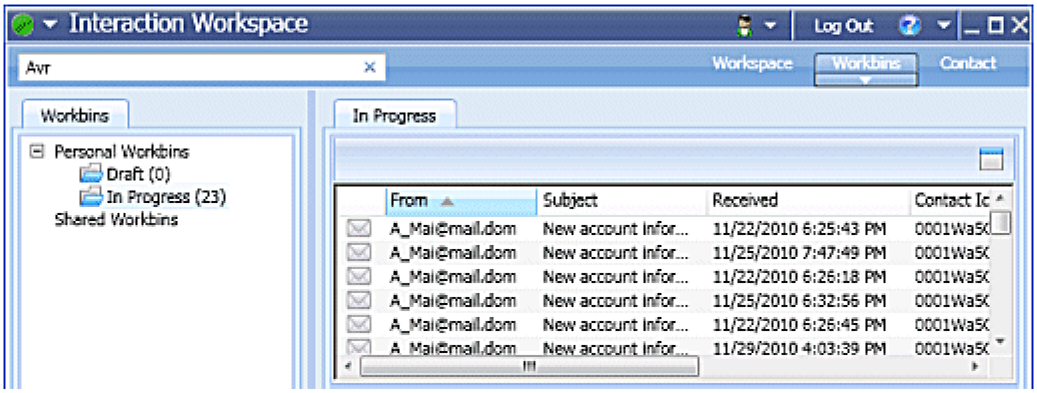


Figure 222:Workbins view in the Interaction Workspace Main Window

The Workbins view comprises three areas:

- Workbins Explorer—Enables you to select workbin folders from your personal workbins and your shared workbins
- Workbin view—Lists all the interactions that are stored in the selected workbins, and includes information about the status of the interaction; enables you to sort, search, and perform actions on interactions
- Workbin interaction information—Enables you to view the `Details` tab, the `Notes` tab, and the `Case Data` tab for the selected interaction (see Figure 228 on page 282)

2. In the Workbins Explorer, select the workbin that contains the interaction that you want to open.
3. In the Workbin view, scroll through the list of interactions to find the specific interaction that you want to open (see Figure 223).

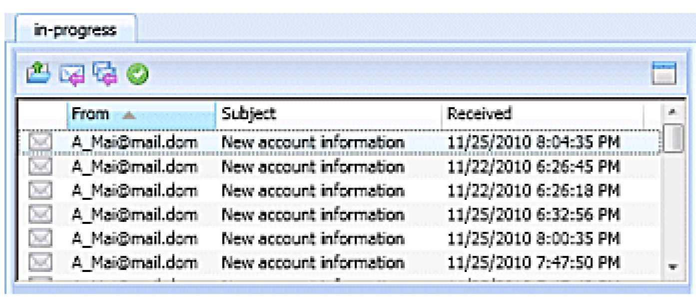


Figure 223:In Progress Workbin view in the Workbins view

4. To change the sorting order of the interactions, click the column headings in the table of interactions. Clicking the same column heading again reverses the sort order for that heading (see Figure 224).

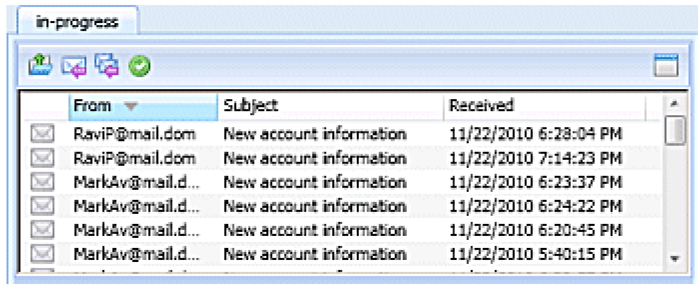


Figure 224:Changed sorting order in the Workbin view

5. Click the interaction that you want to handle when you find it in the Workbin view (see Figure 225).

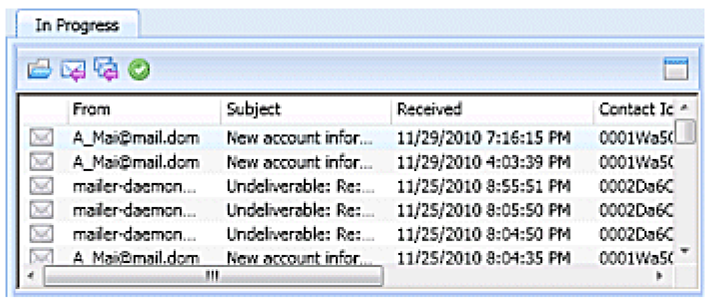


Figure 225:Workbin view with a selected e-mail interaction

When you select an interaction, the following functionality becomes available for the interaction, depending on the interaction type:

- `Open`—Opens the interaction in an Interaction window (see Procedure: Handling an inbound e-mail interaction, on page 158)
- `Reply` (for e-mail only)—Creates a reply and opens the interaction in an outbound E-Mail Interaction window (see Procedure: Replying to a inbound e-mail interaction, on page 161)
- `Reply All` (for e-mail only)—Creates a reply and opens the interaction in an outbound E-Mail Interaction window and addresses the e-mail to the sender and all other recipients of the original e-mail (see Procedure: Replying to a inbound e-mail interaction, on page 161)
- `Mark Done`—Complete the interaction and close the interaction window; you might be configured to specify a disposition code before you can click `Mark Done` (see Procedure: Handling an inbound e-mail interaction, on page 158 and “Assigning Disposition Codes” on page 287)

End of procedure

Procedure:
Storing an interaction in your Draft workbin

Purpose: To use your Drafts workbin to store an outbound e-mail interaction to be completed at a later time by you or another agent.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have accepted an inbound or transferred e-mail interaction (see "Receiving and Handling an Inbound E-Mail Interaction" on page 157) or you want to create a new outbound e-mail interaction (see "Creating and Handling a New or Reply E-Mail Interaction" on page 161).

Start of procedure

1. You can save a new outbound e-mail message or a reply outbound e-mail message (see Procedure: Replying to a inbound e-mail interaction, on page 161) to your Draft workbin.

   To create new outbound e-mail, use the Team Communicator to find the contact, and select `New E-Mail` (see Figure 226 and Procedure: Using the Team Communicator feature to find a contact, on page 62).

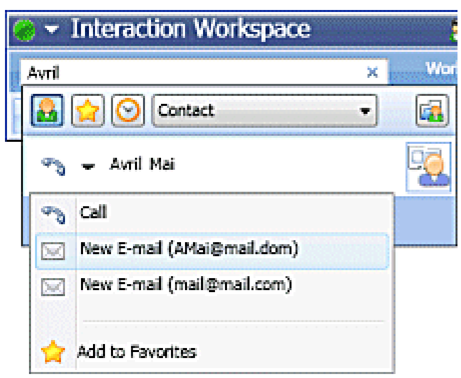


Figure 226:New E-Mail option in the Team Communicator Action menu

2. Compose your new or reply e-mail interaction in the E-Mail Interaction window (see Figure 227).

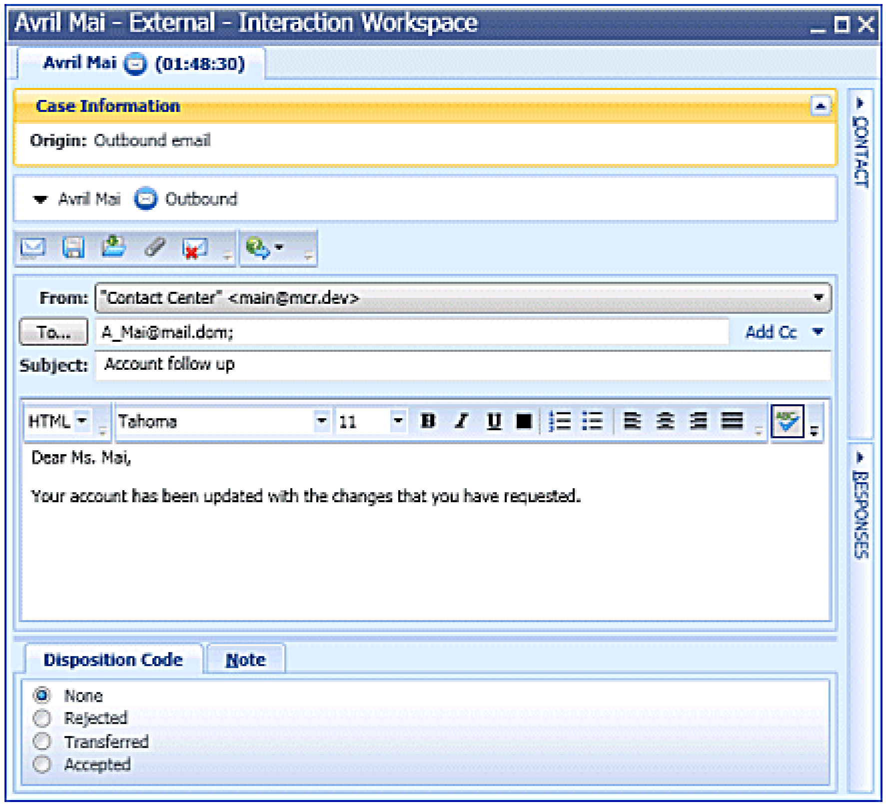


Figure 227:New outbound E-Mail Interaction window

3. To save the outbound e-mail interaction in your Draft workbin folder, click the `Save in Draft Workbin` button.

The interaction window closes, and the interaction is stored in your Draft workbin.

4. If you want to open the interaction later to continue to work on it, click the `Workbins` button on the Interaction Workspace Main Window (see Figure 228). The Workbins Explorer displays the number of interactions in each workbin, and your saved interaction is displayed in the Draft workbin.

   The Draft Workbin enables you to use the following functionality:

   - Find an interaction by scrolling through the list of interactions.
   - Change the sort order of interactions by clicking the interaction list column heads.
   - `Open`—Open the interaction in an inbound E-Mail Interaction window (see Procedure: Handling an inbound e-mail interaction, on page 158).
   - `Delete`—Delete the interaction permanently from the Interaction Server database (if you have the correct permissions).
   - `Details`—View the sender and recipient information, subject, and contents of the selected interaction.

- Use the Notepad to attach a note to the interaction history. See "Managing Contact History" on page 291
- `Case Data`—View Case Information and Disposition Code for the current interaction

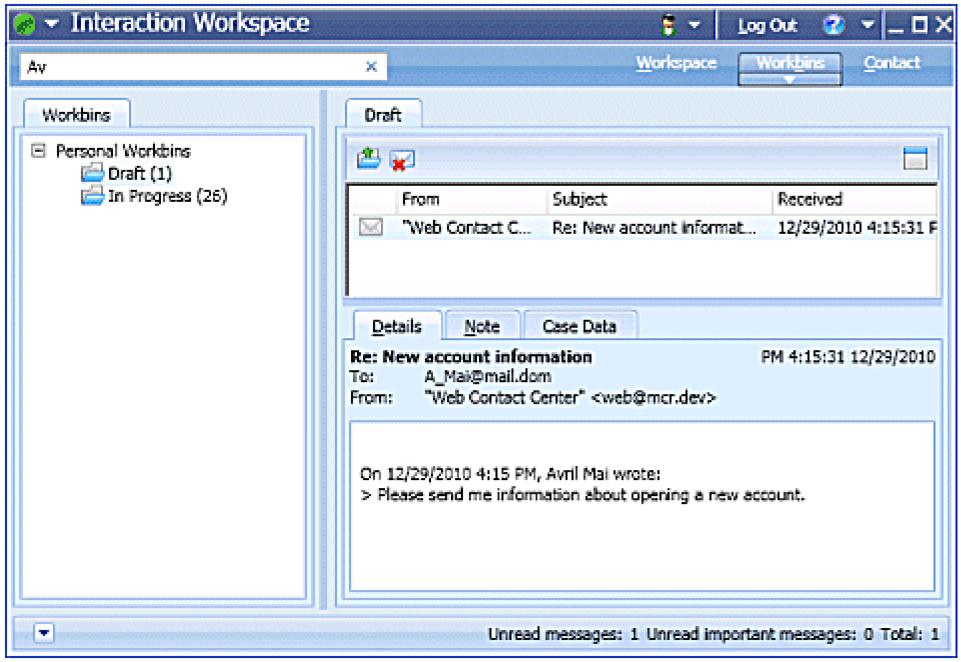


Figure 228:Workbins view in the Interaction Workspace Main Window with a selected draft interaction

5. If you want to hide or show column headings in the interaction list, right-click in the list and select the headings that you want to hide or show respectively (see Figure 229).

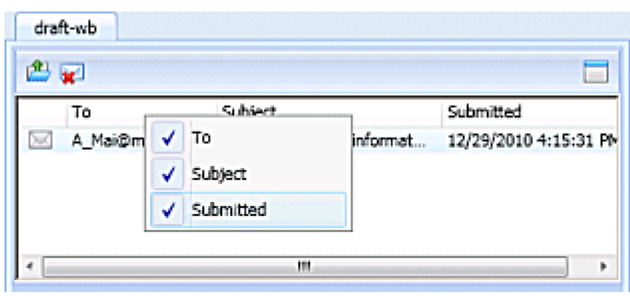


Figure 229:Interaction list column-heading contextual menu

6. To show or hide the interaction information area, click the `Show/Hide Details Panel` button. Figure 230 shows the Draft workbin in which the interaction-information area is hidden.

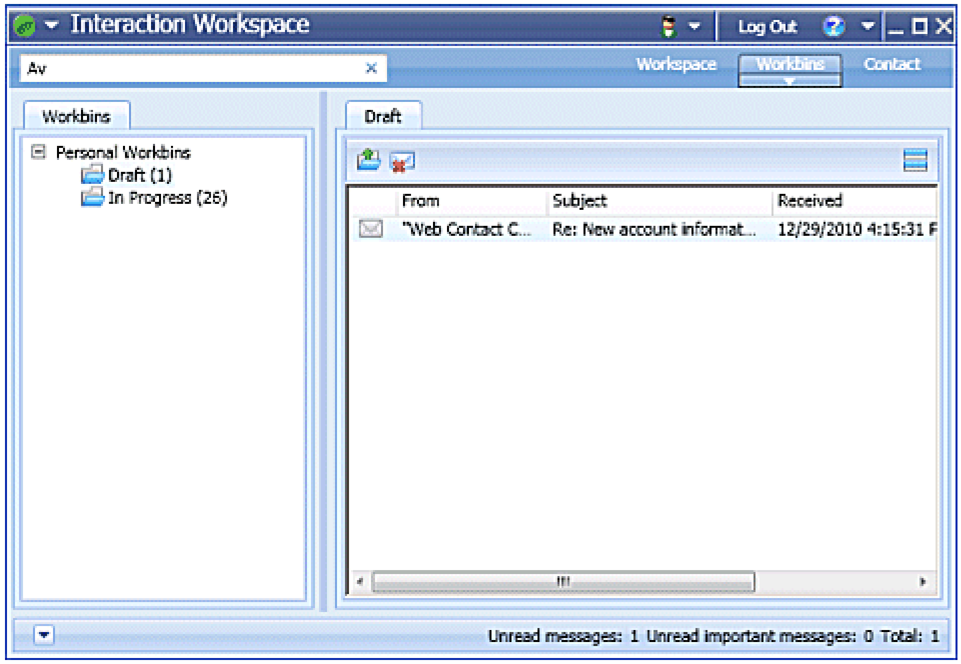


Figure 230:Draft workbin with the interaction information area hidden

7. When you have finished handling all the interactions in the `Draft` workbin, the `Draft` folder in the Workbins Explorer shows `0` entries and the Draft workbin shows *`No items`* (see Figure 231).

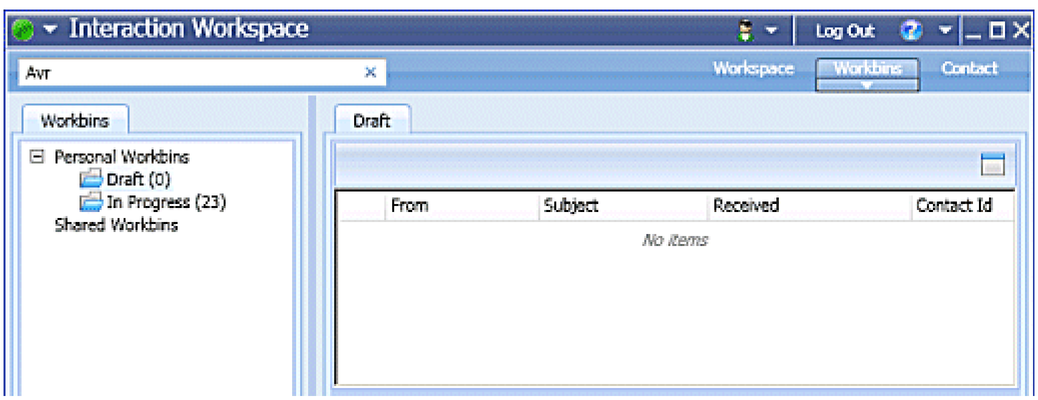


Figure 231:Empty Draft workbin

End of procedure

Chapter

26 Task: Record Interactions

In this chapter, you will learn how to use the call recording functionality of Interaction Workspace.

This chapter contains the following section:

Recording a Voice Interaction

The Voice Recording functionality (for VoIP-/SIP-enabled agents only) enables you to record the current voice interaction with a contact or an internal target. You can start a recording, pause a recording, resume a recording, and end a recording.

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

Procedure: Recording a voice interaction

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

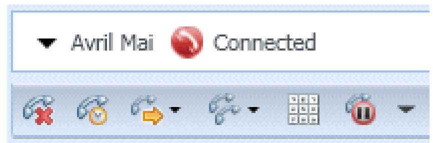
Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Going Ready in the Interaction Workspace Main window, on page 51).
- You are handling a voice interaction (see Chapter 6, "Task: Handle Voice Interactions," on page 71).

Start of procedure

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

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

2. To control the recording of the call, use the call-recording control buttons and drop-down menu:
   - To pause the recording of the call, click `Pause Recording the call` ( ).
   - To resume the recording of the call after you have paused, click `Resume Recording the Call` ( ).
3. To stop the recording the call, open the call-recording control menu and select `Stop` ( ).

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

End of procedure

Chapter

27 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 section:

Assigning Disposition Codes

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

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

Note: In some Outbound Campaign interactions, the Disposition Code view has additional features. See Chapter 11, "Task: Handle Outbound-Campaign Voice Interactions," on page 121.

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.

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 51).
- You have an open Voice Media interaction (see “Receiving a Voice Interaction” on page 71).
- 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 window (see “Receiving a Voice Interaction” on page 71), click `End Call` (the phone-set button that has a red `X`; see Figure 232).

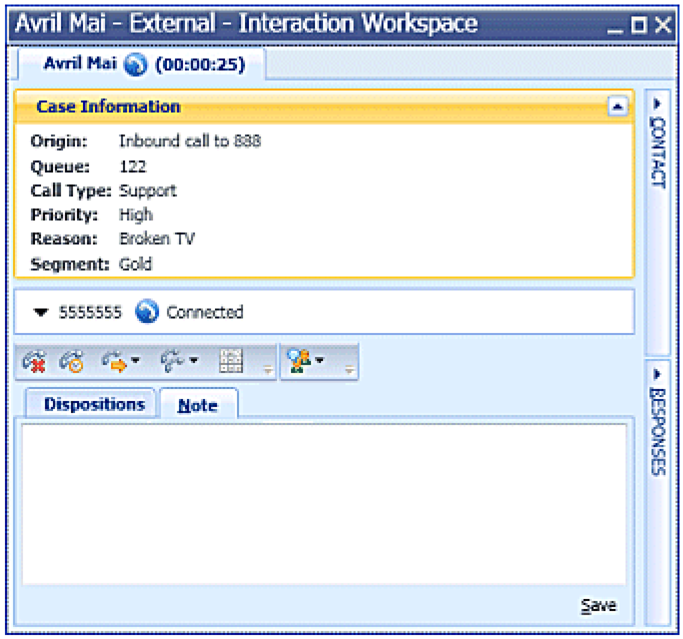


Figure 232:Inbound Voice Interaction window, with no disposition code set

2. Click the `Dispositions` tab (see Figure 233) to display the Disposition Code selector.

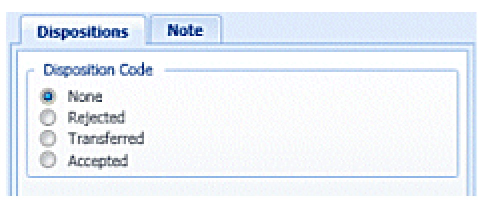


Figure 233:Dispositions view, with no disposition code set

3. Click the `Disposition Code` radio button to specify the outcome of the call. The available options are configured by your system administrator, and might not be the same values that are shown in Figures 233 and 234.

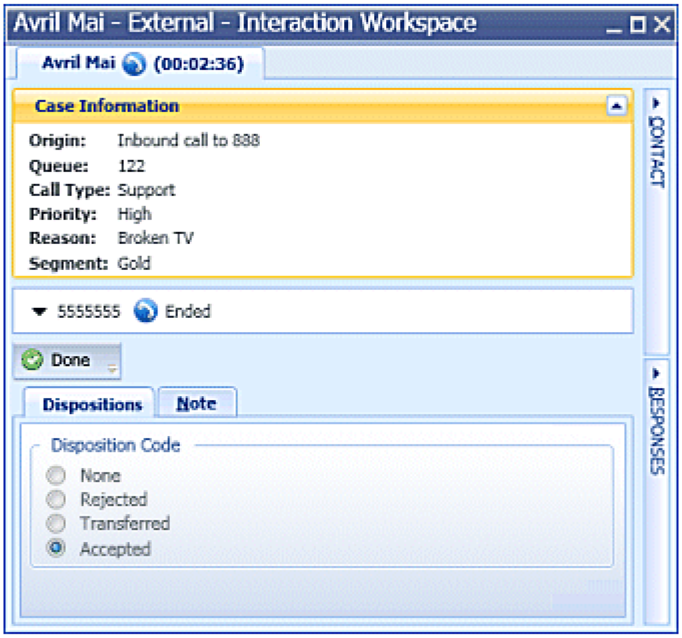


Figure 234:Voice Interaction window, with disposition code set

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

End of procedure

Chapter

28 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 (see Procedure: Finding and viewing an interaction in the contact database, on page 292)
- Information view of the current voice interaction (see Chapter 6, "Task: Handle Voice Interactions," on page 71)

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

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

This section contains the following procedures:

- Procedure: Finding and viewing an interaction in the contact database, on page 292
- Procedure: Finding and viewing an interaction in the contact view of the Interaction window, on page 296
- Procedure: Using the History tab Quick Search to find an interaction, on page 300
- Procedure: Using the History tab Advanced Search to find an interaction, on page 301

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 47).

Start of procedure

1. On the Interaction Workspace Main Window, click `Contact` to display the `Contact Directory` tab.

Figure 235:Contact Directory tab

2. Click in the `Quick Search` field and enter the name of the contact for whom you are searching to find the contact in the contact database.
3. Click the magnifying-glass icon, or press `Enter`, to begin the search.

4. Click the name of the contact in the search-results table or list.
5. In the `Show Details Panel` drop-down list, display the Details panel (see Figure 236).

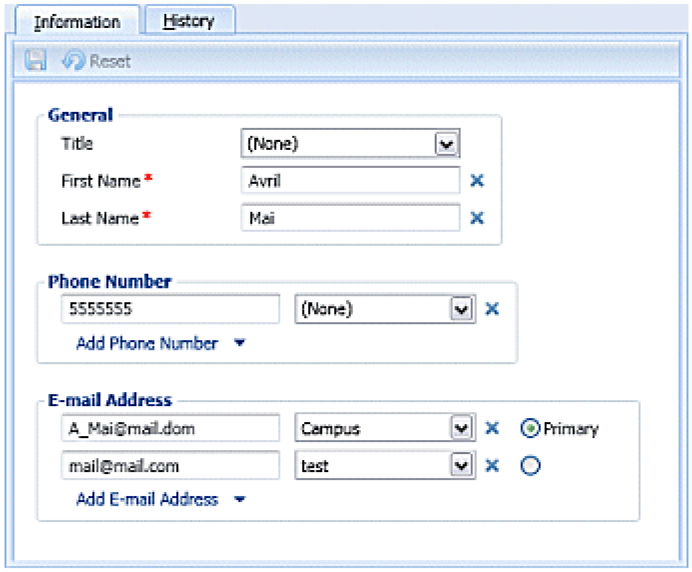


Figure 236:Contact Details view, displaying the Contact Information tab

6. Click the `History` tab to display the contact History view (see Figure 237).

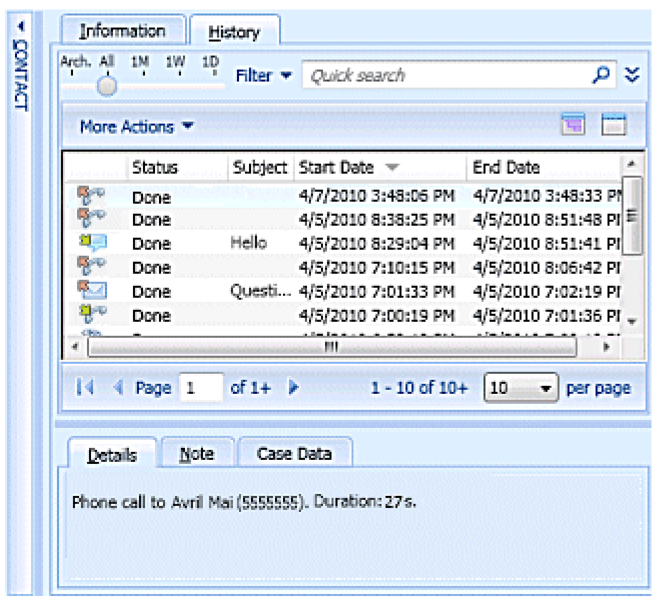
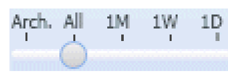


Figure 237:Contact Details view, displaying the Contact History tab

7. Find the interaction that you want to view by using one of the following search types:

- **Quick Search**—Enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of `2` or find all interactions that are related to the subject of `billing`. See Procedure: Using the History tab Quick Search to find an interaction, on page 300.
- **Advanced Search**—Enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject`. It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See Procedure: Using the History tab Advanced Search to find an interaction, on page 301.

8. If more than one interaction matches your search criteria, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.

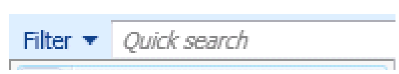


The slider has five positions that represent different time intervals:

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

9. If more than one type of interaction matches your search criteria, use the Type filters to search only for interactions of a specific type.

Select the filter type from the drop-down list to turn the filters on and off. When a filter is on, a check mark appears beside its name in the menu.



The interaction filters might include the following types:

- Show All Interactions
- Show Voice Interactions
- Show E-mail Interactions
- Show Chat/Instant Message Interactions
- Show SMS Interactions
- Show Other Media Interactions—Includes workitems and social-media interactions

Your administrator might also include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.

10. 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 (see Figure 239 on page 297). 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`.

11. Interaction Workspace enables you to view contact interactions either by attributes or as threads. Click the `Show Interactions in Grid View`/`Show Interactions in Tree View` button (/) to specify how the Contact History panel is displayed.

    Grid View displays interactions by attribute and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (e-mail replies, multichannel conversations, social-media threads, and so on).

12. Click an interaction to select it. The `Details` panel displays information about interactions on the `Details` tab, the `Notepad` tab, and the `Case Data` tab (see Figure 239 on page 297).

    If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the `Details` tab. If the status of an e-mail interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the `Open` button () is displayed (if the e-mail is in a queue, a workbin, or in routing—including outbound in-progress e-mails).

    a. Click `Open` to open the e-mail interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the e-mail from the Main Window or Gadget Contact History view.

    b. After you open the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction (refer to Procedure: Replying to a inbound e-mail interaction, on page 161 and Procedure: Creating and sending a new e-mail interaction to a contact, on page 166).

       You can also click `Put back in original location` () to return the e-mail interaction back to the In-Progress workbin or into a queue.

13. 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.
14. When you have finished working on the selected interaction in the Main Window, clear the search results by clicking the `X` button beside the search field.

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

End of procedure

Procedure: Finding and viewing an interaction in the contact view of the Interaction window

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

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have an active interaction.

Start of procedure

1. In the active interaction window, click `Contact` to display the `Contact Directory` tab (see Figure 236).

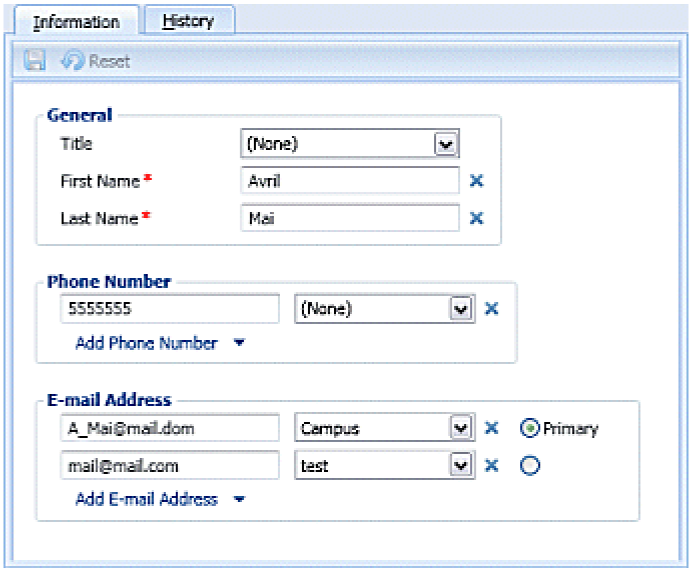


Figure 238:Contact Details view displaying the Contact Information tab

The `Information` tab displays information about the current contact.

2. Click the `History` tab to display the list of interactions for the current contact (see Figure 239).

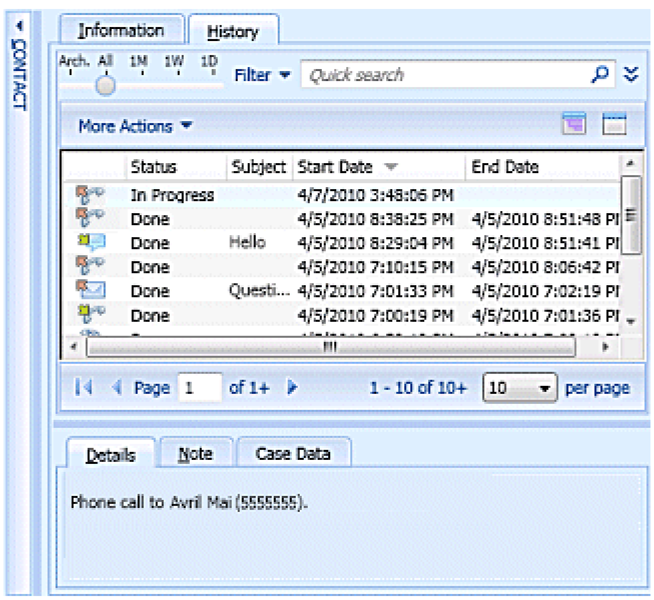


Figure 239:History View for the current or selected contact

3. Find the interaction that you want to view by using one of the following search types:

- **Quick Search**—Enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of `2` or find all interactions that are related to the subject of `billing`. See Procedure: Using the History tab Quick Search to find an interaction, on page 300.
- **Advanced Search**—Enables you to use multiple criteria to refine your search. The Advanced Search pane contains drop-down lists of search criteria, such as `Status`, `Start Date`, and `Subject`. It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See Procedure: Using the History tab Advanced Search to find an interaction, on page 301.

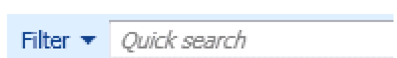
4. If more than one interaction matches your search criteria, specify the time interval that is to be used to filter your search results by using the `Chronology` slider.

The slider has five positions that represent different time intervals:

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

5. If more than one type of interaction matches your search criteria, use the Type filters to search only for interactions of a specific type.

Select the filter type from the drop-down list to turn the filters on and off. When a filter is on, a check mark appears beside its name in the menu.



The interaction filters might include the following types:

- Show All Interactions
- Show Voice Interactions
- Show E-mail Interactions
- Show Chat/Instant Message Interactions
- Show SMS Interactions
- Show Other Media Interactions—Includes workitems and social-media interactions

Your administrator might also include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.

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

   To sort the interactions by one of the attributes, click the column headings that match the attribute that you wan to use to sort the results (see Figure 239 on page 297). Your available search criteria might include one of the following:

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

7. Interaction Workspace enables you to view contact interactions either by attributes or as threads. Click the `Show Interactions in Grid View`/`Show Interactions in Tree View` button (/) to specify how the Contact History panel is displayed.

   Grid View displays interactions by attribute, and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (e-mail replies, multichannel conversations, social-media threads, and so on).

8. Click an interaction to select it. The `Details` panel displays information about interactions on the `Details` tab, the `Notepad` tab, and the `Case Data` tab (see Figure 239 on page 297).

   If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the `Details` tab. If the status of an e-mail interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the `Pull` button () is displayed (if the e-mail is in a queue, a workbin, or in routing—including outbound in-progress e-mails).

   a. Click `Pull` to open the e-mail interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the e-mail from the Main Window or Gadget Contact History view.

   b. After you pull the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction (refer to Procedure: Replying to a inbound e-mail interaction, on page 161 and Procedure: Creating and sending a new e-mail interaction to a contact, on page 166).

      You can also click `Put back in original location` () to return the e-mail interaction back to the In-Progress workbin or into a queue.

9. If you are configured to manage contact data, open the `Actions` menu and then choose one of the following actions:
   - **Mark Done**—Displayed only if an interaction is still in progress. If you complete an interaction, select it in the interactions table, and then click `Mark Done`. The status of the interaction will be changed to `Done`.
   - **Change Contact**—Assign a different contact for the selected interaction.
10. When you have finished working on the selected interaction in the Main Window, clear the search results by clicking the `X` button beside the search field.

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

End of procedure

Procedure:
Using the History tab Quick Search to find an interaction

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

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have completed Step 1 of Procedure: Finding and viewing an interaction in the contact database, on page 292.

Start of procedure

1. To search the contact history, in the History tab, type in the `Quick Search` field (see Figure 240) the attribute value for which you are searching.

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

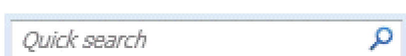


Figure 240:Contact History view Quick Search tool

Note: Quick Search is a *contains* search.

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

   Your search results are displayed in the Search Results table (see Procedure: Finding and viewing an interaction in the contact database, on page 292).

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

End of procedure

Procedure:
Using the History tab Advanced Search to find an interaction

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

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have completed Step 1 of Procedure: Finding and viewing an interaction in the contact database, on page 292.

Start of procedure

1. To search the contact history, in the History tab, enter in the Advanced Search view (see Figure 241) the attribute value or values that you want to find. You can use the standard Windows wildcard characters to expand your search.

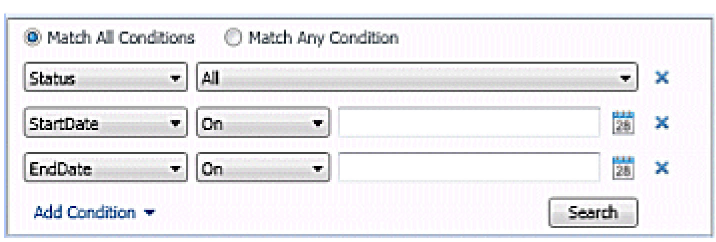


Figure 241:Contact History view Advanced Search tool

- 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 (see Procedure: Finding and viewing an interaction in the contact database, on page 292).
3. Click the `X` to clear the `Advanced Search` fields and the Search Results table.

End of procedure

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 303

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 by using the `My History` view.

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. Do one of the following:
   - On the Interaction Workspace Main Window (see Figure 242):
     i. Click `Workspace` to display your workspace.
     ii. Click the `My History` tab to display all of your interactions.

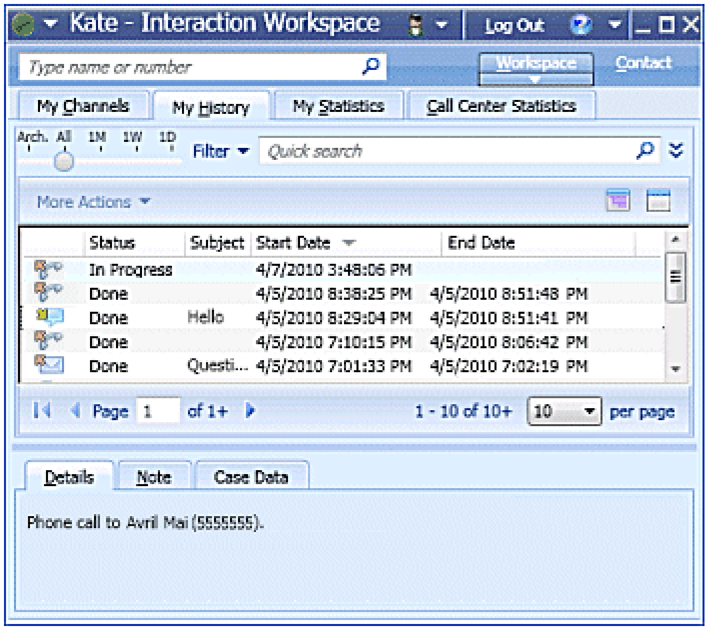


Figure 242:Main Window, displaying the My History tab in Workspace view

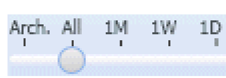
2. To find all of your interactions with a specific contact, do the following:
   i. Click in the `Quick Search` field and enter the name of the contact for whom you are searching.

      The Quick Search enables you to search for any attribute that begins with the value that you enter. For example, you could search for a disposition code of `2` or find all interactions that are related to the subject of `billing`. See Procedure: Using the History tab Quick Search to find an interaction, on page 300.

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

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

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



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

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

- **1W**—Search the database from the most recent interaction, back to one week ago.
- **1D**—Search the database from the most recent interaction, back to one day ago.

4. To filter the search results by type of interaction, use the Type filters to search only for interactions of a specific type (see Figure 243). The interaction types are: Voice, E-mail, and Chat/Instant Message. Select the types to display from the `Filter` drop-down menu. The `Filter` menu options turn the filters on and off. When a filter is on, a check mark is displayed next to its name in the menu.

   Your administrator might include filter types that are related to your specific role in the company, such as the type of customer that your deal with or the business area for which you are responsible.

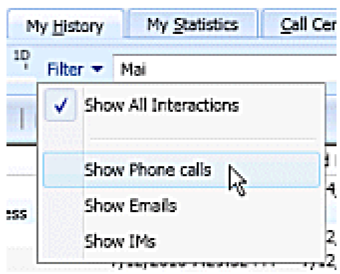


Figure 243:My History view Filter menu.

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 244). It also contains drop-down lists with modifiers that determine how the criteria will affect the search. See Procedure: Using the History tab Advanced Search to find an interaction, on page 301.

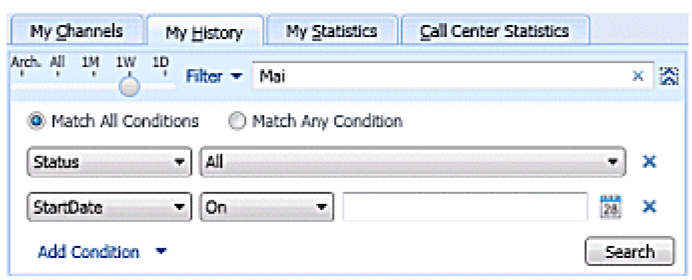


Figure 244:Advanced Search view displaying the My History tab

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 245). The attributes are defined by your system administrator.

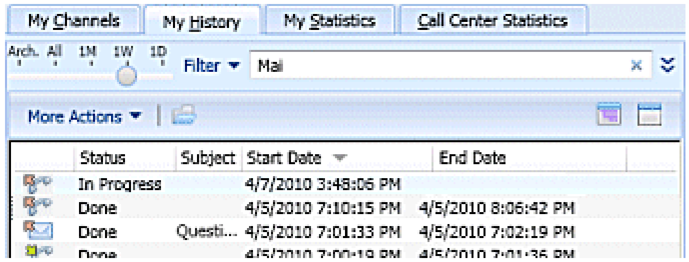


Figure 245:Search results displaying the My History tab

To sort the interactions by one of the attributes, click the column headings that match the attribute that you want to use to sort the results (see Figure 245). 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. Interaction Workspace enables you to view contact interactions either by attributes or as threads. Click the `Show Interactions in Grid View`/`Show Interactions in Tree View` button (/) to specify how the Contact History panel is displayed.

   Grid View displays interactions by attribute and Tree View displays interactions chronologically by thread. A thread is a group of two or more interactions with a single contact that were created in the same context (e-mail replies, multichannel conversations, social-media threads, and so on).

8. Click an interaction to select it. The `Details` panel displays information about interactions on the `Details` tab, the `Notepad` tab, and the `Case Data` tab (see Figure 242 on page 304).

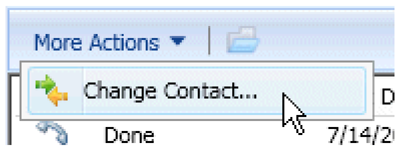
   If you are configured to see the detailed status of the in-progress interaction, the status of the interaction is displayed in the `Details` tab. If the status of an e-mail interaction in the Contact History view is in one of the in-progress states, when you select the interaction, the `Open` button () is displayed (if the e-mail is in a queue, a workbin, or in routing—including outbound in-progress e-mails).

   a. Click `Open` to open the e-mail interaction in the current active interaction window, or in a new E-mail Interaction window if you are opening the e-mail from the Main Window or Gadget Contact History view.

b. After you open the in-progress e-mail interaction, you can read or handle it as an inbound e-mail interaction or an outbound e-mail interaction (refer to Procedure: Replying to a inbound e-mail interaction, on page 161 and Procedure: Creating and sending a new e-mail interaction to a contact, on page 166).

   You can also click `Put back in original location` ( ) to return the e-mail interaction back to the In-Progress workbin or into a queue.

9. If you are configured to manage contact data, open the `More Actions` menu and then choose one of the following actions:
   - **Mark Done**—If you complete an interaction, select it in the interactions table, and then click `Mark Done`. The status of the interaction will be changed to `Done`.
   - **Change Contact**—Assign a different contact for the selected interaction.



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

End of procedure

Managing Contacts and Contact Information

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

- Contact Directory (see Procedure: Finding and viewing an interaction in the contact database, on page 292)
- Information view of the current voice interaction (see Chapter 6, "Task: Handle Voice Interactions," on page 71)

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 308
- Procedure: Deleting a contact, on page 309
- Procedure: Updating contact information, on page 310
- Procedure: Merging contacts, on page 312
- Procedure: Manually assigning an interaction to a contact, on page 314
- Procedure: Unmerging contacts, on page 313

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 47).

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 246). 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.

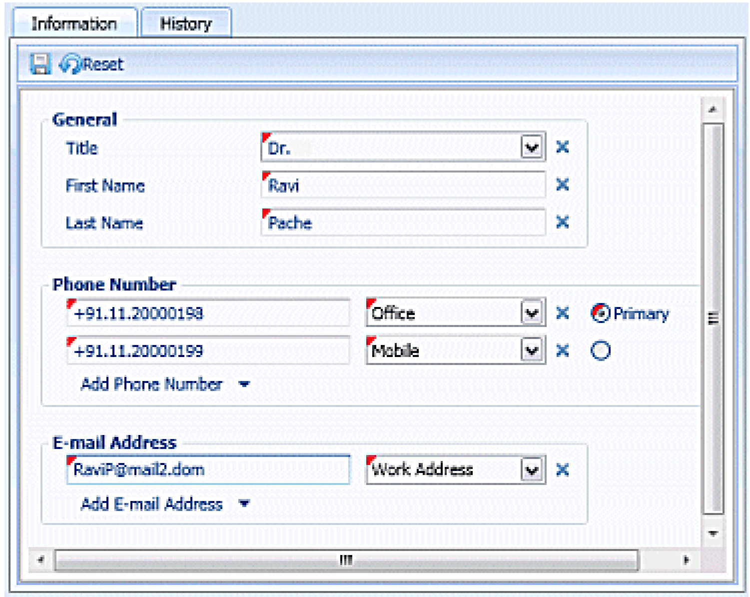


Figure 246:Contact Information tab

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

Procedure: Deleting a contact

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

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. To delete a contact, you first must find the contact in the contact database and then select it in the Contact Directory (see the Procedure: Using the Team Communicator feature to find a contact, on page 62).
2. With one or more contacts that you want to delete selected, click the Delete icon.

3. A confirmation dialog box is displayed.
   - Click `OK` to remove the contact permanently from the contact database.
   - Click `Cancel` to cancel the delete-contact function; this leaves the contact in the contact database.
4. When you have finished working on the selected interaction in the `My History` tab, clear the search results by clicking the `X` button that is displayed next to the search field.

End of procedure

Next Steps

- Manage contact records. See Chapter 28, "Task: Manage Contacts," on page 291.
- Send or receive an internal Instant Message (IM). See Chapter 12, "Task: Handle Internal Instant Messaging," on page 145.

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 47).

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 247). 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.

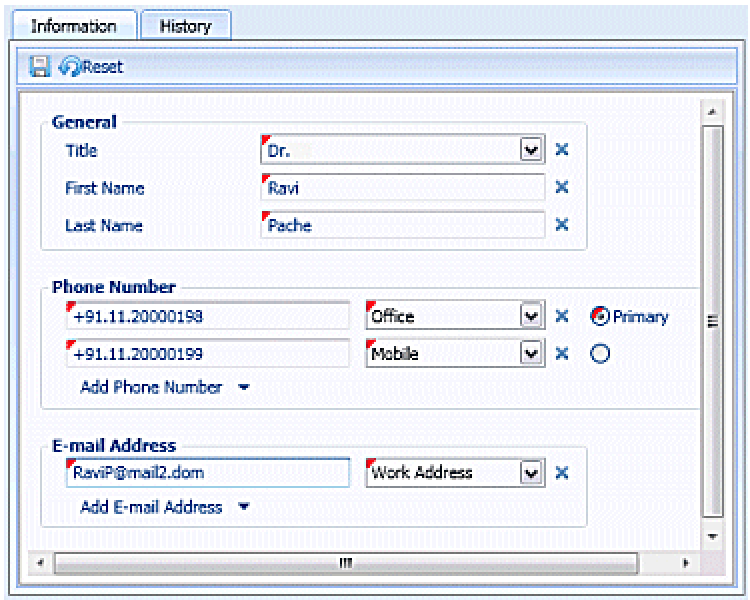


Figure 247:Contact Information tab

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

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 47).

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 (see the Procedure: Using the Team Communicator feature to find a contact, on page 62) and then select it in the Contact Directory (see Figure 248).

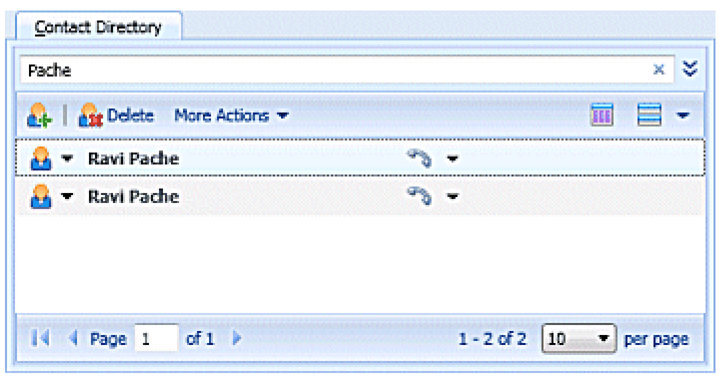


Figure 248:Two contact entries for the same contact in the Contact Directory

2. Click the `More Actions` menu and select `Merge` (see Figure 249).

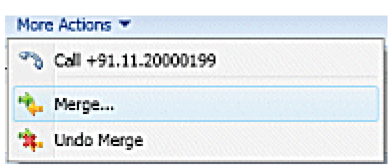


Figure 249:Contact Directory More Actions menu

3. The `Merge Contact` dialog box is displayed (see Figure 250).

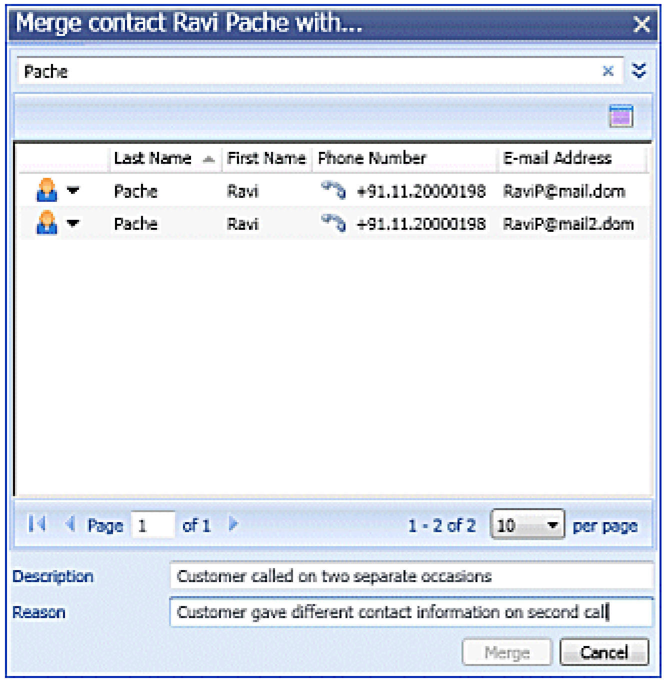


Figure 250:Merge Contact <name> With dialog box

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

Procedure: Unmerging contacts

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

Prerequisites

- You are configured to view or manage the contact database.
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. First, find the contact in the contact database (see the Procedure: Using the Team Communicator feature to find a contact, on page 62).
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

Procedure: Manually assigning an interaction to a contact

Purpose: To assign an interaction with an unknown contact to a contact that is in your contact database.

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

If your system is not configured to create a new contact automatically for an unknown contact, the Contact Information view for the current interaction window will be blank.

Note: You can also use the `Assign Another Contact to This Interaction` button to create a new contact or to manually reassign an interaction that has been assigned to the wrong contact. You can also use the Change Contact view.

Start of procedure

1. If you are handling an interaction that has an unknown contact, there will not be a contact name displayed in the party display area (seeFigure 251).

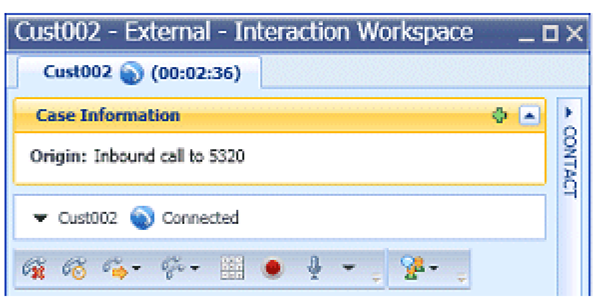


Figure 251:Interaction window with an unknown contact

2. If you identify the contact as being one of your known contacts, you can add the interaction to the history of the contact. Click Contact to display the Contact Directory (see Figure 252).

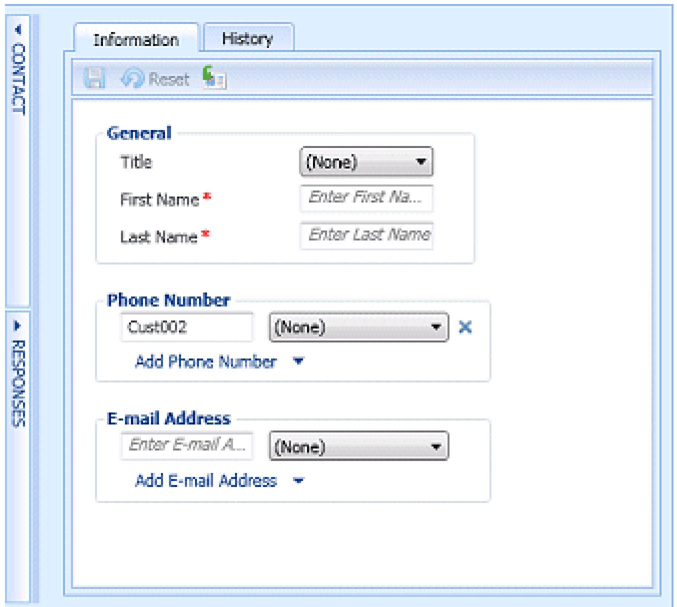


Figure 252:Information tab of the Contact Directory

3. Click `Assign Another Contact to this Interaction` (see Figure 253).

Figure 253:Assign another contact to this interaction button

The Contact Search view is displayed (see Figure 254).

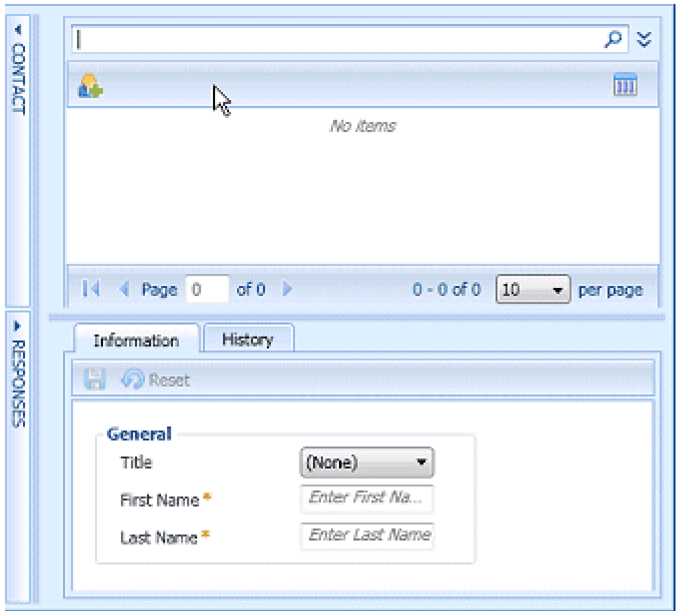


Figure 254:The Contact Search view and Quick Search field

4. In the Quick Search field, enter the name or other identifying information of the contact.

5. Click the magnifying-glass icon to begin the search of the contact database (see Figure 255).

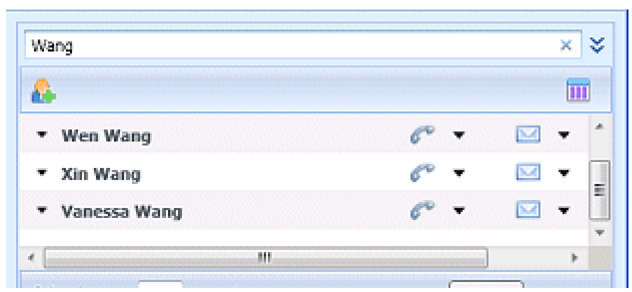


Figure 255:Quick Search results

6. In the Search Results list or grid, select the correct contact (see Figure 256).

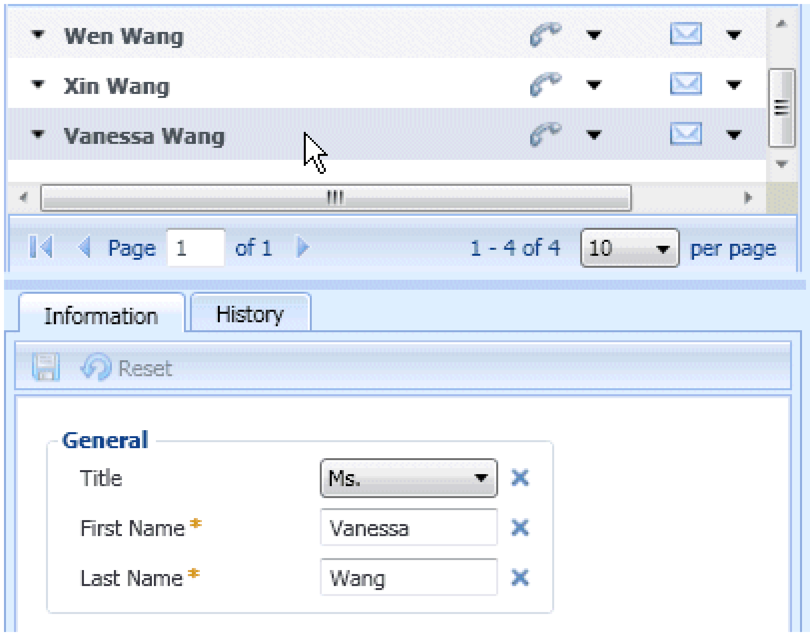


Figure 256:Search Results list

7. Click `Assign` to assign this interaction to the selected contact. The interaction is added to the Contact History (see Figure 257). Click `Cancel` to return to the blank Contact Information view.

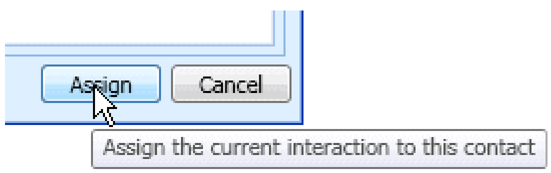


Figure 257:Assign button

The title bar, tab, and party action area of the interaction window is updated to display the name of the contact (see Figure 258).

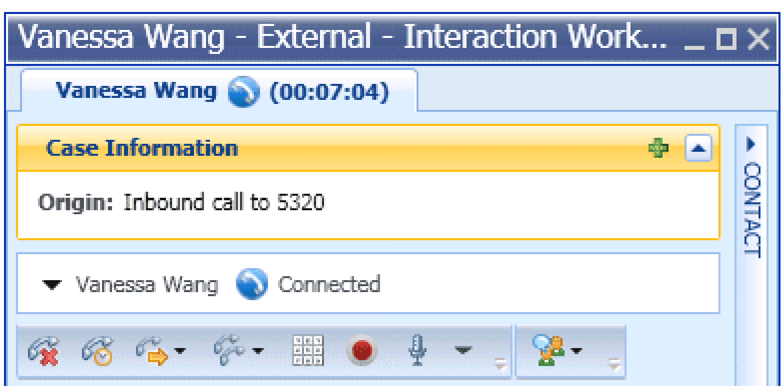


Figure 258:Interaction window displaying the name of the contact

End of procedure

Chapter

29 Task: Using the Standard Response Library

In this chapter, you will learn how to access a database of prewritten standard responses for your interactions.

Note: You can insert responses as replies into any e-mail message, chat message, or SMS message, or you can read them to the contact during a voice interaction or Outbound Campaign call.

This chapter contains the following section:

Inserting a Standard Response into an E-Mail Interaction

Your contact center might have a database of standard responses that you can access to compose prewritten replies to the e-mail, chat, and SMS interactions of a contact. You can find and insert standard responses manually, or use suggested responses that are based on relevancy. Your administrator defines the standard responses to which you have access. The responses to which you have access might be restricted by business area, language, or other criteria that is specific to your business or role.

This section contains the following procedures:

- Searching the Standard Response Library for a suggested response, page 327

Procedure: Finding and inserting a standard response into an e-mail interaction

Purpose: To send a prewritten response to a customer interaction (e-mail, chat, or SMS).

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have accepted the inbound or transferred e-mail interaction or created a new interaction (see Procedure: Handling an inbound e-mail interaction, on page 158 or Procedure: Creating and sending a new e-mail interaction to a contact, on page 166).
- If you are handling an inbound e-mail interaction, you have clicked `Reply` or `Reply All` in the inbound E-Mail Interaction window (see Procedure: Replying to a inbound e-mail interaction, on page 161).

Start of procedure

1. If you are configured to use standard responses, all Interaction Workspace interaction windows, such as the E-Mail Interaction window (see Figure 259), enable you to access the Standard Responses Library.

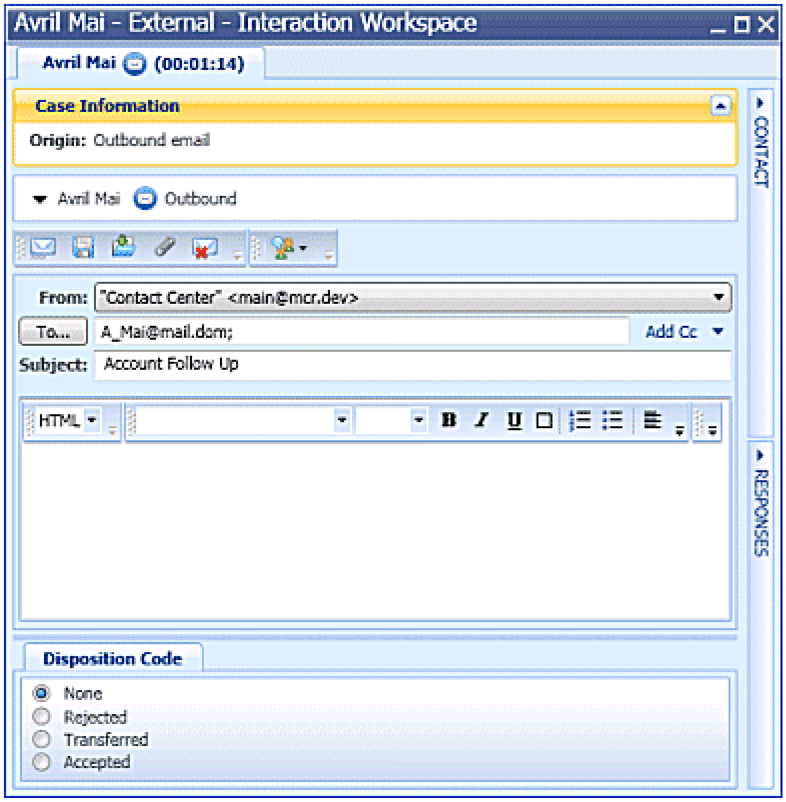


Figure 259:Blank outbound E-Mail Interaction window

To open the Responses view in *any* interaction window, including e-mail, chat, and voice, click the `Responses` button, which is located on the left-hand side of the interaction window and below the `Contact` button.

2. The Responses view is displayed. The Responses view has two view modes: tree mode (see Figure 260) and list mode (see Figure 261).

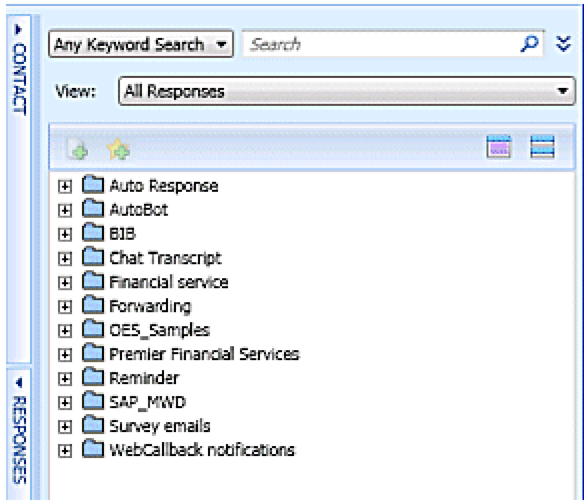


Figure 260:Responses tree-mode view of an interaction window

Similar to the tree view of Microsoft Windows Explorer, the tree view enables you to explore folders of responses by category. The list mode enables you to view the response documents in a table view that is sortable by document name or folder name.

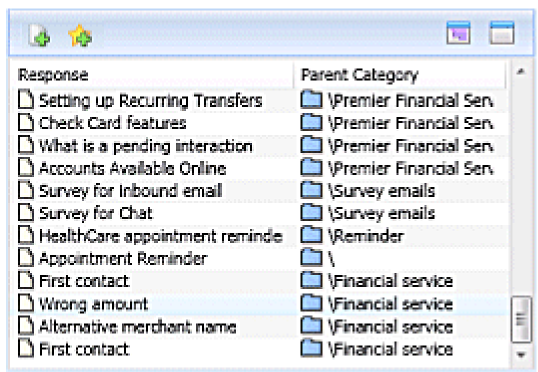


Figure 261:Responses list-mode view of an interaction window

Click folders in the tree view to open them and view sub-folders and documents.

You can also search for a specific response by title or content by using the search functionality (see Procedure: Searching the Standard Response Library for a standard response, on page 324).

3. To view or use a standard response, click the document in either mode (see Figure 262).

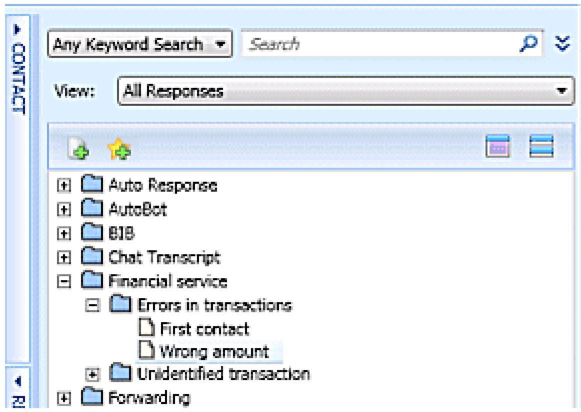


Figure 262:Responses view, with a selected standard response

When a document is highlighted, you can perform the following actions:

- Preview the contents of the response by clicking `Show Detail` (see Figure 263).

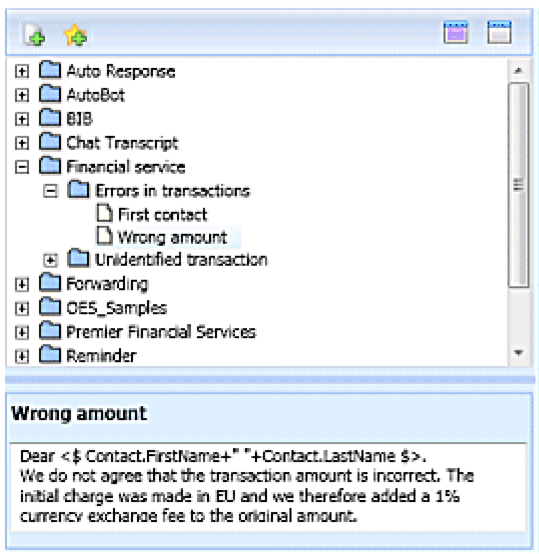


Figure 263:Responses view, displaying the details of the selected response

- Insert the response into your interaction at the insertion point by clicking `Insert Standard Response Text`.
- Add the document to your list of favorite responses by clicking `Add Standard Response into Favorite Responses`. You can then filter the tree mode or list mode to show only your favorites by clicking the `View` drop-down list and then selecting `Favorite Responses` instead of `All Responses`.

Figure 264 shows a selected response in the tree-mode view, the associated Details view, and inserted into the e-mail interaction text composition area. You can add multiple responses in the same interaction.

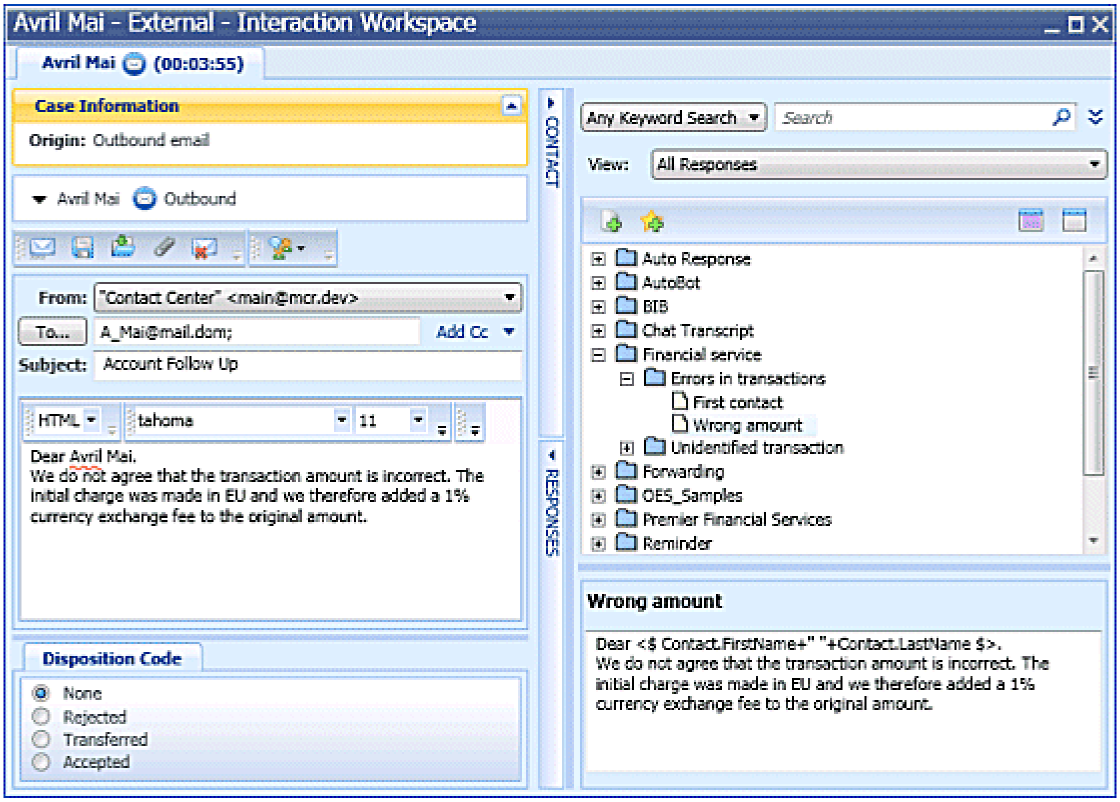


Figure 264:A standard response inserted into an outbound e-mail interaction

4. Complete and send or transfer the interaction (see Procedure: Replying to a inbound e-mail interaction, on page 161 or Procedure: Creating and sending a new e-mail interaction to a contact, on page 166).

End of procedure

Procedure: Searching the Standard Response Library for a standard response

Purpose: To use search tools to find a response in the Standard Response Library.

Note: If you are configured to use responses, the Responses view is available for the E-Mail, Chat, SMS, and Voice Interaction windows.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have accepted the inbound or transferred interaction or created a new interaction.

Start of procedure

1. You can use either the tree mode or list mode to search manually through the list of standard responses (see Procedure: Finding and inserting a standard response into an e-mail interaction, on page 320), or you can use keyword searches to identify quickly the responses that contain the information that you want to send to your contact.

   In the responses view, type a word or words into the search field and then click the magnifying glass or press `Enter` to return all documents that meet the criteria that you specify (see Figures 265 and 266).

   The Responses search function enables you to perform three standard searches:

   - `Any Keyword Search`—Find all responses that contain at least one of the specified keywords
   - `All Keyword Search`—Find all responses that contain all of the specified keywords
   - `Exact Text Search`—Find all responses that contain the specified keywords in the order in which they are specified

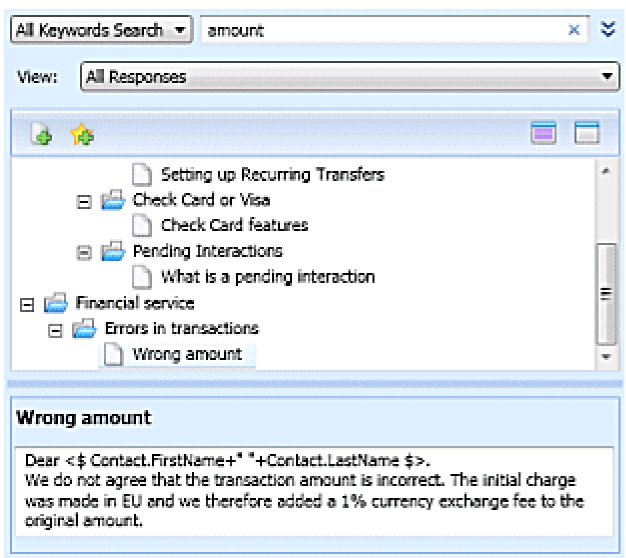


Figure 265:Responses All Keyword Search

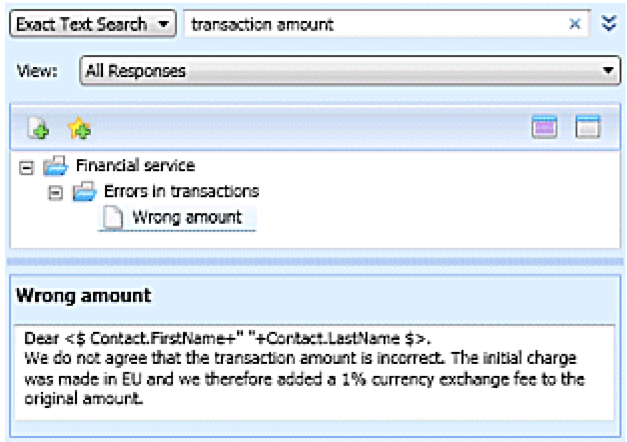


Figure 266:Responses Exact Text Search

2. Use the `View` menu to search through All Responses or your Favorite Responses (seeFigure 267).

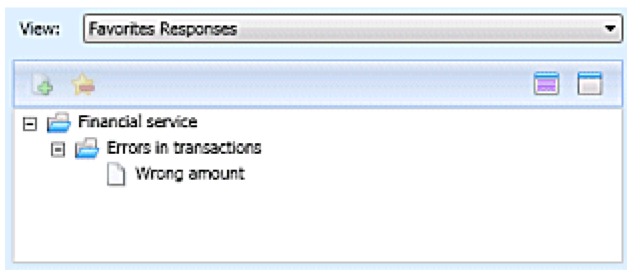


Figure 267:Favorite Responses filter

3. Click the `Show Advanced Search Options` button (two downward pointing chevrons) to display the advanced filtering options. The advanced filtering options enable you to specify whether to search in Responses Names, Responses Body Text, or both (see Figure 268).

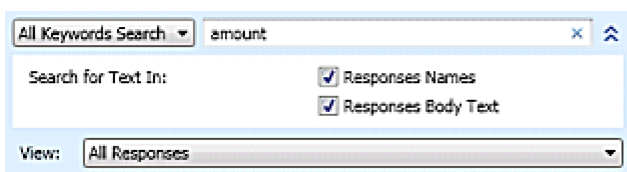


Figure 268:Advanced response filtering options

4. When you have found the responses for which you are searching, you can insert it into your interaction at the insertion point (go to Step 3 of Procedure: Finding and inserting a standard response into an e-mail interaction, on page 320) or you can read it to a contact on a voice call.

End of procedure

Procedure:
Searching the Standard Response Library for a suggested response

Purpose: To use a suggested response from the Standard Response Library.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have accepted the inbound or transferred e-mail interaction.

Start of procedure

1. In the Responses view, from the `View` menu, select `Suggested Responses` (see Figure 269).

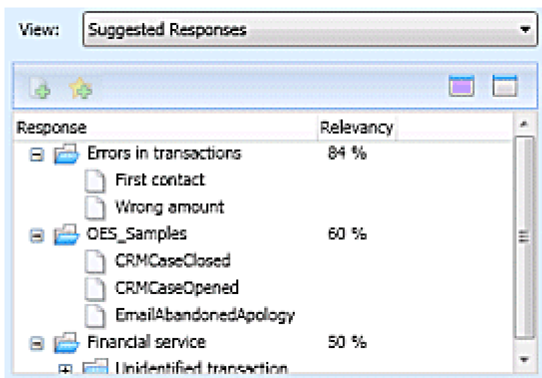


Figure 269:Tree view of Suggested Responses in the Responses view of a reply e-mail interaction window

Suggested responses are displayed in either list view or tree view. In list view (see Figure 270), you can sort by column. Click a column heading to sort by that field; click the same column head to reverse the sort order.

In tree view (see Figure 269), the responses are sorted by relevancy to the inbound interaction to which you are replying.

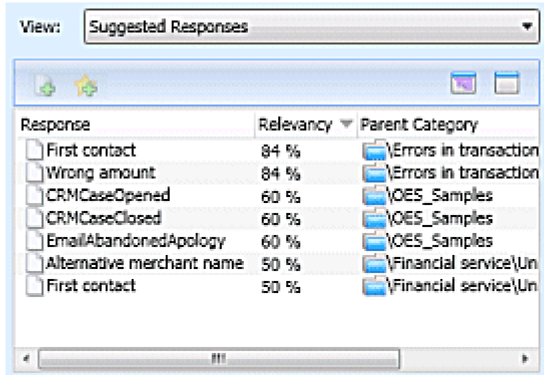


Figure 270:List view of the Suggested Responses view

2. To search through the Suggested Responses list, you can use either the tree mode or list mode to search manually through the list of standard responses (see Procedure: Finding and inserting a standard response into an e-mail interaction, on page 320), or you can use keyword searches to identify quickly the responses that contain the information that you want to send to your contact (see Procedure: Searching the Standard Response Library for a standard response, on page 324).
3. When you have found the response for which you are searching, you can insert it into your interaction at the insertion point (go to Step 3 of Procedure: Finding and inserting a standard response into an e-mail interaction, on page 320) or you can read it to a contact on a voice call.

End of procedure

Chapter

30 Task: Edit Case Information and Record Information

In this chapter, you will learn how to edit the Case Information of your interactions and the Record Information of your outbound campaign voice interactions.

Sometimes when you receive an interaction, there might be errors in the Case Information. For example, a contact might have given erroneous or incomplete information to the IVR, or selected the wrong language preference. Interaction Workspace enables agents who are configured to edit Case Information to make changes to specified fields in the Case Information and Record Information views (refer to the *Interaction Workspace Help* for more information on these views).

You can correct fields while you manage the interaction, or you can update fields to reroute the interaction to a different agent or queue.

This chapter contains the following section:

Editing Case Information

You can edit the case information of active interactions if you are configured with this privilege. There are four types of Case Data that you can update:

- Text (string)
- Check boxes (Boolean)
- Dates (date)
- Numbers (integer and enum)

Procedure:
Modifying case information

Purpose: To specify a different value for a Case-Information field that is configured to be editable.

Note: You can also use this procedure to edit the Record Information of your outbound campaign voice interactions.

Prerequisites

- You are configured to edit case information.
- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You have accepted an interaction that contains case data.

Start of procedure

1. When the interaction is displayed on your desktop, view the Case Information view. Move your mouse pointer over the view to see which fields are editable. Editable fields are indicated by a small pencil icon (see Figure 271).

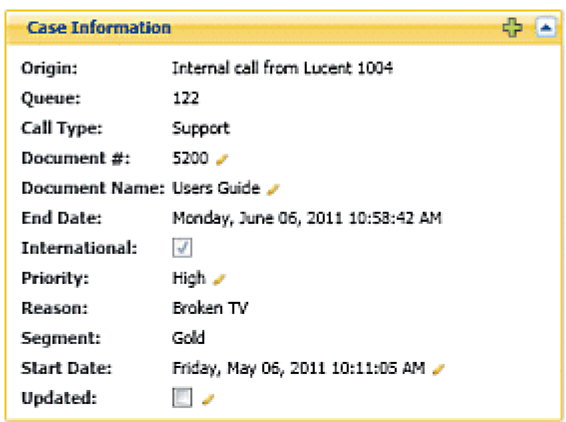


Figure 271:Case Information view, with both editable and non-editable fields

2. Editable check boxes appear as active, while non-editable check boxes appear as inactive (that is, dimmed—see Figure 272).

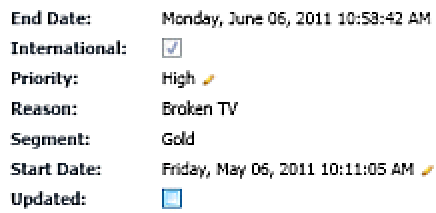


Figure 272:Case Information, with both editable and non-editable check boxes

3. Sometimes, not all of the case data is available. There might be fields missing. If you are configured to add missing fields, the `Add Field` () button is displayed in the Case Information toolbar.
   a. Click `Add Field` to display a drop-down list of fields.
   b. Select a missing field to display the field in the Case Information view. Click `X` to remove the field.
   c. Enter the missing Case Data.
   d. Press `Enter` to add the Case Data to the case information for the interaction.
4. Click an editable check box to select it (see Figure 273); click it again to de-select it (see Figure 272).

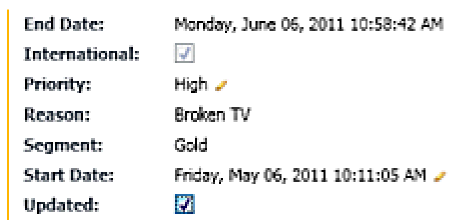


Figure 273:Case Information with an editable check box selected

5. Click an editable data-time field to edit it. A calendar and time-picker view is displayed (see Figure 274).

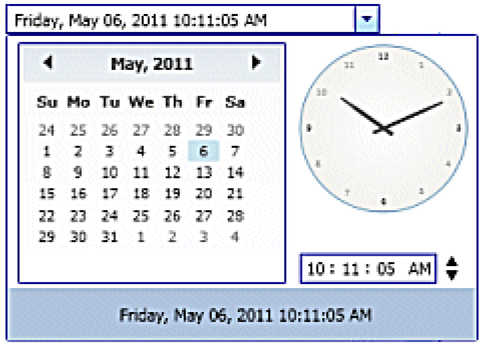


Figure 274:Case Information date and time editor

To set a new date, use the arrows to move the month and year forward and backward, respectively. Click a day to select it.

To set a new time, click an hour, minute, or second, and then use the up and down arrows to increase or decrease the value respectively, or use your keyboard to enter a new value.

6. Click an editable drop-down list to change its value (see Figure 275).

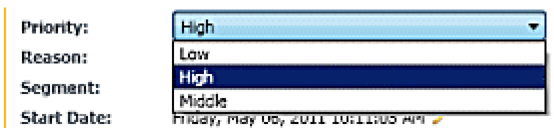


Figure 275:Case Information drop-down list editor

7. To edit a text value, click the value to open the text-edit field. Modify the value and press `Enter` (see Figure 276).

Figure 276:Case Information editable text field

End of procedure

Genesys

Chapter

31 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 333)
- From the `My Statistics` window of the Gadget (see the *Interaction Workspace 8.1 Help*)
- From the Statistics Gadget (see "Viewing Statistics by Using the Statistics Gadget" on page 337)

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 47).
- You are using the Main Window view, not the Gadget. To view the `My Statistics` window from the Gadget, select it from the `Main Menu` (see the *Interaction Workspace 8.1 Help*).

Start of procedure

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

   The Main Window Workspace view opens below the Team Communicator (see Figure 277).

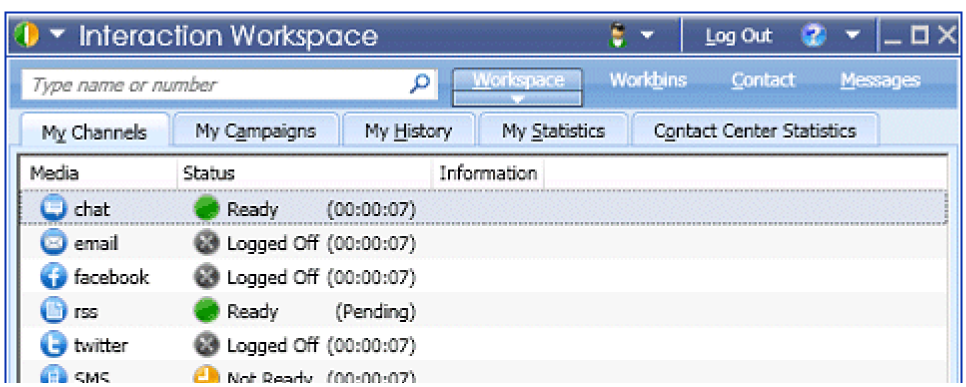
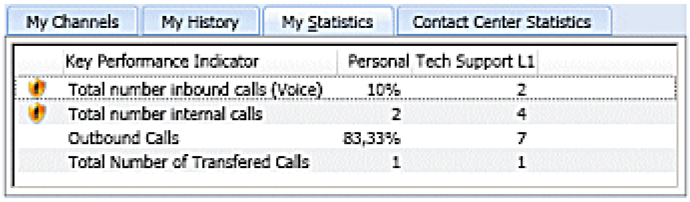


Figure 277:Main Window Workspace view

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

The list of your Key Performance Indicators (KPIs) is displayed (see Figure 278). This view is updated constantly so that you can view your current statistics.



Key Performance Indicator	Personal Tech Support L1	
Total number inbound calls (Voice)	10%	2
Total number internal calls	2	4
Outbound Calls	83,33%	7
Total Number of Transfered Calls	1	1

Figure 278: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

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 335)
- From the `Contact Center Statistics` window of the Gadget (see the *Interaction Workspace 8.1 Help*)
- From the Statistics Gadget (see "Viewing Statistics by Using the Statistics Gadget" on page 337)

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 47).
- You are using the Main Window view, not the Gadget. To view the `Contact Center Statistics` window from the Gadget, select it from the `Main Menu` (see the *Interaction Workspace 8.1 Help*).

Start of procedure

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

   The Main Window Workspace view opens below the Team Communicator (see Figure 279).

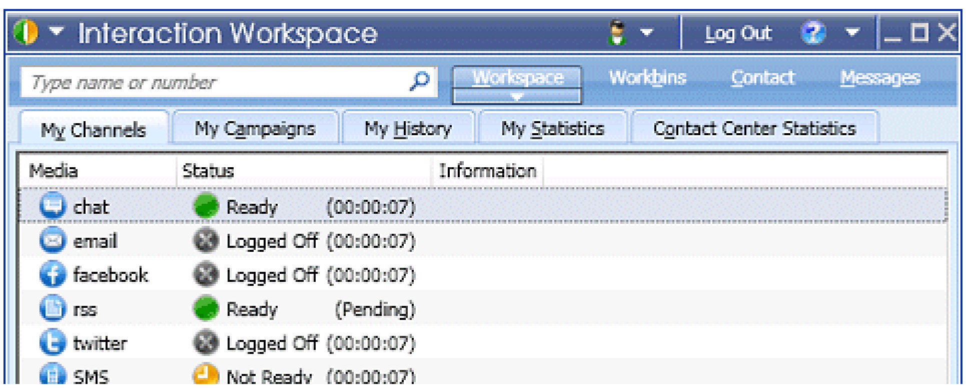


Figure 279:Main Window Workspace view

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 (see Figure 280). This view is updated constantly so that you can view statistics from minute to minute.

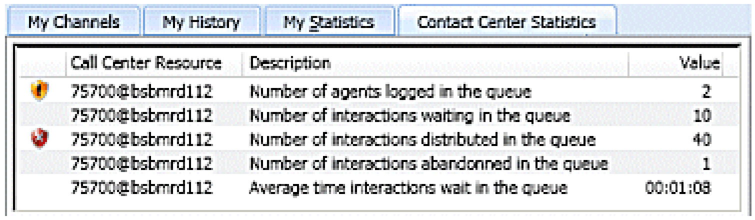


Figure 280:Main Window Workspace view Contact Center Statistics tab

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

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 47).

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 281).

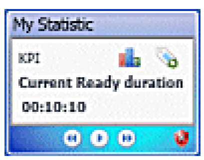


Figure 281:Interaction Workspace Statistics Gadget

   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 281):
   - 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 282).

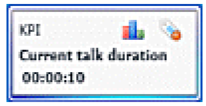


Figure 282:Interaction Workspace Statistics Gadget Tagged Statistic view

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 283).

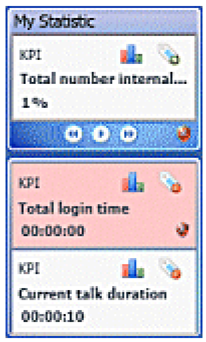


Figure 283:Interaction Workspace Tagged Statistic View stack

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

Chapter

32 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 three interfaces:

- The `My Messages` interactive notification
- The `My Messages` window
- 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 47).
- You are using the Main Window view, not the Gadget.

Start of procedure

1. In the Main Window view, click the Messages button to view any system or business messages that you might already have received.

   The messages are displayed in a scrolling list with the most recent message at the top. Messages that are displayed in bold have not been read (see Figure 284).

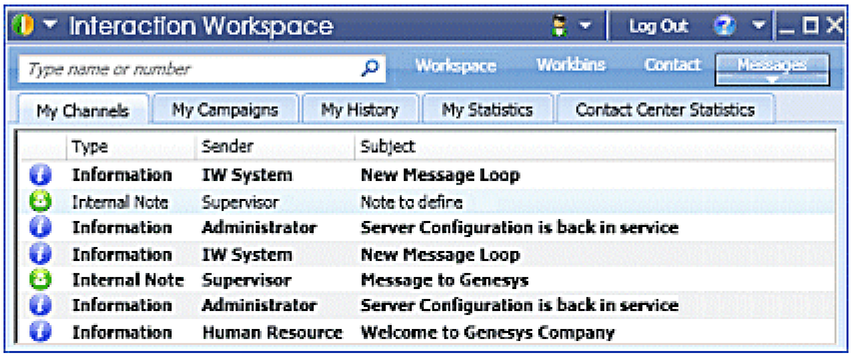


Figure 284:Interaction Workspace Main Window showing the Message Area open and displaying current messages

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 285).

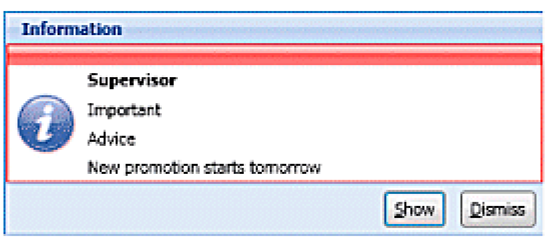


Figure 285:Interaction Workspace My Messages interactive notification

   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 286).

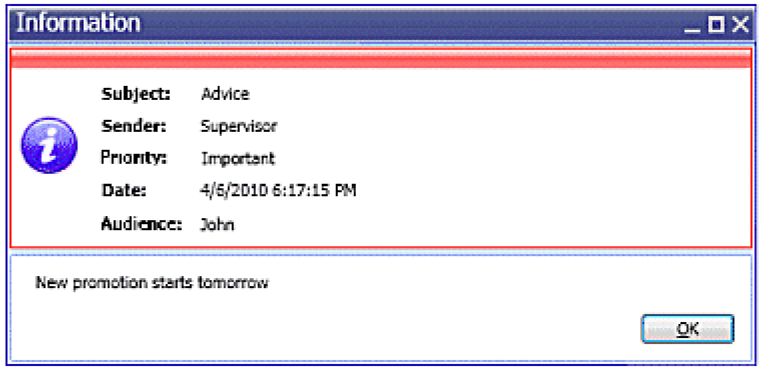


Figure 286:Interaction Workspace Business Message window

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

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

Click `OK` to close the Message window.

5. If you clicked `Dismiss`, or if you allowed the interactive notification to time-out by not clicking either button, the Message window is not displayed. To view the contents of the message, you must open the Message Area in the Main Window (see Figure 284).

End of procedure

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 47).
- 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 287).

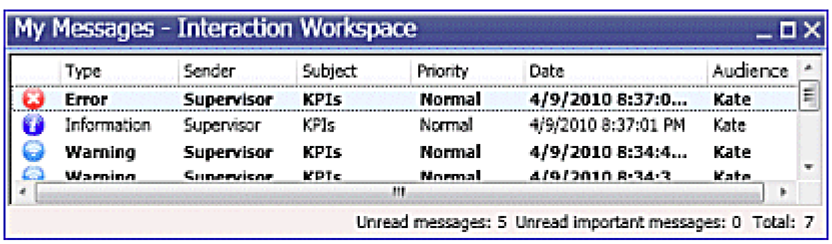


Figure 287:Interaction Workspace My Messages window displaying current messages

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 285).

   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 286).

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

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

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

5. If you clicked `Dismiss`, or if you allowed the interaction notification to time-out by not clicking either button, the `Message` window is not displayed. To view the contents of the message, you must select `My Messages` from the Gadget `Main Menu` to display the `My Messages` window (see Figure 287).

End of procedure

Genesys

Chapter

33 Task: Using the Interaction Bar

In this chapter, you will learn how to use the Interaction Bar in the Main Window to manage one or more interactions.

This chapter contains the following section:

Managing Interactions

The Interaction Bar enables you to use a simplified control set to handle one or more interactions without having to make the interaction window active. It also enables you to restore, or bring to the front, any active interaction window.

Procedure:
Managing multiple interactions by using the Interaction Bar

Purpose: To manage interaction windows and interaction functionality from the Main Window.

Prerequisites

- You are logged in to Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).
- You are handling one or more interactions.
- You are using the Main Window view.

Start of procedure

1. If you have one or more active interactions, the Interaction Bar is displayed at the bottom of the Main Window (see Figure 288). Interactions are "docked" in the Interaction Bar. The interactions appear as boxes that are identified by a name, number, or other contact information, as well as an icon that represents the interaction type (refer to the *Interaction Workspace Help*).

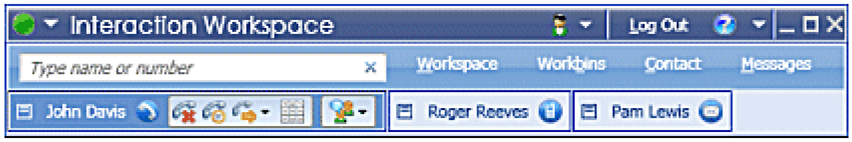


Figure 288:Main Window displaying the Interaction Bar at the bottom

You can minimize interaction windows or cover them with other windows and then access them quickly and easily by clicking the interaction box in the Interaction Bar.

If you place your mouse pointer over an interaction in the Interaction Bar, a ToolTip is displayed that summarizes the content or the attached data for the interaction. The ToolTip also includes a summary of all the interactions that are involved in this thread, as well as any consultation interactions that are related to the interaction.

Entries in the Interaction Bar flash (or blink) when specific events occur that might require your immediate attention. Chat, SMS Session, and IM interactions flash when a new message is received.

2. If you click another interaction box, it becomes active and changes color, and controls are displayed (see Figure 289).

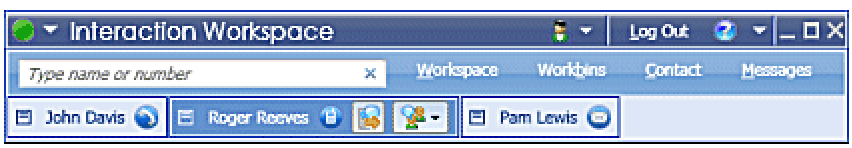


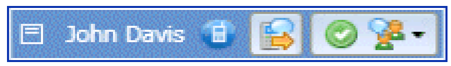
Figure 289:Main Window, displaying an active SMS interaction in the Interaction Bar

The controls are a subset of the controls that are available in the interaction window for the interaction.

3. To open an interaction window from the Interaction Bar, click the box icon on the left-hand side of the interaction box (see Figure 289).

4. To control the interaction from the Interaction Bar, click on the interaction box, and then use the controls. Different controls are available for different interaction types (see Table 3). Refer to the interaction-specific chapters of the *Interaction Workspace User's Guide* and the *Interaction Workspace Help* for information about the functionality of each control.

Table 3: Interaction Bar interaction boxes by type

Interaction Type	Interface
Chat	
E-Mail	
Instant Message	
SMS	
Voice	

End of procedure

Chapter

34 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 that is 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 47).

Start of procedure

1. The blue appearance of Interaction Workspace is the default color scheme; it is called the `Default Theme` (see Figure 290).

Figure 290: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 291).

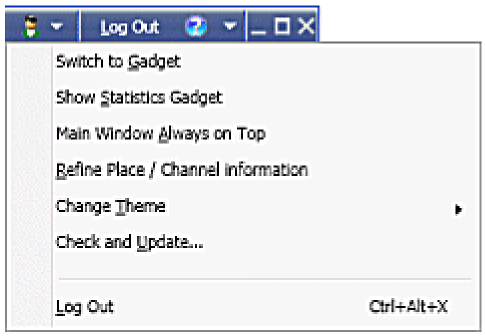


Figure 291:Main Window Main menu

2. Select a different theme from the `Change Theme` submenu (see Figure 292).

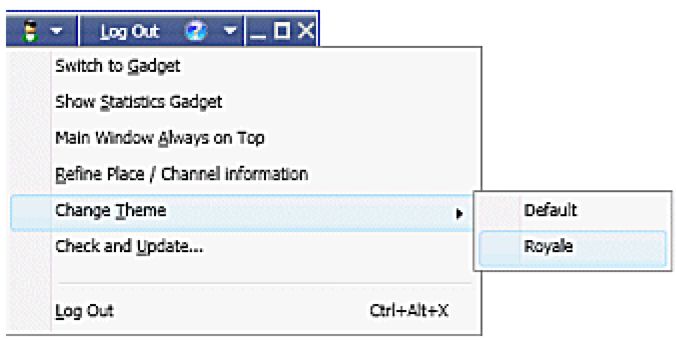


Figure 292:Main Window Main Menu, displaying Change Theme to Royale option

Interaction Workspace provides two additional themes, which are called `Royale` and `Fancy`. Your system administrator might have configured additional theme options from which you can choose.

3. The Main Window and all the other windows of Interaction Workspace are displayed with the new theme (see Figure 293).

Figure 293:Main Window displaying the Royale theme

End of procedure

Genesys

Chapter

35 Task: Monitor, Coach, and Barge-in Interactions

In this chapter, you will learn how a Team Supervisor can monitor, coach, and barge-in on agents who are handling voice and chat interactions:

- Monitoring an agent enables you to hear the interaction between an agent and a contact without either party being able to hear you; or read the chat transcript between an agent and a contact without either party knowing that you are reading the transcript. Agents might be configured to know when they are being monitored (an icon is displayed in the interaction window), or they might be configured to be monitored without their knowledge (silent monitoring).
- You can barge-in to an active voice interaction that you are monitoring between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are monitoring.
- Coaching an agent enables you to hear the interaction between an agent and a contact without the contact being able to hear you coach the agent; or read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent.
- You can barge-in to an active voice interaction that you are coaching between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are coaching.

This chapter contains the following sections:

Notes:
- To use the Team Supervisor functionality, you must be configured as a Supervisor for an agent group.
- A Team Supervisor can monitor or coach as many chat agents as he or she want to, but he or she can monitor or coach only one voice agent at a time.

Monitoring a Voice Interaction

Monitoring an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact without the agent or contact being aware that you are listening. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

Note: You can monitor only one voice agent at a time.

Procedure: Monitoring an agent who is handling a voice interaction

Purpose: To listen to an agent and a contact in a voice interaction without the agent or contact being able to hear you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see Figure 294) in the agent group to which you have been assigned as a Supervisor.

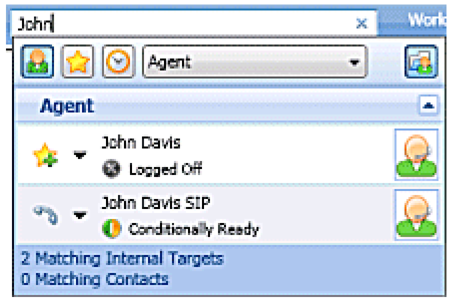


Figure 294:Main Window Team Communicator

2. Open the `Action Menu` for the agent whom you want to monitor and select `Monitor Next Interactions` (see Figure 295). If there is a currently active interaction, it is displayed in the `Monitor` menu; to monitor the current interaction, select it from the `Monitor` menu. To monitor the next interactions, select `Next Interactions`.

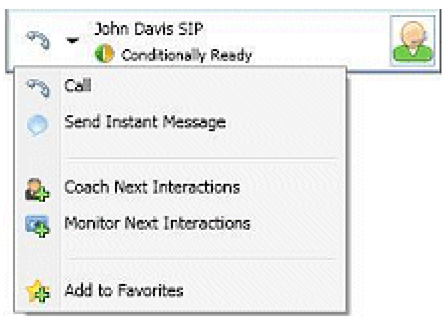
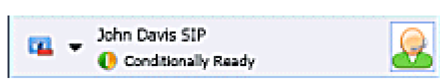


Figure 295:Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent.

In the Team Communicator, the `Action Menu` for the agent whom you are monitoring changes to the `Stop Monitoring` button.

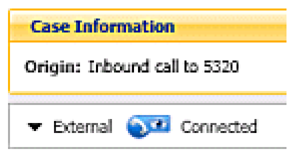


3. When the monitored agent accepts a voice interaction, a notification is displayed on your desktop. Click `Accept` to begin monitoring the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. Neither the contact nor the agent can hear you, but you can hear both parties.

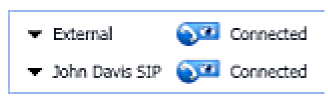
   If you do not click `Accept`, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent.

   If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click `Accept`, you will begin monitoring the call that is already in progress.

   If the monitored agent is configured to be notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Voice Interaction window on the agent's desktop.



   The same icon is displayed in the Voice Interaction Monitoring window on your desktop next to the party `Action` menu.



4. During a monitoring session, you can perform the following actions from the Voice Interaction Monitoring window:
   - End Monitoring—Click `End Monitoring` ( ) in the Supervisor controls of the `Call Actions` toolbar to end the monitoring session.
   - Barge-in—Click `Barge-in` ( ) in the Supervisor controls of the `Call Actions` toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking `End the Call` ( ) in the `Call Actions` toolbar.
   - Coach via Instant Messaging—Select `Coach via Instant Messaging` from the agent party `Action` menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent whom you are monitoring by sending instant messages to them (see Chapter 12, "Task: Handle Internal Instant Messaging," on page 145).

- Coach via voice—Select Coach via voice from the agent party `Action` menu (see Procedure: Coaching an agent who is handling a voice interaction, on page 359), or use `Unmute (Coach)` ( ) in the Interaction toolbar to return to coaching.

  If you stopped monitoring, you are disconnected from the call. The monitoring-indicator icon is removed from the Voice Interaction window of the agent.

  If the agent ends the call while you are still monitoring the agent, your monitoring session ends automatically.

5. Click `Done` to close the Voice Interaction Monitoring window and mark the interaction as `Done`.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the `Action Menu` for the agent ,and select `Stop Monitoring` (see Figure 296).

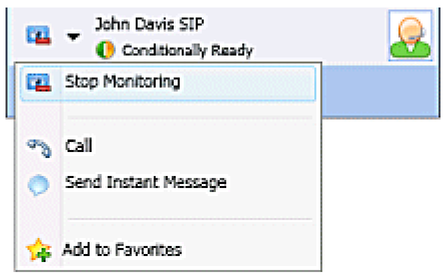


Figure 296:Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

End of procedure

Coaching a Voice Interaction

Coaching an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact and speak to that agent without the contact being aware that you are listening and speaking to the agent. You can coach the current or next interaction of an agent.

Procedure:
Coaching an agent who is handling a voice interaction

Purpose: To listen and speak to an agent who is handling a voice interaction without the contact being able to hear you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see Figure 297) in the agent group to which you have been assigned as a Supervisor.

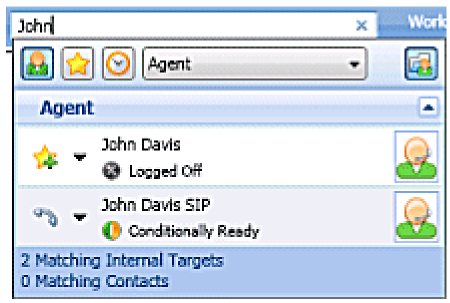


Figure 297:Main Window Team Communicator

2. Open the `Action Menu` for the agent whom you want to coach and select `Coach Next Interactions` (see Figure 298). If there is a currently active interaction, it is displayed in the `Coach` menu; to coach the current interaction, select it from the `Coach` menu. To coach the next interactions, select `Next Interactions`.

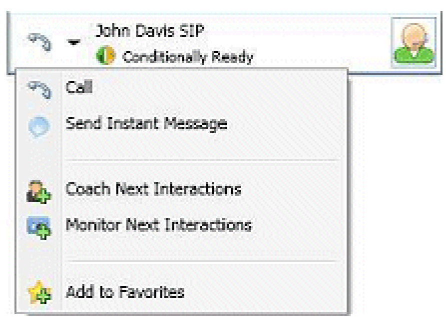


Figure 298:Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.

In the Team Communicator, the `Action Menu` for the agent whom you are coaching changes to the `Stop Coaching` button.

3. When the coached agent accepts a voice interaction, a notification is displayed on your desktop. Click `Accept` to begin coaching the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. You can hear the agent and the agent can hear you, but the contact can hear only the agent.

   If you do not click `Accept`, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.

   If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click `Accept`, you will begin coaching the call that is already in progress.

   The eye icon is displayed in the Voice Interaction Coaching window on your desktop next to the party `Action` menu.

4. During a coaching session, you can perform the following actions from the Voice Interaction Coaching window:
   - End Monitoring—Click `End Monitoring` ( ) in the Supervisor controls of the `Call Actions` toolbar to end the coaching session.
   - Mute (Monitor)—You can switch to monitoring the call by clicking `Mute (Monitor)` ( ) in the `Call Actions` toolbar.
   - Coach via Instant Messaging—Select `Coach via Instant Messaging` from the agent party `Action` menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent that you are coaching by voice by sending instant messages to that agent (see Chapter 12, “Task: Handle Internal Instant Messaging,” on page 145).

   If you stopped coaching, you are disconnected from the call.

   If the agent ends the call while you are still coaching the agent, your coaching session ends automatically.

5. Click `Done` to close the Voice Interaction Coaching window and mark the interaction as `Done`.

6. To stop coaching the agent, use the Team Communicator to find the agent whom you are coaching.

7. Open the `Action Menu` for the agent and select `Stop Coaching` (see Figure 299).

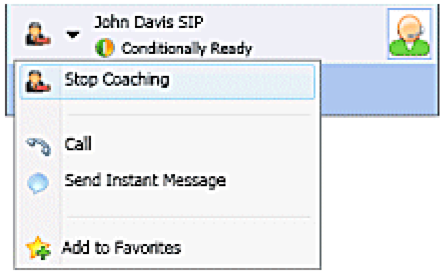


Figure 299:Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

End of procedure

Monitoring a Chat Interaction

Monitoring an agent who is handling an interaction means that you can read a chat interaction between an agent and a contact without the agent or contact being aware that you are reading the interaction. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

Procedure:
Monitoring an agent who is handling a chat interaction

Purpose: To read the live transcript between an agent and a contact in a chat interaction without the agent or contact being aware of you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Chat channel in Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see Figure 300) in the agent group to which you have been assigned as a Supervisor.

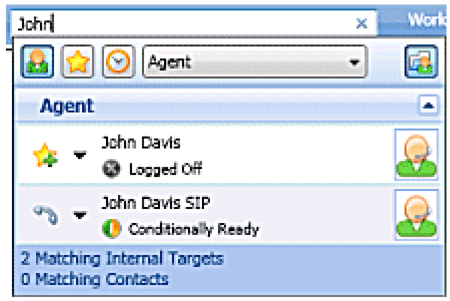


Figure 300:Main Window Team Communicator

2. Open the `Action Menu` for the agent whom you want to monitor and select `Monitor Next Interactions` (see Figure 301). If there is a currently active interaction, it is displayed in the `Monitor` menu; to monitor the current interaction, select it from the `Monitor` menu. To monitor the next interaction, select `Next Interactions`.

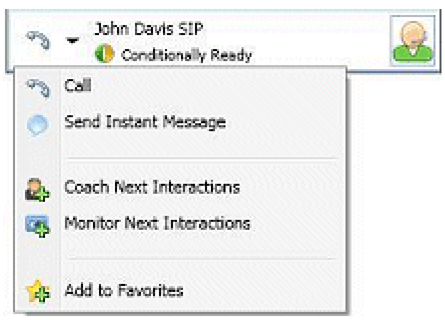


Figure 301:Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent.

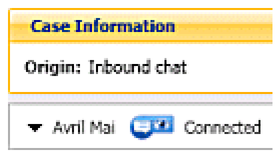
In the Team Communicator, the `Action Menu` for the agent whom you are monitoring changes to the `Stop Monitoring` button.

3. When the monitored agent accepts a chat interaction, a notification is displayed on your desktop. Click `Accept` to begin monitoring the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript, but you cannot send any text to the contact or the agent.

   If you do not click `Accept`, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent.

   If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click `Accept`, you will begin monitoring the chat that is already in progress.

   If the monitored agent is configured to be notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Chat Interaction window on the agent's desktop.



   The same icon is displayed in the Chat Interaction Monitoring window on your desktop next to the party `Action` menu.

4. During a monitoring session, you can perform the following actions from the Chat Interaction Monitoring window:
   - End Monitoring—Click `End Monitoring` ( ) in the Supervisor controls of the `Call Actions` toolbar to end the monitoring session.
   - Barge-in—Click `Barge-in` ( ) in the Supervisor controls of the `Call Actions` toolbar to join the monitored chat session. Both parties will be able to see your messages. You can switch back to monitoring by clicking `End Chat` ( ) in the `Call Actions` toolbar.
   - Coach via Instant Messaging—Select `Coach via Instant Messaging` from the agent party `Action` menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending instant messages to the agent (see Chapter 12, "Task: Handle Internal Instant Messaging," on page 145).
   - Coach via voice—Select `Coach via Voice` from the agent party `Action` menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent (see "Making a Voice Call" on page 76).

- Coach via chat—Select `Coach via Chat` from the agent party `Action` menu. A chat session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending chat messages to the agent (see “Starting or Receiving a Chat Consultation” on page 187).

If you stopped monitoring, you are disconnected from the chat session. The monitoring indicator icon is removed from the Chat Interaction window of the agent.

If the agent ends the chat session while you are still monitoring the agent, your monitoring session ends automatically.

5. Click `Done` to close the Chat Interaction Monitoring window and mark the interaction as `Done`.

6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.

7. Open the `Action Menu` for the agent and select `Stop Monitoring` (see Figure 302).

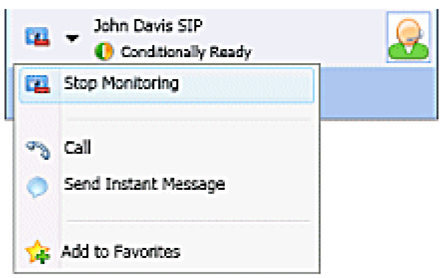


Figure 302:Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

End of procedure

Coaching a Chat Interaction

Coaching an agent who is handling an interaction means that you can read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent. You can coach the current or next interaction of an agent.

Procedure: Coaching an agent who is handling a chat interaction

Purpose: To read the chat transcript and send messages to an agent who is handling a chat interaction without the contact knowing that you are reading the transcript and communicating with the agent.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a SIP Voice channel in Interaction Workspace (see Procedure: Logging in to Interaction Workspace, on page 47).

Start of procedure

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see Figure 303) in the agent group to which you have been assigned as a Supervisor.

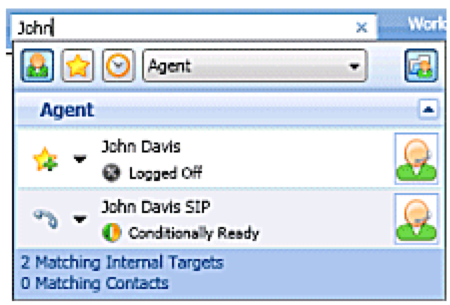


Figure 303:Main Window Team Communicator

2. Open the `Action Menu` for the agent whom you want to coach and select `Coach next interactions` (see Figure 304). If there is a currently active interaction, it is displayed in the `Coach` menu; to coach the current interaction, select it from the `Coach` menu. To coach the next interaction, select `Next Interactions`.

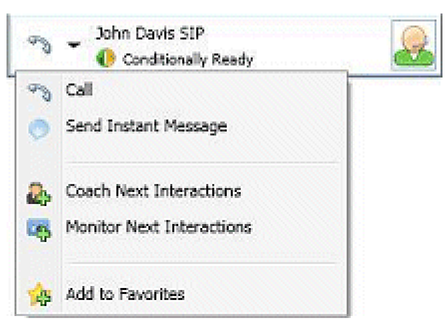
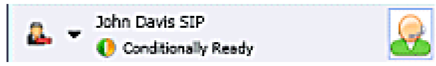


Figure 304:Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent.

In the Team Communicator, the `Action Menu` for the agent whom you are coaching changes to the `Stop Coaching` button.



3. When the coached agent accepts a chat interaction, a notification is displayed on your desktop. Click `Accept` to begin coaching the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript and send private chat messages to the agent without the contact seeing your messages.

   If you do not click `Accept`, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent.

   If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click `Accept`, you will begin coaching the chat session that is already in progress.

   The eye icon is displayed in the Chat Interaction Coaching window on your desktop next to the party `Action` menu.

4. During a coaching session, you can perform the following actions from the Chat Interaction Coaching window:
   - End Monitoring—Click `End Monitoring` ( ) in the Supervisor controls of the `Call Actions` toolbar to end the coaching session.
   - Barge-in—Click `Barge-in` ( ) in the Supervisor controls of the `Call Actions` toolbar to join the monitored chat session. Both parties will be able to see your messages. Your coaching session ends when you barge-in to the chat.

     Click `Done` to close the coaching session in the window and mark the coaching interaction as `Done`. You can switch to monitoring the chat session (see “Monitoring a Chat Interaction” on page 362) by clicking `End Chat` ( ) in the `Call Actions` toolbar.
   - Coach via voice—Select `Coach via Voice` from the agent party `Action` menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent (see “Making a Voice Call” on page 76).

- Coach via Instant Messaging—Select `Coach via Instant Messaging` from the agent party `Action` menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are coaching by chat by sending instant messages to that agent (see Chapter 12, “Task: Handle Internal Instant Messaging,” on page 145).

If you stopped coaching, you are disconnected from the chat session.

If the agent ends the chat session while you are still coaching the agent, your coaching session ends automatically.

5. Click `Done` to close the Chat Interaction Coaching window and mark the interaction as `Done`.
6. To end coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the `Action Menu` for the agent and select `Stop Coaching` (see Figure 305).

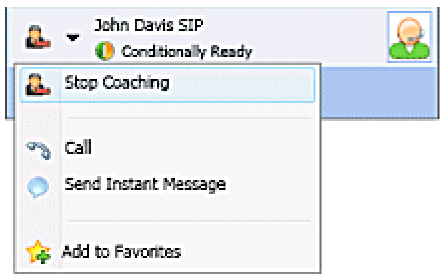


Figure 305:Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

End of procedure

Switching Team Supervisor Modes

Interaction Workspace enables you to switch from certain team-supervision modes to others. During the monitoring or coaching of an active interaction, you can switch from one supervision mode to another. The following transitions are supported:

- Monitoring to coaching—Use the party `Action` menu that is associated with the agent, or `Use Unmute (Coach)` in the Interaction toolbar to return to coaching.
- Monitoring to barge-in—Click `Barge-in` in the `Supervision` bar.
- Coaching to barge-in—Click `Barge-in` in the `Supervision` bar.
- Coaching to monitoring—Click `End Chat`, `End Call`, or `End IM` in the Interaction toolbar of the coaching interaction to return to monitoring, or `Mute (Monitor)` in the Interaction toolbar to return to monitoring.

- Barge-in to monitoring—Click `End Call` or `End Chat` in the Interaction toolbar to return to monitoring.
- Barge-in to coaching—Use the party `Action` menu that is associated with the agent.

Note: Depending on the technical environment of your voice channel, some voice specific supervisor switching-modes might not be available, for example:
- Switching from coaching to barge-in might not be possible.
- Switching from monitoring to barge-in might not be possible.

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 section of the Genesys documentation wiki at http://docs.genesyslab.com/wiki/index.php?title=Category:Interaction_Workspace.
- 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 about 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`.
- Genesys Documentation wiki at `http://docs.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, might 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 4 describes and illustrates the type conventions that are used in this document.

Table 4: 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 374).	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 4: 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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