Interaction Client
Phone & Fax

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Division of Information Technology

June 2011
Version 2

Interaction Client at CSU

Contents

Interaction Client at CSU – A How to Guide

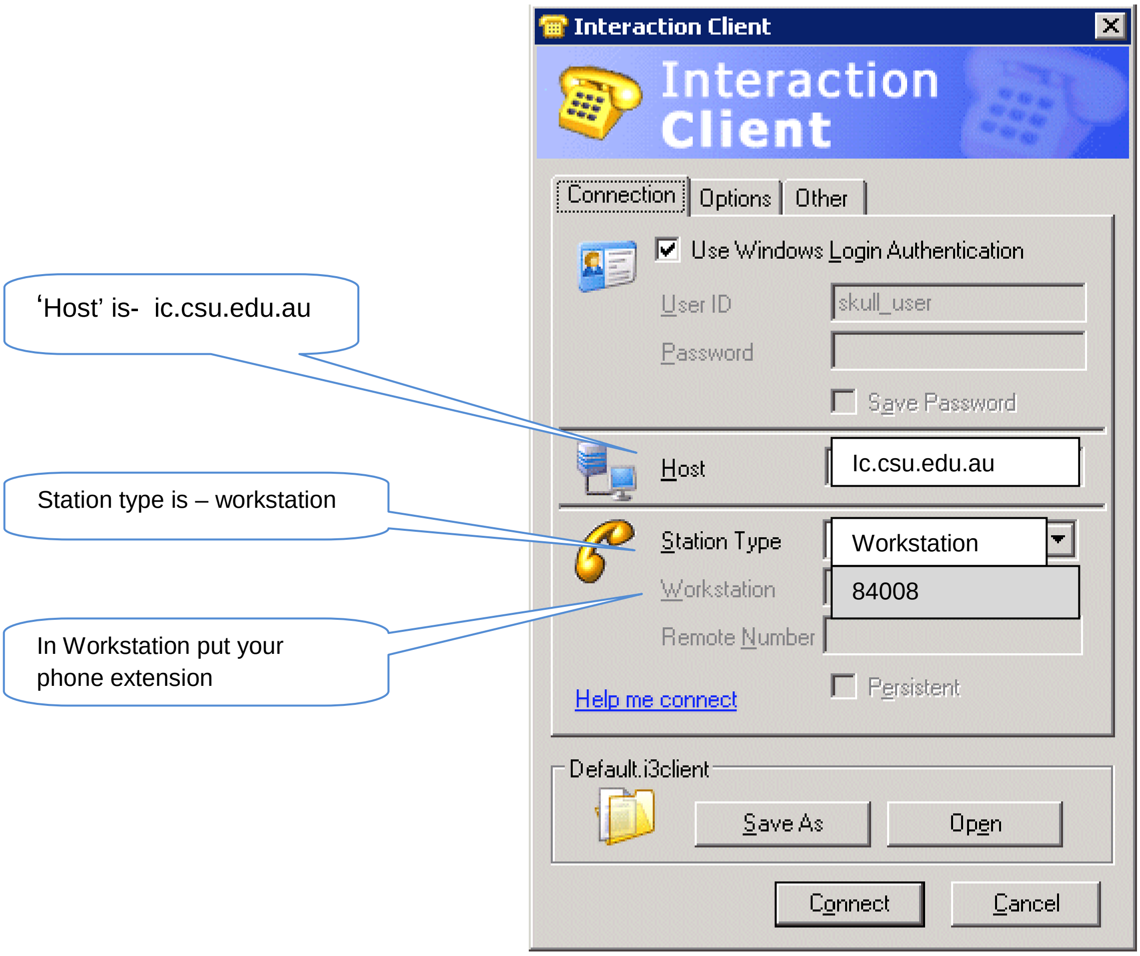
Introduction

CSU is moving towards a new phone system using VOIP or Voice Over IP telephony. What this means is that the telephones will work over the CSU network rather than over the old Telstra Telephone system.

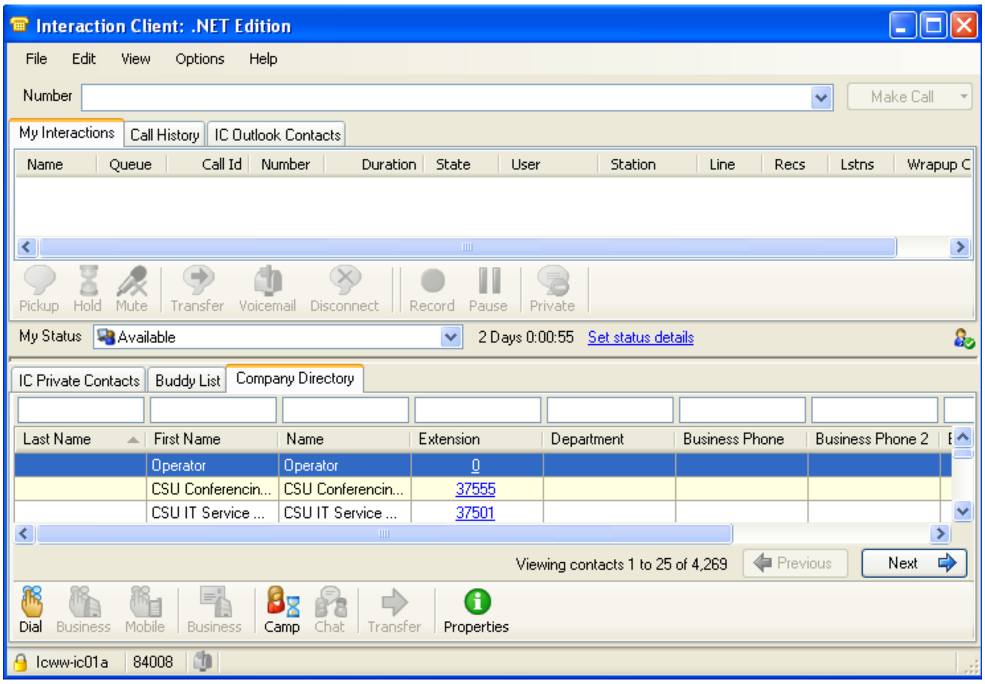
You will see an icon on your desktop to launch the ICA Client, which is the software upon which your phone operates.

The icon looks like this:

When you double click on the icon to open the software you will see this screen where you can log on to the Client:



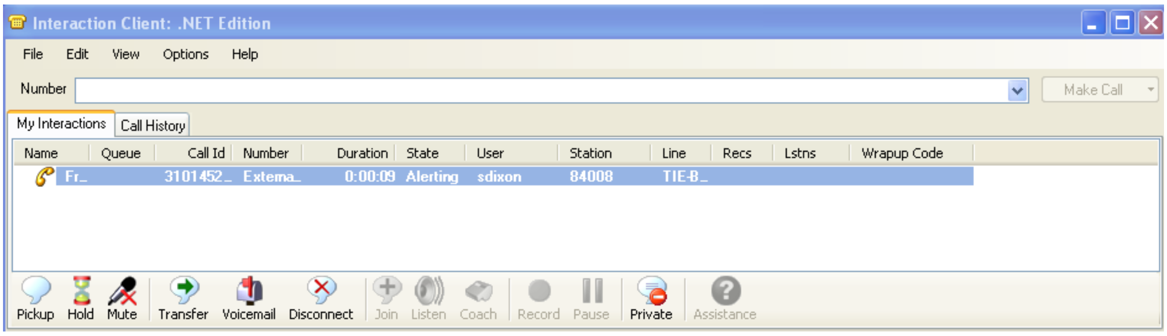
Once you have successfully logged on you will see this screen:



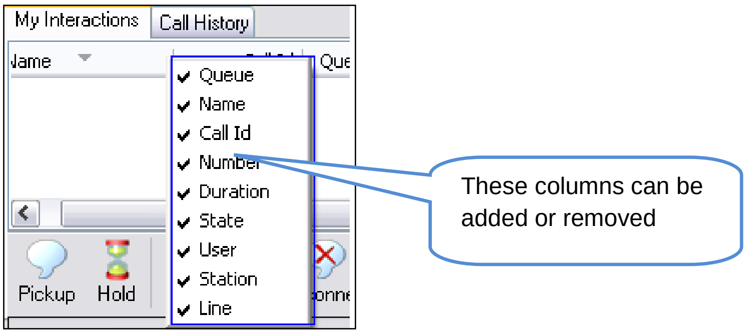
You are now logged in and ready to make and receive calls.

‘My Interactions’ Window

The ‘My Interactions’ window displays all active calls for the user of the Interaction Client. The user may toggle from an active call, to a holding call, for desktop call control.

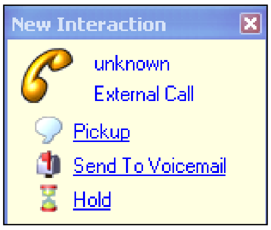


Call details are displayed in the ‘My Interactions’ window. Calls displayed in the window will show the incoming/outgoing phone number, as well as the status of the call from start to finish, the duration of the call, current user/station, and the name of the calling party. The columns to view and control the user’s interactions are customizable, where the user can change which columns to display. By right-clicking on a column label, a menu with entries will appear, showing each available column that can be added or removed. The columns can also be rearranged by clicking and dragging the desired entry to be moved.



Receiving Calls

When you receive a call your phone will ring but you will also see a message on your screen which looks like this:



It gives you a few options. You can either:

- Pickup the call
- Send it to Voicemail
- Put it on Hold

To Pick Up the call

- You can use your mouse to click on the 'Pickup' option on the screen (as above) the call will go to your phone and you will hear it via the 'Handsfree' function on your handset
- You can pick up the call by pressing the 'Answer' button on the handset. This too will go to the 'Handsfree' function
- You can simply pick up the receiver on the phone to take the call

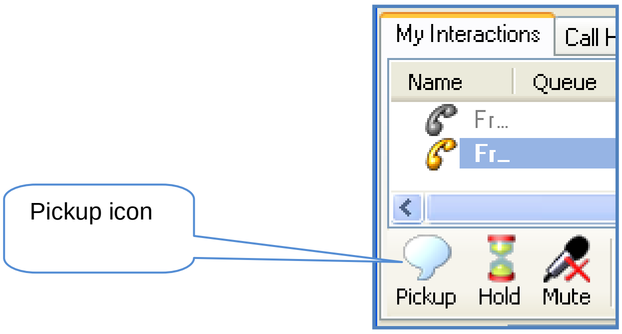
Benefit: You do not need to be in the 'Interaction Client' to see incoming calls. You will see the alert appear on your screen while you are working in other applications

To put a call on Hold

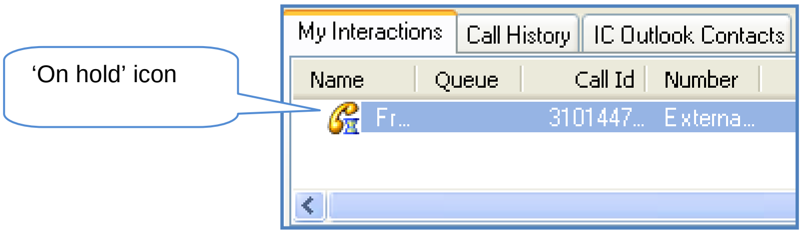
You may already be on a call when another one comes in and you want to put it on hold to take as soon as you finish the call you are on. Click on the 'Hold' option on the pop up window and the caller will hear some 'On hold' music until you pick up their call.

When you have finished the call you are on and wish to pick up their call you have a couple of options. These are:

- Click on the 'Hold' option again in the pop up window
- Click on the 'Pickup' icon on the 'Interaction Client' window. See below



- Click on the call in the 'Interaction Client' window. You will see an icon at the start of the line with a telephone off the hook. See below:



To send a call to Voicemail

Simply click on the 'Send to Voicemail' option on the pop up window and the call will divert directly to your voicemail.

If you will be away from your desk and would like all your calls to go directly to voicemail then you need to select 'Away from Desk' from the drop down list in 'My status'.

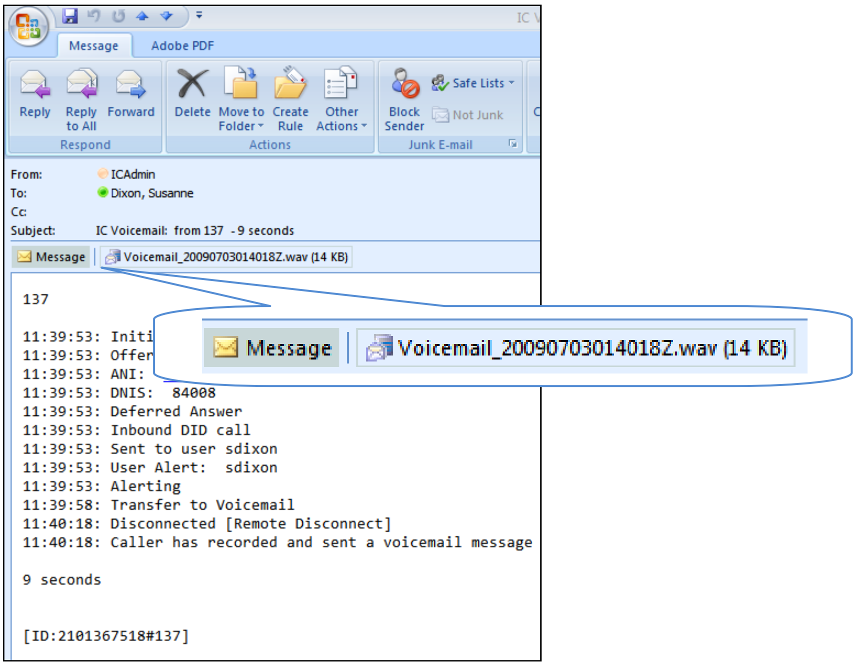
How it works

With Interaction Voicemail, the user will receive voice mail in the same place they receive e-mail. Any time a caller leaves a voice mail message; it is attached to an e-mail and sent to the user's e-mail account. The user may play, replay, rewind, fast forward, save, and change the volume of the message. The user can also forward the message to another person, just as they would any other e-mail message.

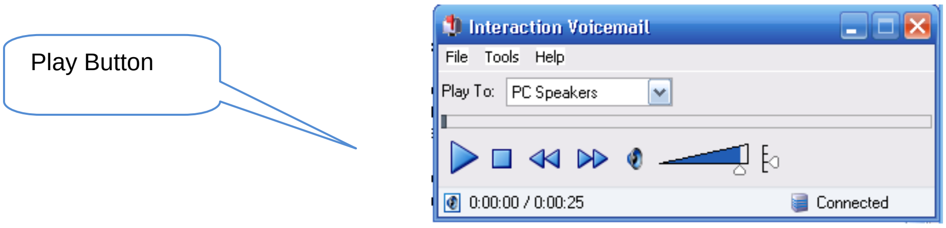
Listening to your voicemail messages

Voicemail messages on Email

When a caller leaves you a voicemail message you will receive an email message informing you of the message and with the message attached. The message will tell you the time of the call, who called and the length of the voicemail message. Just double click on the attachment.



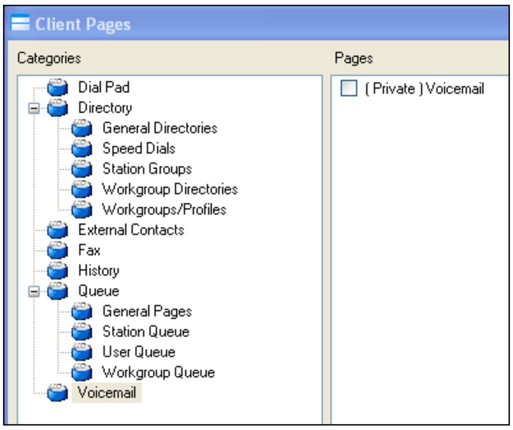
You will then see the ‘Interaction Voicemail’ player. If you click on the play button it will play for you via your pc speakers. See below:



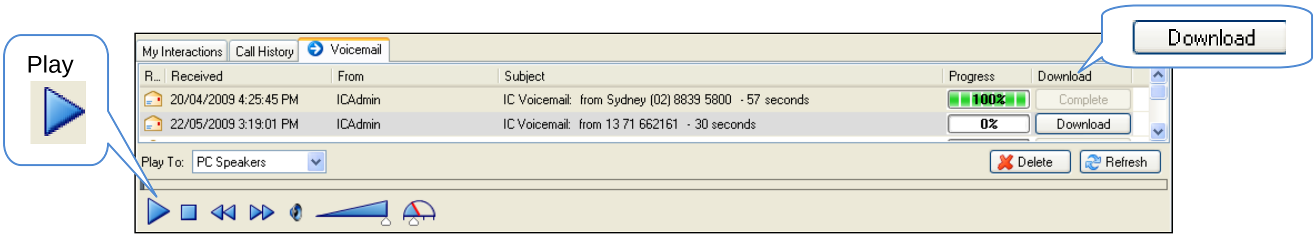
You have options to stop, rewind fast forward and turn the sound up or down.

Voicemail Viewer

You have the option to listen to your voicemail messages via the ‘Voicemail Viewer’. You can add the voicemail viewer to your ‘Interactions’ window by right clicking on the ‘My Interactions’ or ‘Call History’ tab and choosing ‘Pages’. When you have done this the following window appears and by selecting the ‘Voicemail’ option and then ticking the box next to ‘(Private) voicemail’ you will have another tab on the window where you can view your voicemail messages and choose the ones you wish to listen to via your pc speakers.



The new tab on your ‘Interactions’ window will look like this:



Click on the 'Download' option to download the message and then click on the 'Play' button to listen to it.

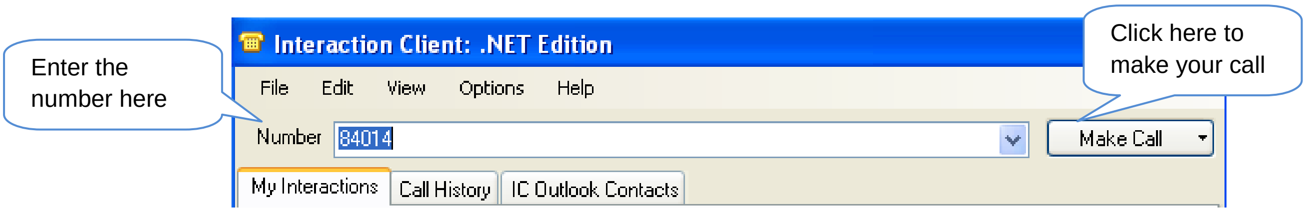
Voicemail on your Phone handset

You can still listen to your voicemail messages as you have always done by dialling the CSU Voicemail number and entering your pin number when prompted to do so.

Making Calls

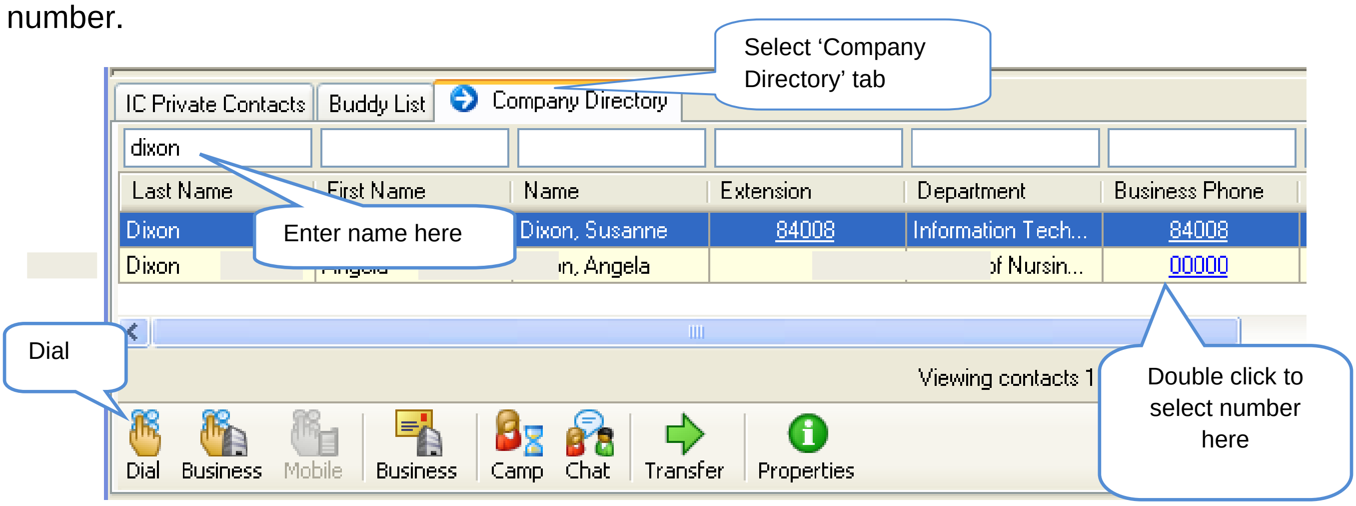
There are a couple of different ways to make a call. You can simply pick up your handset and punch in the numbers just as you do with a normal phone.

You can enter the number you wish to call directly into the 'Interaction Client' and click on the 'Make a Call' icon. See below:

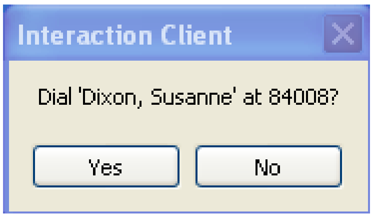


Or you can select the number you wish to call from the 'Interaction Client' - 'Company Directory' which you will find on the lower half of the window.

To find a number here you simply enter details into the appropriate search box (in this case I entered 'dixon') and all of the records which match your search will display as well as their phone number.



To then call the number you wish to use you click on the number and you will then see a window with option to click on either 'Yes' or 'No'.

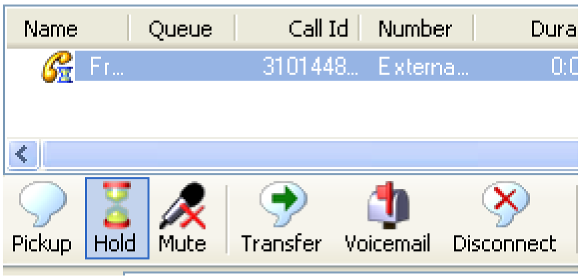


Or you can select the number you wish to call and click on the 'Dial' icon on the bottom left of the window. 

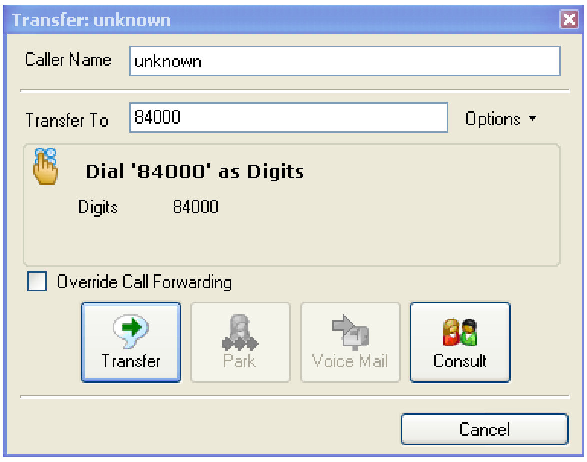
Transferring calls

Calls can be transferred to another number after you have answered them. To forward a call follow these simple steps.

- Put the caller on 'Hold' by clicking on the 'Hold' icon
- They will then be showing as 'Hold' in the Interaction Client window



- Click on the 'Transfer' icon and you will see the following screen

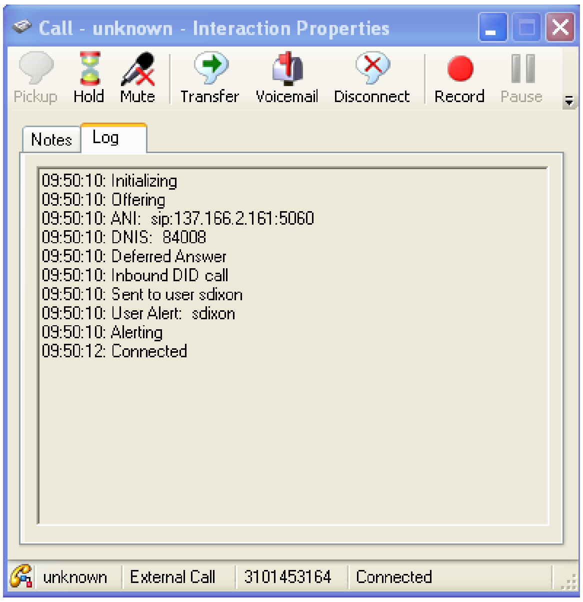


- Click on 'Transfer' in the IC Client window
- You will then have the option to 'consult' which means you can talk to the person to whom you are transferring the call before you have transferred it.
- Once you have established that it is OK for you to transfer the call to another party you just need to click on the 'Transfer' icon'

Call Information

When you are taking a call you can view information about that call by right-clicking on the active call in the 'My Interactions' window.

When the resulting menu opens click to select ‘Properties’. The following window will display giving you information about that call.



Rules

Interaction Client gives you the ability to apply rules to your incoming calls so you can dictate how you wish to handle them. You may wish to send all your calls to voicemail. You can set Interaction Client to do this. You can then set exceptions to this rule. For example:

You may wish to send all calls to voicemail except those calls coming from your supervisor. In this case you would set a rule to send all calls to voicemail with the exception being all calls from your supervisor, which would come through as normal.

Setting rules using the ‘Rules Wizard’

To set up a rule you first have to open the ‘Rules Wizard’. To do this:

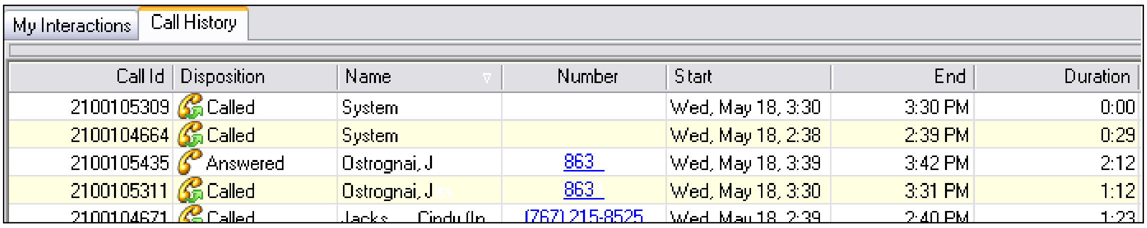
- Click on ‘Options’ on the top of the IC window
- From the resulting ‘Drop Down’ list select ‘Rules’
- Click on ‘New’
- Choose either ‘A Template’ or ‘An Event’
- Choose your options and follow through with the ‘Next’ prompts at the bottom of each window
- When your new rule is complete click on ‘Finish’
- You then need to click on ‘Apply’ and ‘OK’ and your new rule will operate

Call History

If you happen to miss an important phone call, the ’Interaction Client’ allows you to see who has tried to contact you. You can view who tried to call and use the ‘Call History’ window to call them back.

The Call History page has the following columns available:

- Disposition Column - Shows Answered, Called, Missed and Unknown (i.e. —N.A.) calls
- Name - Name of caller or callee
- Number - For an outbound call, this indicates the number that was dialed. For an inbound call, this indicates the number of the caller.
- Start Time - The start time is when the call is added to the user's queue
- End Time - The end time is when the call disconnects
- Duration - The difference in time between the Start and End times
- Call ID - This column holds the call identifier for the call. This can be handy if users need to report a problem with a call to their administrator. By default, this column is not displayed.



Call Id	Disposition	Name	Number	Start	End	Duration
2100105309	Called	System		Wed, May 18, 3:30	3:30 PM	0:00
2100104664	Called	System		Wed, May 18, 2:38	2:39 PM	0:29
2100105435	Answered	Ostrognai, J	863	Wed, May 18, 3:39	3:42 PM	2:12
2100105311	Called	Ostrognai, J	863	Wed, May 18, 3:30	3:31 PM	1:12
2100104671	Called	Jacks..., Cindy (In	(767) 215-8525	Wed, May 18, 2:39	2:40 PM	1:23

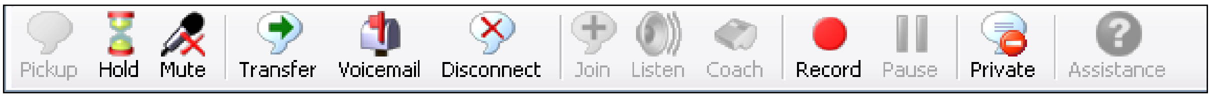
The 'Call History Tab' with the columns

The phone number is hyperlinked so you can easily call back the missed call with one click.

Call Control Toolbar

Interaction Client's button bar helps the user manage telephone calls. Each directory page has a call control toolbar. The user can change the appearance of the call control toolbar buttons by right clicking on the toolbar and selecting one of the options:

- Show Text - This option turns on or off the text displayed below the button icon.
- Customize Button Order - This option allows the user to rearrange the button order or delete buttons by clicking and dragging. Click Done to save the changes.
-



The Call Control Toolbar

As well as clicking on the above icons, the Interaction Client .NET Edition has easy keyboard navigation for the user to type in the following commands:

(Note that .NET toolbar shortcuts work only if the user selects an interaction by clicking on it before using the shortcut keys.)

- Pickup (Ctrl+P)
- Hold (Ctrl+H)
- Mute (Ctrl+U)

- Transfer (Ctrl+T)
- Voice Mail (Ctrl+M)
- Disconnect (Ctrl+D)
- Join (Ctrl+J) - Authorized users can automatically join a current interaction (automatically creates a conference including all parties)
- Listen (Ctrl+L)
- Coach (Ctrl+O) – Authorized users can join a conversation to provide assistance. The agent can hear the ‘coach’ side of the conversation but the external caller cannot
- Record (Ctrl+R)
- Pause Recording (Ctrl+E)
- Private- disables Listening (Ctrl+I)
- Assistance (Ctrl+N) – Authorized users can notify supervisors they require assistance

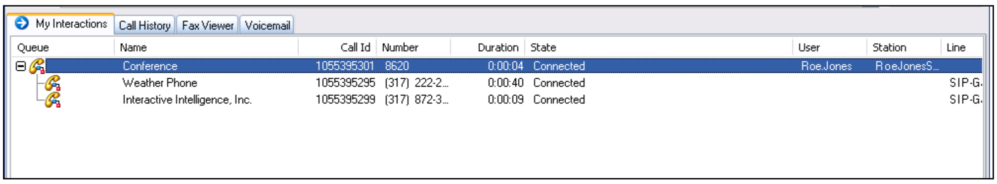
Camping on an Internal Extension

The Camp feature works on any ‘not available’ status, whether the person is on the phone or away from their desk. When you want to contact another person, within a directory, you can ‘Camp’ on that person’s extension. When you select an individual in your directory, and use the ‘Camp’ feature, a notification dialog pops up when the selected person’s status becomes ‘available’.

Benefit: This helps save time, eliminating the need to check back several times to see when a contact becomes available.

Conference Calls

In the Interaction Client there is no conference button or separate dialog to handle conferences. Conferences will show up in the main queue list in a tree fashion. The user’s call will always be the top item on that list. Next to it will be a plus or minus icon that can be clicked on to expand or collapse the conference. To add parties to a conference, the user may drag a connected call to another call that is on the conference. The number of parties is dependent on the user’s telephony server hardware.



Conference Call Window

Benefit: You can handle impromptu conferencing easily without having to call in to the University’s ‘Teleconference’ system

Recording

Calls can be recorded using the ‘Interaction Client’. This can be quite useful for a number of different reasons.

Record Calls

You may record a selected call by clicking on the ‘Record’ icon (or Ctrl+R) on the call control toolbar in your ‘My Interactions’ window. You may also pause the recording by clicking on the ‘Pause’ icon (or Ctrl+E) on the call control tool bar. The recording will be stored as a standard .wav file. The default system behavior sends the recording to you via e-mail. If you are on a private call, you may click on the ‘Private’ icon or press Ctrl+I, to avoid the call from being recorded. Other recording functions are:

- With the addition of Interaction Recorder, the call can be imported into the Interaction Recorder database for storage
- You can initiate multiple recordings on separate interactions from the same Interaction Client interface
- Multiple users can record an interaction simultaneously
- Record actions create an optional Record Object in the Interaction Client

Benefits

Recording calls is beneficial when you are coaching new agents. Recordings can be saved as examples of both good and bad behaviour. You may monitor individual queues if you have been given the appropriate rights. You can configure the monitored queue so that it appears next to your ‘My Interactions’ window. If granted the right, a supervisor may record an employee’s call they are monitoring from an individual monitored queue. If the supervisor has been given authority to listen in on a call, they can simply click on the ‘Listen’ icon (or Ctrl+L) on their keyboard, after they select the call to which they want to listen in the monitored queue view.

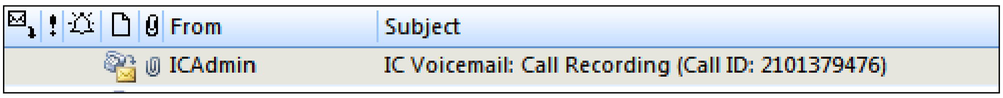
Other:

- Multiple users can listen in on the same interaction simultaneously
- Listen actions create an optional Listen Object in the Interaction Client

Recording and Listening Indicators

You can view the Record or Listen columns in the ‘My Interactions’ window to see whether a call is being monitored or recorded. The ‘red dot’ indicator appears when the user presses the Record button on the client to record an interaction on the fly. It also appears when Interaction Recorder (and Interaction Media Server) is automatically recording the interaction.

When you have recorded a call you will receive an email message with the recording attached. See below:



Disable Recording Indicator

Under specific conditions, Interaction Client users may disable the 'red dot' indicator in the 'My Interactions' window, when Interaction Recorder is automatically recording. This option is configured in 'Interaction Administrator', with the default setting showing the indicator. When the recording 'red dot' is disabled, the listen icon is disabled too.

Contact Dial Directories

Directories are lists of contact details and phone numbers put together so you can find details when you wish to find another staff member and contact them. The 'Company Directory' within the 'Interaction Client' is very similar to the 'Global Address List' which CSU have on Microsoft Outlook.

The directories within 'Interaction Client' support customisable columns, user status columns, and local cache for offline browsing and fast reconnects. Directories also offer list filtering to narrow the users search (see Directory Filtering). Whether the user is looking at a Company, Workgroup, or other speed dialling directory, there is no difference in functionality other than content. Larger organizations may prefer to have users see a subset of employees when transferring, or checking the company directory. Directories can be filtered so users will only see those which they have permissions to see.

Options available in the Company Directory

From the company directory tab, the user may do the following:

1. Double-click a person's name to call the person.

2. Right-click a person's name to:

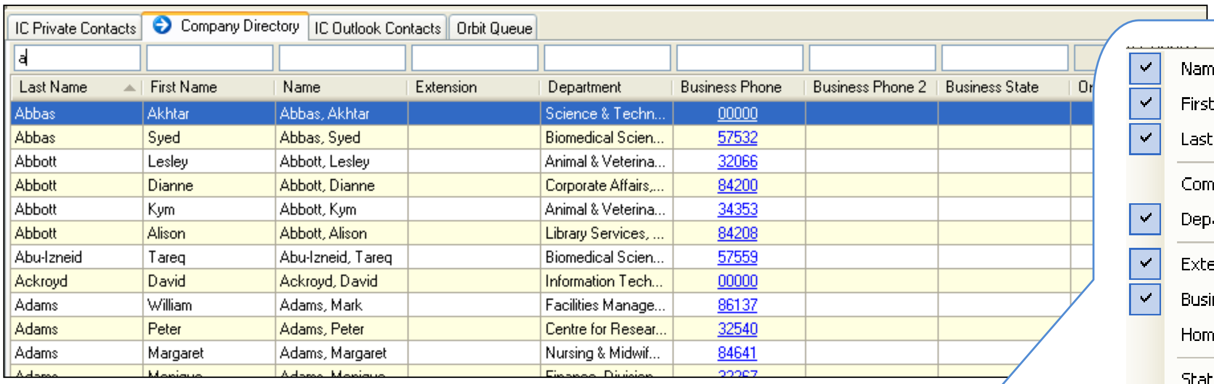
- Dial the default number
- View the person's status
- Camp on the person's extension
- View the person's properties (address and other information)
- Change the person's status (If the IC administrator has granted the right)
- Transfer connected call
- Dial the person's phone (business, home, mobile)

3. Drop a call onto a name in the Company Directory to transfer a call to that person.

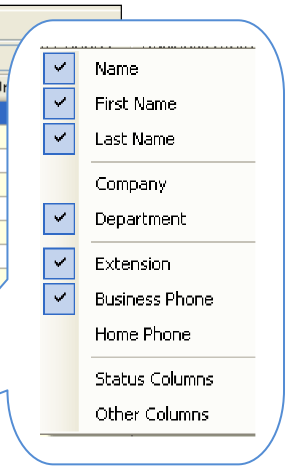
4. Sort the users listed in the Company Directory by clicking on any of the column headings.

5. Reorder columns by clicking on a column heading, dragging it over the desired location, and releasing the column heading.

6. Search for a person by clicking the area (line) directly above the column heading to expand the search area. Enter the first few letters of the column (if alphabetical), or enter the first few numbers of the column (if numeric). The user cannot perform a search in a column which is in a time format.



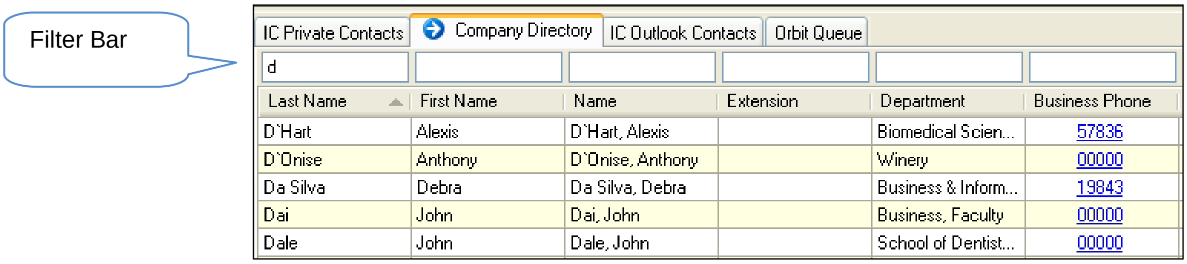
Last Name	First Name	Name	Extension	Department	Business Phone	Business Phone 2	Business State
Abbas	Akhtar	Abbas, Akhtar		Science & Techn...	00000		
Abbas	Syed	Abbas, Syed		Biomedical Scien...	57532		
Abbott	Lesley	Abbott, Lesley		Animal & Veterina...	32066		
Abbott	Dianne	Abbott, Dianne		Corporate Affairs,...	84200		
Abbott	Kym	Abbott, Kym		Animal & Veterina...	34353		
Abbott	Alison	Abbott, Alison		Library Services, ...	84208		
Abu-Izneid	Tareq	Abu-Izneid, Tareq		Biomedical Scien...	57559		
Ackroyd	David	Ackroyd, David		Information Tech...	00000		
Adams	William	Adams, Mark		Facilities Manage...	86137		
Adams	Peter	Adams, Peter		Centre for Resear...	32540		
Adams	Margaret	Adams, Margaret		Nursing & Midwif...	84641		



These options can be added by right clicking on a column heading

Directory Filtering

With any directory view selected, you can start typing in the column, to quickly filter the list to find a particular person, phone number, department, etc. Any column within the directory can be filtered by using the 'filter bar':

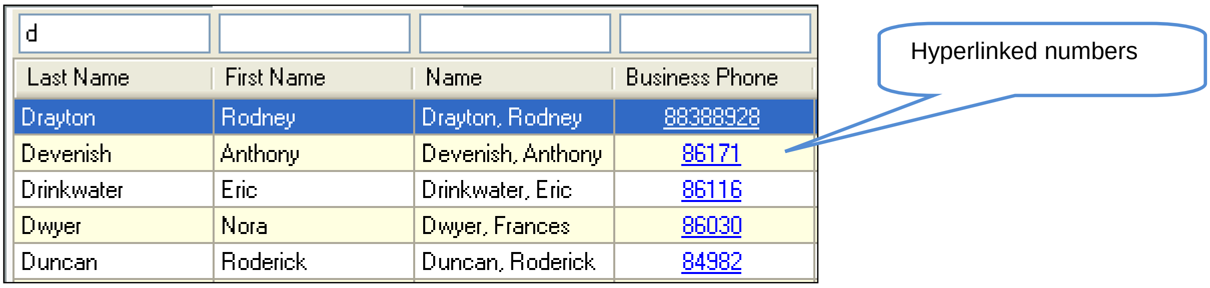


Last Name	First Name	Name	Extension	Department	Business Phone
D'Hart	Alexis	D'Hart, Alexis		Biomedical Scien...	57836
D'Onise	Anthony	D'Onise, Anthony		Winery	00000
Da Silva	Debra	Da Silva, Debra		Business & Inform...	19843
Dai	John	Dai, John		Business, Faculty	00000
Dale	John	Dale, John		School of Dentist...	00000

Benefit: Easy to use filtering and sorting, aids in quickly finding the right contact to assist with an issue

Dialling from Directories

Phone Number columns are hyperlinked so you can simply click on the number for easy dialling.



Last Name	First Name	Name	Business Phone
Drayton	Rodney	Drayton, Rodney	88388928
Devenish	Anthony	Devenish, Anthony	86171
Drinkwater	Eric	Drinkwater, Eric	86116
Dwyer	Nora	Dwyer, Frances	86030
Duncan	Roderick	Duncan, Roderick	84982

Benefit: You do not need to leave the directory to dial a phone number; you can quickly click on the person's number and dial straight from the directory.

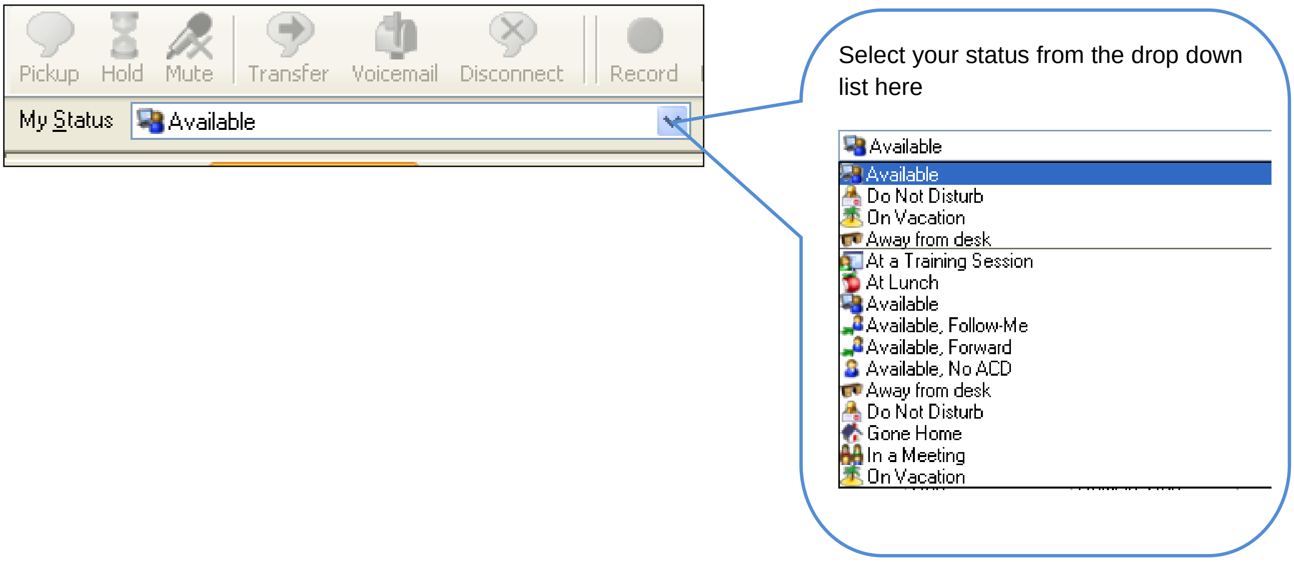
Presence Management

Core to the Interaction Centre Platform's functionality is the concept of presence. Users all have an active status. Time in status is reported on, which can assist managers to determine on which tasks team members are focusing their time. To provide more detailed reporting, statuses can be filtered and be unique to a team or even to an individual user. Users can set their status from:

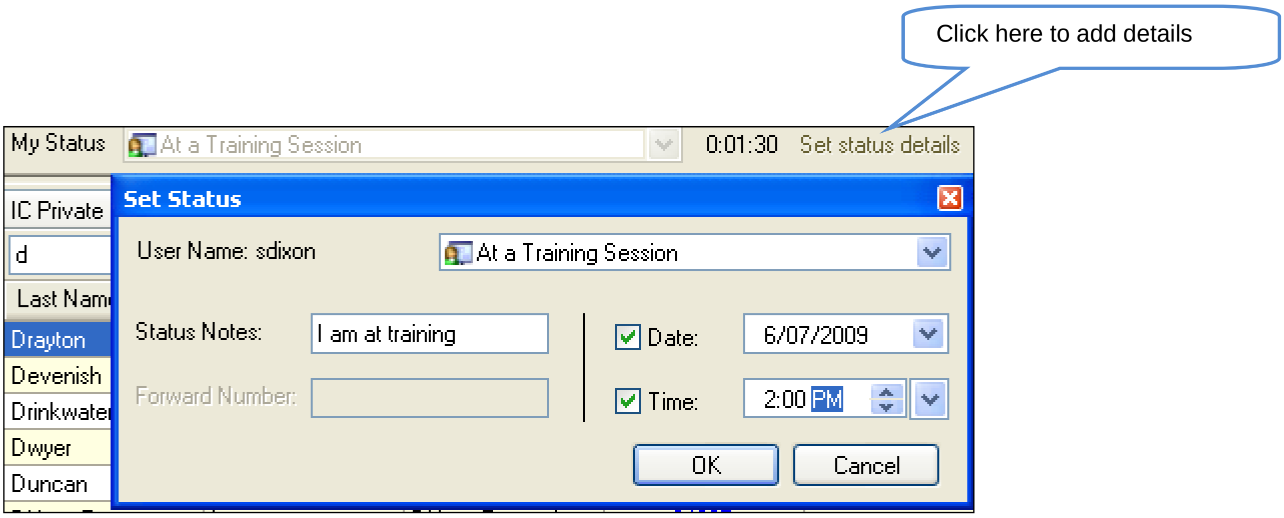
- The Interaction Client interface
- Phone prompts using key presses

- Interaction Mobile Office – Speech enabled phone prompts

Depending on the status you select, you can set status details including status notes, forward number, and date and/or time you will become available. The date and time information you enter is played for all their incoming calls while in this status.

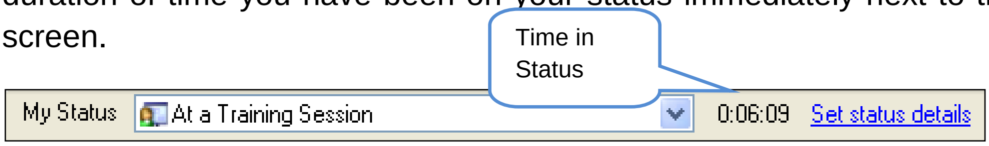


Once you have selected your status you can add some status details by selecting the 'Set Status Details' option and filling in the dialogue boxed. See below:



Time in Status View

You may also want to see how long you have been in a particular status to remind you when you have run over time on a break or on your lunch period. The Interaction Client will show you the duration of time you have been on your status immediately next to the 'My Status' section of the screen.



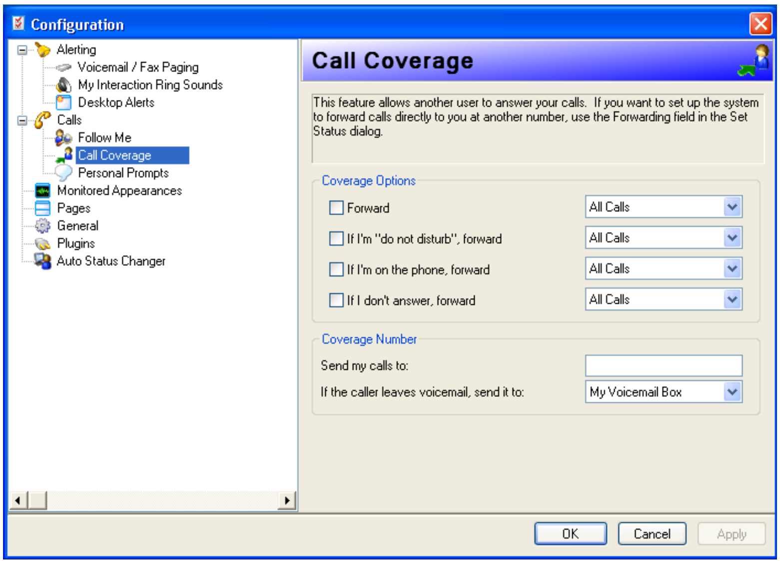
Benefit: User status allows others, including the supervisor, to know who is available. There is no need to run down the hall or call a person, if they are working in a remote location, to see if he or she is available.

Configuring your Interaction Client

You can do a certain amount of configuration on your interaction client and set what options you want to activate and how you want it to look.

Configuration Options

To configure your phone click on ‘Options’ at the top of your ‘Interaction Client’ window and from the resulting menu select ‘Configuration’. You will then see this window:



Configuration Options within Interaction Client

You can set up the following client options from the configuration dialog box:

- Alerting - Settings for interaction alerts like ring phone, ring pc and pop client
- Voicemail/Fax Paging - Options for alerts when a new fax or voicemail arrives
- My Interaction Ring Sounds - Allows ring sounds to be set for each different interaction type (Calls, Faxes, Voicemails)
- Desktop Alerts - Displays a desktop dialog box (toast) for alerting interactions and camped calls. The desktop alert dialog box pops up in the bottom right corner of the Windows desktop. The dialog box fades automatically depending on the type of alert
- Calls - Various options for Calls
- Follow Me - Allows entering the list of phone numbers used when the system tries to find a user if their status is ‘Available’ or ‘Follow Me’
- Call Coverage - Allows user to configure which interactions will be forwarded to another user. Typical use may be for an assistant to take calls
- Personal Prompts - Allows a user to record different prompts and to configure when Out Of Office and Agent Greeting prompts are active
- Monitored Appearances - Set up monitored appearances to observe the activity of several users at the same time
- Pages - Allows pages to be added and removed. Also see Docking Views
- General - Various other settings

Viewing Multiple Extensions

If you have been given permission by the system administrator, you can monitor another user's 'My Interactions' window. This means that on the Interaction Client, you can open a view to another user's interactions. An administrative assistant for instance may view their boss's telephone calls, answer calls for their boss, etc.

Picking up nearby Extensions

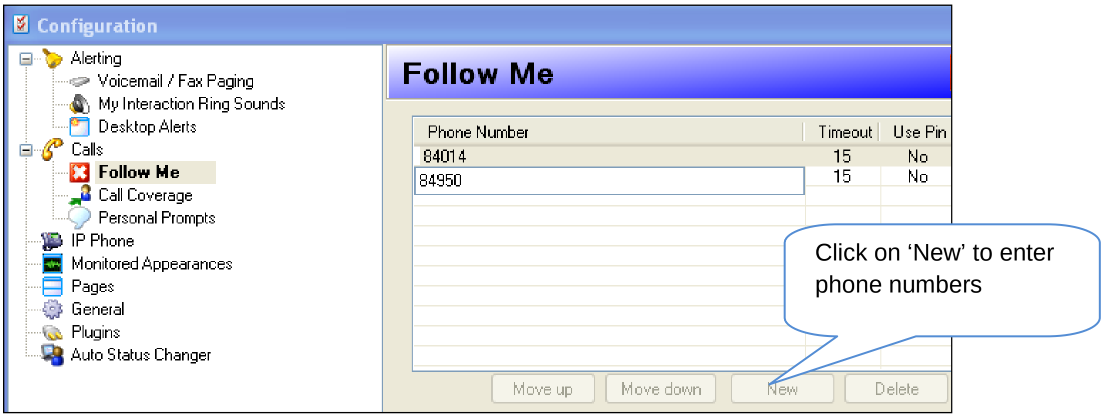
If you have been given permission by the system administrator, you can monitor the 'My Interactions' window of a particular extension. This means that you can monitor a standalone telephone that is nearby and answer it if it rings. This can be used for a lobby telephone which is near a receptionist desk.

Call Forward (Available, Follow Me)

If you will be away from your desk but wish to be accessible at another telephone number, you can forward your calls. You can forward calls to an internal extension, a local number, a long distance number, or even a mobile phone.

When you choose to forward calls to a remote telephone number, you must set your status to Available, Forward. Interaction Client will then route all calls sent to your local extension on to your remote number. If your remote telephone number is long distance, you must have rights to place long distance calls. If you can't normally make long distance calls from Interaction Client, you will not be able to forward your calls to a long distance number.

To configure your 'Call Forward' click on 'Options' at the top of your 'Interaction Client' window and from the resulting menu select 'Configuration'. You will then see this window:



Once this window opens you need to select 'New' to enter each of the numbers to which you wish to forward your phone.

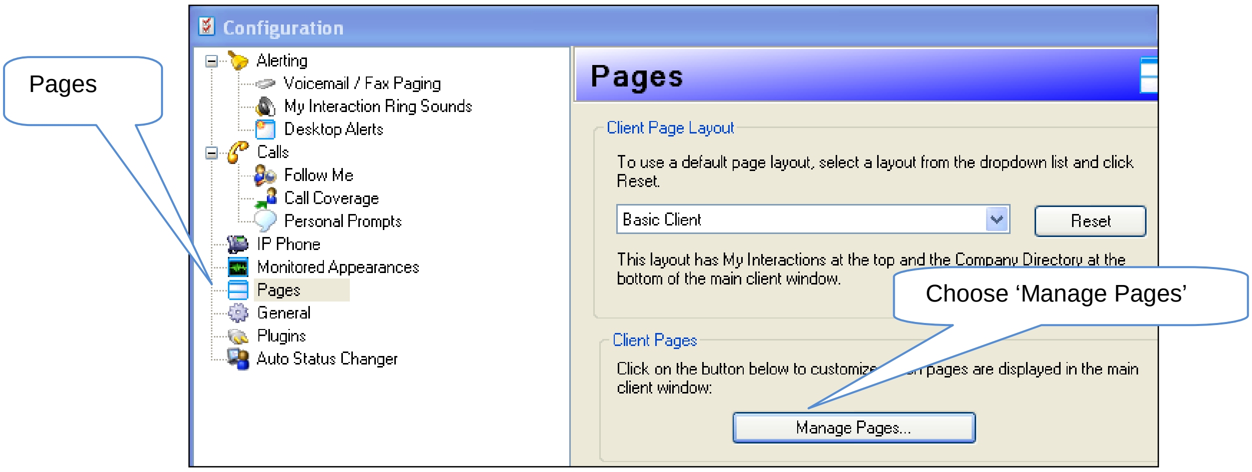
Benefit: This function allows you to receive calls at a remote location and increases contact rates for field technical and sales staff as well as business users who travel.

Rearranging your Screen (Docking Views)

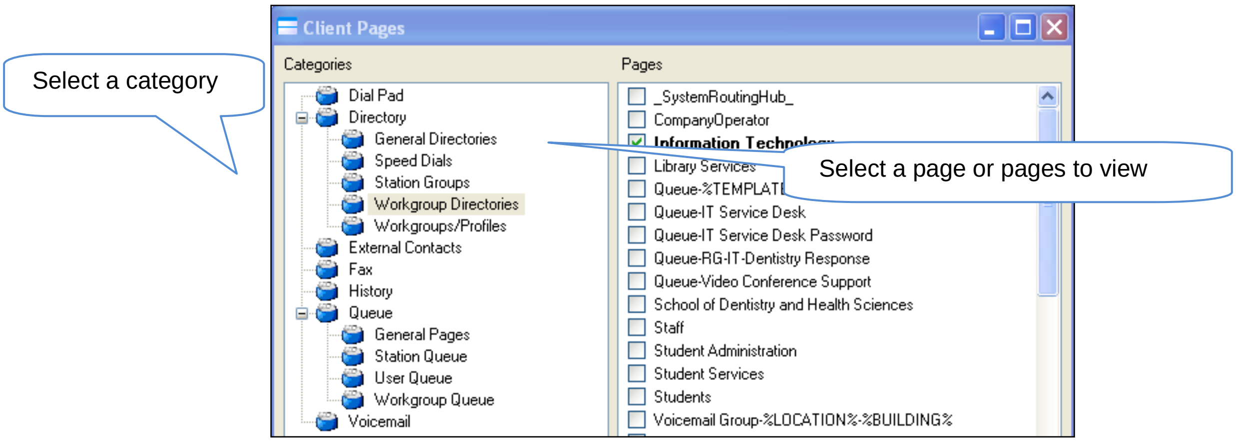
Using 'flexible docking architecture', you can rearrange pages within the Interaction Client .Net window. The pages can be dragged from zone to zone. By allowing you to dock views, this gives you the flexibility to display exactly what you want to see and in a view that makes sense for how you work. You can also choose to view a number of different 'pages'

Adding and Removing Pages

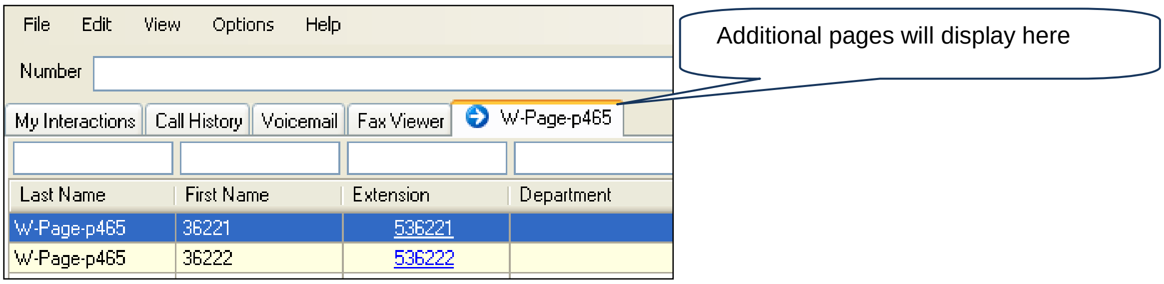
You can add and remove pages by using the 'Configuration' window. Click on 'Options', choose 'Configuration' then choose 'Pages'.



Select 'Manage Pages' and then within the resulting window select the pages you wish to view by placing a tick next to the option you require . See below:



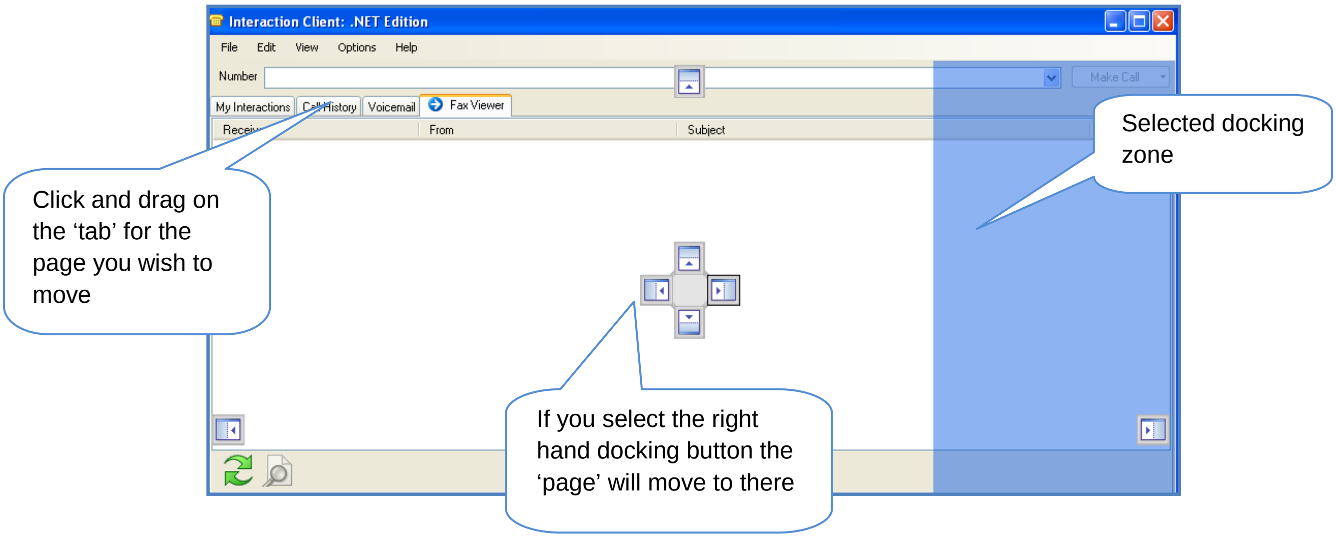
Any additional 'Pages' you choose to view will appear as tabs on the top of your 'My Interactions' window.



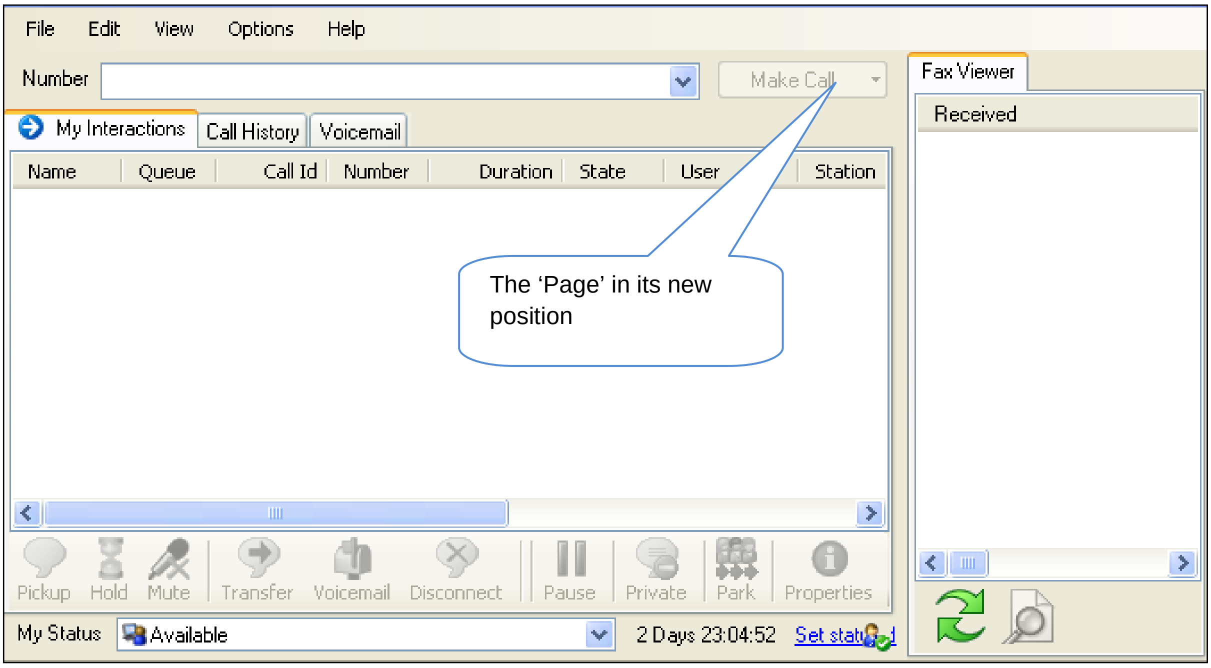
Arranging your Windows on the screen (Docking Views)

You can move your different 'pages' around the screen and place them in a configuration to match your work flows and make it easier to view which are the most important ones to you.

If you click on one of the tabs and hold the mouse button down you will see a docking icon appear on the screen. By choosing one of the directional icons you can move the 'Page' to the corresponding area of the screen. For instance, in the image below the right hand icon has been chosen and the area of the screen where the page will be moved to is highlighted in blue. You just need to drag the 'Tab' and drop it on the icon corresponding to the area of the window you would like it to display and it will move to there.



The window below shows the 'Page' docked in its new position in the 'Interaction Client' window.

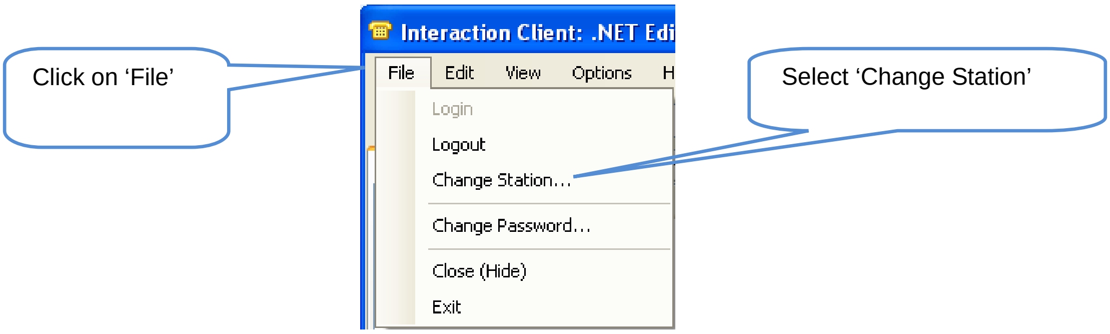


Using your phone from another Workstation

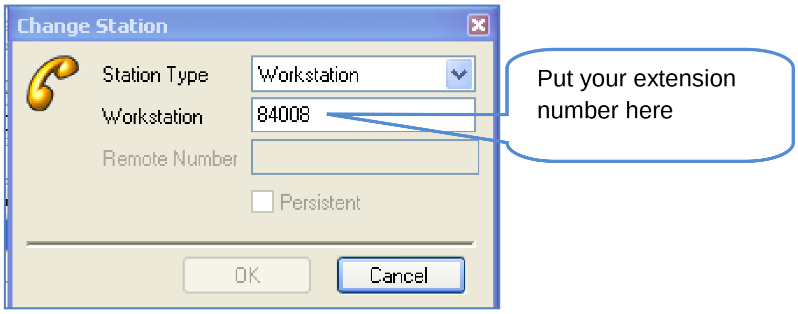
Because your phone runs through the network you can get it to follow you and answer it wherever you happen to be logged on to a computer if that computer has the IC Client installed. This is called 'Changing Workstations'

Changing workstations

To change the workstation through which you receive your phone calls follow these steps:



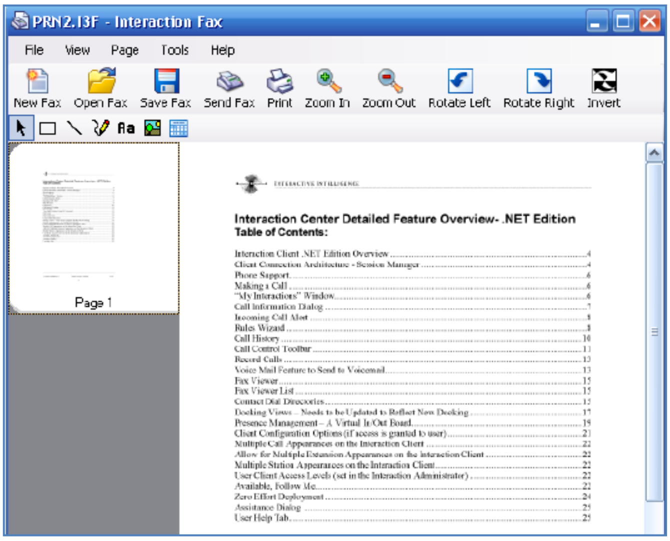
You will then see a dialogue box showing your 'Station Type' and 'Workstation'. Change the 'Workstation' number to your extension number. See below:



Interaction Client Fax

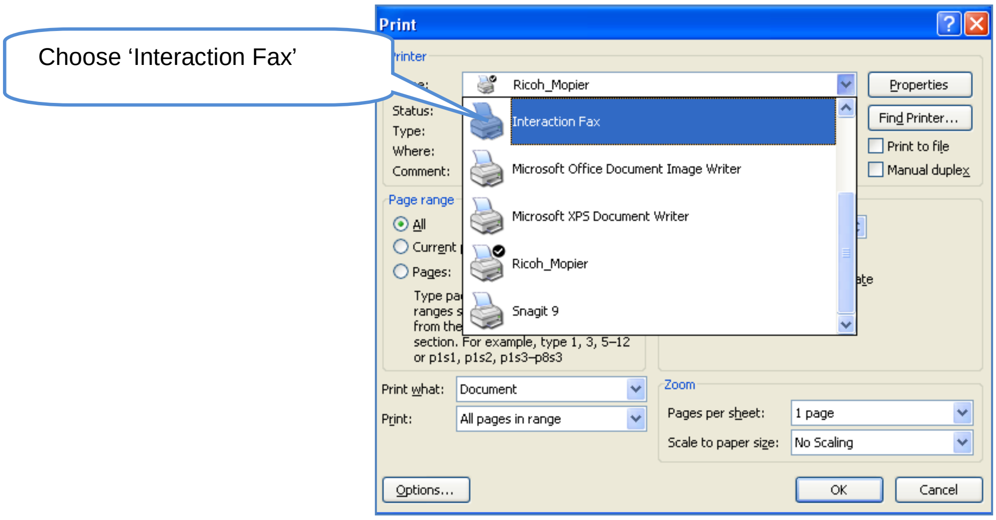
Using the IC Client you can send, receive, print, annotate, and rotate fax documents. Faxes are received as .i3f files but the system may be configured to receive faxes as .TIF files as well.

When you receive a fax it will look like this:

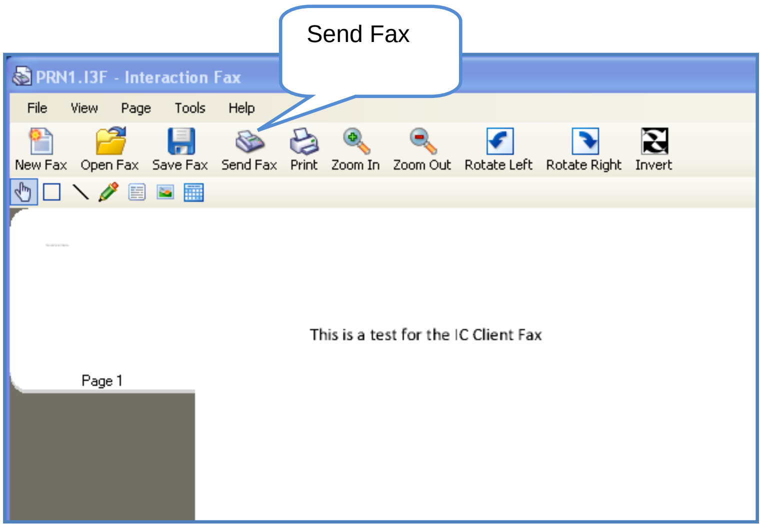


To send a fax using Interaction Client:

- Create the document you wish to fax
- Choose 'Print'
- From the Printer Options choose 'Interaction Fax'.



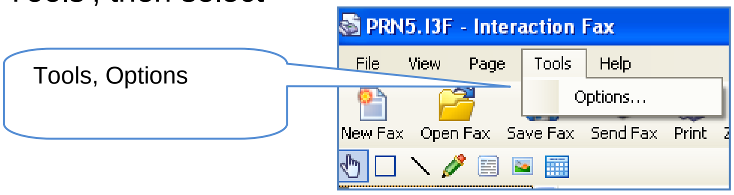
- Select OK
- The resulting window will look like this:



If this window does not immediately appear then select OK from the screen which is showing and it will. It may have appeared but be minimised on the 'Task Bar' at the bottom of the screen.

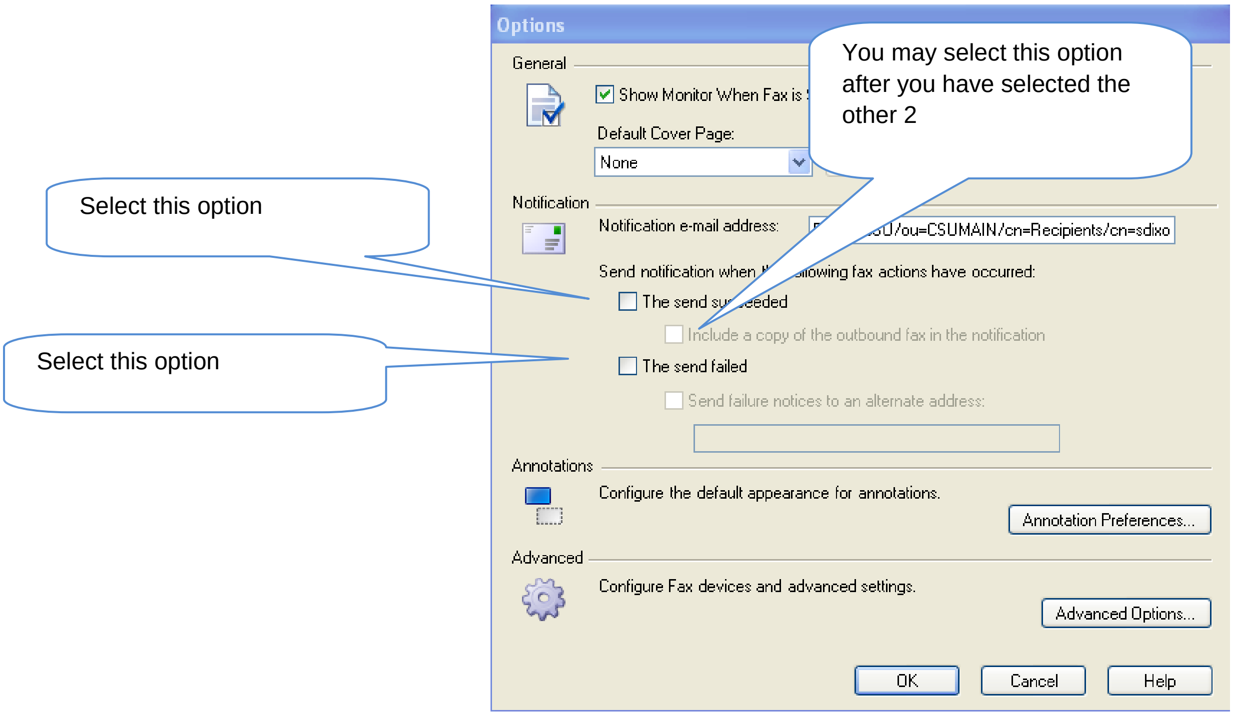
Information for the first time you use the Interaction Fax

The first time you use the software to send a fax you need to select a couple of options. To do this, from the above screen select 'Tools', then select 'Options'.



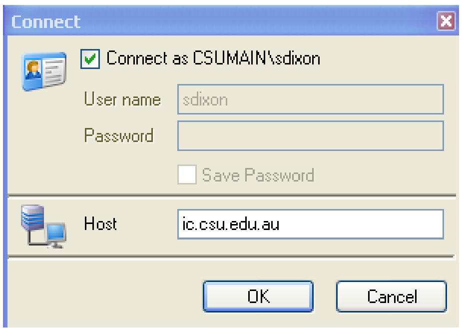
From the resulting screen click on 'OK' to see the options available. It will look like the screen below and you will need to put a tick in the boxes labelled 'The send succeeded' and 'The send failed'.

Once you have done this you will also see an option to 'Include a copy of the outbound fax in the notification'.

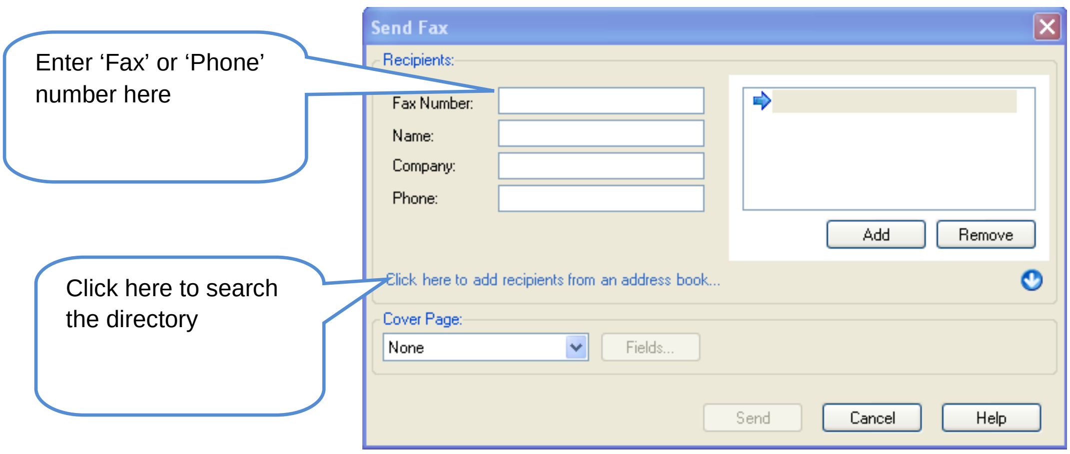


Back to the instructions for sending a fax:

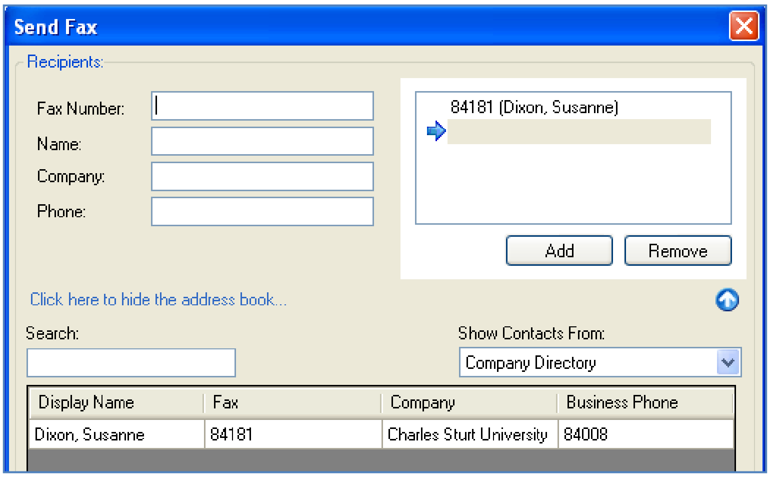
- Click on ‘Send Fax’
- If you see a window asking you to connect, click on OK. The window looks like this:



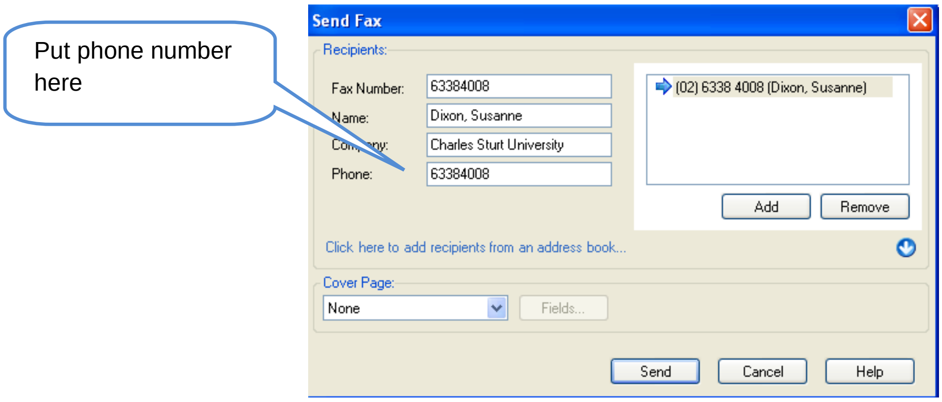
- You will then see a window asking you to enter some information.
- You enter the ‘Fax or phone number’ in the ‘Fax number’ text box or search the Directory
- To search the Directory select ‘Click here to add recipients from an address book’. See below:



- To search the resulting directory type in the last name of the person to whom you are sending the fax into the ‘Search’ box
- You will see an entry for the person to whom you wish to send the fax. This entry will contain both a fax number and a phone number for this person. Double click on the entry and the details will then show in the ‘Send to’ box on the top right of the screen. See below:



- This will automatically send the fax to their fax machine.
- If you wish to send the fax directly to their PC you need to click on this entry and enter their ‘Phone’ number in the ‘Fax number’ box. See below:
-

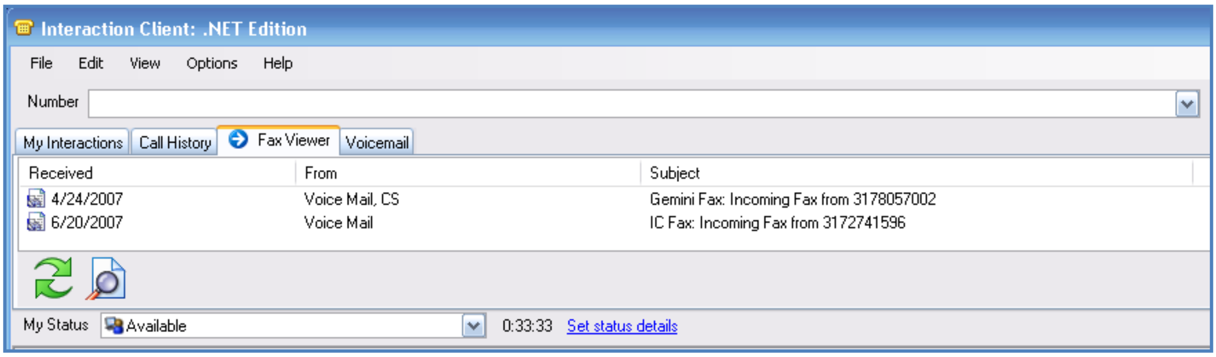


- Click on ‘Send’ and the fax will be sent

Fax Viewer List

The Fax Viewer List provides a convenient place for users to view all the faxes that have been delivered to them. Users can also delete, save, or remove copies of faxes from this page.

This is the ‘Fax Viewer’ list:



Receiving a Fax

When you receive a fax via ICAdmin it will come as an email and it will look like this: