



# Welcome to Interactive Intelligence 3.0 .Net Client Training

# Training Agenda

- Introduction to Client
- Log into Client
- Configuring Client
  - Personal Prompts
- Alerts
  - Computer Rings
  - Toast Pops
  - Interaction program opens
- Make Calls
  - Manually
  - Using the Directory
- Status
  - Present status
  - Change status
- Transfer Calls
- Conference Calls
- Camp

# Client Login

**Connect**

Use Windows Login Authentication

User ID: rhardake

Password: \*\*\*\*

Save Password

Host: ent-acd-cic1

Station Type: <this computer>

Workstation: DII-RHARDAKE-LT

Remote Number:

[Help me connect](#)  Persistent

OK Cancel

**User ID** will be the 1<sup>st</sup> character of your first name and your entire last name

Make sure that the Use Windows Login Authentication is NOT checked.

**Host** is the CIC server name: ent-acd-cic1

**Station Type:** Click on the drop down tab and select "This Computer"

**Workstation:** This is will be grayed out with workstation name normally.

# Configuration

## Customizing your client

To access the client configuration page:

Click "Options".

Select the "Configuration".

The screenshot shows the 'Interaction Client: .NET Edition' application window. The 'Options' menu is open, and the 'Configuration...' option is highlighted. The main window displays a 'Company Directory' table with the following data:

Lo	Last Name	First Name	Extension	Department	Title	Status
✓	Phillips	Andy	9515	Testing	Level 2 Testing Engineer	Available, No ACD
✓	Frederiksen	Ben	8710	Testing	Level 1 Testing Engineer	Available
✓	Lindsey	Ben	197	Testing	Simulation Developer	Available, No ACD
✓	Bohney	Carol	8603	Testing	Level 2 Testing Engineer	Available, No ACD
✓	Wampler	Carolyn	143	Testing	Level 3 Testing Engineer	Available
✓	Bowman	Chas	8205	Testing	Scalability Engineer	Available, No ACD
✓	Dombkowski	Dennis	8782	Testing	Automation Engineer	Available
✓	Wampler	Doug	130	Testing	Testing Manager, PIT	Working in the Lab
✓	Chreist	Eric	8641	Testing	Level 2 Testing Engineer	Available
✓	Ostrognaï	Jim	8634	Testing	Director of Testing	At Lunch
✓	Gladish	Jason	8707	Testing	Level 1 Testing Engineer	Away from desk
✓	Probala	Jason	8529	Testing	Testing Manager, Functionality	Available

# Configuration

## Personal Prompts – Voicemail Prompts

**Out of Office:** This message is used when you are out of the office for a period of time. This is not required to record if you choose to use the canned Out of Office message. (Optional)

**Record No Answer Message:** If you are familiar with voicemail, this is your general voicemail message that a caller will hear when you are on the phone or away from your desk. (Required)

**Record Name:** This is the name that is played when a caller selects your number in the directory. (Required) By not changing this prompt, the caller will hear a digitized voice announcing your core id and name. Not very legible.

The screenshot shows a 'Configuration' window with a tree view on the left and a 'Personal Prompts' panel on the right. The tree view includes 'Alerting', 'Voicemail / Fax Paging', 'My Interaction Ring Sounds', 'Desktop Alerts', 'Calls', 'Follow Me', 'Call Coverage', 'Personal Prompts', 'Pages', 'General', 'Plugins', and 'Outlook Dialing'. The 'Personal Prompts' panel has a blue header and contains two checkboxes: 'Activate out of office message' and 'Activate agent greeting'. Below these are seven rows, each with a text input field and 'Preview' and 'Reset' buttons. The rows are: 'Record Out Of Office', 'Record No Answer Message', 'Record Follow Me Message', 'Record Name', 'Record Agent Greeting', and 'Record Available, Forward Message'. At the bottom of the window are 'OK', 'Cancel', and 'Apply' buttons. Blue arrows point from the text boxes to the corresponding input fields in the 'Personal Prompts' panel.

Option	Preview	Reset
<input type="checkbox"/> Activate out of office message		
<input type="checkbox"/> Activate agent greeting		
Record Out Of Office	Preview	Reset
Record No Answer Message	Preview	Reset
Record Follow Me Message	Preview	Reset
Record Name	Preview	Reset
Record Agent Greeting	Preview	Reset
Record Available, Forward Message	Preview	Reset

# Client Page

Consists of two parts:

- My Interactions (normally top section of page). Includes Call Control buttons and Status.
- Directory pages (normally bottom section of page).

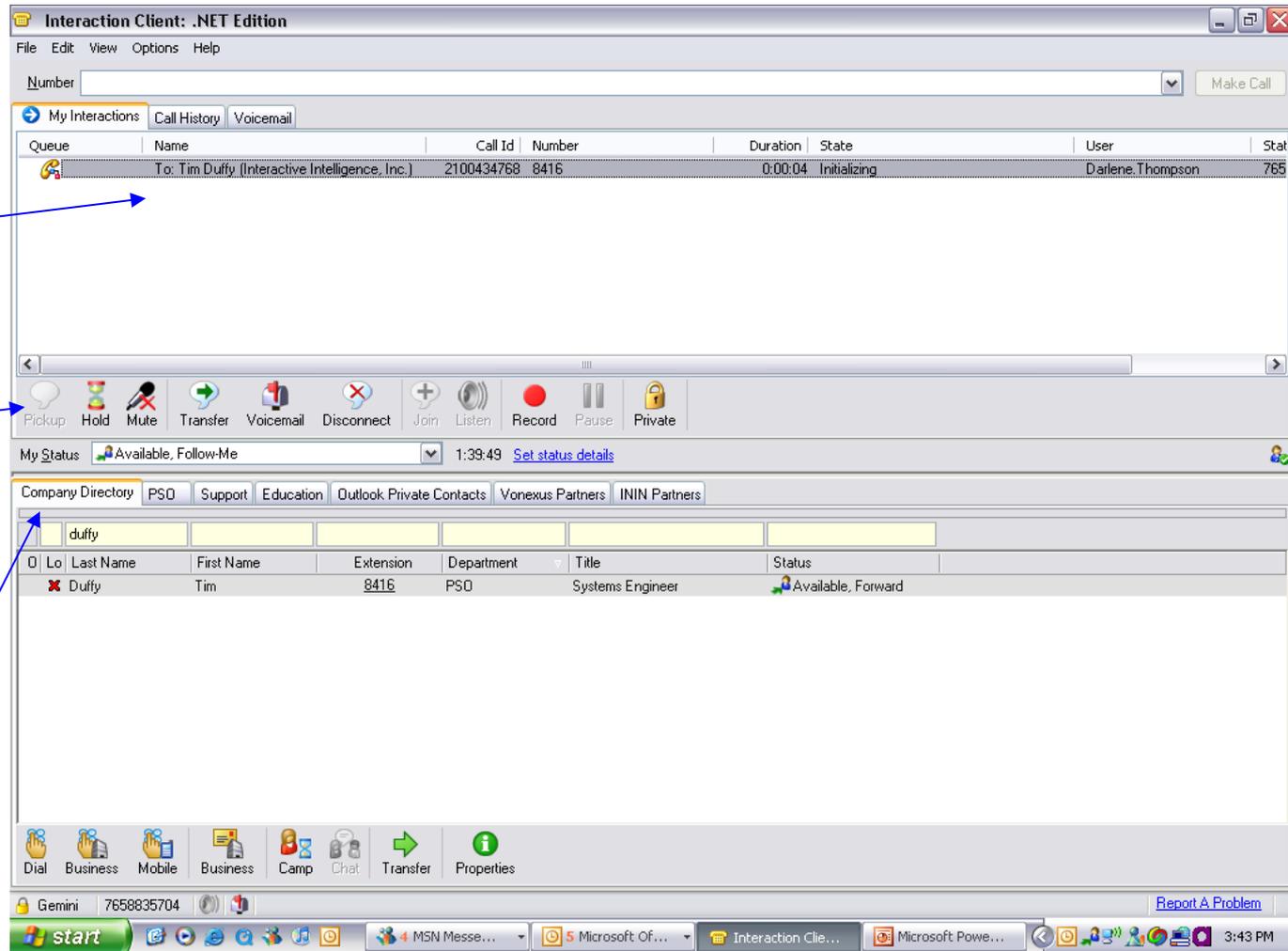
# Client Page

## My Interactions:

- My Interactions tab shows the connected calls and their status.
- History tab contains the calls that have been placed from your client. (This is not a permanent storage area for calls received and placed.)
- The buttons in the middle of the page that are present when there is an “active” call on the My Interactions section. (Pickup, Hold, Transfer, Voicemail, Disconnect)

## Directories

- Show company or workgroup directories.



My Interactions

Call Control  
Your screen will show the following buttons:  
Pickup, Hold, Mute, Transfer, Voicemail, and Disconnect

Directories

## My Interactions

At this point there is an active call on this page.

The **call control** buttons are available since there is an active call. Based on your rights, you may not have all of the call control features available in this demo.

- Pickup
- Hold
- Transfer
- Voicemail
- Disconnect
- Mute

The screenshot displays the 'Interaction Client: .NET Edition' window. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Options', and 'Help'. Below the menu is a search bar labeled 'Number' and a 'Make Call' button. The main area is divided into tabs: 'My Interactions', 'Call History', and 'Voicemail'. The 'My Interactions' tab is active, showing a table with the following data:

Queue	Name	Call Id	Number	Duration	State	User	Stat
	To: Tim Duffy (Interactive Intelligence, Inc.)	2100434768	8416	0:00:04	Initializing	Darlene.Thompson	765

Below the table is a toolbar with call control buttons: Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Record, Pause, and Private. The 'My Status' dropdown is set to 'Available, Follow-Me' with a timer at 1:39:49 and a 'Set status details' link. Below the toolbar is a 'Company Directory' section with tabs for 'PSD', 'Support', 'Education', 'Outlook Private Contacts', 'Vonexus Partners', and 'ININ Partners'. The 'PSD' tab is active, showing a search for 'duffy' and a table with the following data:

Lo	Last Name	First Name	Extension	Department	Title	Status
X	Duffy	Tim	8416	PSD	Systems Engineer	Available, Forward

At the bottom of the window is another toolbar with buttons for 'Dial', 'Business', 'Mobile', 'Business', 'Camp', 'Chat', 'Transfer', and 'Properties'. The Windows taskbar at the very bottom shows the 'start' button, several open applications, and the system clock at 3:43 PM.

# Incoming Call Alerting

## Incoming Call Alerts:

- Toast (miniature screen)– Just like with your Outlook, you will be alerted with a “New Interaction” toast in the lower right corner of the screen.

The screenshot displays the 'Interaction Client: .NET Edition' window. The main interface shows a call log with the following details:

Queue	Name	Call Id	Number	Duration	State	User	Stat
	From: anonymous	2100434862	(317) 266-6966 87	0:00:18	Alerting	Darlene.Thompson	

Below the call log is a toolbar with various call control icons: Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Record, Pause, and Private. The status bar indicates 'My Status: Available, Follow-Me' with a timer at 1:45:24 and a link to 'Set status details'.

The bottom section of the window shows a 'Company Directory' with a search for 'duffy' and a list of results:

Lo	Last Name	First Name	Extension	Department	Title	Status
X	Duffy	Tim	8416	PSD	Systems Engineer	Available, Forward

A blue arrow points from the 'New Interaction' toast notification in the bottom right corner to the 'duffy' entry in the company directory. The toast notification contains the following information:

- Phone icon
- anonymous (317) 266-6966 87
- Pickup
- Send To Voicemail
- Hold

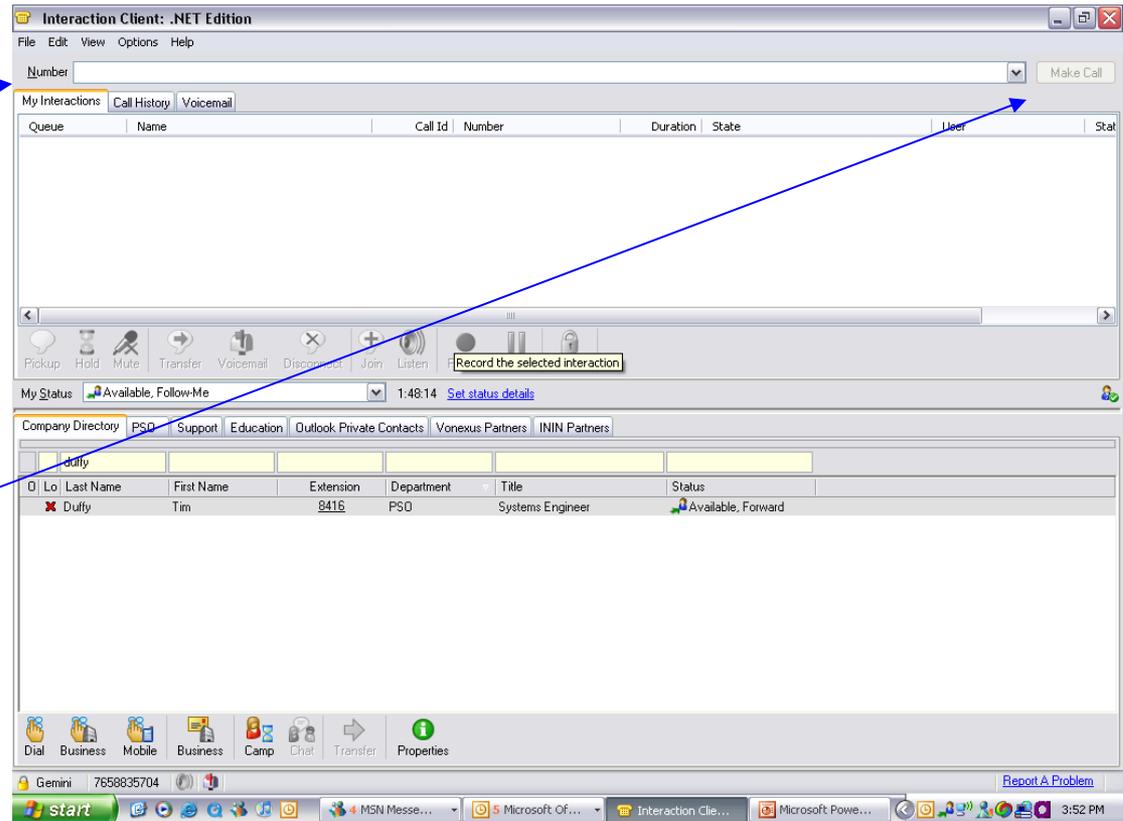
The Windows taskbar at the bottom shows the Start button, several open applications (MSN Messenger, Microsoft Office, Interaction Client, Microsoft PowerPoint), and the system tray with the time 3:49 PM.

# Make Call

## Entering numbers

### Making Calls:

- Type in the number that you wish to dial. (You do not have to dial from the phone set.)
- You can copy a number from an email and paste in this field to make a call.
- Press “Make Call”



# Make Call

## Using Directories

### Making a Call from the directory:

•Click on the number (hyperlink) and press “Yes” if prompted. The client will dial the number.

You ‘drag and drop’ a call on to a person in the directory in order to perform a transfer.

•Outlook Contacts Directory: You have the ability to dial from the Outlook Contacts directory. The client is linked to your Outlook Contacts.

Interaction Client: .NET Edition

File Edit View Options Help

Number  Make Call

My Interactions Call History Voicemail

Queue	Name	Call Id	Number	Duration	State	User	Stat
-------	------	---------	--------	----------	-------	------	------

Pickup Hold Mute Transfer Voicemail Disconnect Join Listen Record the selected interaction

My Status Available, Follow-Me 1:48:14 Set status details

Company Directory PSD Support Education Outlook Private Contacts Vonexus Partners ININ Partners

Lo	Last Name	First Name	Extension	Department	Title	Status
X	Duffy	Tim	8416	PSD	Systems Engineer	Available, Forward

Dial Business Mobile Business Camp Chat Transfer Properties

Gemini 7658835704 Report & Problem

start 4 MSN Messe... 5 Microsoft Of... Interaction Cle... Microsoft Powe... 3:52 PM

# Status

## Status:

•Status tells the CIC system how to treat incoming calls. Selecting “Available” as a status will allow incoming calls to reach you at your DID. To receive a call the My Status field must have one of the following:

1) Available; 2) Available, No ACD; 3) Available, Follow-Me; 4) Available, Forward

•When you are on a call, anyone within your organization can see this by your status or the “On Phone” symbol.

•If an outside call is received while your status is set to “Gone Home”, the system will announce this status to the caller and place them in your voicemail.

The screenshot shows the Interaction Client: .NET Edition interface. At the top, there is a menu bar with File, Edit, View, Options, and Help. Below the menu bar is a search field labeled "Number" and a "Make Call" button. The main interface is divided into several sections. The top section is labeled "My Interactions" and contains tabs for "Call History" and "Voicemail". Below this is a table with columns for Queue, Name, Call Id, Number, Duration, and State. The middle section contains a toolbar with icons for Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Record, Pause, and Private. Below the toolbar is a "My Status" dropdown menu currently set to "Available, ..." and a timer showing "1:23:58" with a "Set status details" link. The bottom section is labeled "Company Directory" and contains tabs for PSD, Support, Education, Outlook Private Contacts, Vonexus Partners, and ININ Partners. Below the tabs is a table with columns for O, Lo, Last Name, First Name, Department, Title, and Status. The table contains the following data:

O	Lo	Last Name	First Name	Department	Title	Status
	✓	Flack	Chris	Corporate Marketi	Lead Team Specialist	Available, No ACD
	✓	Skinner	Dan	Corporate Marketi	Marketing Associate	Available
	✓	Maple	Jenn	Corporate Marketi	Marketing Events Manager	Gone Home
	✗	Watson	Jessica	Corporate Marketi	Lead Team Specialist	Gone Home
	✓	Wilson	Mary	Corporate Marketi	Telemarketing Specialist	Available, No ACD
	✗	Harnish	Sarah	Corporate Marketi	Corporate Marketing Coordina	Available, Forward
	✓	Bailey	Tom	Corporate Marketi	Marketing Copywriter	Available, No ACD
	✓	Klee	Sarah	Corporate Marketi	Lead Team Specialist	Available, No ACD

At the bottom of the interface, there is a toolbar with icons for Dial, Business, Mobile, Business, Camp, Chat, Transfer, and Properties. The bottom status bar shows "Gemini 7658835704" and "Wilson, Mary".

# Camp

## Camp Feature

•When you are waiting for someone within the organization to become available, right-click on the name and select “Camp”.

•Or click once on their name and click the “Camp” button at the bottom of the screen.

The screenshot displays the Interaction Client .NET Edition interface. At the top, there is a menu bar (File, Edit, View, Options, Help) and a 'Number' input field with a 'Make Call' button. Below this is a 'My Interactions' section with tabs for 'My Interactions', 'Call History', and 'Voicemail'. A table with columns 'Queue', 'Name', 'Call Id', 'Number', 'Duration', 'State', and 'User' is present but empty. A toolbar with icons for Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Record, Pause, and Private is located below the table. The 'My Status' dropdown is set to 'Available, Follow-Me' with a 'Set status details' link. The main area shows a 'Company Directory' tab with sub-tabs for 'PSO', 'Support', 'Education', 'Outlook Private Contacts', 'Vonexus Partners', and 'ININ Partners'. A table lists directory entries with columns: 'Lo', 'Last Name', 'First Name', 'Extension', 'Department', 'Title', 'Status', 'Until', and 'Time in SI'. The 'Camp' button is visible in the bottom toolbar, highlighted by a blue arrow from the text on the left. The Windows taskbar at the bottom shows the Start button, system tray, and open applications including MSN Messenger, Microsoft Office, and the Interaction Client.

Lo	Last Name	First Name	Extension	Department	Title	Status	Until	Time in SI
✓	Mendoza	Leticia	8343	PSO	Systems Engineer	Available, No ACD		1:27:06
✓	West-Worland	Lori	8659	Education	Education Operati	On a Conference C		0:04:45
✓	Modglin	Al	8430	PSO	Manager, Global S	Available		1:33:50
✓	Middleton	Andrew	8439	PSO	Packaged Solution	Available		0:21:48
✗	Hartwig	Barry	8336	Services	System Engineer	Gone Home		13 Days 2
✗	Chung	Casey	8201	PSO	Systems Engineer	At Customer Site		23 Days 2
✓	Nay	Chad	8410	PSO	Project Engineer	Available, Follow-		17:48:34
✗	Karpp	Christian	8470	PSO, EMEA	Systems Engineer	Gone Home		19 Days 1
✓	Thompson	Darlene	8243	PSO	Project Engineer	Available, Follow-		2:00:50
✗	Goldstein	Daryl	8395			Gone Home		23 Days 2
✓	Hill	David	8419	PSO	Project Manager	Available, Forward		1 Day 3:3
✗	McCoy	David	8349	PSO	Project Engineer	Available, Follow-		18 Days 1
✗	Aker	Evren	8772	PSO/Support, EM	Systems Engineer	Available, Forward		6 Days 14

# Camp

(Toast)

## Camp - Alert:

- Toast pops
- 2 choices are available: Stop Camp, Options
- Cancelling Camp: Either right-click the name again within the directory page. Or select “Stop Camp” on the toast before it disappears. (Usually remains open for 20 seconds.)

The screenshot shows the 'Interaction Client: .NET Edition' interface. At the top, there is a menu bar (File, Edit, View, Options, Help) and a 'Number' input field with a 'Make Call' button. Below this are tabs for 'My Interactions', 'Call History', and 'Voicemail'. A table with columns 'Queue', 'Name', 'Call Id', 'Number', 'Duration', and 'State' is visible. A toolbar contains icons for Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Record, Pause, and Private. The 'My Status' section shows 'Available, WAH' and a clock '1:23:58'. Below is a 'Company Directory' section with tabs for PSD, Support, Education, Outlook Private Contacts, Vonexus Partners, and ININ Partners. A table lists employees with columns for status (checkmarks or X), last name, first name, department, title, and status. At the bottom, there are icons for Dial, Business, Mobile, Business, Camp, Chat, Transfer, and Properties. A toast notification for 'Wilson, Mary' is open, showing 'Available, No ACD', 'Time in Status: 0:57:23', and 'Logged In: 7655282655'. The toast has buttons for 'Call Now', 'Stop Camp', and 'Options'.

Lo	Last Name	First Name	Department	Title	Status
✓	Flack	Chris	Corporate Marketi	Lead Team Specialist	Available, No ACD
✓	Skinner	Dan	Corporate Marketi	Marketing Associate	Available
✓	Maple	Jenn	Corporate Marketi	Marketing Events Manager	Gone Home
✗	Watson	Jessica	Corporate Marketi	Lead Team Specialist	Gone Home
✓	Wilson	Mary	Corporate Marketi	Telemarketing Specialist	Available
✗	Harnish	Sarah	Corporate Marketi	Corporate Marketing Coordina	Available
✓	Bailey	Tom	Corporate Marketi	Marketing Copywriter	Available
✓	Klee	Sarah	Corporate Marketi	Lead Team Specialist	Available

Wilson, Mary	
Available, No ACD	
Time in Status: 0:57:23	
Logged In: 7655282655	
<a href="#">Call Now</a>	<a href="#">Stop Camp</a> <a href="#">Options</a>

# Status

## Changing Your Status

You can change your status from the icon in the system tray by right-clicking on the status object in your system tray.

The screenshot displays the Interaction Client .NET Edition interface. At the top, there is a menu bar (File, Edit, View, Options, Help) and a 'Number' input field with a 'Make Call' button. Below this is a tabbed interface with 'My Interactions', 'Call History', and 'Voicemail'. A table lists interactions with columns for Queue, Name, Call Id, Number, Duration, State, and User. The main area shows a toolbar with call control icons (Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Record, Pause, Private) and a 'My Status' dropdown menu currently set to 'Available, Follow-Me'. Below the toolbar is a 'Company Directory' tab with a search bar and a list of contacts. The contact list has columns for Last Name, First Name, Extension, Department, Title, and Status. A right-click context menu is open over the status icon in the system tray, listing various status options such as 'At a Training Session', 'At Customer Site', 'At Lunch', 'At Play', 'Available', 'Available, Callback', 'Available, Follow-Me', 'Available, Forward', 'Available, No ACD', 'Available, WAH', 'Away from desk', 'Code Red', 'Do Not Disturb', 'Do not disturb, awaiting call', 'Gone Home', 'In a Meeting', 'Medical Appointment', 'On a Conference Call', 'On Break', 'On Other Call', 'On Vacation', 'Out of the Office', 'Out of Town', 'Researching', 'Sick At Home', 'Support Callback', 'Working At Home', 'Working in the Lab', 'Working Late', 'Working On Server', 'Working Out', 'Working with Engineer', and 'Exit'. A blue arrow points from the text on the left to the status icon in the system tray.

Queue	Name	Call Id	Number	Duration	State	User	Status
	Hill						Available, Fc
	McCoy						Available, Fc
	Aker						Available, Fc
	Bonness						Available, Fc
	Rocha						Gone Home
	Grenier						Available, Fc
	Spillane						Available, No
	Meltzer						Gone Home
	Elshaug						Available, Fc
	Buis						Available, Fc
	Mazuera						Available, Fc
	McNamara						Available, Fc
	Michael						Available, No

C	Lo	Last Name	First Name	Extension	Department	Title	Status
	✓	Hill	David	8419	PSO	Project Manager	Available, Fc
	✗	McCoy	David	8349	PSO	Project Engineer	Available, Fc
	✗	Aker	Evren	8772	PSO/Support, EM	Systems Engineer	Available, Fc
	✗	Bonness	Greg	8478	PSO	Team Lead of Proj	Available, Fc
	✗	Rocha	Ivan	8474	Services	Support Consultan	Gone Home
	✗	Grenier	Jackie	8388	PSO	Project Manager	Available, Fc
	✓	Spillane	Jaclyn	8437	Package Solutions	Package Solutions	Available, No
	✗	Meltzer	James	8378	Services	Systems Engineer	Gone Home
	✓	Elshaug	Jay	8216	PSO	Engagement Man	Available, Fc
	✗	Buis	Jeroen	8599	PSO, EMEA	Engagement Man	Available, Fc
	✗	Mazuera	Juan	8440	PSO	Senior Systems E	Available, Fc
	✗	McNamara	Karen	8368	PSO	Project Manager	Available, Fc
	✓	Michael	Lisa	8607	PSO	Operations Team	Available, No

# Exiting CIC

## Exiting CIC Client

•Clicking on the “X” in the upper right corner minimizes the client, it DOES NOT exit the program.

•Click “File” and “Exit”.

or

•Right-Click on the icon in the system tray and click “EXIT”.

Interaction Client: .NET Edition

File Edit View Options Help

Number [ ] Make Call

My Interactions Call History Voicemail

Queue	Name	Call Id	Number	Duration	State	User	Stat

Pickup Hold Mute Transfer Voicemail Disconnect Join Listen Record Pause Private

My Status Available, Follow-Me 2:03:24 Set status details

Company Directory PSD Support Education Outlook Private Contacts Vonexus Partners ININ Partners

C	Lo	Last Name	First Name	Extension	Department	Title	Status
		Hill	David	8419	PSO	Project Manager	Available, Fc
		McCoy	David	8349	PSO	Project Engineer	Available, Fc
		Aker	Evren	8772	PSO/Support, EM	Systems Engineer	Available, Fc
		Bonness	Greg	8478	PSO	Team Lead of Proj	Available, Fc
		Rocha	Ivan	8474	Services	Support Consultan	Gone Home
		Grenier	Jackie	8388	PSO	Project Manager	Available, Fc
		Spillane	Jaclyn	8437	Package Solutions	Package Solutions	Available, Nc
		Meltzer	James	8378	Services	Systems Engineer	Gone Home
		Elshaug	Jay	8216	PSO	Engagement Man	Available, Fc
		Buis	Jeroen	8599	PSO, EMEA	Engagement Man	Available, Fc
		Mazuera	Juan	8440	PSO	Senior Systems E	Available, Fc
		McNamara	Karen	8368	PSO	Project Manager	Available, Fc
		Michael	Lisa	8867	PSO	Operations Team	Available, Nc

Dial Business Mobile Business Camp Chat Transfer Properties

Gemini 7658835704

start MSN Messe... Microsoft Of... Interaction

Report A Problem 4:07 PM