CIC 3.0 Basic Client Training

Interaction Client
Last Updated December 19, 2008

This document offers training for beginning CIC users.
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Introduction to the Interaction Client

The client’s size can be adjusted like any standard window in Microsoft Windows. Place your mouse on any edge or the bottom corner of the window, click and drag.

The top portion of your client contains the “My Interactions” window. This window shows all alerting interactions when you are working on them.

Located below the “My Interactions” window are the interaction buttons. They include the following:

- **Pickup** - answer an interaction.
- **Hold** – put an interaction on hold
- **Voicemail** – puts the caller into your voicemail
- **Join** – creates a conference call between you and another user already on a call
- **Listen** – allows a user with supervisor rights to listen on calls
- **Coach** – allows a supervisor to speak to an agent while they are on a call without the caller hearing the supervisor
- **Disconnect** - quit an interaction.
- **Transfer** - send this interaction to another user or back into a queue.
- **Mute** - keep the caller from hearing you.
- **Assistance** - ask a supervisor for help.
- **Record** - record the present call.
- **Pause** – pause existing recording without ending it.

Located below these buttons is your current status.

At the bottom of the client is a client user’s directory. This directory shows you all the Client users and their current status.

‘My interactions’ is the tab that will show all incoming or outgoing calls.

Call info will appear here when you have an active call.

Workgroup queue tabs allow you to monitor calls in other queues (permissions based)

Directories tabs allow you to organize and search for users inside or outside the company and provides options for one click dialing.

Figure 1. Interaction Client
Minimizing and Maximizing

When your client is loaded, there will be a status icon in the right corner of your Windows desktop next to the clock. This icon means the client is loaded and you are logged in. It will be visible as the icon representing your current status.

If you hit the “X” button in the top right corner to minimize the client, the client will not exit. You will still see the status icon next to the clock. To open your client window again, simply left-click the icon.

If you mouse over that icon in the system tray, you will see the status displayed. You can right click on the icon to change the status or exit.

If you left click on that icon, your client will again be the active window on the desktop.
Customizing the client
Change Page Layout

Using a flexible docking architecture, you can rearrange pages within the Interaction Client .NET window, placing them in more convenient locations to suit your needs. This capability is helpful if you manage many interactions and users, for example in different states or multiple inter-office divisions, because more page can be visible at a time than in previous versions of Interaction Client .NET Edition.

To move a page, click the tab with your mouse and start dragging it. Docking arrows appear on the client window, showing you the available locations to which you can move the page.

When you move the mouse on top of an arrow, the client highlights the area to which the page will move if you release your mouse and “drop” it on that particular docking arrow. You can also drag a page within its current set of tabs to reorder it.

![Docking pages](image)

**Figure 3. Docking pages**

**Note:** When you click a tab to select a page, the tab contains a focus indicator icon which helps you see which page is being moved.
Customizing columns and tabs

There are many customization options available.

Add tabs/pages. Right click next to the last tab in the section you want to add your new tab. Click on ‘pages’.

The configuration window will open. You can check the boxes you want to add. When you are finished, click OK.

Change the order of the tabs. You can change the order of the tabs by left clicking on the tab and dragging it to the desired location.

Change the columns that appear. Right click on any column heading to see a list of available fields. Those that are checked are the ones that have already been selected. You can select a field to add just by clicking on it. Once you have added the column, you can reposition it by dragging and dropping in the appropriate location.

Reposition the columns. Left click on the column you want to move and drag the column to the appropriate position.
Help Menu

Click the help option in the Interaction Client menu.

Figure 7. Help Menu
Client Features

User Status

Your status tells the system and your co-workers whether you are available to take calls. To change your status, simply select the drop-down bar and highlight your current status.

Hint: You can also change your status by calling into the telephone user interface (TUI) where you access your voicemail and email. Option 5 allows you to change your personal options, including your status.

![Figure 8. User Status View](image8.png)

![Figure 9. User Status Details](image9.png)

Certain statuses have an “Until” date and/or time. If you click the “Until” button next to the status bar, you can specify a date and/or time for this status. You can also input a value into status notes that will appear in the client. This allows you to display additional information on your whereabouts.
<table>
<thead>
<tr>
<th>Status</th>
<th>Use this status when….</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>You are available to receive calls/ faxes from the queue</td>
</tr>
<tr>
<td>Available, No ACD</td>
<td>You are not available to receive calls/ faxes from the queue, but you are available to receive direct calls.</td>
</tr>
<tr>
<td>Follow Up</td>
<td>The amount of time from when you disconnect until you receive the next interaction. After a queued interaction is finished, the system will change your status to “Follow-Up” automatically. This status temporarily blocks queued calls so that you can have a breather between calls or finish up any follow-up for this interaction. If you are working but need more than a few seconds, change your status to “Extended Follow Up.” If you are ready early, feel free to change your status to “Available” to receive the next interaction in the queue.</td>
</tr>
<tr>
<td>Extended Follow Up</td>
<td>Put yourself in this status if you need additional Follow Up time for the call you just finished.</td>
</tr>
<tr>
<td>ACD – Agent Not Answering</td>
<td>When a queue call alerts you and you fail to answer, your status will automatically change to “ACD-Agent Not Answering.” This status blocks queue calls and direct calls to you, since you were not available to take the call assigned to you. To prevent increased waiting times for callers, the system will not repeatedly send you queue calls while you are gone. If you notice that you are in this status, please change it to “Available” or another appropriate status when you are ready. It is important to change your status when you leave your desk, go on breaks, or are scheduled to be in/out of the queues.</td>
</tr>
<tr>
<td>At a Training Session</td>
<td>You are at a training session</td>
</tr>
<tr>
<td>At Lunch</td>
<td>You are at lunch or on a break that is greater than 15 minutes</td>
</tr>
<tr>
<td>Away from Desk</td>
<td>Use when you will be away from your desk for 15 minutes or less</td>
</tr>
<tr>
<td>Gone for the Day</td>
<td>Use when you have left for the day</td>
</tr>
<tr>
<td>In a Meeting</td>
<td>Use if you are in a meeting</td>
</tr>
<tr>
<td>On Vacation</td>
<td>Use if you are on vacation</td>
</tr>
<tr>
<td>Out of Office</td>
<td>Use if you are doing a business related activity, but you are not in the office</td>
</tr>
</tbody>
</table>

You can also change your status by Right-Clicking the icon in the bottom right corner of your Windows task bar. When you click here, a menu will pop up showing all the statuses. Simply select one to change it.

If you select the “Exit” option, the CIC system will log you off.

Figure 10. Right-Click Status Change
Outbound Calls

You can make a call in any of the following ways:

1) Type the numbers in the field marked “Number” at the top of the client. Then click “Make Call” button.
   
   Spaces and dashes are optional, and will not affect the dialed number.
   
   Letters can be typed, and the system will automatically translate them into standard digits. For example, 1-800-FLOWERS will become 1-800-356-9377.
   
   You can use a slash “/” to force the system to wait until the call is answered before typing the extension digits. For example, 888-555-1234/9090 will dial 888-555-1234, wait for an answer, and if it is a machine, dial extension 9090.
   
   You can use the comma “,” to pause for a few seconds while dialing. Use this when calling long distance. For example, type the long distance number, add a comma and type your long distance code number.

2) Double click on the directory entry you would like to dial.

3) Click once on the phone number field of the person you would like to dial.

4) Right click on a directory entry and select the phone number to dial.

5) Pick up your handset and dial on the keypad.

Figure 11. Making Calls
Basic information is displayed for incoming and outgoing calls. The first few columns have the following information that might be useful:

- The symbol to the far left shows the call state. This is a picture representation of the information in the “State” column.
- The Queue column will tell you what ACD queue gave you the call. If it is outbound or direct to your extension, this column will be blank.
- Name and Number will tell you Caller ID information, so you know who is calling you.
- Duration is the elapsed time the call has been in the CIC system. The call duration may have started counting if you receive a queue call or a transferred call.
- The State of the Call is represented by the symbol on the left and the State column. Some possible Call States are:
  - **Alerting** = A call waiting to be picked up
  - **Disconnected [Local Disconnect]** = A call that you hung up.
  - **Disconnected [Remote Disconnect]** = A caller that hung up on you.
  - **Connected**
  - **Voicemail**
  - **On Hold**
  - **Dialing**
Disconnected Calls

The screenshot shows a disconnected call. The call data will stay visible for 30 seconds (or whatever interval your system is configured for) before disappearing. To call a person who was disconnected, you can double-click on the disconnected call and the system will call them back.

Figure 13. Disconnected Calls

Multiple Calls

You can make or receive multiple calls at the same time. You will NOT receive ACD calls (queue calls) if you are already on the phone. This client shows how each interaction (call, fax, etc.) has its own information.

Figure 14. Multiple Calls
Number Field

The Number field is also a drop down box, which will retain a history of dialed calls. To dial a previously dialed number, select an item from the drop-down box and click “Make Call.”

![Number Field Image](image_url)

Figure 35. Number Field
Call History

The call history tab allows you to see all calls (incoming, outgoing and missed). For instance, if you miss a call and the caller does not leave a voicemail, you will see the call information here and you can click and dial the number to return the call.

Figure 16. Call History
Directories

You can use directories at the bottom of your client to see the current status of anyone in the system. Directories show who is logged in and how long they have been in that status. Since this is a directory, you can double click on any person’s row to call them.

Directories can be sorted by any column by clicking on the column name. If you click on the column header (once for ascending, twice for descending) it will sort on that column. You can also set up a filter on any column. If you place your mouse between the directory tabs and the column headings, you will see a blue line. This is an on/off toggle for the filter columns. Once they are turned on, you will see input boxes above each column heading. To search by last name, put your cursor in the last name field and start typing the person’s name.

Figure 17. Activating search/filter fields

For example, if you are searching for someone with the last name of ‘Williams’, you would put your cursor in the last name input box and type Wi. As you type, the client will filter out anyone who does not meet that criteria. Search for all combinations of specific letters by using * for a wildcard match. For example, use *ob to find all entries containing, but not necessarily beginning with, ob.

Figure 18. Search results
CIC also has a public contacts directory that may include outside numbers. This is a shared phonebook that can be viewed by anyone with the Interaction Client. To call outside numbers, simply double click the name or single click on the phone number. Like all directories, the public contacts directory is sortable and searchable.

You can also right click on the entry you would like to dial and you will see a menu of available options for that entry. From here, you can dial any number that is configured in this profile (Business number, home number, mobile number, etc.).
Incoming Calls

When a call or fax is alerting you, it is ready to be answered. Your telephone and/or computer will make noise to alert you that a new call or fax is ready to be answered.

To pickup a call, you have the following options:

1) Select the call in the “My Interactions” window and click the “Pickup” button.
2) Double-click on the alerting call.
3) Pick up your handset and answer the call
When a call is connected, you will see the State switch to “Connected.” As long as the call is highlighted in your “My Interactions” window, the call control buttons will color and become ready to use.

*Note: Some buttons are not needed and may remain gray. For Example, the “Pickup” button will remain gray for a call already picked up.*
Placing a call on hold

![Image of hold button with text](image)

**Figure 23. Hold Button**

To place a call on hold, simply highlight the call and press the “HOLD” button. You will see the button depress and the state of the call will switch to “On Hold.” The symbol for “On hold” matches the one on the button.

Muting a call

![Image of mute button with text](image)

**Figure 245. Muting Calls**

To mute a call, simply highlight the call and select the “Mute” button. This silences your end of the conversation, but you can still hear the caller. You will see the Mute button depressed, but the state of the call hasn’t changed.

Your phone also has a Mute button, which will also work. However, these two buttons will not affect each other. If you use the client to mute, you need to use the client to un-mute. Same with the phone.
Transferring Calls

There are multiple ways to transfer a call.

1) Use the Transfer call control button.

Select the call and hit the “Transfer” button. A separate transfer options window will appear. In the “Transfer To” field, type the extension of the person or queue to which you want to transfer. Once you enter a valid extension, the ‘transfer now’ and ‘make consult call’ buttons will be active.

![Transfer call control button](image)

Figure 25. Consult Calls (Transfers)

To do an announced (monitored) transfer, click on ‘Make Consult Call’. This will place the caller on hold and connect you to the person you are transferring to. Once you announce the call, you can click on the ‘transfer now’ button to connect the caller to the person you are transferring the call to. You can switch back and forth between the caller and consultee as necessary.

To do a blind transfer, you can enter the extension and click on ‘Transfer Now’.

![Transfer window with Caller Name Field](image)

Figure 26. Caller Name Field

The “Caller Name” field will display the Caller ID information the system received from the call. If there is incomplete information for a transfer call, you can add information for the person receiving the transfer (i.e. Name + ‘VIP Customer’).
If the caller requests to go to the voicemail of the recipient, you can transfer them directly by clicking “Send to Voicemail.”

If the recipient is not willing to accept the call, hit “Cancel” to eliminate the transfer window and cancel the transfer.

If the caller is not available but will be soon, you can use the “Park” button to place the caller on hold on the client’s recipient. The caller will stay on hold until the recipient is available to pick them up. The recipient can pick up this call like any other “On Hold” call. **Only use this feature if you have spoken to the person you are sending the call and you know they will pick up the “Parked” call.**

2) Find the person you want to transfer to in the directory and check their status. If they are available and not on the phone, you can right click on the name. You will get the same options that you get when using the transfer button. See image below.

*Note: This is the preferred way to transfer since it decreases the likelihood of mistyping the extension and it also forces you to look at the person’s status to make sure they are available. You can also configure the button row below the directory to have shortcut buttons for the various types of transfers.*

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![Figure 27. Right click to transfer](image1.png)

![Figure 28. Directory Shortcut buttons](image2.png)

3) ‘Drag and drop’ a call onto a directory entry. You can highlight the call in ‘my interactions’. While left clicking on the call you can ‘drag’ it to the directory entry you would like to transfer to. It will transfer to the default number for that entry.