

ice

Manager  
User Manual  
Server Version 12

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## Welcome to iceManager

As email and web-based communications become more common in today's business world, many call centers are evolving into **contact centers**. Contact centers interact with clients over the telephone, through email messages, and over the Internet.

**ice** is a powerful contact center solution that allows for the integrated handling of **contacts** (calls, email messages, chat requests, etc.) that are directed to your contact center. **iceManager** is the website that allows you to download tools, access monitoring information, and configure recording settings in your contact center.

The iceManager User Manual helps supervisors and administrators of ice understand how to configure settings and gather pertinent information about the contact center. This manual also helps users understand how to download the necessary tools and where to find the manuals.

This manual assumes that you:

- Understand basic telephony terms and concepts, such as queue and contact.
- Have basic navigating skills for standard Windows-based graphical user interfaces. This includes the ability to right-click and left-click, select *Options* from a right-click menu, resize and minimize windows and navigate and scroll with a mouse pointer.
- Have basic keyboarding and data entry skills.

The following conventions are used in this manual:

- **Notes** highlight important information.
- **Cautions** draw attention to functions and features that can impact the handling of contacts.
- Words displayed in **bold** font are defined within the paragraph.
- *Italics* indicate buttons on the software interface.
- The term "right-click" is used to indicate that the secondary mouse button, which by default is the button on the right, should be clicked. This configuration can be changed so that the left mouse button is the secondary button (for personal preference, for example, if the user is left-handed.)





## Chapter 1: Getting Started

This chapter includes information about the iceManager site – responsive design, how to navigate the iceManager site, how to sign in, and access permissions. Once you are familiar with the interface of iceManager, you may refer to subsequent chapters for information on the different components of iceManager. Refer to the iceReporting User Manual to learn about how to generate reports and for detailed information on each report.

**Note:** iceManager is a web-based application. Some popup blocker applications may prevent the opening of iceManager dialog boxes. If you encounter a problem when opening secondary web pages in iceManager, disable your Popup Blocker software and try again. For more information on popup blockers, please refer to Appendix A: Adding to Allowed sites.

## Responsive Design

Responsive design is a web design approach aimed at crafting sites to provide an optimal viewing experience - easy reading and navigation with a minimum of resizing, panning, and scrolling - across a wide range of devices (from desktop computer monitors to mobile phones). iceManager has been designed responsively for an enhanced user experience. When your browser window is minimized below a certain resolution, elements on the page will collapse to ensure they are still legible. By default, the responsive layout is enabled. This setting can be disabled in the Settings section. For information on how to do this, refer to Chapter 3: Settings.

The screen below shows the viewing experience on a desktop monitor.

The screenshot displays the iceManager web application interface on a desktop monitor. The interface is organized into several sections:

- Navigation Menu (Left):** Includes options like Interaction Type, Voice, Email, Instant Message, Contact Info, Evaluation, Recording, Survey, and Miscellaneous. There are also buttons for UPDATE and CLEAR ALL.
- Top Navigation Bar:** Contains tabs for HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. It also shows the user's name (JULIE (1301) Administrator) and the time (LOGGED OFF 23:36:10).
- Main Content Area:** Displays a search results page for 'CONTACTS'. It includes filters for 'INTERACTION TYPE', 'QUEUES', 'USERS', and 'DATE RANGE'. The search results table is empty, showing 'Showing 0 to 0 of 0 entries'.



The screen below shows the viewing experience on a tablet.

**EVALUATION EXTERNAL USER**

**DETAILS**

Duration: 00:00:05  
Contact Name: External User  
Interaction Type: Voice

**INTERACTION**

Contact ID: 7329  
Sender: External User (tel:+1...)  
Receiving Address: dennisdemo8@icela...  
Contact Group Name: DennisDemo  
Contact Modalities: Voice  
State: Ended  
User Data  
Handling User ID:

**EVALUATION**

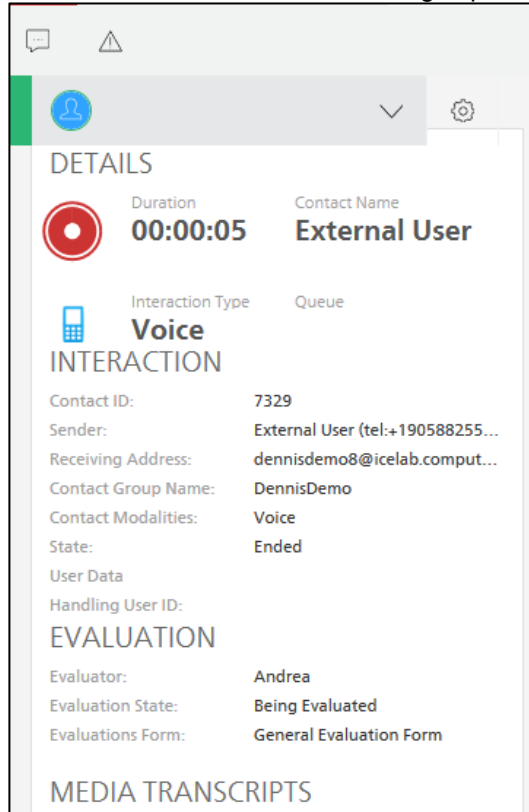
Evaluator: Andrea  
Evaluation State: Being Evaluated  
Evaluations Form: General Evaluation Form

**MEDIA TRANSCRIPTS**

**CALL QUALITY**

				Comment
Agent Attitude	☆☆☆☆☆	/1	0%	Comment
Caller attitude	<input type="range"/>	/1	0%	Comment
Lync Call Quality	TERRIBLE MEDIOCRE EXCELLENT BAD GOOD	/1	0%	Comment
CALL QUALITY TOTALS		0/0	0%	Comment

The screen below shows the viewing experience on a mobile device.



To navigate to another tab while on a tablet or on another mobile device, click the red menu button.

## **Navigating to the iceManager Site**

iceManager is accessed on the iceManager website, which could be hosted on the web server as part of the ice deployment. It is where you can access the various ice contact center tools and user manuals.

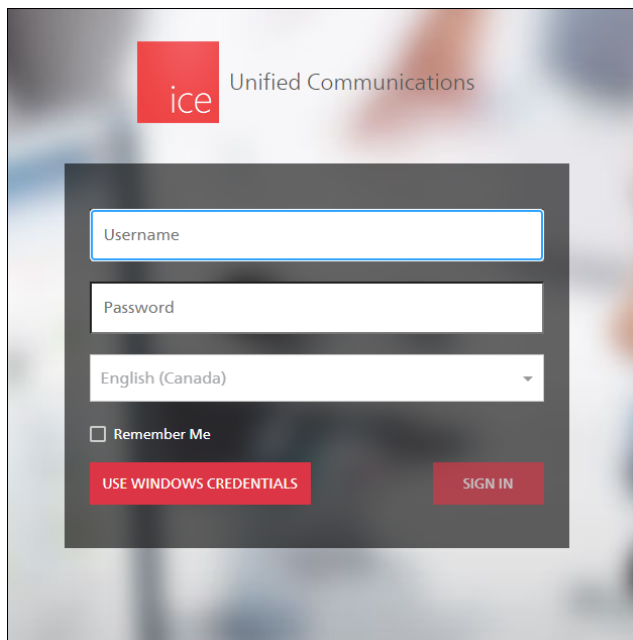
To access the iceManager website, open the web browser and type in the URL for the website. If you do not know the URL, contact your ice administrator.

## Procedure to Sign In

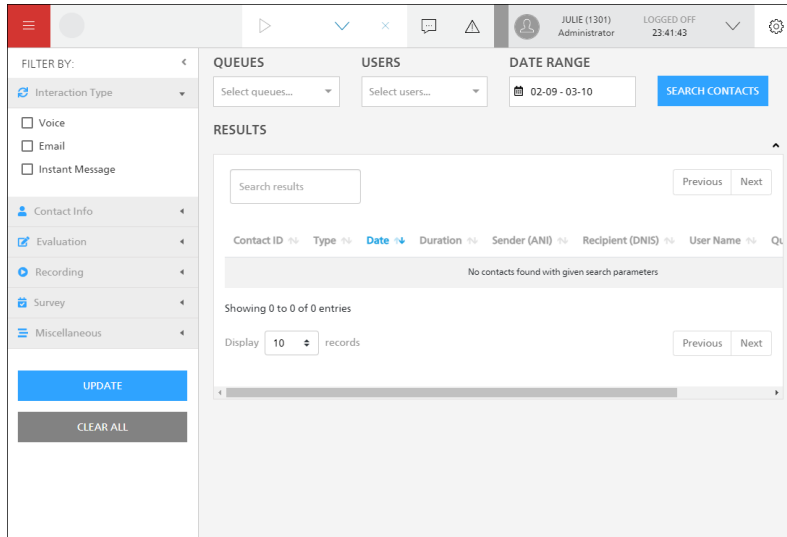
iceManager is a web-based application and can be used on any computer that is running a web browser. To sign in, you must provide a user ID and password. Contact the ice administrator if you do not have this information. For information on how to use single sign-on to log in, proceed to the next section.

Follow these steps to sign into iceManager:

1. Open your Web browser and go to your iceManager site.



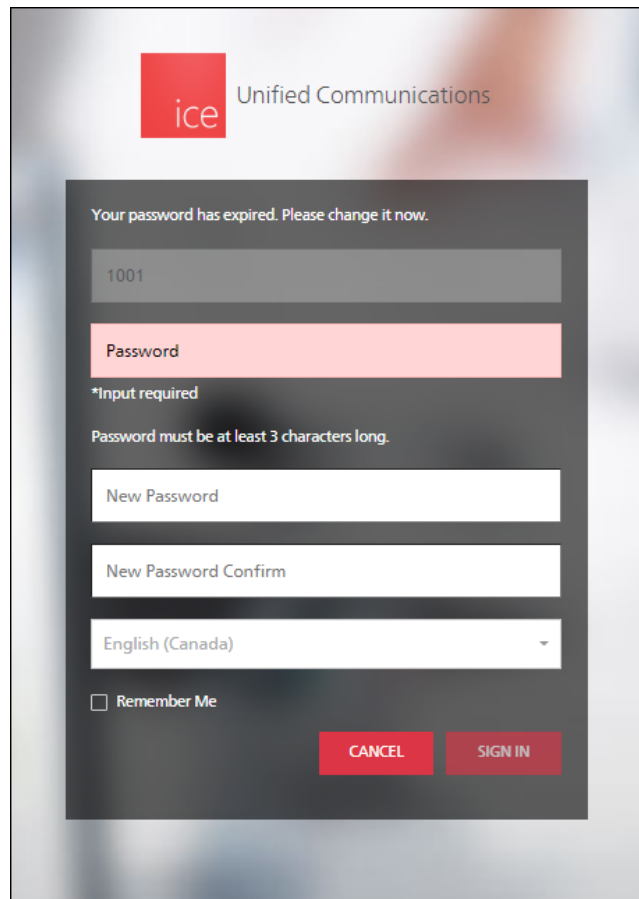
2. In the 'Username' field, enter your four-digit user ID.
3. In the 'Password' field, enter your password.
4. Use the language drop-down menu to select either *English* or *French*.
5. Select the 'Remember Me' check box if you want your Username to be pre-populated the next time you go to the Sign In page  
**Note:** this option is not recommended for shared computers.
6. Click *Sign In*.
7. Once you have signed in, you will see the Journal page.



## Expired Password

Follow the steps below to change your password:

1. Sign in to your iceManager site by following the instructions in the Procedure to Sign In section.
2. If your password has expired, you will see the following page.



The screenshot shows a web interface for changing a password. At the top left is the 'ice' logo, and to its right is the text 'Unified Communications'. Below this is a message: 'Your password has expired. Please change it now.' The form contains several fields: a greyed-out field with '1001', a 'Password' field with a red border, a '\*Input required' label, a note 'Password must be at least 3 characters long.', a 'New Password' field, a 'New Password Confirm' field, a dropdown menu currently showing 'English (Canada)', and a checkbox labeled 'Remember Me'. At the bottom right are two red buttons: 'CANCEL' and 'SIGN IN'.

3. In the 'Password' field, enter your current password.
4. In the 'New Password' field enter your new password. Confirm your new password by entering it again in the 'New Password Confirm' field.
5. Select 'Sign in' to complete your password change, or 'Cancel' to return to the log in page.
6. The log in page will open again. Enter your user ID and new password to complete the log in process.

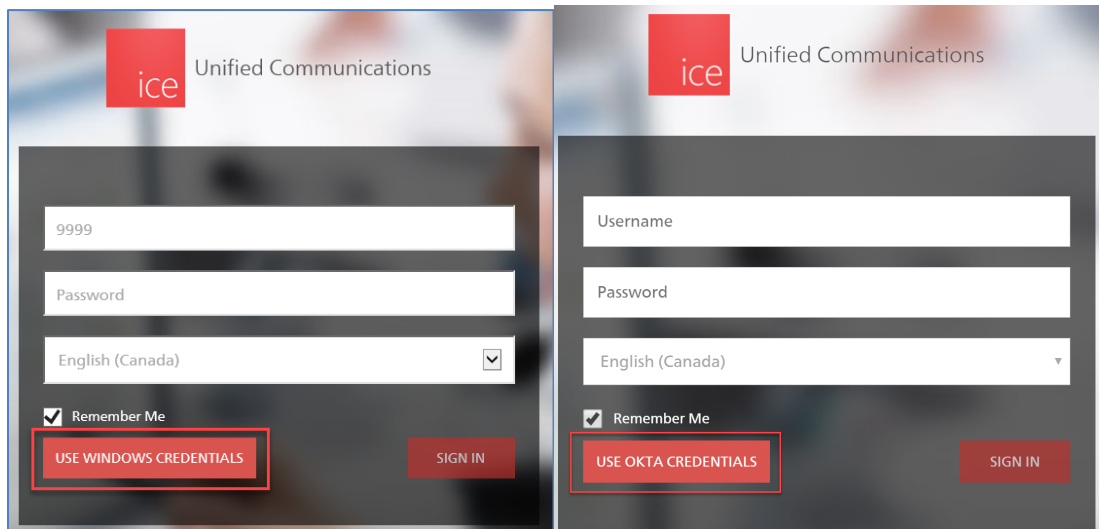
## Single Sign-On

If your organization has enabled Single Sign-On for iceManager, you will be able to sign on using one of the identity management platforms, including ADFS (Active Directory Federation Services) or Okta.

**Note:** To enable Single Sign-On, it will need to be configured using Active Directory in iceAdministrator. For further information to enable Single Sign-On, please review the iceAdministrator User Manual.

### Signing on with Single Sign-On

Once Single Sign-On is properly configured, when launching the iceManager website, click *Use Windows Credentials* or the *Use Okta Credentials* button rather than entering the user name and password.

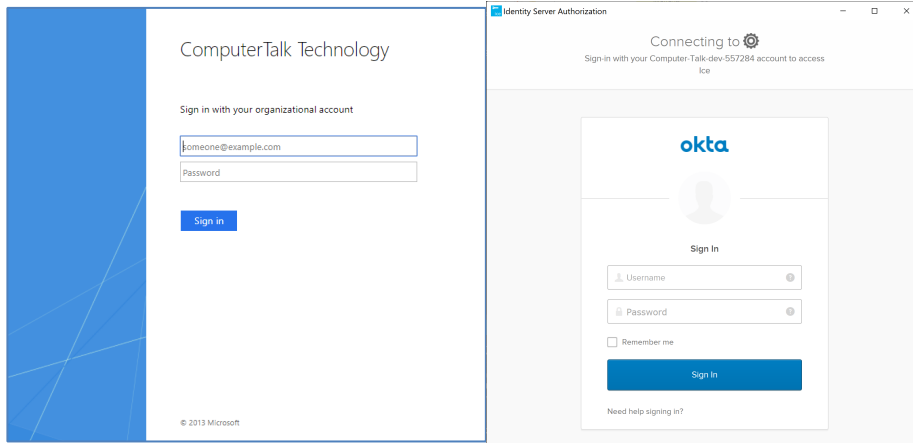


1. Click the *Use Windows Credentials* or the *Use Okta Credentials* button.

**Note:** If you wish to skip this step for future logins, check the box for *Remember Me*. This way, you will not have to enter your credentials each time you sign in.

2. You will be prompted to log in or redirected to a page where you can log in using your ADFS or Okta credentials.
3. Enter your ADFS or Okta username and password and log in.

**Note:** This dialog box may look different, depending on the way your administrator has configured the system.

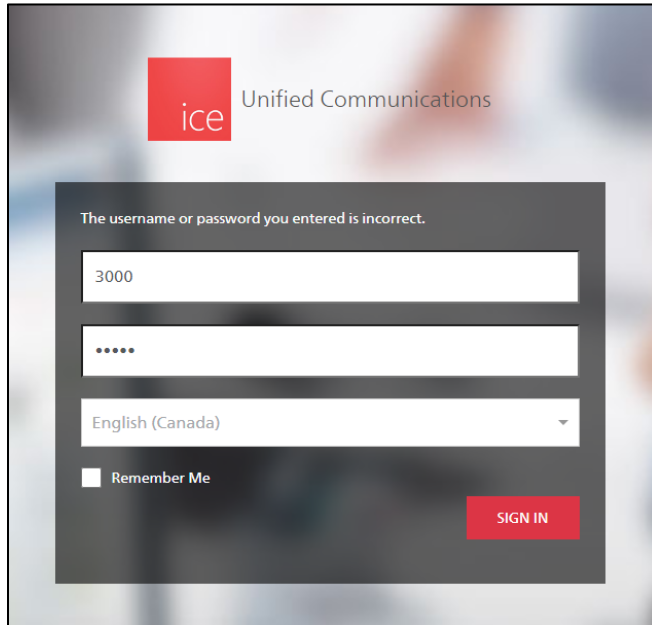




## Common Error and Warning Messages

### Authentication error

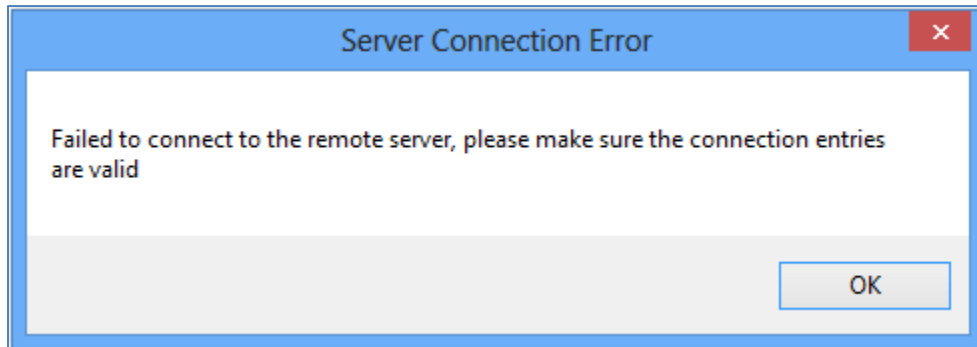
If a user types the wrong User ID or the wrong password, the following message appears.



If you cannot remember your password or User ID, an Administrator can reset it in iceAdministrator. For more information refer to the iceAdministrator User Manual.

## Server Connection Error

iceManager must have network connectivity to the ice server to function properly. If your contact center experiences network problems, you may see this error message.



“Failed to connect to the remote server, please make sure the connection entries are valid.”

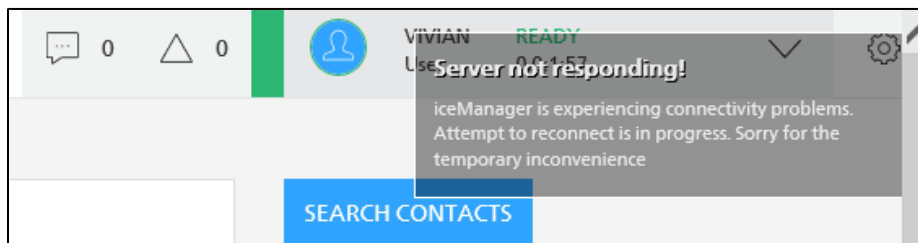
This error message indicates that the server is potentially experiencing a problem with connection. Please contact your ice administrator.

## Loss of connection

A few seconds after connection is lost, an error message appears in the top right corner of the screen:

“Server not responding! iceManager is experiencing connectivity problems. Attempt to reconnect is in progress. Sorry for the temporary inconvenience”.

The message fades away after a few minutes. iceManager will keep attempting to reconnect until it is successful.



Verify that you are connected to the Internet. If you are connected, but still receive the Server not responding message, contact your Administrator.

## iceManager Access Permissions

The following table lists the access permissions for the major functions of the application.

	User	Team Lead	Supervisor	Switch Admin	Global Admin
<b>Tabs</b>					
Home	✓	✓	✓	✓	✓
Monitor	✓	✓	✓	✓	✓
Reports	✓	✓	✓	✓	✓
Journal	✓	✓	✓	✓	✓
Administrator (download)*		✓	✓	✓	✓
Campaign (download)				✓	✓
iceBar (download)	✓	✓	✓	✓	✓
<b>Functionality</b>					
Perform/view evaluation & Delete evaluation in progress		✓ For contacts handled by anyone assigned to the team	✓ For any contact handled in the supervisor queue(s) or for any contact where the supervisor shares a queue with the handling agent.	✓ For contacts handled by anyone assigned to his/her switch (similarly for Node and Site Admin)	✓ For all contacts
Perform self-evaluation	No one is allowed to perform self-evaluations				
Delete completed evaluations & evaluation of self in progress				✓	✓
View evaluation of self				✓	✓
View Recordings (everyone can see contact search results)	✓ Can view own recording transcript only	✓ For anyone assigned to the team	✓ For any contact handled in the supervisor	✓ For anyone assigned to his/her switch	✓ For anyone

	User	Team Lead	Supervisor	Switch Admin	Global Admin
			queue(s) or for any contact where the supervisor shares a queue with the handling agent.	(similarly for Node and Site Admin)	
Delete Recordings (can delete audio recordings, but not IMs and emails)				✓	✓
Change email resolution code	✓ Own contacts only	✓ For contacts handled by anyone assigned to the team	✓ For any contact handled in the supervisor queue(s) or for any contact where the supervisor shares a queue with the handling agent.	✓ For contacts handled by anyone assigned to his/her switch (similarly for Node and Site Admin)	✓ For all contacts
<b>Settings</b>					
<b>Journal Settings</b>					
Schedules			✓	✓	✓
Recording Server/Screen Recording				✓ Can view datastores	✓
Evaluations		✓	✓	✓	✓
Datastore				✓ Can view datastores	✓

	User	Team Lead	Supervisor	Switch Admin	Global Admin
Archiving/Purging Rules				✓ Can view datastores	✓
Reports Settings			✓	✓	✓
Campaign Settings			✓	✓	✓
Intranet/Session Settings				✓ Can view and edit some settings.	✓ Can view and edit all settings.
Browser Settings	✓	✓	✓	✓	✓
Language Settings	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓ Can edit settings.
Server Settings				✓	✓
Configuration Group Settings	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓	✓
Line of Business Settings	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓	✓
iceMail Settings	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓	✓
ice Settings					✓

\* The iceAdministrator application can be downloaded by On-Prem customers. Cloud solution customers will have access to Citrix through the tab.

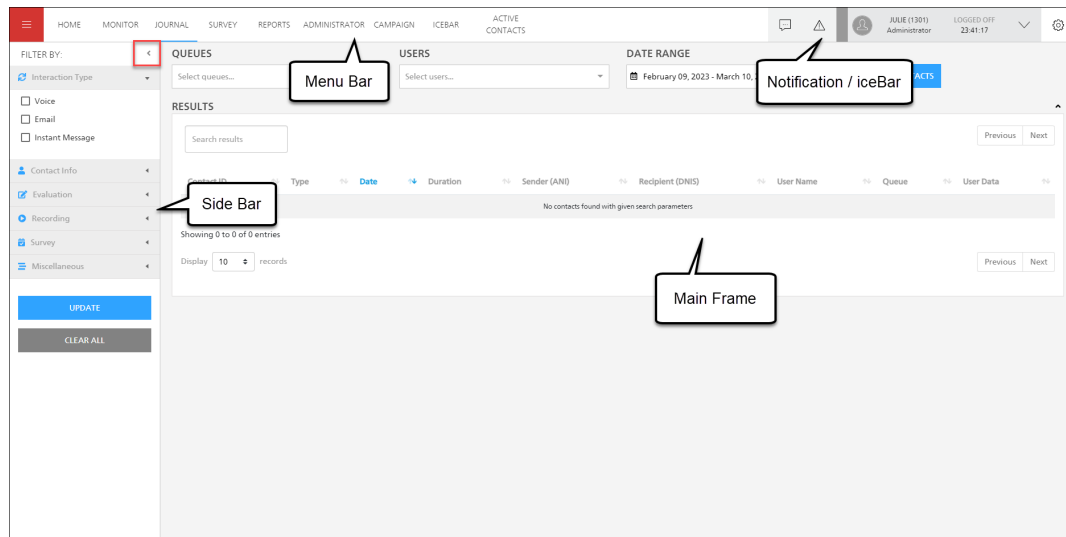


## Chapter 2: Components of iceManager

iceManager is composed of a Notification/iceBar, a Menu Bar, a Side Bar, and the Main Frame.

From the Notification/iceBar, you can view Quick Text messages, view alerts, log off, access contact handling features, and change the settings. From the Menu Bar, you can access different tools within ice. The Side Bar shows different options specific to the ice tool selected. The Main Frame displays content for the ice tool selected based on the settings in the Side Bar.

This Chapter provides information about all of these functionalities.



**Note:** To hide the sidebar, click the sideways pointing arrow, highlighted by the square box above.

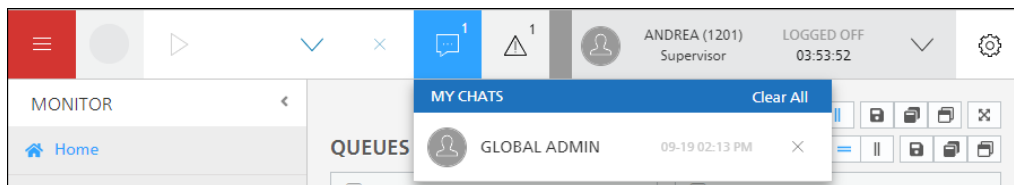
## Notification Bar

The notification bar is located on the top-right corner of the screen. It is comprised of several buttons and drop-downs: *Quick Text Messages*, *Alerts*, *iceBar*, and *Settings*.



### Quick Text Messages

Quick Text Messages allow you to send a message to any other user running iceBar, iceAdministrator, or iceMonitor. To receive a message that someone sends you, you must have one of these applications open. To view unread Quick Text messages, click on the Quick Text Messages icon (pictured below) to open a drop-down list.

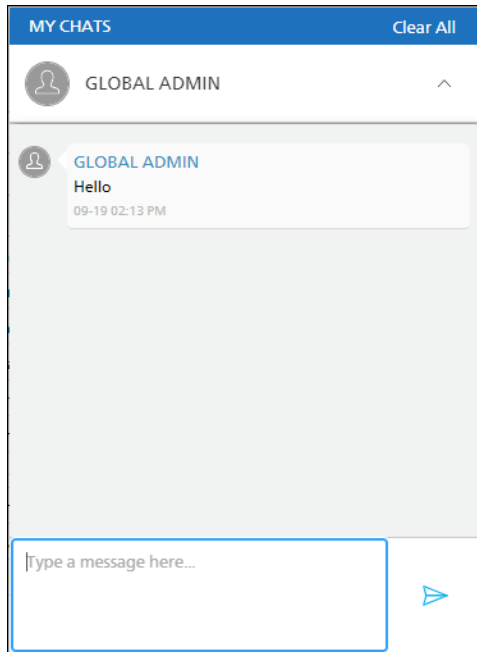


You can respond to the Quick Text message when the dialog box appears by clicking on the conversation.

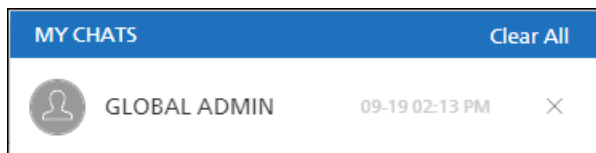
The conversation is kept until that entry in the drop-down list is permanently removed. To permanently remove the conversation from the list, click the X located on the right side of the drop-down dialog box.

To respond to the conversation, type in your response and click the *send* button.

To close the conversation window, click the ^ button in the dialog window, as indicated below:



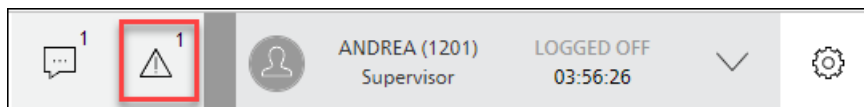
Now you can click on the X to delete the conversation.



For information on Quick Text Messages, refer to the iceBar User Manual.

## Alerts

Alerts are iceMonitor messages that announce changes in the contact center (i.e., once a certain threshold has been met or exceeded.) The number of unopened notifications is displayed next to the *Alerts* button (caution triangle icon). To read the notification, click on the *Alerts* button. For information on configuring conditions for notifications, refer to the iceMonitor User Manual.



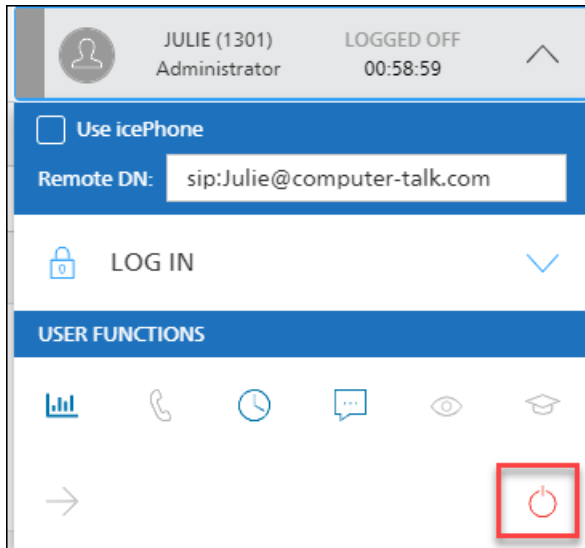


## iceBar for web

iceBar for web allows users to receive interactions, place calls, and a limited number of other contact handling functionality. For more information about iceBar for web, refer to the iceBar for web User Manual.

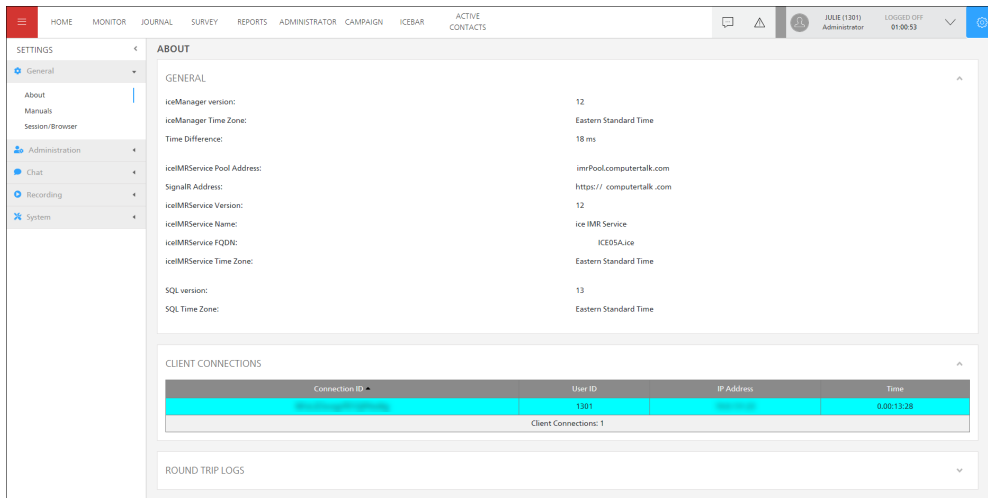
## Logging out

To sign out, click the drop-down arrow on the iceBar and click the *Log Out* button.



## Settings

Click *Settings* to modify the iceManager display settings, to modify the settings for recordings and evaluations, or to access user manuals. The following display appears:



For more information about settings, refer to Chapter 3: Settings.

## Menu Bar

The menu bar is comprised of tabs that contain contact center tools. The following section will provide information on each tab.

### Monitor tab

To access the iceMonitor real-time monitoring dashboard, click the *Monitor* tab.

The screenshot shows the iceMonitor real-time monitoring dashboard. The top navigation bar includes tabs for MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. The main content area is divided into two sections: QUEUES and USERS.

**QUEUES Section:**

ID	Name	Short Name	Status	TASA	TASA2	Server
0000	Default Name (0000)	DE000	Night Service	00:00:45	00:01:00	Aggregate
0001	Sales Voice Queue	Sales	Day Service	00:00:45	00:01:00	Aggregate
0002	Tech Support Voice Queue	TechSupp	Day Service	00:00:45	00:01:00	Aggregate
0003	Customer Service Voice Queue	CustServ	Night Service	00:00:45	00:01:00	Aggregate
0004	Sales Voice French Queue	FSales	Night Service	00:00:45	00:01:00	Aggregate
0005	Tech Support Voice French Queue	FTechSupp	Night Service	00:00:45	00:01:00	Aggregate
0006	Customer Service French Queue	FCustServ	Night Service	00:00:45	00:01:00	Aggregate
0007	Email Queue	Email	Day Service	00:00:45	00:01:00	Aggregate
0008	Email French Queue	HEmail	Night Service	00:00:45	00:01:00	Aggregate
0009	Training Queue	Training	Night Service	00:00:45	00:01:00	Aggregate
0010	French Training Queue	FTTraining	Night Service	00:00:45	00:01:00	Aggregate
0000	IM Queue	IM	Night Service	00:00:45	00:01:00	Aggregate
0001	IM French Queue	IFIM	Night Service	00:00:45	00:01:00	Aggregate

**USERS Section:**

ID	Image	Name	Display Name	Role Name	State	State Duration	Voice P
1001		Lucas	Lucas (1001)	User	Loc...	20:17:43:23	appLaw
1002		Lucas	Lucas (1002)	User	Loc...	20:17:43:23	appLaw
1003		Paula	Paula (1003)	User	Loc...	20:17:43:23	appLaw
1004		Francis	Francis (1004)	User	Loc...	20:17:43:23	appLaw
1005		Sylvie	Sylvie (1005)	Team Lead	Loc...	20:17:43:23	appLaw
1006		Anthony	Anthony (1006)	Team Lead	Loc...	20:17:43:23	appLaw
1007		Andrew	Andrew (1007)	Supervisor	Loc...	0:00:52:00	appLaw
1008		Marcel	Marcel (1008)	Supervisor	Loc...	20:17:43:23	appLaw
1009		Julie	Julie (1009)	Administrator	Loc...	0:19:17:16	appLaw
0996		Switch Admin	Switch Admin (0996)	Administrator	Loc...	20:17:43:23	appLaw
0999		Global Admin	Global Admin (0999)	Global Admin	NL	0:21:01:00	appLaw

For more information on iceMonitor, refer to the iceMonitor User Manual.

## Journal tab

From the Journal tab, you can access the ice interaction viewer. iceJournal provides the ability to search for interactions by queue, user, contact type, date range, and other criteria. Contact details are shown when a particular record is selected.

Using iceJournal, you can:

- Search for recorded and in-progress contacts.
- Display details for a selected contact. A contact can be of type voice, email or IM.
  - For a voice contact, playback of the recording is available (if it was recorded).
  - For email, the email subject, body, and attachments, if any, can be viewed.
  - For IM, the conversation between the web chat user and the user is displayed.
- Evaluate the handling user's performance on the selected contact if you are a team lead, supervisor, or administrator.

The following screenshot shows the results of an iceJournal search:

The screenshot displays the iceJournal search results interface. The top navigation bar includes HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. The user is identified as JULIE (1301) Administrator, logged off at 01:11:46. The search filter on the left includes options for Interaction Type (Voice, Email, Instant Message), Contact Info, Evaluation, Recording, Survey, and Miscellaneous. The search criteria are set to 'Voice' and 'Recording'. The date range is 'February 01, 2023 - February 28, 2023'. The search results table shows the following data:

Contact ID	Type	Date	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data
471	Voice	2023-02-06 03:41:54 PM	00:00:07	agent one (agentone)				
461	Voice	2023-02-06 03:38:30 PM	00:00:08	agent one (agentone)				
451	Voice	2023-02-06 03:37:13 PM	00:01:02	agent one (agentone)				
401	Voice	2023-02-03 09:02:39 AM	00:00:08	agent one (agentone)				
361	Voice	2023-02-02 01:08:17 PM	00:00:14	agent one (agentone)				

The interface also shows 'Showing 1 to 5 of 5 entries' and a 'Display 10 records' option.

For more information on iceJournal, refer to Chapter 4: iceJournal.

## Survey Tab

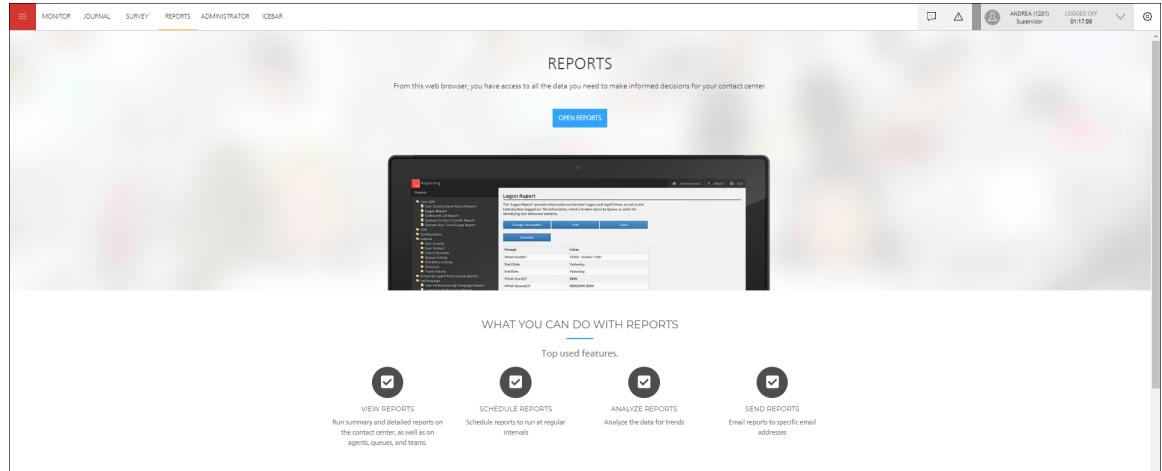
From the Survey tab, you can open iceSurvey to create and manage surveys presented to contacts, after an interaction with the user. For more information on how to manage and configure surveys please review the iceSurvey User Manual.

The screenshot displays the 'SURVEY' tab interface. The top navigation bar includes 'HOME', 'MONITOR', 'JOURNAL', 'SURVEY', 'REPORTS', 'ADMINISTRATOR', 'CAMPAIGN', 'ICEBAR', and 'ACTIVE CONTACTS'. The user profile 'JULIE (1301) Administrator' is logged off at '01:14:12'. The left sidebar shows 'SURVEY' with sub-items: 'Surveys', 'Survey Runs', 'Survey Settings', and 'Audio Files'. The main content area is titled 'SURVEYS' and features a 'Show deactivated forms' toggle set to 'OFF'. Below this is a table with the following columns: ID, Name, Presentation Modes, Creation Date, Last Modified Date, Assigned Runs, Action, and Active.

ID	Name	Presentation Modes	Creation Date	Last Modified Date	Assigned Runs	Action	Active
----	------	--------------------	---------------	--------------------	---------------	--------	--------

## Reports Tab

From the Reports tab, you can open iceReporting to run and schedule reports.



**Note:** If the reports window doesn't open after clicking on *Open Reports*, check your browser, the Pop-up blockers might be active. The pop-up blockers parameters can be found in various locations depending on the browser you are using. For more information, refer to Appendix A: Adding to Allowed sites.

## Administrator Tab

As an on-prem customer, you can download and install iceAdministrator from the Administrator tab. As a cloud customer, you will have access to Citrix through the Administrator tab. For more information on iceAdministrator, refer to the iceAdministrator User Manual. For information on iceWorkflow Designer, refer to the iceWorkflow Designer User Manual.

The screenshot displays the iceManager Administrator interface. At the top, a navigation bar includes tabs for MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR (highlighted), CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. The user is identified as JULIE (1301) Administrator, with a LOGGED OFF status at 21:16:57. The main content area features the heading "ADMINISTRATOR" and the text: "Administering your contact center has never been easier. Add or change user accounts, queues, teams, connection addresses, the types of interactions users can handle, and more - all on one interface." Below this text is a blue button labeled "DOWNLOAD ADMINISTRATOR". A central image shows a laptop displaying the iceWorkflow Designer software, which contains a complex flowchart with various steps and decision points. At the bottom of the interface, the text "WHAT YOU CAN DO WITH ADMINISTRATOR" is visible.

## Campaign Tab

iceCampaign is an outgoing calls module for ice. From the Campaign tab, you can download iceCampaign Administrator that you will use to create and schedule campaigns.

**Note:** iceCampaign User allows you to access the user portion of the solution, from iceBar. For more information on iceCampaign User, refer to the iceBar User Manual.

The screenshot shows the 'CAMPAIGN' tab in the iceManager interface. At the top, there is a navigation bar with tabs: MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN (selected), and ICEBAR. On the right, it shows the user 'JULIE (1301) Administrator' and 'LOGGED OFF 21:18:23'. The main content area has the heading 'CAMPAIGN' and a sub-heading: 'Run engaging campaigns that maximize agents' time without sacrificing customer service or satisfaction. iceCampaign reduces agent burnout, eliminates dialing errors, blends inbound and outbound campaigns, reduces abandoned calls, and uses existing investments into third-party databases.' Below this is a blue button that says 'DOWNLOAD CAMPAIGN ADMINISTRATOR'. In the center, a tablet displays a 'CAMPAIGN INFO' interface. It has tabs for 'PREVIEW', 'PROGRESSIVE', and 'PREDICTIVE'. The 'PREVIEW' tab is active, showing a table with the following data:

NAME	NUMBER OF PROSPECTS
✓ Campaign Name	1,022
This is same long campaign name	1,021
Campaign Name	2,339
✓ Campaign Name	221

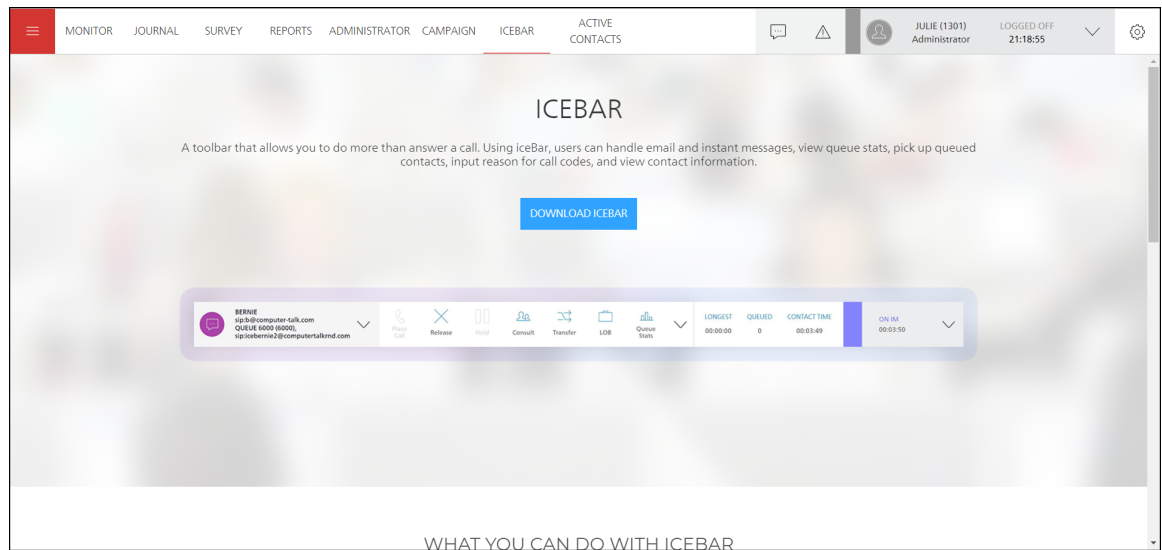
At the bottom of the tablet screen, there are buttons for 'UNSUBSCRIBE ALL' and 'SUBSCRIBE ALL'. To the right of the tablet, there is a 'SCRIPT SEARCH' section with a search bar and two contact entries:

- 648-568-5514 Martin Bonavita [CAMPAIGN NAME]
- 648-568-5514 Martin Bonavita [CAMPAIGN NAME]

At the bottom of the screenshot, the text 'WHAT YOU CAN DO WITH CAMPAIGN' is visible.

## iceBar Tab

From the iceBar tab, you can download the iceBar client. For more information on iceBar, refer to the iceBar User Manual.





## Active Contacts Tab

From the Active Contacts tab, you can access the ice active interaction viewer to see the contacts that have entered the system today. Active Contacts provides the ability to search for interactions by ice server, queue, user, and other criteria.

### Using Active Contacts, you can:

- Search for active contacts in the system.
- Search for contacts that entered the system today.

The following screenshot shows the results of an Active Contacts search:

The screenshot displays the 'ACTIVE CONTACTS' tab in the iceManager application. The interface includes a navigation menu on the left with options like 'MONITOR', 'JOURNAL', 'SURVEY', 'REPORTS', 'ADMINISTRATOR', 'CAMPAIGN', 'ICEBAR', and 'ACTIVE CONTACTS'. The main area shows search filters for 'ICE SERVERS', 'QUEUES', and 'USERS'. Below these filters are buttons for 'SEARCH CONTACTS', 'CLEAR', and 'UPDATE ACTIVE CONTACTS'. A table of search results is displayed, showing columns for ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Num..., Subject, and User Data. The table contains three rows of data.

ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Num...	Subject	User Data
4218451	Email	Leo	Leo@computer...	Ended	Dec 13, 2021 05:13:...	Dec 15, 2021 08:03:...	ice A	4217401	RE Agent Not Ready...	
4220101	Voice	External User	apanyan@com...	Ended	Dec 15, 2021 12:57:...	Dec 15, 2021 12:08:...	ice A	0		
4220001	Email	Adrian	Adrian@computer...	Ended	Dec 14, 2021 08:19:...	Dec 15, 2021 08:05:...	ice A	4217501	Supervisor User setup	

For more information on Active Contacts, refer to Chapter 5: Active Contacts on page 183.



## Chapter 3: Settings

Under the Settings tab, you can modify the display settings in iceManager, modify recordings and evaluations, or access manuals.

**Note:** Global Administrators have the highest access level to iceManager and can make more changes than those with Switch Administrator access and lower. For information on the settings that Global Administrators can modify, refer to iceManager Access Permissions on page 17.

## General

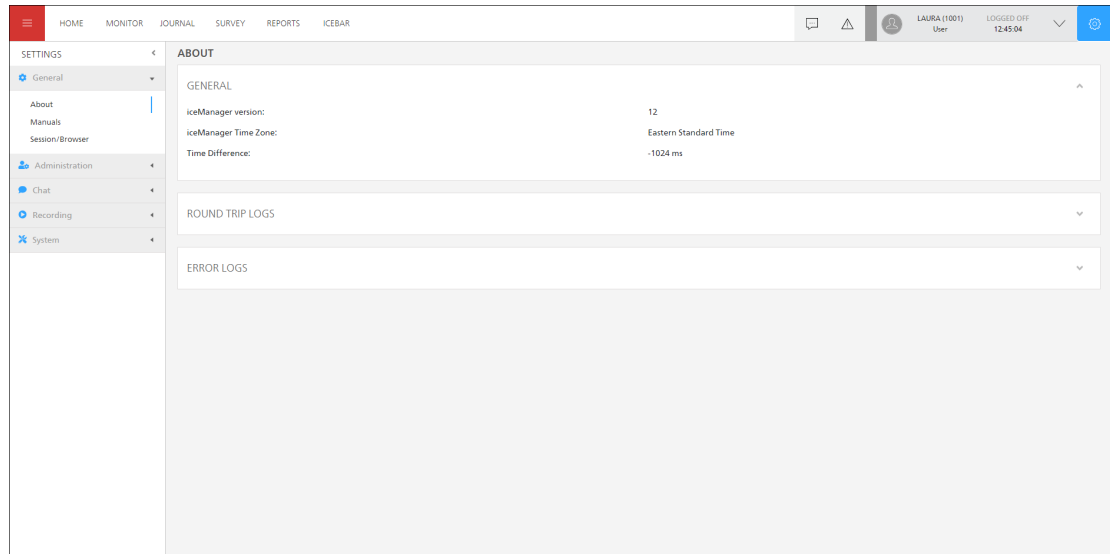
The General section in the sidebar contains information about browser settings, language, users, manuals, and ice. By default, items in the General sidebar option are shown.

A Switch Administrator can only view a subset of the parameters, whereas the Global Administrators will be able to view all the available settings in the General section.

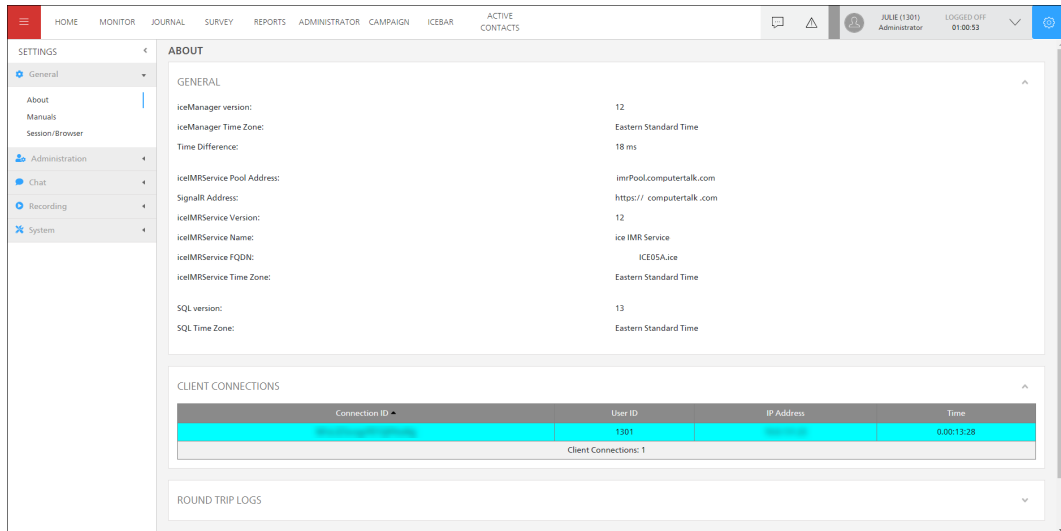
**Note:** you can collapse the individual items in the sidebar into the header by clicking the downward pointing arrow.

## About

To find the version number and time zone of the iceManager, select the *About* option in the sidebar.



Administrators will also have access to version numbers and time zone for the iceIMRService and SQL Server.



## Manuals

Launch our Education and Documentation site to find a full set of manuals and e-learning material. You will need a user name and password to gain access. Please contact your administrator if you do not have one.

## Session/Browser

Anyone who accesses iceManager will be able to view the Browser Settings section. Only Global Administrators will be able to view the General settings section.

### Session/Browser: General

The screenshot below is displaying the options that are available for Global Administrators and Switch Administrators under the General Section in the Session/Browser tab.

**SESSION/BROWSER**

---

**GENERAL**

Client Timeout Interval (Seconds)

Handshake Timeout (Seconds)

Keep Alive Interval (Seconds)

RESET CONNECTION SETTINGS

---

Browser Session Timeout (minutes)

---

Custom Home Page OFF

Enable Quick Text ON

Enable Send Quick Text For Logoff User ON

In the General section, the following parameters can be configured:

Parameter	Allowable values	Description
<b>Client Timeout Interval</b>	The default is 30 seconds	The server considers the client disconnected if it hasn't received a message (including keep-alive) in this interval. It could take longer than this timeout interval for the client to be marked disconnected due to how this is implemented.  The recommended value is double the Keep-Alive Interval value.
<b>Handshake Timeout</b>	The default is 15 seconds	If the client doesn't send an initial handshake message within this time interval, the connection is closed.  This is an advanced setting that should only be modified if handshake timeout errors are occurring due to severe network latency.
<b>Keep-Alive Interval</b>	The default is 15 seconds	Enter the number of seconds for Keep-Alive value.  By default, the server sends keep-alive pings every 10 seconds and the client checks for keep-alive pings about every 2 seconds (one-third of the difference between the keep-alive timeout value and the keep-alive timeout

Parameter	Allowable values	Description
		warning value). The default keep-alive timeout warning period is 2/3 of the keep-alive timeout. If the keep-alive timeout is 20 seconds, the warning occurs at about 13 seconds.
<b>Browser Session Timeout</b>	The default is 30 minutes	The number of minutes the browser session will stay active while the user is idle before the session is terminated.
<b>Custom Home Page</b>	On/Off	Will enable or disable the custom home page. When this is set to <i>On</i> , you can configure the custom URL link that will display in the Home Page.
<b>Enable Quick Text</b>	On/Off	Will enable or disable Quick Text capabilities in iceMonitor and iceBar for web.
<b>Enable Send Quick Text To Logoff User</b>	On/Off	Will enable or disable Send Quick Text To Logoff User capabilities in iceMonitor and iceBar for web.

To save changes that were made click *Save* or to discard changes click *Revert*.

## Session/Browser: Browser Settings

The below screenshot displays the default view of the Browser Settings for Global Administrators and Switch Administrators.

The screenshot shows the 'BROWSER SETTINGS' section with the following controls:

- Browser Logging:** A toggle switch set to OFF.
- Log SignalR Push Event:** A toggle switch set to OFF.
- Log SignalR Push Event Table:** A toggle switch set to OFF.
- Theme:** A dropdown menu currently showing 'Light'.
- Cookies:** A blue button labeled 'CLEAR COOKIES'.

The table below provides information on the fields and buttons found in the Browser Settings.

Parameter	Allowable values	Description
Browser Logging	On/Off	Select <i>On</i> to enable logging to the browser console. By default, Browser Logging is disabled.
Log SignalR Push Event	On/Off	Select <i>On</i> to enable logging of SignalR Push Event to browser. SignalR Push Event logs single events one at a time where: <ul style="list-style-type: none"> <li>• “Count” is the number of messages received.</li> <li>• “Last” is the time it took to receive your last message.</li> <li>• “Max”, “Min” and “Avg” are based on all your received messages so far.</li> </ul> <p>By default, Log SignalR Push Event is disabled.</p>
Log SignalR Push Event Table	On/Off	Select <i>On</i> to enable logging of SignalR Push Event Table to browser. SignalR Push Event Table summarizes the stats for all messages received and logged to console for every ‘x’ number of messages pushed. When this setting is enabled, you will see an additional input box to configure the value of ‘x’. By default, Log SignalR Push Event is disabled.
Log SignalR Push Event Table Count	The default is 100	Configures the value used in Log SignalR Push Event Table to determine the number of messages pushed to summarize.
Theme	Dark/Light/Contrast	Select the theme
Cookies	Clear Cookies	Select this button to clear your iceManager browser cookies.

The screenshot below is displaying the options that are available for Global Administrators and Switch Administrators under the Level parameter in the Browser Settings.

BROWSER SETTINGS

Browser Logging ON

Level

Azure Level

Auth OIDC Client Level

Log SignalR Push Event

Log SignalR Push Event Table OFF

- Debug
- Severe
- Error
- Warning
- Information
- Debug
- Verbose

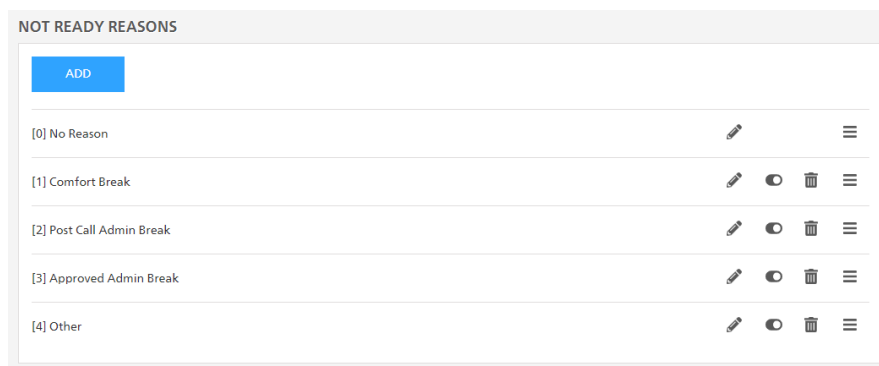


## Administration

The Administration section allows users to create and modify not ready reasons, line of business codes, evaluation forms and configuration groups. Users are also able to manage password settings and reset user passwords.

### Not Ready Reasons

This section allows users to view the Not Ready Reasons that have been configured for the system. Users with supervisor privileges or higher are also able to add, edit, disable, or move Not Ready Reasons.



#### To add a Not Ready Reason:

1. Click the *Add* button at the top of the page. A new entry will be added to the bottom of the page.
2. Enter the English and French names for the new Not Ready Reason.

[5]

Code  
[5]

English (Canada) Français (Canada) Español (México)

English (Canada) Français (Canada) Español (México)

3. Click *Save* to save the changes. Click *Revert* to cancel the changes.
4. If you clicked *Save*, the 'Not Ready Reasons Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### To edit a Not Ready Reason:

1. Select the pencil icon in the row of the Not Ready Reason you would like to edit.



2. Make the changes you would like to make to the Not Ready Reason. Once a change has been made, a blue banner will appear at the bottom of the screen.
3. Click *Save* to save the changes. Click *Revert* to cancel the changes.
4. If you clicked *Save*, the 'Not Ready Reasons Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### To delete a Not Ready Reason:

1. Select the trash icon in the row of the Not Ready Reason you would like to delete.



2. Click *Save* to save the changes. Click *Revert* to cancel the changes.
3. If you clicked *Save*, the 'Not Ready Reasons Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### Disable a Not Ready Reason:

- Click the toggle on the Not Ready Reason to disable the Not Ready Reason.



- A disabled Not Ready Reason can be enabled at a later time.
- Reporting is still available for disabled LOBs.

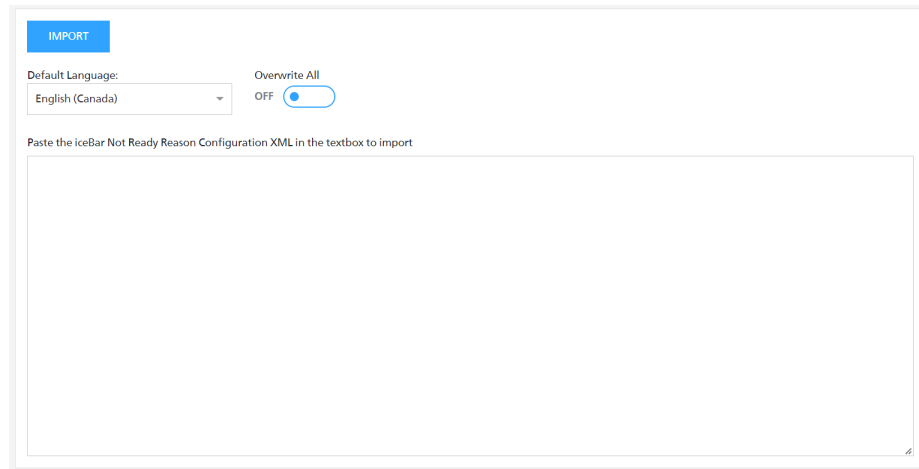
#### Reorder a Not Ready Reason:

- Use the hamburger button to reorder the Not Ready Reasons.



To import Not Ready Reasons from XML format:

1. From the dropdown list, select the default language for the Not Ready Reasons you are you going to import.
2. Select the Overwrite All toggle if you would like to overwrite the existing Not Ready Reasons on the page.
3. Enter the Not Ready Reasons that are in XML format into the field at the bottom of the page:



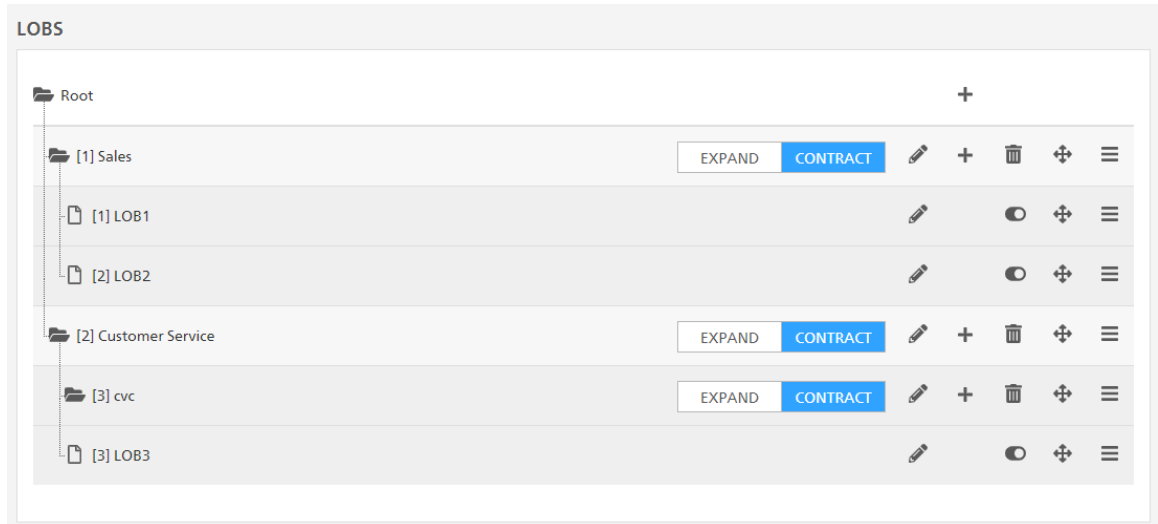
The screenshot shows a web form titled 'IMPORT'. At the top left is a blue button labeled 'IMPORT'. Below it, there are two controls: a 'Default Language' dropdown menu currently showing 'English (Canada)', and an 'Overwrite All' toggle switch currently set to 'OFF'. Below these controls is a large text area with the instruction 'Paste the iceBar Not Ready Reason Configuration XML in the textbox to import'.

4. Click the Import button to import the Not Ready Reasons.
5. New Not Ready Reason fields open populated with your imported Not Ready Reasons.
6. If you clicked *Save*, the 'Not Ready Reasons Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

## Line of Business Codes

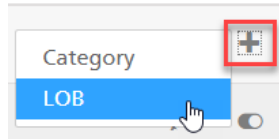
This section allows users to view the Line of Business (LOB) codes that have been configured for the system. Users with administrator privileges or higher are also able to add, edit, disable, or move LOBs.

**Note:** Any changes to the LOB codes will be made visible to agents after they close and reopen the iceBar.



#### To add an LOB:

1. Choose a category under which you want to add an LOB.
2. Click the *add* (+) button in the same row as the chosen category. Select LOB from the list. A new entry will be added to the category.

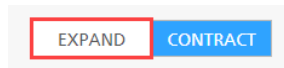


3. Enter the English and French names for the new LOB.

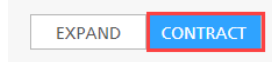
4. Click *Save* to save the changes. Click *Revert* to cancel the changes.
5. If you clicked *Save*, the 'LOBS Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### Expand or contract an LOB category:

- Click *Expand* on the LOB category to expand this category in the LOB window on iceBar.

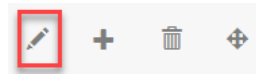


- Click Contract on the LOB category to contract this category in the LOB window on iceBar.



#### To edit an LOB:

1. Select the pencil icon in the row of the LOB you would like to edit.



2. Make the changes you would like to make to the LOB. Once a change has been made, a blue banner will appear at the bottom of the screen.
3. Click *Save* to save the changes. Click *Revert* to cancel the changes.
4. If you clicked *Save*, the 'LOB Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### To delete an LOB:

1. Select the trash icon in the row of the LOB you would like to delete.



2. Click *Save* to save the changes. Click *Revert* to cancel the changes.
3. If you clicked *Save*, the 'LOB Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### Disable an LOB:

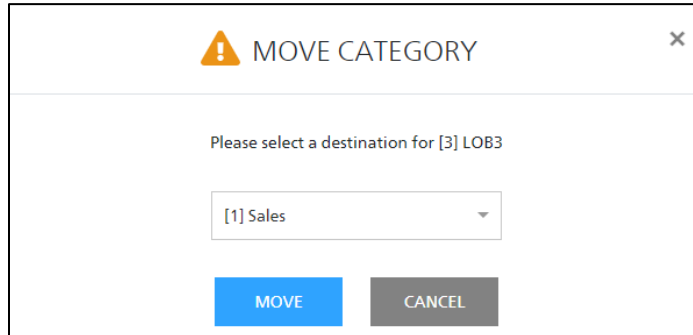
- Click the toggle on the LOB to disable the LOB.



- A disabled LOB can be enabled at a later time.
- Reporting is still available for disabled LOBs.

#### To move an LOB:

1. Select the compass icon (⊕) in the row of the LOB you would like to move.
2. Select the category under which you would like to move the LOB.



MOVE CATEGORY

Please select a destination for [3] LOB3

[1] Sales

MOVE CANCEL

3. Click *Move* to successfully move the LOB to another category.

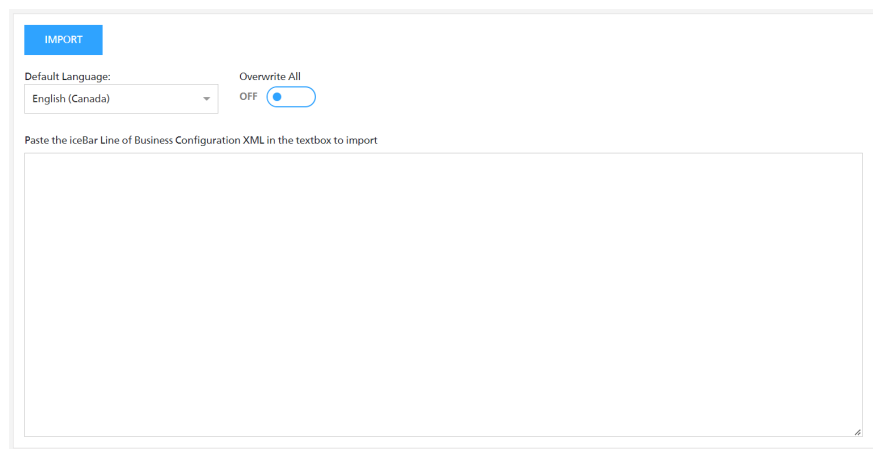
#### Reorder an LOB or Category:

- Use the hamburger button to reorder the LOBs and categories.



#### To import LOBs from XML format:

1. From the dropdown list, select the default language for the LOBs you are going to import.
2. Select the Overwrite All toggle if you would like to overwrite the existing LOBs on the page.
3. Enter the LOBs that are in XML format into the field at the bottom of the page:



IMPORT

Default Language: English (Canada)

Overwrite All OFF

Paste the iceBar Line of Business Configuration XML in the textbox to import

4. Click the Import button to import the LOBs.

5. New LOB fields open populated with your imported LOBs.
6. If you clicked *Save*, the 'LOBs Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.










## Evaluations

This section can only be modified by Administrators, Supervisors, and Team Leads.

Inbound and outbound evaluation forms can be viewed, added, reactivated, cloned, deleted, and modified from the Evaluations option in the sidebar. Evaluation forms are selected from iceJournal to be used for evaluating agent performance.

**EVALUATIONS**

Show deactivated forms  OFF

Name	ID	Ancestor ID	Times Used	Creation Date	Action	Active
Agent Evaluation Form	16		2	2022-12-22 10:05:07 AM	  	<input checked="" type="checkbox"/> ON
Agent Evaluation Form - Template	20	Agent Evaluation Form [16]	1	2023-01-06 09:05:13 AM	  	<input checked="" type="checkbox"/> ON
Customer Service Evaluation	12		0	2022-11-10 10:23:55 AM	  	<input checked="" type="checkbox"/> ON

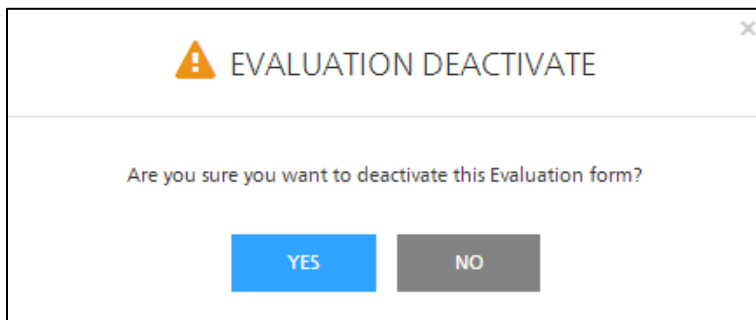
The table below explains each column:

Column	Description
<b>Name</b>	Name of the evaluation form. It is recommended that you provide a descriptive name that is below 25 characters. Names over 25 characters may not fit the columns in evaluation reports.
<b>ID</b>	Identification number of the form. Allows you to differentiate between evaluation forms with the same name.
<b>Ancestor ID</b>	Identification number of the parent form, that is, the form where it was copied from.

<b>Times Used</b>	The number of times the form was used for evaluation purposes. Regardless of whether the evaluation is in progress or not, it will be counted in this field. However, if an evaluation is deleted in iceJournal, it will be reflected in this field.
<b>Creation Date</b>	The date and time the evaluation form was created.
<b>Action</b>	Icons that you click to edit, clone, and delete existing evaluation forms.
<b>Active</b>	Toggles that allow you to flip an evaluation on or Shows whether the form is active.

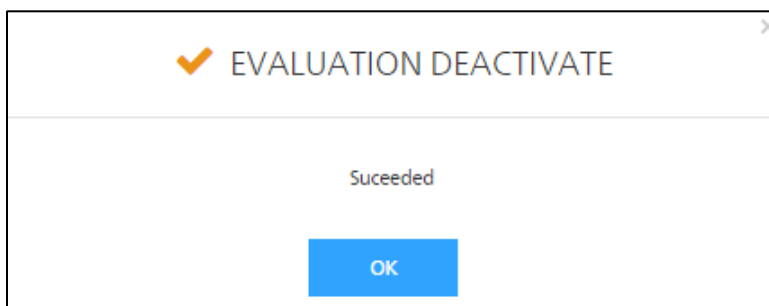
To edit an existing evaluation form, click the pencil. The evaluation form appears, and you can proceed to edit.

To deactivate the evaluation form, flip the Active toggle off. An “Are you sure you want to deactivate this Evaluation form?” message appears.













To proceed, click *Yes*. To cancel, click *No*.

Once you click *Yes* you will see the ‘Evaluation deactivate succeeded’ message.






To view all deactivated forms, toggle Show deactivated forms. Once an evaluation form is deleted, all evaluations that were completed using that form will also be deleted therefore, it is highly recommended that you deactivate forms, rather than delete them.

EVALUATIONS							
ADD							
Show deactivated forms <input checked="" type="checkbox"/> ON							
Name	ID	Ancestor ID	Times Used	Creation Date	Action	Active	
test	2		0	2014-03-28 01:43:57 PM	 	<input checked="" type="checkbox"/> ON	
test2	4	test (2)	0	2014-04-16 03:02:27 PM	 	<input type="checkbox"/> OFF	
test	5		0	2014-04-16 05:32:18 PM	 	<input type="checkbox"/> OFF	
Evaluation Form 1	7		0	2014-04-16 05:40:27 PM	 	<input type="checkbox"/> OFF	
Evaluation Form 1	8		0	2014-04-16 05:59:43 PM	 	<input checked="" type="checkbox"/> ON	

To reactivate a form, toggle the Active switch On.

An “Are you sure you want to activate this Evaluation form” message appears.

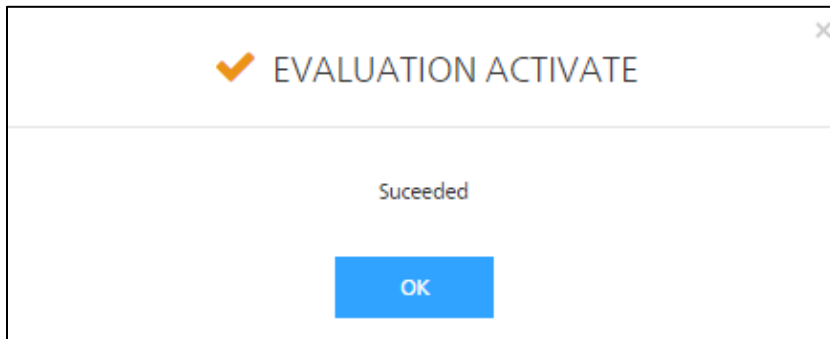
 EVALUATION ACTIVATE ✕

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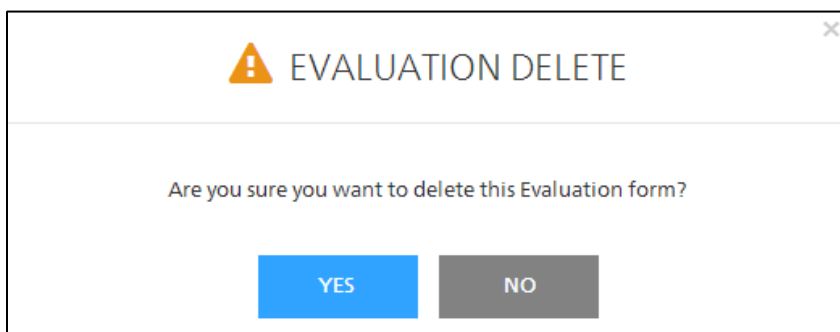
Are you sure you want to activate this Evaluation form?

To proceed, click Yes. To cancel, click No.

Once you click Yes you will see ‘Evaluation activate succeeded’ message.



To delete the evaluation form, click the garbage can icon. When you click the garbage can icon, an “Are you sure you want to delete this Evaluation form?” message appears.



Click *Yes* to proceed with the deletion. Click *No* to cancel the deletion.

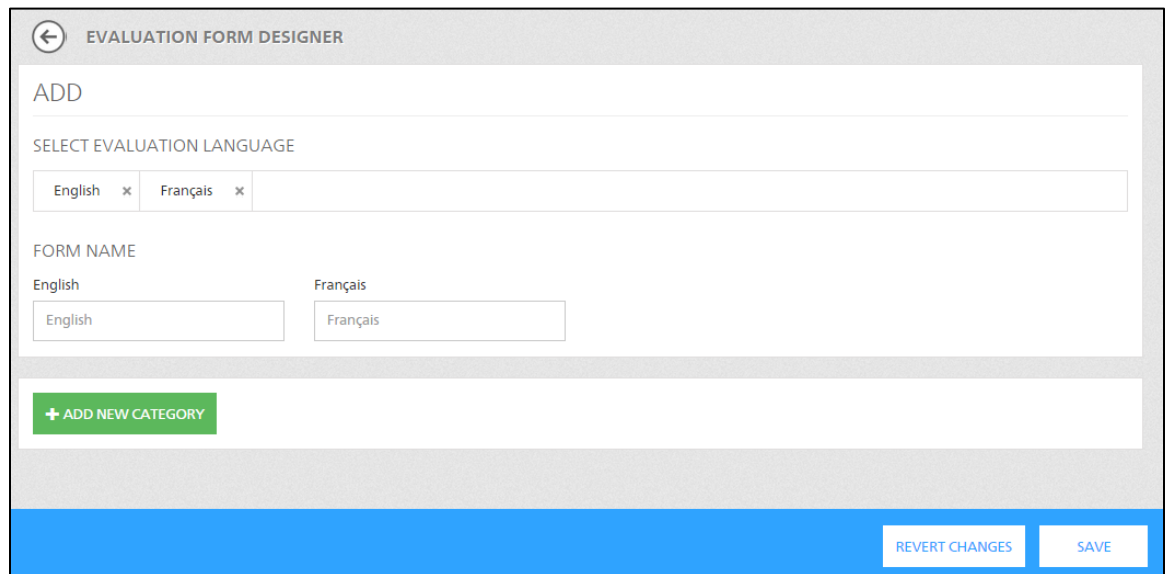
**Important:** Evaluation form deletion will delete all evaluations associated with it. You will not be able to view reports on evaluation results for deleted forms.

## Creating a New Evaluation Form

To create a new evaluation form, complete the following steps:

1. Click *Add*.

The Evaluation form designer appears.



The screenshot shows the 'EVALUATION FORM DESIGNER' interface. At the top left is a back arrow icon. Below it is a large text input field containing the word 'ADD'. Underneath is a section titled 'SELECT EVALUATION LANGUAGE' with a horizontal list of language tags: 'English' with a grey 'x' to its right, and 'Français' with a grey 'x' to its right. Below this is a 'FORM NAME' section with two columns. The 'English' column has a text input field containing 'English'. The 'Français' column has a text input field containing 'Français'. At the bottom left of the main content area is a green button with a plus sign and the text '+ ADD NEW CATEGORY'. At the bottom right of the interface are two buttons: 'REVERT CHANGES' and 'SAVE'.

2. Remove the languages that you will not use by clicking the grey x next to them. The Form Name fields for the languages you remove will automatically disappear. Minimum one language must be selected.
3. Enter the name of the form. The recommended length for names is less than 25 characters.
4. Click *Add New Category* to add a new group of questions. Fill in the name field(s).

The screenshot shows the 'EVALUATION FORM DESIGNER' interface. At the top, there is a back arrow and the title 'EVALUATION FORM DESIGNER'. Below this is a section titled 'ADD'. Under 'ADD', there is a 'SELECT EVALUATION LANGUAGE' section with two tabs: 'English' and 'Français'. Below that is a 'FORM NAME' section with two input fields: 'English' and 'Français'. Below that is a 'CATEGORY NAME' section with two input fields: 'English' and 'Français'. At the bottom of the 'ADD' section, there is a red button labeled '+ ADD NEW CRITERIA'. Below the 'ADD' section, there is a green button labeled '+ ADD NEW CATEGORY'.

5. To add a question, click *Add New Criteria*.

The criteria area expands to show additional options.

The screenshot shows the 'EVALUATION FORM DESIGNER' interface with the 'CRITERIA' section expanded. At the top, there is a back arrow and the title 'EVALUATION FORM DESIGNER'. Below this is a section titled 'ADD'. Under 'ADD', there is a 'SELECT EVALUATION LANGUAGE' section with two tabs: 'English' and 'Français'. Below that is a 'FORM NAME' section with two input fields: 'English' and 'Français'. Below that is a 'CATEGORY NAME' section with two input fields: 'English' and 'Français'. Below that is a red button labeled '+ ADD NEW CRITERIA'. Below the 'ADD' section, there is a green button labeled '+ ADD NEW CATEGORY'. Below the 'CRITERIA' section, there is a preview section showing a star rating system with five stars, the first of which is yellow. To the right of the stars is a '0/1' indicator, a blue button labeled '0%', and a 'Comment' button. At the bottom of the 'CRITERIA' section, there is a red button labeled '+ ADD NEW CRITERIA'.

The table below provides information on the fields and buttons found on this page:

Parameter	Permissible Values	Description
Select Evaluation Language	Languages configured in the system	Select one or more languages from the drop-down. There must be a minimum of one language selected.
Form Name	Free text	Enter form name.
<b>Category</b>		
Category Name	Free text	Enter category name.
<b>Criteria</b>		
Criteria Type	<ul style="list-style-type: none"> <li>▪ Stars</li> <li>▪ Buttons</li> <li>▪ Drop Down</li> <li>▪ Slider</li> </ul>	Select one of the criteria types.
Optional/Mandatory	Optional/Mandatory	Select to make criteria optional or mandatory.
Minimum Value	0 to N	Enter the minimum score value.
Maximum Value	1 to N	Enter the maximum score value. This does not necessarily correspond to the number of stars or buttons displayed. See Number of Increments.
Number of Increments	2 to N	<p>Enter the number of increments, reflecting how each star, button, drop-down or slider marker increments in score value.</p> <p>The maximum number of increments for each Criteria Type is as follows:</p> <ul style="list-style-type: none"> <li>▪ Stars – max 10</li> <li>▪ Buttons – max 5</li> <li>▪ Drop Down – max 10</li> <li>▪ Slider – max 100</li> </ul>
Criteria Name	Free text	Enter criteria name.

## Criteria Types

The following table outlines which criteria type to use, depending on the response required.

Criteria Type	Number of choices	When the response is in the form of text	When the response is in the form of numbers
Stars	Fewer		✓
Buttons	Fewer	✓	
Drop-down	More	✓	
Slider	More		✓

### Stars

The screenshot below is an example of a Stars criteria being used to evaluate agent attitude.

**CRITERIA**

Type: Stars Optional: OFF

Minimum Value: 0 Maximum Value: 5 Number of Increments: 5

Name: English (Canada) Agent attitude Français (Canada) Français (Canad

---

**PREVIEW**

Agent attitude ★★★★☆ 3.75/5 75% Comment

## Slider

The screenshot below is an example of Slider criteria that is used to evaluate caller attitude.

The screenshot shows the configuration for a Slider criteria. The 'Type' is set to 'Slider'. The 'Optional' toggle is turned OFF. The 'Minimum Value' is 0, the 'Maximum Value' is 10, and the 'Number of Increments' is 11. The 'Name' is 'Caller attitude' in English (Canada) and 'Français (Canada)'. The 'PREVIEW' section shows a slider bar with a value of 8.00/10, a blue button indicating 80%, and a 'Comment' field.

## Buttons

The screenshot below is an example of a Buttons criteria that is used to evaluate how well the problem was solved.

The screenshot shows the configuration for a Buttons criteria. The 'Type' is set to 'Buttons'. The 'Optional' toggle is turned OFF. The 'Minimum Value' is 0, the 'Maximum Value' is 1, and the 'Number of Increments' is 5. The 'Name' is 'How well was the pr' in English (Canada). The 'PREVIEW' section shows a grid of buttons: 'NOT AT ALL' (highlighted in orange), 'BARELY', 'SOME WHAT', 'ALMOST', and 'COMPLETELY'. The current value is 0/1, with a blue button indicating 0% and a 'Comment' field.

## Drop Down

Below is a screenshot of the Drop Down criteria that are used to display whether or not the user passed the evaluation.

CRITERIA

Type  Optional

Minimum Value  Maximum Value  Number of Increments

English (Canada)

Name


0

0.50


1.00

PREVIEW

Pass/Fail  0/1

Once you are finished, click *Add*. If you wish to cancel this form, click  at the top of the page.

The 'Revert Evaluation' message will appear.

 REVERT EVALUATION?

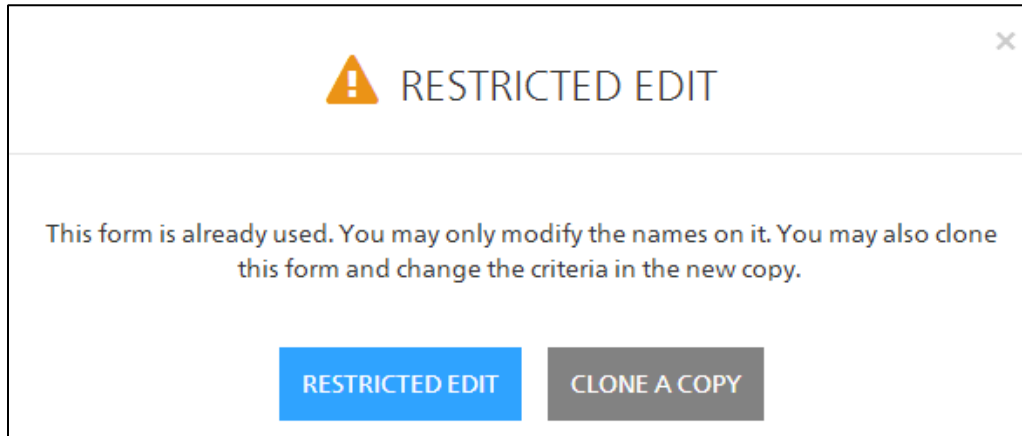
Are you sure you want to revert your changes?

Click *Yes* to continue the cancelation. Click *No* to abort the cancelation.



## Modifying an Evaluation Form

Evaluations for each interaction is linked to a form. Once a form has been used, there are two ways to modify a form: clone a copy or restricted edit. If the form has never been used, then you can edit without having to select from a clone or restricted edit.



To ensure evaluations and reports remain accurate, select the appropriate method.

- To add or delete categories and criteria to the evaluation form, select *Clone a Copy*.
  - When a clone is created, new report entries are also created in the database. You can add, delete, and modify all parts of the evaluation form.
- To make modifications to the wording of a category or criteria, select *Restricted Edit*.
  - When a restricted edit is carried out, changes affect all the previously completed evaluations as well. You cannot change Minimum Value, Maximum Value or Number of Increments – these are greyed out. Only Category and Criteria labels can be changed or added to a new language.

These different edit modes ensure that reports are not affected since textual changes made to existing forms affect previously completed evaluations. The following section explains how to use each mode.

## Clone a Copy

When you select *Clone a Copy*, a copy of the evaluation is created, with “– Copy” appended to the name. Click the edit pencil to edit the copy.

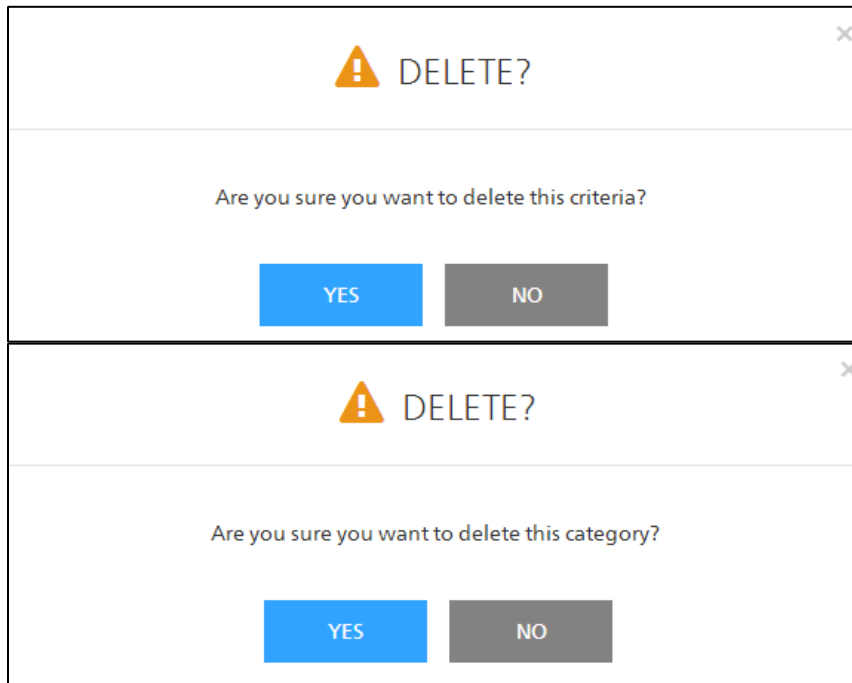
In this mode, you can add evaluation languages and modify all aspects of each criterion. Clone a copy duplicates the structure, using the original as a template for the cloned version.



## Delete Criteria or Category

To delete a criterion or category, select the garbage sign.

Once you click *Delete*, a warning message appears: “Are you sure you want to delete this criterion?” or “Are you sure you want to delete this category?”



Click *Yes* to proceed with the deletion and click *No* to cancel the deletion.

## Minimize Criteria or Category

To see fewer details in each criterion or category, click the down arrow.

The expanded view:

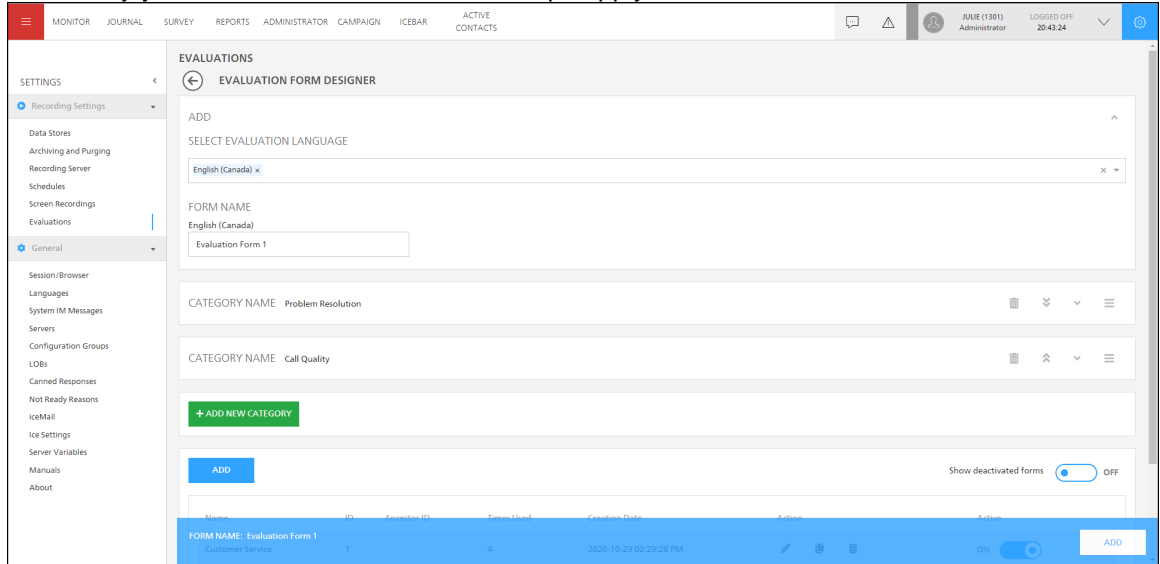
The expanded view shows a detailed configuration for a criterion. At the top, the category is identified as 'English' and the criterion as 'Problem Resolution'. The 'CRITERIA' section includes a 'Type' dropdown set to 'Buttons', an 'Optional' toggle set to 'OFF', and three input fields: 'Minimum Value' (0), 'Maximum Value' (10), and 'Number of Increments' (5). Below this, the 'Name' is 'How well did the problem get resolved?'. A vertical scale from 0 to 10.00 is shown on the left, with corresponding labels: 'Not at all', 'Barely', 'Marginally', 'Sort of', and 'Mostly'. A red box highlights a down arrow icon in the top right corner of the criteria section.

The minimized view:

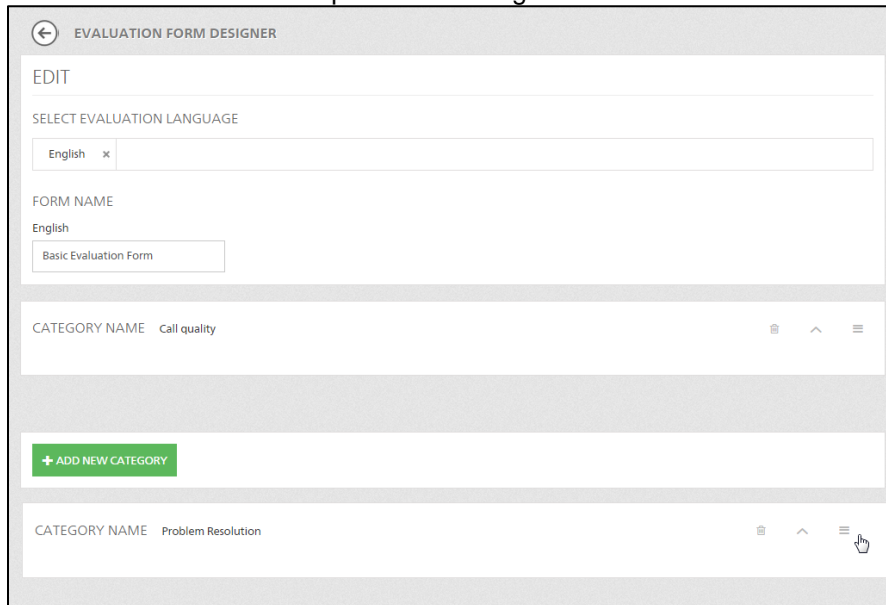
The minimized view shows a summary of the criterion. The category is 'English' and the criterion is 'How well did the problem get resolved?'. The criterion name is displayed in a larger font. Below the name, there are five buttons representing the scale: 'NOT AT ALL' (highlighted in orange), 'BARELY', 'MARGINALLY', 'SORT OF', and 'MOSTLY'. To the right of these buttons, the current score is shown as '0/10' and a progress indicator shows '0%'. At the bottom of the interface, there are two buttons: a red '+ ADD NEW CRITERIA' button and a green '+ ADD NEW CATEGORY' button.

## Move Criteria or Category

It is recommended that you minimize categories prior to moving them because it is easier to drag and drop smaller sections of the page. The way you move a category is the same as the way you move criteria, so the same steps apply.



To move a category, click the menu sign and drag the criteria or category to where you want it to move. Notice in the screenshot below that the Problem Resolution category has been selected and is in the process of being moved.



In the screenshot below, the Problem Resolution category has been placed above the Call Quality category.

The screenshot displays the 'EVALUATION FORM DESIGNER' interface. At the top, there is a back arrow icon and the title 'EVALUATION FORM DESIGNER'. Below this is an 'EDIT' button. The 'SELECT EVALUATION LANGUAGE' section shows a dropdown menu with 'English' selected and a close icon. The 'FORM NAME' section shows a text input field containing 'Basic Evaluation Form'. Below this is a list of categories. The first category is 'Problem Resolution' and the second is 'Call quality'. A red double-headed vertical arrow is positioned between these two categories, indicating they have been swapped. Each category entry includes a trash icon, an up arrow icon, and a menu icon. At the bottom of the list is a green button labeled '+ ADD NEW CATEGORY'.

## Restricted edit

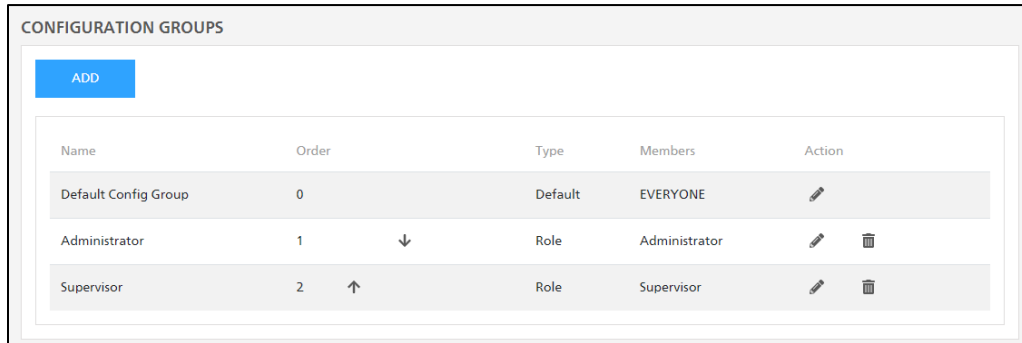
In Restricted edit mode, you can change the category name and the content in the text fields. You can also add a new evaluation language. However, elements within each criterion (e.g., Type, Minimum Value, Maximum Value, and Number of Increments) cannot be changed.

The screenshot displays the 'Restricted edit' interface for a category named 'Problem Resolution'. The interface is organized into two main sections: 'CATEGORY NAME' and 'CRITERIA'.  
In the 'CATEGORY NAME' section, the language is set to 'English' and the category name is 'Problem Resolution'.  
The 'CRITERIA' section contains the following settings:  
- 'Type': Buttons  
- 'Minimum Value': 0  
- 'Maximum Value': 10 (indicated as restricted with a red prohibition sign)  
- 'Number of Increments': 5  
Below these settings, the 'Name' field is 'How well did the probler'. A list of evaluation points is shown with corresponding text labels:  
- 0: Not at all  
- 2.50: Barely  
- 5.00: Marginally  
- 7.50: Sort of  
- 10.00: Mostly

**Important:** It is highly recommended that you avoid changing the button names drastically since changes affect previously completed evaluations as well. For example, changing Happy to Sad would change the connotations of all the previous scores.

## Configuration Groups

The configuration groups section allows an administrator to group a set of users and apply specific settings to only those users.



Column Heading	Details
<b>Name</b>	The name of the configuration group.
<b>Order</b>	This illustrates the hierarchy of the configuration groups. If a configuration item is set to be inherited, it would inherit from a parent group that they also belong to. Use the arrows to change the order of the configuration group.
<b>Type</b>	This is how members have been grouped. Options include Users, Teams, and Roles.
<b>Members</b>	Once a type has been selected, members can be specified. Users: members are selected from a list of ice users Teams: members are selected from a list of ice teams Roles: members are selected based on their ice user type
<b>Action</b>	Allows users with administrator privileges or higher to edit or delete the configuration groups. All other user types cannot add or modify configuration groups

To add a configuration group:

1. Select the *Add* button in the top left corner.
2. Configure the Name, Type, and Members fields.

ADD

Name

Type

Members

### 3. Configure the General properties.

General | Server | LOB | Canned Response | Not Ready Reason | IceBar for desktop | IceBar for web | Survey | IcePhone

Enable Access To Active Contacts

Force Logon All Queues

Show Queue Picker

Default User Connectivity

User Connectivity Changeable From IceBar

### 4. Configure the Server Assignments.

ASSIGNED SERVER

UNASSIGNED SERVERS Show deactivated servers  OFF

Server

### 5. Configure the LOB Assignments.



Enable force LOB Code (iceBar Desktop)	<input type="text" value="Inherit"/>
Default LOB Assignment	<input type="text" value="Inherit"/>
Default Category Expansion	<input type="text" value="Inherit"/>
Auto Submit (iceBar Desktop)	<input type="text" value="Inherit"/>
Close on Submit (iceBar Desktop)	<input type="text" value="Inherit"/>

LOB Assignments

Root			
[1] Sales	EXPAND	CONTRACT	<b>INHERIT</b>
[1] New customer	INCLUDE	EXCLUDE	<b>INHERIT</b>

6. Configure the Canned Responses if your ice system allows IM handling.

Default Canned Response Assignment	<input type="text" value="Inherit"/>
Default Folder Expansion	<input type="text" value="Inherit"/>

Canned Response Assignments

Root			
[1] General	EXPAND	CONTRACT	<b>INHERIT</b>
...	INCLUDE	EXCLUDE	<b>INHERIT</b>

7. Configure the Not Ready Reasons.

Default Not Ready Reason Assignment	<input type="text" value="Inherit"/>
-------------------------------------	--------------------------------------

Not Ready Reason Assignments

[0] No Reason	INCLUDE	EXCLUDE	<b>INHERIT</b>
[1] Comfort Break	INCLUDE	EXCLUDE	<b>INHERIT</b>
[2] Post Call Admin Break	INCLUDE	EXCLUDE	<b>INHERIT</b>
[3] Approved Admin Break	INCLUDE	EXCLUDE	<b>INHERIT</b>
[4] Other	INCLUDE	EXCLUDE	<b>INHERIT</b>

## 8. Configure the iceBar for Desktop.

IceBar UI Language	Use OS Language
Target IceBar Installer Version	Inherit
Target IceBar Version	Inherit
Target IceBar Updater Version	Inherit
IceBar Configuration XML	

## 9. Configure the iceBar for Web.

Enable iceBar for web	Inherit
Enable Set User Data	Inherit
Maximum PAQ Number	Inherit
IceBar Buttons	Inherit

## 10. Configure the Survey Permissions, if applicable.

<b>Permissions</b>	
Surveys	Inherit
Survey Runs	Inherit
Survey Response	Inherit

## 11. Configure the icePhone settings, if applicable.

Close Window on Release	Disable
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For details on each field, refer to the table below.

Configuration Group Properties	
Parameter	Details
Name	Enter a unique name to identify this configuration group.
Type	Select a grouping type – <i>Users</i> , <i>Teams</i> , or <i>Role</i>
Members	Members are specified based on the type selected. Users: members are selected from a list of ice users Teams: members are selected from a list of ice teams Roles: members are selected based on their ice user type
<b>General</b>	
Enable Access to Active Contacts	Options include <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group has access to the Active Contacts tab. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. <b>Note:</b> Only users with administrator privileges or higher can have access to the Active Contacts tab.
Force Logon All Queues	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will decide whether this configuration group will be forced to logon to all assigned queues. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Show Queue Picker	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will decide whether this configuration group has access to the queue picker. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Default User Connectivity	Options include <i>iceAdministrator defined</i> , <i>icePhone</i> and <i>Inherit</i> which will decide the default connectivity for users in this configuration group. If this setting is set to <i>iceAdministrator defined</i> , it will set the remote DN field in the global iceBAR XML to blank, prompting the server to use the <i>iceAdministrator</i> configuration when the agent logs into ice. If set to <i>icePhone</i> , it will set the remote DN field to “8:acs:” which informs the server that the agent will use <i>icePhone</i> . The <i>Inherit</i> option forces the system to look at a

Configuration Group Properties	
Parameter	Details
	parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
User Connectivity Changeable from iceBar	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will control whether an agent's remote DN on their iceBar and iceBar is editable or not. If this setting is enabled, the remote DN field in the iceBar is editable. If it is disabled, the remote DN field in the iceBar is disabled, as well as the "Use icePhone" checkbox. In the server profile page, the "Roaming DN", "Use iceMA assigned remote DN" and "Use icePhone" fields will also be disabled. The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Server</b>	
Assigned Server	Shows all the ice servers that the configuration group has been assigned to. To remove a server from this list select the <i>remove</i> button (-) under the Unassign column. The server will then move to the list of unassigned servers. By default all servers are listed under the Unassigned field.
Unassigned servers	Shows all the ice servers that the configuration group has not been assigned to. To assign a server from this list, select the <i>add</i> button (+) under the Assign column. The server will then move to the list of assigned servers. By default, all servers are listed under this field.
<b>LOB</b>	
Enable force LOB Code (iceBar Desktop)	Options include <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group will be required to assign an LOB code to each contact after it has been handled. The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Number of LOB Codes Required (iceBar)	This option is available when <b>Enable force LOB Code</b> is set to <i>Enable</i> . Enter the number of LOB Codes this configuration group will be required to assign to each contact after it has been handled.

Configuration Group Properties	
Parameter	Details
Desktop)	
Default LOB Assignment	Options are <i>Include</i> , <i>Exclude</i> , and <i>Inherit</i> which will decide whether this configuration group has access to the default LOB assignment. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Default Category Expansion	Options are <i>Expand</i> , <i>Contract</i> , and <i>Inherit</i> which will decide whether this configuration group's LOBs will be viewed in expanded or contracted form by default. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Auto Ready (iceBar Desktop)	This option is available when <b>Enable force LOB Code</b> is set to <i>Enable</i> . Options are <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will decide whether this configuration group will automatically enter into the ready state after submitting the LOB assignments. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Number of Seconds Before Setting Agent to Ready (iceBar Desktop)	This option is available when <b>Enable force LOB Code</b> is set to <i>Enable</i> . Enter the number of seconds before this configuration group will be set to the Ready state after submitting the LOB assignments.
Auto Submit	Options are <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group will need to select the Submit button in the iceBar LOB window to submit their LOB selection. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.

Configuration Group Properties	
Parameter	Details
Number of Seconds Before Auto Submit After LOB Selection (iceBar Desktop)	This option is available when <b>Auto Submit</b> is set to <i>Enable</i> . Enter the number of seconds this configuration group will have between assigning LOBs and automatic submission.
Close on Submit	Options are <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group will need to manually close the iceBar LOB window after submitting their LOBs. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
LOB Assignments	Shows all available categories and LOBs. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each LOB. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. By default, this field is set to <i>Inherit</i> .
Canned Response	
Default Canned Response Assignment	Options are <i>Include</i> , <i>Exclude</i> , and <i>Inherit</i> which will decide whether this configuration group has access to the default Canned Response assignment. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Default Folder Expansion	Options are <i>Expand</i> , <i>Contract</i> , and <i>Inherit</i> which will decide whether this configuration group's Canned Responses will be viewed in expanded or contracted form by default. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.

Configuration Group Properties	
Parameter	Details
Canned Response Assignments	Shows all available folders and Canned Responses. Users have the options <i>Expand</i> , <i>Contract</i> , or <i>Inherit</i> for each folder. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each Canned Response. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. By default, this field is set to <i>Inherit</i> .
<b>Not Ready Reason</b>	
Default Not Ready Reason Assignment	Options are <i>Include</i> , <i>Exclude</i> , and <i>Inherit</i> which will decide whether this configuration group has access to the default Not Ready Reason assignment. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Not Ready Reason Assignments	Shows all available Not Ready Reasons. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each Not Ready Reason. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. By default, this field is set to <i>Inherit</i> .
<b>iceBar for desktop</b>	
iceBar UI Language	Configures the language that iceBar will open in. The dropdown shows the following options: Use OS Language, Prompt, English, French and Spanish. Users also have the <i>Inherit</i> option to use the Default Config Group settings.
Target iceBar Installer Version	iceBar Installer is the executable file that is used to install iceBar on a user's workstation. This dropdown shows all available iceBar Installer versions. Users also have options <i>Inherit</i> and <i>Release\Latest</i> . <i>Release\Latest</i> will use the latest version within the Release channel folder.  <b>Note:</b> Only Global Administrator has access to this configuration option.
Target iceBar Version	The version of iceBar that will be installed on the user's workstation. This dropdown shows all available iceBar

Configuration Group Properties	
Parameter	Details
	<p>versions. Users also have options <i>Inherit</i> and <i>Release\Latest</i>. <i>Release\Latest</i> will use the latest version within the Release channel folder.</p> <p><b>Note:</b> Only Global Administrator has access to this configuration option.</p>
Target iceBar Updater Version	<p>When iceBar is launched, the version on the desktop will be confirmed against the Target iceBar Version field. If the desktop version does not match the Target iceBar Version, the correct version will be downloaded and installed.</p> <p>This dropdown shows all available iceBar versions. Users also have options <i>Inherit</i> and <i>Release\Latest</i>. <i>Release\Latest</i> will use the latest version within the Release channel folder.</p> <p><b>Note:</b> Only Global Administrator has access to this configuration option.</p>
iceBar Configuration XML	<p>Contains the iceBar configuration settings in xml format.</p> <p><b>Note:</b> The override="always" attribute in the Queues element in the iceBar configuration will be added if <i>Force Logon All Queues</i> is enabled.</p>
<b>iceBar for Web</b>	
Enable web iceBar	<p>Options include <i>Enable</i>, <i>Disable</i>, and <i>Inherit</i> which will decide whether this configuration group has access to iceBar for web. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.</p>
Enable Set User Data	<p>Options include <i>Enable</i>, <i>Disable</i>, and <i>Inherit</i> which will decide whether this configuration group has access to modifying the User Data field. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.</p>
Maximum PAQ Number	<p>Options include <i>Custom</i> and <i>Inherit</i> which will decide the number of rows this configuration group has in their PAQ. The <i>Custom</i> option displays a field to enter the number of PAQ rows for this configuration group. The <i>Inherit</i> option forces the system to look at a parent configuration group</p>



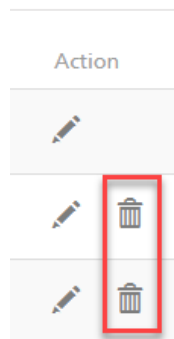
Configuration Group Properties	
Parameter	Details
	that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>iceBar Buttons</b>	<p>Options include <i>Custom</i> and <i>Inherit</i> which will decide the buttons displayed on the iceBar for Web for this configuration group. The Custom option displays section to select and configure the buttons displayed on the iceBar for Web. Refer below to see the configuration options available for iceBar for Web.</p> <p>The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.</p>
<b>Survey</b>	
<b>Surveys</b>	Options include <i>None</i> , <i>View (View)</i> , <i>Edit (View / Edit)</i> , Full Control (View / Edit / Delete), and Inherit which will decide the permissions that this configuration group has on the Survey page. The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Survey Runs</b>	Options include <i>None</i> , <i>View (View)</i> , <i>Edit (View / Edit)</i> , Full Control (View / Edit / Delete), and Inherit which will decide the permissions that this configuration group has on the Survey Run page. The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Survey Response</b>	Options include <i>None</i> , <i>View (View)</i> , <i>Delete (View / Delete)</i> , and Inherit which will decide the permissions that this configuration group has on managing Survey Responses. The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Configuration Groups</b>	Displays the current configuration groups that have been added to the system.

Configuration Group Properties	
Parameter	Details
<b>icePhone</b>	
<b>Close Window on Release</b>	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> . By default, chat windows will stay open when the contact is completed. When this setting is enabled, chat windows will close when the agent selects the release button.

12. Click *Add* in the blue banner at the bottom of the screen.
13. The 'Save Configuration Group' message will appear. Click *OK* to complete the change.

To delete a configuration group:

1. Under 'Action', select the trash icon in the row of the group you would like to delete.



2. The 'Delete Configuration Group' message will appear. Click *Yes* to delete the group, or click *No* to keep the group

To edit a configuration group:

1. Under 'Action', select the pencil icon in the row of the group you would like to edit.

The screenshot shows a configuration page for a user. At the top, there are three fields: 'Name' (text input), 'Type' (dropdown menu with 'Users' selected), and 'Members' (text input with a 'SELECT' button to its right). Below these fields is a horizontal tab bar with the following tabs: 'General' (selected), 'Server', 'LOB', 'Canned Response', 'Not Ready Reason', 'iceBar for desktop', 'iceBar for web', 'Survey', and 'icePhone'. Under the 'General' tab, there are five settings, each with a dropdown menu set to 'Inherit':

- Enable Access To Active Contacts
- Force Logon All Queues
- Show Queue Picker
- Default User Connectivity
- User Connectivity Changeable From iceBar

2. Make the changes you would like to make to the configuration group. Once a change has been made, a blue banner will appear at the bottom of the screen.
3. Click *Save* to save the changes. Click *Revert* to cancel the changes.
4. If you clicked *Save*, the 'Save Configuration Group' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

### Configure iceBar for Web

#### **Understanding Contact Buttons**











You can use the Contact Buttons for easy access to answer calls, place callers on hold, and perform many other contact control functions. Common buttons allow users to place calls on hold, consult, conference, and transfer contacts.












The availability of Contact Buttons depends on your current state and the type of contact you are handling. For example, if you are not handling a contact, the Hold button is not available.

#### **Understanding User Buttons**

User Buttons provide the user with additional buttons. These buttons are not meant to be used to handle contacts. Instead, they are used to assist the user in other functions such as initiating a call or silent monitoring, viewing contacts previously handled, or opening the PAQ window.

The table below briefly describes the functionality of each button that you can have available for Contact Buttons and User Buttons.

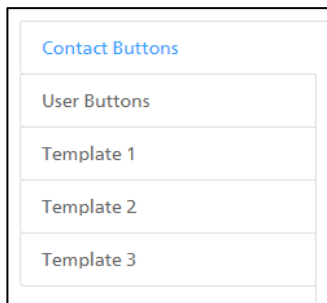
Buttons panel summary		
Button	Available when	Use Button to...
 Answer	Alerting with a contact.	Answer a call alerting at your workstation if off-hook.
 Release	On a contact.	End the contact you are on.
 Place Call	Logged on and not handling another call.	Place a call to another user, or to an external number.
 Hold	On a call.	Place a caller on hold. The caller hears music while on hold.
 Transfer	On a call.	Transfer a caller to another user, queue or external number.
 Consult	On a call.	Consult a third party when you are on a call.
 End Consult	On a consult or on a conference.	While on a consult, release the active party and return to the caller on hold OR While on a conference, release the third party and stay on the line with your original caller.
 Conference	On a consult.	Initiate a conference call with your original caller while you are consulting.
 LOB	On a contact.	Tag a call with a Line of Business code.
 Silent Monitor	Logged on	Receive a notification when an ice Administrator is silently monitoring you or initiate silent monitoring.

Buttons panel summary		
Button	Available when	Use Button to...
 Coach	Logged on	Receive a notification when an ice Administrator is coaching you or initiate silent monitoring.
 Quick Text	Application is open.	Send a Quick Text message to another iceBar user.
 PAQ	Application is open.	View Personal Access Queue (PAQ) window and manage contacts as a Multi-Contact Handling user.
 Apply Resolution Code	In Email state.	Attach a resolution code to the email currently being handled. Also used to create new Resolution codes.
 Contact History	Application is open.	Open iceJournal and view Contact History.
 Queue Stats	Application is open.	View Queue Statistics.
 Elevate	User is on a call or IM.	Create a separate multi-party conference, for application sharing and video.
 Add Participant	On a call.	Add additional participants to a call.
 Conference Roster	In the In Meeting state.	View all participants on the call.
 Mute	On a call.	Mute your audio.
 Request New Contact	Multi-contact handling COS and	Request the next contact.


Buttons panel summary		
Button	Available when	Use Button to...
	Request to Select Next Contact COS are enabled.	

### Adding Buttons to the Toolbar

1. Click one of the tabs listed below to configure the buttons for that page.

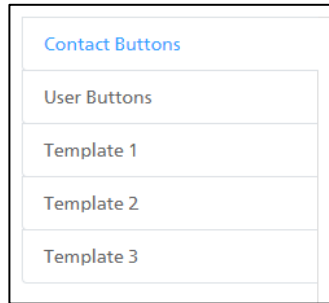


**Note:** Templates 1, 2, and 3 can be used to create and save alternative layouts. Templates can be copied and imported into the Contact Buttons or User Buttons pages. Refer below to learn how to copy and import templates.


2. The column on the left shows the other buttons available for the user to add to the toolbar. The column on the right shows the buttons currently displayed on the toolbar.
3. In the column on the left, highlight the button that you wish to add to the panel.
4. Click  to move the selected button to the right column. The button is added to the panel when you click Save.
5. Click Save if you are finished making changes.

### Removing Buttons from the Toolbar

1. Click one of the tabs listed below to configure the buttons for that page.



**Note:** Templates 1, 2, and 3 can be used to create and save alternative layouts. Templates can be copied and imported into the Contact Buttons or User Buttons pages. Refer below to learn how to copy and import templates.

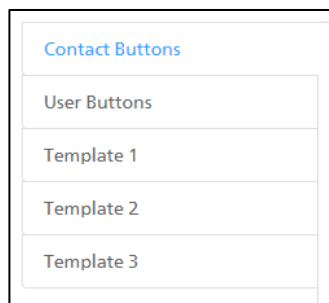
3. The column on the left shows the other buttons available for the user to add to the toolbar. The column on the right shows the buttons currently displayed on the toolbar.
4. In the column on the right, highlight the button that you wish to remove from the Buttons panel.
5. Click  to move the selected button to the left column. The button is removed from the panel when you click Save.
6. Click Save if you are finished making changes.

### Customize Buttons

iceBar for Web allows you to add custom buttons with additional capabilities. It also allows you to edit the appearance of a particular button by changing some of its properties, such as its icon, tool tip, and caption. Custom Buttons can be edited further, as detailed in the steps that follow.

#### To add a new button:

1. Click one of the tabs listed below to configure the buttons for that page.



2. Click the Add Button. A dialog box appears:

**ADD BUTTON**

Tooltip:

Icon:  
 ...

Command:

Queue ID:

Dialed Digits:

User Data:

3. Add the information about the new button.

**Note:** More information about the parameters in the table below.

4. Click OK to add the new button or click Cancel to discard your changes.
5. Click Save to save your changes.

Add Button Options	
Parameter	Description
<b>Tooltip</b>	Insert the text that will be displayed in the tooltip section.
<b>Icon</b>	<p>Add icon.</p> <p>Click the ellipsis button to open the 'select icon' window.</p> <p>Click on the desired icon you wish to use</p> <p>Click <i>OK</i> to apply your changes or <i>Cancel</i> to discard your changes.</p>
<b>Command</b>	Click the drop-down menu to select the command that you wish to associate with this button.
<b>Queue ID</b>	Enter a Queue ID to be associated with this button, if applicable.
<b>Dialed Digits</b>	Enter Dialed Digits to be associated with this button, if applicable.



Add Button Options	
Parameter	Description
User Data	Enter User Data to be associated with this button, if applicable.

To edit a button:

1. Click one of the tabs listed below to configure the buttons for that page.

The screenshot shows a configuration page with a sidebar containing five tabs: 'Contact Buttons' (highlighted in blue), 'User Buttons', 'Template 1', 'Template 2', and 'Template 3'. The main content area is currently empty.

2. Locate the button you wish to edit on any of the columns that appear.
3. Select the button by highlighting it with a single-click.
4. Click the Edit Button. A dialog box appears:

The 'EDIT BUTTON' dialog box contains the following fields and controls:

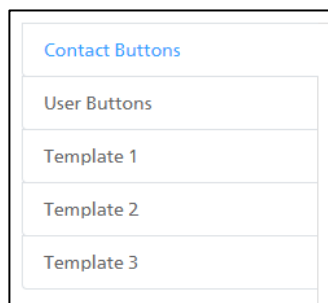
- Tooltip:** A text input field containing 'Place a call'.
- Icon:** A selection field showing a telephone handset icon and the text 'placeCall', with a three-dot menu icon to its right.
- Command:** A dropdown menu showing 'Place a call'.
- Queue ID:** An empty text input field.
- Dialed Digits:** An empty text input field.
- User Data:** An empty text input field.
- Buttons:** 'Ok' and 'Cancel' buttons at the bottom right.

5. Make the desired changes outlined in the table below.
6. Click OK to apply your changes or click Cancel to discard your changes.
7. Click Save to save your changes.

Edit Button Options	
Parameter	Description
<b>Tooltip</b>	Edit the text that will be displayed in the tooltip section.
<b>Icon</b>	Change the icon. <ol style="list-style-type: none"> <li>1. Click the ellipsis button to open the 'select icon' window.</li> <li>2. Click on the desired icon you wish to use</li> <li>3. Click <i>OK</i> to apply your changes or <i>Cancel</i> to discard your changes.</li> </ol>
<b>Command</b>	Click the dropdown menu to select the command that you wish to associate with this button. <b>Note:</b> This option is only available for new icons.
<b>Queue ID</b>	Enter a Queue ID to be associated with this button, if applicable. <b>Note:</b> This option is only available for new icons.
<b>Dialed Digits</b>	Enter Dialed Digits to be associated with this button, if applicable. <b>Note:</b> This option is only available for new icons.
<b>User Data</b>	Enter User Data to be associated with this button, if applicable. <b>Note:</b> This option is only available for new icons.

To delete a button:

1. Click one of the tabs listed below to configure the buttons for that page.



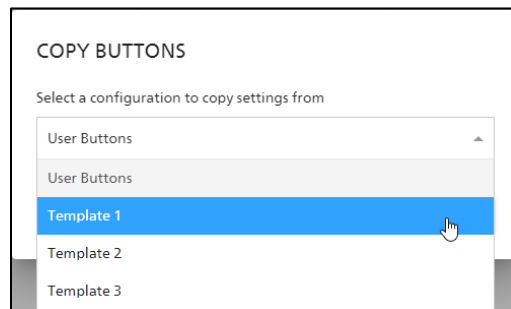
2. Locate the button you wish to delete on any of the columns that appear.

3. Click the Delete button to delete the button.
4. Click Save to save the changes.

#### Copy the Settings from a Template

An alternative way to configure your Buttons panel is to create templates and copy the settings from the template:

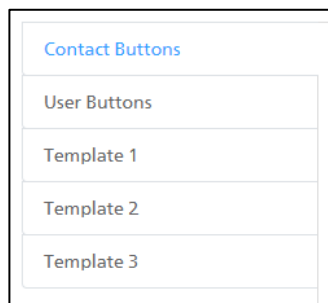
1. Navigate to the Contact Buttons or User Buttons page that you wish to configure.
2. Click the Copy button.
3. In the window that appears, select a page you wish to copy from by highlighting it in the drop-down list.



4. Click Ok.
5. Notice that the Hidden and Visible columns are now populated with the buttons associated with the copied page.
6. Click Save to save the changes.

#### To reset the buttons:

1. Click one of the tabs listed below to configure the buttons for that page.



2. Click Reset to reset the buttons back to default settings.
3. Click Save to save the changes.

## icePhone Connection and Backup Settings

### Voice Settings

The following table describes the settings required to configure icePhone as a primary or backup connection for voice calls. This includes settings in iceManager Configuration groups, as well as settings in iceAdministrator.

For more information on the settings in iceAdministrator, refer to the iceAdministrator User Manual.

iceAdministrator					iceManager Configuration Groups		
Voice		Enable ACS Voice	Connection address (Remote DN)	Use MS Teams Direct Routing	Block PSTN remote DN	Default User Connectivity	
Primary	Backup					Voice Primary	Voice Backup
Teams Direct Routing	icePhone	✓	Direct Routing number	✓	✓	iceAdministrator-defined	icePhone
Teams Direct Routing	PSTN		PSTN number	✓		iceAdministrator-defined	iceAdministrator-defined
PSTN	icePhone	✓	PSTN number			iceAdministrator-defined	icePhone
icePhone	PSTN	✓	PSTN number			icePhone	iceAdministrator-defined
icePhone	Teams Direct Routing	✓	Direct Routing number	✓	✓	icePhone	iceAdministrator-defined

**Note:** If the *User Connectivity Changeable From iceBar* setting is enabled in iceManager Configuration Groups, the iceBar remote DN will override any settings in iceAdministrator and iceManager. For more information, refer to Configuration Groups.

## IM Settings

The following table describes the settings required to configure icePhone as a primary or backup connection for IMs. These settings are configured in iceAdministrator.

For more information on the settings in iceAdministrator, refer to the iceAdministrator User Manual.

IM		Enable ACS IM	IM Address
Primary	Backup		
icePhone	SIP	✓	Sip address
SIP	icePhone	✓	Sip address

Consider the following example to set Teams Direct Routing as the primary connection, and icePhone as the backup.

### In iceManager

1. In iceManager settings, locate the correct Configuration Group, and open the General Tab.
2. Set the *Default User Connectivity* to iceAdministrator defined.

The screenshot shows the 'EDIT CONFIGURATION GROUP' interface in iceManager. The 'DEFAULT CONFIGURATION GROUP' is selected, and the 'General' tab is active. The 'Default User Connectivity' dropdown menu is highlighted with a red box, showing 'iceAdministrator defined' as the selected option. Other settings visible include 'Enable Access To Active Contacts' (Enable), 'Force Logon All Queues' (Disable), 'Show Queue Picker' (Enable), and 'User Connectivity Changeable From iceBar' (Enable).

### In iceAdministrator

1. In iceAdministrator, ensure that both the *Enable ACS Voice* and *Enable ACS IM* class of service features are enabled.

The screenshot shows the 'Class of Service' configuration window. The 'ACS Settings' section is highlighted with a red box, containing the following options:

- Enable ACS Voice
- Enable ACS IM

Other visible settings include:

- Allow Multi Contact Handling (Max Concurrent IMs: 3, Max Concurrent Emails: 3)
- Auto Answer Calls (Only require answer button when offhook)
- Auto Answer Email or IM
- Disable Auto Not Ready
- Disable PAQ Queuing
- Emergency Contact
- Enable Cleardown
- Drop ice User Line Between Calls
- Disable Whisper
- Logon to NOT READY (Not Ready Reason: 0)
- Auto Wrap Time (s): INFINITE
- Smart Routing: Use Switch Default
- Recording Notification
- Recording Error Notification
- Send Callers ANI to User Device
- Silent Monitoring Privilege
- Silent Monitoring Notification
- Screen Monitoring Privilege
- Play Call Waiting Tone
- Virtual User
- Wrapup After Queued Call
- Wrapup After Placed Call
- Not Ready Cancels Timed Wrapup
- Request to Select Next Contact
- Disable Voice while on IM/Email
- Disable IM/Email while on Voice

Outbound Presentation settings:

- Send Name to PBX
- Send Name to PSTN / SIP Display Name
- Name to Send: \_\_\_\_\_
- Use IM Alias

At the bottom, it says "You are currently in EDIT mode".

- In the user's Connections tab, set the Connection address to their Direct Routing number.
- Ensure both *Use MS Teams Direct Routing* and *Block PSTN Remote DN* are enabled.

**Note:** *Use MS Teams Direct Routing* and *Block PSTN Remote DN* can only be enabled by the Global Administrator. If you require these settings to be enabled, please contact Computer Talk.

The screenshot shows the 'Connections' configuration window. The 'Connection Address/Remote DN' field is set to 4161234567. The 'Use MS Teams Direct Routing' and 'Block PSTN Remote DN' checkboxes are checked and highlighted with a red box.

Other visible settings include:

- Password Callback
- Use MS Teams Direct Routing
- Block PSTN Remote DN
- Email Address:
  - Use Connection Address
  - Use This Address: laura@computer-talk.com
  - Can Handle Email Contacts from ice
- IM Address:
  - Use Connection Address
  - Use This Address: sip.laura@computer-talk.com
  - Can Handle IM Contacts from ice
- Auto Logon:
  - Auto Logon
  - Queue: All Assigned Queues
- Image URL: \_\_\_\_\_

At the bottom, it says "You are currently in EDIT mode".

4. Set the user's IM Address to their sip address, and enable the "Can Handle IM Contacts from ice" checkbox.

#### To switch the connection from the primary to the backup

Open Configuration Groups in iceManager, and set the *Default User Connectivity* to 'icePhone'. No changes are required in iceAdministrator.

The screenshot shows the 'EDIT CONFIGURATION GROUP' interface. At the top, there is a breadcrumb 'DEFAULT CONFIGURATION GROUP' and a page indicator '1 of 2'. Below this is a tabbed interface with tabs for 'General', 'Server', 'LOB', 'Canned Response', 'Not Ready Reason', 'iceBar for desktop', 'iceBar for web', 'Survey', and 'icePhone'. The 'icePhone' tab is active. The configuration items are as follows:

- Enable Access To Active Contacts: Enable
- Force Logon All Queues: Disable
- Show Queue Picker: Enable
- Default User Connectivity: iceAdministrator defined
- User Connectivity Changeable From iceBar: iceAdministrator defined (with 'icePhone' selected and highlighted in a red box)

## Password Management

### Password Policy:

This section allows users to view the password policy that has been configured for the system. Users with Supervisor privileges or higher are also able to reset passwords.

The screenshot shows the 'PASSWORD POLICY' configuration page. It contains three input fields:

- Password Regular Expression: `^({3,31})$`
- Password Description: English (Canada)  
Password must be at least 3 characters long.
- Default Password: `*****`

Parameter	Permissible Values	Description
Password Regular Expression	Regex	Enter the password requirements and limitations using regular expression.

Parameter	Permissible Values	Description
Password Description	Text	Enter a description for the password. This field can be used to remind users of their password requirements, such as minimum password length.
Default Password	Text	The default password for when a new user is created in ice.

### Password Reset:

This section allows users with Supervisor privileges or higher to reset passwords.

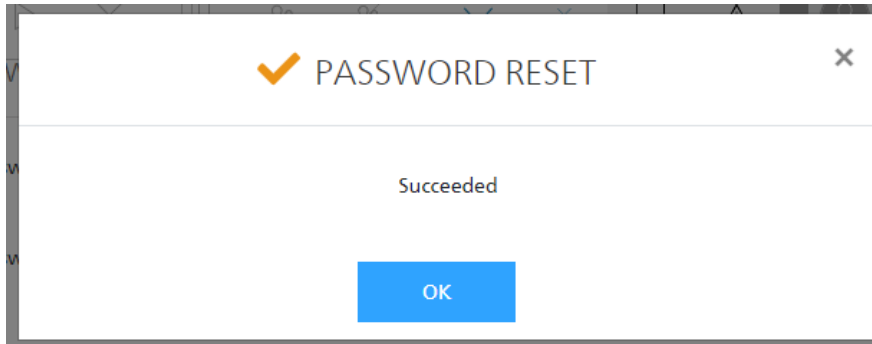
To reset a user's password, follow the steps below:

1. Select the user from the drop down list.

2. Enter the user's new password in the *New Password*, and the *New Password (Confirm)* fields.



3. Toggle the *Force Password Change on Next Logon* on if you would like the user to reset their password the next time they logon.
4. Select the Update button to update the password.
5. The Password Reset Succeeded message will appear. Click OK.

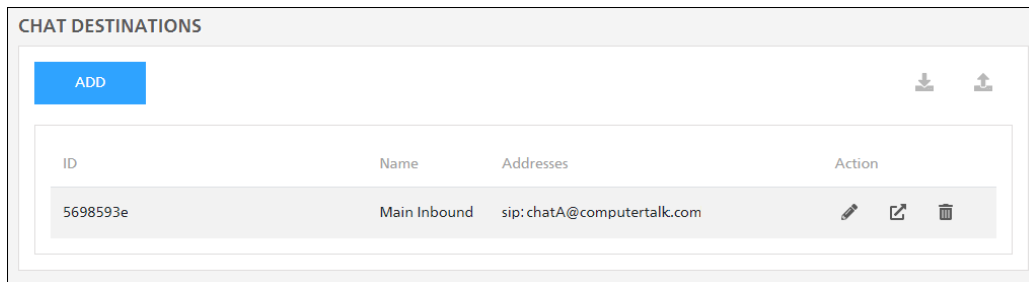


## Chat

The Chat section allows users to configure chat settings for your contact center. In this section, we will explain each of the chat settings options: Chat Destinations, Chat Styles, Canned Responses and System IM Messages.

### Chat Destinations

The Chat Destinations section allows an administrator to configure the chat destination settings.



Column Heading	Details
<b>ID</b>	The chat destination ID.
<b>Name</b>	The name given to the chat destination.
<b>Addresses</b>	The sip addresses of the chat destination.
<b>Action</b>	<p>Allows users with administrator privileges or higher to edit or delete the destination. All other user types cannot add or modify chat destinations.</p> <p>The Test iceChat option opens a chat session and allows administrators to test the iceChat settings and configurations.</p>

To add a chat destination:

1. Select the *Add* button in the top left corner.
2. Configure the Name, Addresses, and Lookup Type.

EDIT ↑ ↓ of 1 ^

ID	00000000-0000-0000-0000-000000000000
Name	<input type="text"/>
Addresses	<input type="text"/>
Lookup Type	Sequential

3. Configure the Style, Require SSO and Use ReCaptcha settings.

Style	Light
Require SSO	OFF <input type="checkbox"/>
Use ReCaptcha	OFF <input type="checkbox"/>

4. Configure the Chat Toolbar settings.

CHAT TOOLBAR ^

Show Exit Button Text	OFF <input type="checkbox"/>
Show Print Button	ON <input checked="" type="checkbox"/>
Show Print Button Text	OFF <input type="checkbox"/>
Show Sound Button	ON <input checked="" type="checkbox"/>
Show Sound Button Text	OFF <input type="checkbox"/>
Use Logo Instead of Title	OFF <input type="checkbox"/>

5. Configure the Chat Messages setting.

CHAT MESSAGES ^

Always Display Message Time	ON <input checked="" type="checkbox"/>
-----------------------------	--

## 6. Configure the Localization settings for the appropriate languages.

**LOCALIZATION** ^

---

**en-CA**

Window Title

Toolbar Title

Logo

Logo Alt Text

---

**fr-CA**

Window Title

Toolbar Title

Logo

Logo Alt Text

For details on each field, refer to the table below.

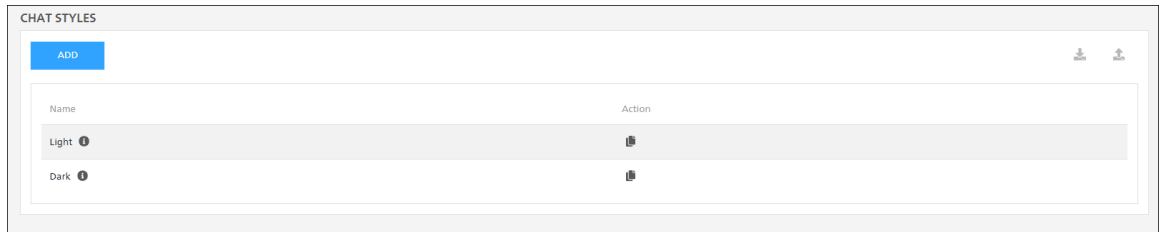
Chat Destination Properties	
Parameter	Details
<b>ID</b>	System generated ID for the chat destination
<b>Name</b>	The unique name given to this chat destination.
<b>Addresses</b>	The destination chat address(es).
<b>Lookup Type</b>	Options include Sequential or Round-robin.
<b>Style</b>	Select from the default (light or dark) chat styles, or the configured options in Chat Styles.

Chat Destination Properties	
Parameter	Details
Require SSO	Options include On/Off. Enable this setting to require single sign-on authentication and configure the AAD Client ID and AAD Tenant ID.
Use ReCaptcha	Options include On/Off. Enable this setting to require ReCaptcha and configure the secret ReCaptcha key.
<b>Chat Toolbar</b>	
Show Exit Button Text	Options include On/Off. Enable this setting to show the exit button text on the chat toolbar.
Show Print Button	Options include On/Off. Enable this setting to show the print button on the chat toolbar.
Show Print Button Text	Options include On/Off. Enable this setting to show the print button text on the chat toolbar.
Show Sound Button	Options include On/Off. Enable this setting to show the sound button on the chat toolbar.
Show Sound Button Text	Options include On/Off. Enable this setting to show the sound button text on the chat toolbar.
Use Logo Instead of Title	Options include On/Off. Enable this setting to use the logo instead of title.
<b>Chat Messages</b>	
Always Display Message Time	Options include On/Off. Enable this setting to always display the message time.
<b>Localization</b>	
Window Title	The title text to be displayed in the window.
Toolbar Title	The title text to be displayed in the toolbar.
Logo	The file path for your logo.
Logo Alt Text	The alternate text displayed in place of your logo if the image fails to load.

## Chat Styles

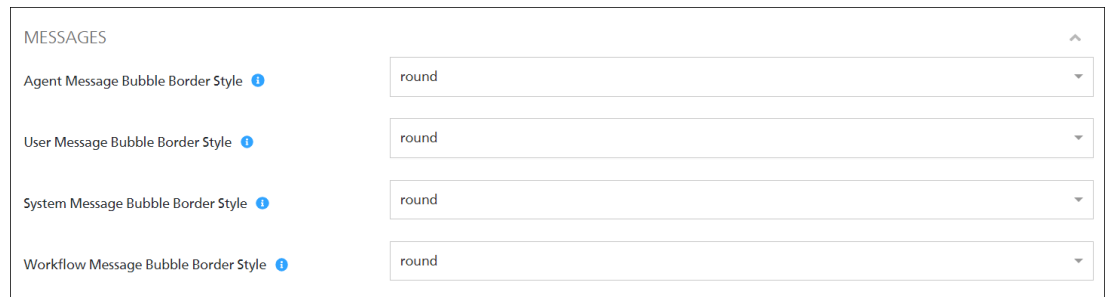
This section allows users to create and configure the chat styles that appear in the customer facing iceChat window. Users with administrator privileges are able to add, edit and delete chat styles.

**Note:** The light and dark system themes are available by default and cannot be removed.



### To add a Chat Style:

1. Click the blue *Add* button in the top left corner.
2. Enter a unique name for your new chat style.
3. Configure the messages section.

The screenshot shows a configuration section titled "MESSAGES". It contains four rows, each with a label and a dropdown menu. The labels are: "Agent Message Bubble Border Style", "User Message Bubble Border Style", "System Message Bubble Border Style", and "Workflow Message Bubble Border Style". Each dropdown menu currently displays the word "round".

4. Configure the colours section.

COLOURS

Chat Input Background ⓘ	#ffffff
Chat Input Colour ⓘ	#323232
Chat Input Toolbar Background ⓘ	#ffffff
Chat Input Toolbar Button Background ⓘ	#ffffff
Chat Input Toolbar Button Hover Background ⓘ	#005999
Chat Input Toolbar Button Text ⓘ	#444444
Chat Input Toolbar Button Hover Text ⓘ	#ffffff
Chat Input Toolbar Toggle Button Background ⓘ	#ffffff
Chat Input Toolbar Toggle Button Hover Background ⓘ	#005999
Chat Input Toolbar Toggle Button Icon ⓘ	#323232
Chat Input Toolbar Toggle Button Hover Icon ⓘ	#ffffff
Chat Thread Background ⓘ	#ffffff

## 5. Configure the fonts section.

FONTS ⓘ

Agent Message Date Time ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
Agent Message ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
Agent Message Name ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
User Message Date ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
User Message ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
User Message Name ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
System Message Date Time ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
System Message ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
Workflow Message Date Time ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
Workflow Message Font ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
Toolbar Button ⓘ	FrutigerNeueLTPro-Light x Courier New x Sans-Serif x
Toolbar Label ⓘ	FrutigerNeueLTPro-Bold x Courier New x Sans-Serif x

**Note:** Fonts have a multi-select dropdown menu. The first selected font will be the primary font to be used. Any fonts selected afterward will be the fallback fonts in the order that they are chosen.

## 6. Click *Add* to save your changes and add your new chat style.

For details on each field, refer to the table below.

Chat Style Properties	
Parameter	Details
Name	Enter a unique name to identify this chat style.
<b>Messages</b>	
Agent Message Bubble Border Style	The border style of the incoming message bubble. The options are round or square. Defaults to round.
User Message Bubble Border Style	The border style of the outgoing message bubble. The options are round or square. Defaults to round.
System Message Bubble Border Style	The border style of the system message bubble. The options are round or square. Defaults to round.
Workflow Message Bubble Border Style	The border style of the workflow message bubble. The options are round or square. Defaults to round.
<b>Colours</b>	
Chat Input Background	The background colour used for the chat input container. Defaults to #ffffff.
Chat Input Colour	The colour used for the input field text. Defaults to #323232.
Chat Input Toolbar Background	The background colour used for the rich text editor toolbar. Defaults to #ffffff.
Chat Input Toolbar Button Background	The background colour used for the rich text editor toolbar buttons. Defaults to #ffffff.
Chat Input Toolbar Button Hover Background	The hover / focus background colour used for the rich text editor toolbar buttons. Defaults to #005999.
Chat Input Toolbar Button Text	The colour used for the rich text editor toolbar buttons text. Defaults to #444444.
Chat Input Toolbar Button Hover Text	The hover / focus colour used for the rich text editor toolbar buttons text. Defaults to #ffffff.



Chat Style Properties	
Parameter	Details
Chat Input Toolbar Toggle Button Background	The background colour used for the rich text editor toolbar toggle button. Defaults to #ffffff.
Chat Input Toolbar Toggle Button Hover Background	The hover / focus background colour used for the rich text editor toolbar toggle button. Defaults to #005999.
Chat Input Toolbar Toggle Button Icon	The colour used for the rich text editor toolbar toggle button icon. Defaults to #323232.
Chat Input Toolbar Toggle Button Hover Icon	The hover / focus colour used for the rich text editor toolbar toggle button icon. Defaults to #ffffff.
Chat Thread Background	The background colour used for the chat thread. Defaults to #ffffff.
Agent Message Bubble Background	The background colour of the incoming message bubble. Defaults to #ffffff.
Agent Message Bubble Border	The border colour of the incoming message bubble. Defaults to #e0dede.
Agent Message Date Time	The colour of the incoming message date and time. Defaults to #2e2e2e.
Agent Message	The colour used for the incoming message. Defaults to #323232.
Agent Message Name	The colour used for the name of the incoming message. Defaults to #2e2e2e.
User Message Bubble Background	The background colour of the outgoing message bubble. Defaults to #a3d6f3.
User Message Bubble Border	The border colour of the outgoing message bubble. Defaults to #005999.
User Message Date Time	The colour of the outgoing message date and time. Defaults to #2e2e2e.

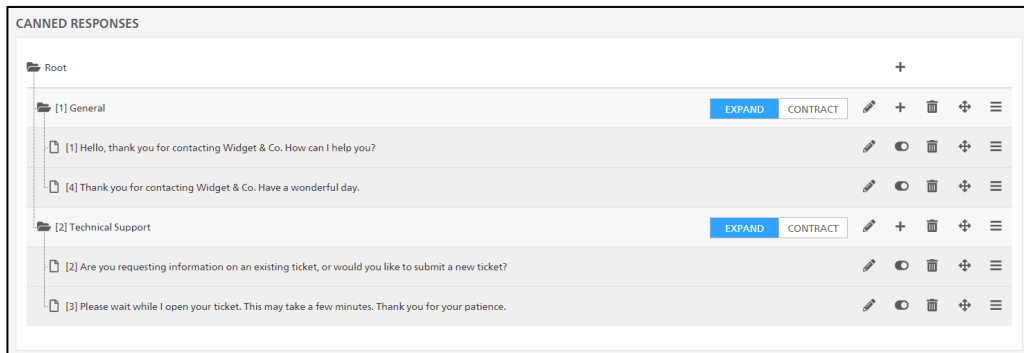
Chat Style Properties	
Parameter	Details
User Message	The colour used for the outgoing message text. Defaults to #323232.
User Message Name	The colour used for the name of the outgoing message. Defaults to #063554.
System Message Bubble Background	The background colour of the system message bubble. Defaults to #fff8f8.
System Message Bubble Border	The border colour of the system message bubble. Defaults to #c9c9c9.
System Message Date Time	The colour of the system message date and time. Defaults to #9e2b24.
System Message	The colour used for the system message text. Defaults to #a51b12.
Workflow Message Bubble Background	The background colour of the workflow message bubble. Defaults to #f8fbff.
Workflow Message Bubble Border	The border colour of the workflow message bubble. Defaults to #c9c9c9.
Workflow Message Date Time	The colour of the workflow message date and time. Defaults to #2e2e2e.
Workflow Message	The colour used for the workflow message text. Defaults to #323232.
Send Message Button Icon	The colour of the send message button icon. Defaults to #005999.
Send Message Button Hover Icon	The hover / focus colour of the send message button icon. Defaults to #ffffff.
Send Message Button Hover Background	The hover / focus background colour of the send message button. Defaults to #005999.
Toolbar Background	The toolbar background colour. Defaults to #005999.

Chat Style Properties	
Parameter	Details
Toolbar Button Text Colour	The toolbar text colour. Defaults to #ffffff.
Toolbar Button Hover Text	The hover / focus toolbar text colour. Defaults to #005999.
Toolbar Button Icon	The toolbar button icon colour. Defaults to #ffffff.
Toolbar Button Hover Icon	The hover / focus toolbar button icon colour. Defaults to #005999.
Toolbar Button Background	The toolbar button background colour. Defaults to #005999.
Toolbar Button Hover Background	The hover / focus toolbar button background colour. Default to #ffffff.
Toolbar Label	The toolbar label colour. Defaults to #ffffff.
<b>Fonts</b>	
Agent Message Date Time	The font used for the incoming message date and time.
Agent Message	The font used for the incoming message text.
Agent Message Name	The font used for the name in the incoming message.
User Message Date	The font used for the outgoing message date and time.
User Message	The font used for the outgoing message text.
User Message Name	The font used for the name in the outgoing message.
System Message Date Time	The font used for the system message date and time.
System Message	The font used for system messages.

Chat Style Properties	
Parameter	Details
Workflow Message Date Time	The font used for the workflow message date and time.
Workflow Message Font	The font used for workflow messages.
Toolbar Button	The font used for toolbar button text.
Toolbar Label	The font used for toolbar label.

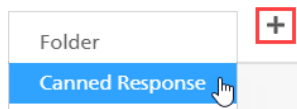
## Canned Responses

This section allows users to view the Canned Responses that have been configured for the system. Users with supervisor privileges or higher are also able to add, edit, disable, or move Canned Responses.



### To add a Canned Response:

1. Choose a folder under which you want to add a Canned Response.
2. Click the *add (+)* button in the same row as the chosen folder. Select Canned Response from the list. A new entry will be added to the folder.



3. Select a type from the dropdown list. Options include HTML and Plain.

A screenshot of a 'Type' dropdown menu. The menu is open, showing three options: 'HTML' (selected and highlighted in blue), 'HTML' (unselected), and 'Plain' (unselected). The dropdown is titled 'Type' and has a small upward-pointing arrow on the right side.

4. Enter the Canned Response into the field.

A screenshot of a Canned Response editor form. The form has a title bar with a close button, a maximize button, and a menu button. Below the title bar, there is a 'Type' dropdown menu with 'HTML' selected. Below the dropdown is a large, empty text input field for entering the canned response.

5. Click *Save* to save the changes. Click *Revert* to cancel the changes.
6. If you clicked *Save*, the 'Canned Responses Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

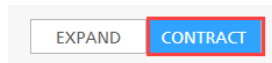
**Note:** Canned responses and folder names are restricted to a maximum of 2000 characters.

#### Expand or contract a Canned Response folder:

- Click *Expand* on the Canned Response folder to expand this folder in the Canned Response window on iceBar.



- Click *Contract* on the Canned Response folder to contract this folder in the Canned Response window on iceBar.



#### To edit a Canned Response:

1. Select the pencil icon in the row of the Canned Response you would like to edit.



2. Make the changes you would like to make to the Canned Response. Once a change has been made, a blue banner will appear at the bottom of the screen.
3. Click *Save* to save the changes. Click *Revert* to cancel the changes.

4. If you clicked *Save*, the 'Canned Responses Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### To delete a Canned Response:

1. Select the trash icon in the row of the Canned Response you would like to delete.



2. Click *Save* to save the changes. Click *Revert* to cancel the changes.
3. If you clicked *Save*, the 'Canned Responses Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### Disable a Canned Response:

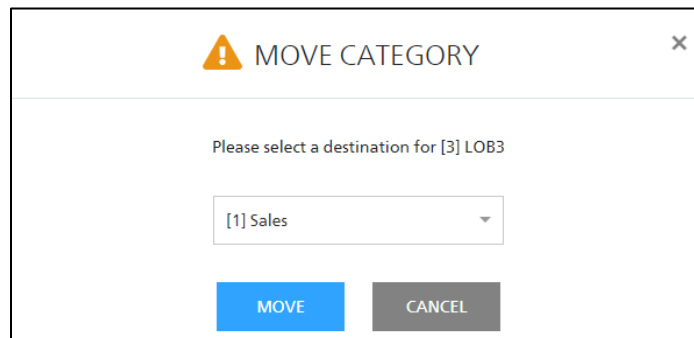
- Click the toggle on the Canned Response to disable the Canned Response.



- A disabled Canned Response can be enabled at a later time.

#### To move a Canned Response:

1. Select the compass icon (⊕) in the row of the Canned Response you would like to move.
2. Select the folder under which you would you like to move the Canned Response.



3. Click *Move* to successfully move the Canned Response to another folder.

### Reorder a Canned Response or folder:

- Use the hamburger button to reorder the Canned Responses and categories.



### To import Canned Responses from XML format:

1. Select the Overwrite All toggle if you would like to overwrite the existing Canned Responses on the page.
2. Enter the Canned Responses that are in XML format into the field at the bottom of the page:

A screenshot of the 'Import Canned Responses' form. At the top left is a blue 'IMPORT' button. To its right is an 'Overwrite All' toggle switch, currently set to 'OFF'. Below this is a text instruction: 'Paste the iceBar Canned Response Configuration XML in the textbox to import'. A large, empty text area is provided for pasting the XML. At the bottom right of the text area is a small cursor icon.

3. Click the Import button to import the Canned Responses.
4. New Canned Response fields open populated with your imported Canned Responses.

A screenshot of a single canned response field. At the top, it shows a preview of the message: '[5] Hello, my name is {{AgentName}}. Thank you for contacting us. How can I help you?'. Below the preview is a 'Type' dropdown menu currently set to 'Plain'. At the bottom is a text input field containing the same message text: 'Hello, my name is {{AgentName}}. Thank you for contacting us. How can I help you?'. To the right of the input field are three small icons: a refresh icon, a close icon, and a hamburger menu icon.

5. If you clicked *Save*, the 'Canned Responses Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

## System IM Messages

This section can only be modified by Administrators. This section allows administrators to edit the automated IM messages sent through the web, mobile, or SMS channel.

The screenshot shows the 'SYSTEM IM MESSAGES' configuration page in iceManager. The page is divided into a sidebar and a main content area. The sidebar contains navigation options: HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. The main content area is titled 'SYSTEM IM MESSAGES' and has tabs for 'Default', 'Web', 'Mobile', and 'SMS'. The 'Default' tab is selected. The configuration sections are as follows:

- Default IM Alias - Text Only:** The default IM Alias to use if the agent doesn't have an alias enabled. Input field: User (0)
- Default Display Name - Text Only:** The default display name to use if no display name is found. Input field: Support Representative
- System Display Name - Text Only:** The display name used for message sent by the system. Input field: System
- Workflow Display Name - Text Only:** The display name used for message sent by workflow. Input field: [Empty]
- External User - Text Only:** The display name to use for someone participating in the call that is outside of ice. Input field: External User
- Chat Transcript Email Subject - HTML:** The subject field for email transcripts of IM sessions. Input field: Chat Transcript
- Consult Subject - Text Only:** The conversation subject of the consult conversation. Input field: Consultation
- Initial Message - HTML:** Sent to the agent when they receive the conversation. Input field: <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-bottom: 5px;">Hi! New message received from '146105456' [1] [View]

**Note:** The fields listed below are available in all languages offered in your ice system.

Parameter	Format	Description
<b>Defaults</b>		
<b>Default IM Alias</b>	Text Only	The default IM Alias to use if the agent doesn't have an alias enabled
<b>Default Display Name</b>	Text Only	The default display name to use if no display name is found.
<b>System Display Name</b>	Text Only	The display name used for message sent by the system.
<b>Workflow Display Name</b>	Text Only	The display name used for message sent by workflow.
<b>External User</b>	Text Only	The display name to use for someone participating in the call that is outside of ice.
<b>Chat Transcript Email Subject</b>	HTML	The subject field for email transcripts of IM sessions.
<b>Consult Subject</b>	Text Only	The conversation subject of the consult conversation.
<b>Initial Message</b>	HTML	Sent to the agent when they receive the conversation.



Parameter	Format	Description
Consult Message	HTML	Sent to the agent when a consult session is established.
Only Party Left	HTML	Sent when there is only one person left in the conversation.
Connected Keep Alive Message	HTML	Sent after the configured idle time when connected to an agent.
Connected Keep Alive Message Final	HTML	Sent after the configured idle time max retries has been reached.
Workflow Keep Alive Message	HTML	Sent after the configured idle when connected to workflow.
PAQ Keep Alive Message	HTML	Sent after the configured idle time when waiting in someone's PAQ.
PAQ Message	HTML	Sent when the client tries to send a message while they are in someone's PAQ.
Agent Did Not Accept Message	HTML	Sent when an agent does not accept the conversation request being sent to them.
Waiting For Agent Message	HTML	Sent when waiting for an agent to join the conversation.
Joined Conversation	HTML	Sent when someone joins the conversation.
Left Conversation	HTML	Sent when someone leaves the conversation.
Outbound Message	HTML	Sent to the agent when they attempt to establish an outbound IM session.
Sent Canned Response Message	HTML	Sent to the agent when they send canned responses.
Chat Replay Message	HTML	The caller's chat replay sent to the IM session.

Parameter	Format	Description
<b>Web / Mobile / SMS</b>		
Connected Keep Alive Message	HTML	Sent after the configured idle time when connected to an agent.
Connected Keep Alive Message Final	HTML	Sent after the configured idle time max retries has been reached.
Workflow Keep Alive Message	HTML	Sent after the configured idle time when connected to workflow.
PAQ Keep Alive Message	HTML	Sent after the configured idle time when waiting in someone's PAQ.
PAQ Message	HTML	Sent when the client tries to send a message while they are in someone's PAQ.
Agent Did Not Accept Message	HTML	Sent when an agent does not accept the conversation request being sent to them.
Waiting for Agent Message	HTML	Sent when waiting for an agent to join the conversation.
Joined Conversation	HTML	Sent when someone joins the conversation.
Left Conversation	HTML	Sent when someone leaves the conversation.
Terminated Message (Agent)	HTML	Sent when the IM session is terminated by the user.
Server Error Message (Agent)	HTML	Sent when there is a server error.
Connection Timeout Message (Agent)	HTML	Sent when the IM session has timed out based on the configured setting for connection loss.

**Note:** Use the Reset to Defaults button to reset the fields on the page to default values.

## Recording settings

Recording is a feature of ice that enables contact centers to record audio and screens. In this section, we will explain each of the recording settings options: Schedules, Datastores, Recording Server, and Archiving and Purging.





### Schedules

This section can only be modified by Administrators and Supervisors.

To add, delete, or change recording schedules, click *Schedules*. A list of existing recording schedules displays, along with the option to:

SCHEDULES ▼

[ADD](#)

User Name	Queue Name	Originator Address	Destination Address	Duration	Date/Time	Audio Recording	Screen Recording	Action
Any	Customer Service (6001)	Any	voice	Any	Any	✓	✗	 
Lucas (1002)	Sales (6002)	Any	IM	Any	Any	✗	✗	 

#### Add a schedule

To add a schedule, following these steps:

1. Click the *Add* button. The following display appears on top of the existing schedules:

← SCHEDULES

ADD

Users

Queues

Destination Address

Originator Address

Duration (Seconds)

Date/Time

Screen Recording OFF

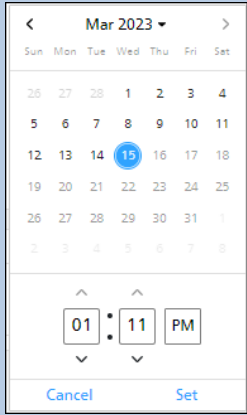
Audio Recording OFF

ADD REVERT

2. Modify the parameters as required to create a schedule based on the user that has received the calls, the queue to which the call belongs, the number the caller has dialed or SIP address entered (destination address), the caller number (originator address), call duration, or date and time.

The table below explains the parameters. These are “And” conditions. For example, if User 1000 and Queue 6000 are selected, only calls received by User 1000 from Queue 6000 will be recorded. For “Or” conditions, you have to create another recording schedule.

Parameter	Allowable values	Description
<b>Users</b>	List of users from the drop-down	Select a user from a list of users configured in the switch. <i>Any User</i> can be selected if recording schedule is not for a specific user.
<b>Queues</b>	List of queues from the drop-down	Select a queue from a list of queues configured in the switch. <i>Any Queue</i> can be selected if recording schedule is not for a specific queue.
<b>Destination Address</b>	List of addresses from the drop-down	Enter a destination address such as a SIP endpoint. <i>Any Destination</i> can be selected if recording schedule is not for a specific destination.
<b>Originator Address</b>	Free text	Enter originator address such as ANI or select <i>Any</i> if not for a specific originator address.

Parameter	Allowable values	Description
Duration	1 to N seconds	Enter the minimum duration of a call before recording starts. Lookback recording must be enabled when the duration is configured.
Date/Time	Any/Specific	Select <i>Specific</i> to enter a start and end date and time for recordings or select <i>Any</i> if not selecting a specific date and time.
Start Date/Time	The date selected from calendar and time from the drop-down	<p>Select starting date and time of date range if the Date/Time field is set to <i>Specific</i>.</p> <ol style="list-style-type: none"> <li>To select a start date, click on the field next to Start Date/Time. A calendar appears:  </li> <li>Select the date. Use the forward and backward arrows where necessary.</li> <li>Select the time. Use the arrows where necessary.</li> <li>Click <i>Set</i> to confirm your selection.</li> </ol>
End Date/Time	The date selected from calendar and time	Select ending date and time of date range if the Date/Time field is set to <i>Specific</i> . Follow the steps listed in Start Date/Time to select the End Date and Time.
Audio Recording	Off/On	Select <i>On</i> to record audio.
Screen Recording	Off/On	Select <i>On</i> to record the agent's screen.

- Once all the parameters have been filled, click *Add*. The new scheduled item is added to the list. If you do not wish to add the schedule, click *Cancel*.

The new schedule appears on the bottom of the list.

SCHEDULES ▼

**ADD**

User Name	Queue Name	Originator Address	Destination Address	Duration	Date/Time	Audio Recording	Screen Recording	Action
Any	Customer Service (6001)	Any	voice	Any	Any	✓	✗	✎ ✖
Lucas (1002)	Sales (6002)	Any	IM	Any	Any	✗	✗	✎ ✖

## Edit a Schedule

To edit a schedule:

- Click the pencil icon located in the Action column.
- Make the appropriate changes and click *Save*.

← SCHEDULES 1 of 3 ▼

EDIT

Users:

Queues:

Destination Address:

Originator Address:

Duration (Seconds):

Date/Time:

Screen Recording: OFF

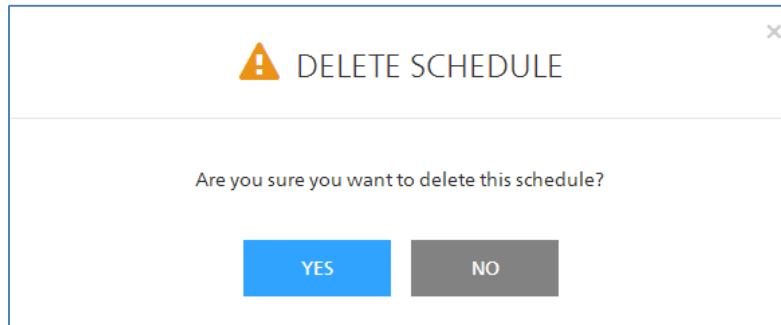
Audio Recording: ON

**SAVE** **REVERT**

## Delete a schedule

To delete the schedule:

1. Click the garbage can icon located in the Action column.  
When you delete a schedule, an “Are you sure you want to delete this schedule” message appears.
2. Select *Yes* to proceed with the deletion. Click *No* to cancel the deletion.



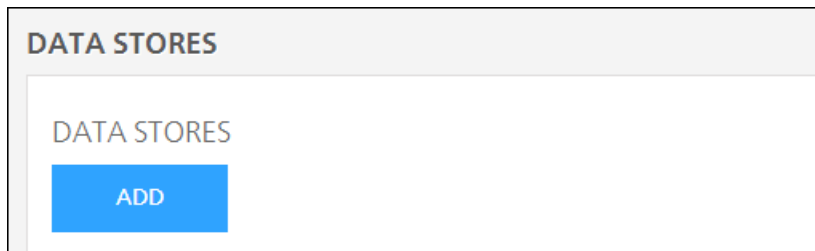
Once you click *Yes* the schedule is removed from the list.

## Datastores

A datastore is a repository for audio, IM, and screen recordings. Different archiving and purging rules can be configured to copy, move, or delete recordings according to defined rules and schedules.

- This section can only be modified by Global Administrators.
- To view the settings for a datastore click the pencil in the action column.
- In the Network tab you can find the location of the recordings and define the timeout.

**Note:** A datastore can be FTP, Network, Azure, AWS (Amazon Web Services) or SFTP. Once it has been defined, it cannot be switched.





The table below describes the parameters that can be configured.

Parameter	Permissible Values	Description
<b>Datastore</b>		
Name	Free text	Enter datastore name.
<b>FTP</b>		
Server	Free text	Enter FTP server URL.
Port	Typically 21	Enter FTP port. The default is 21.
Is Passive	Checked / Unchecked	Select the checkbox to indicate if FTP is passive.  With passive FTP, the connection is initiated between the FTP server's command port (port 21) and the data connection to the server.  If unchecked, it is assumed to be an active mode FTP with the recorders initiating the command connection (port 21) and the FTP server initiates the data connection (from port 20) to the recorders.
Is Secure	Checked / Unchecked	TLS encryption for security.
Username	Free text	Enter the username for FTP connection.
Password	Free text	Enter the password for FTP connection.
Remote Path	Free text	The folder path.
Timeout	1 to N seconds	Enter the connect timeout value.
<b>Network</b>		
UNC Path	Free text	Enter the UNC path of the network location. The network location must be accessible by the recorders (i.e., the UCMARecorders and the Recording Manager) and iceIMRService.
Timeout (Seconds)	1 to N seconds	Enter the connect timeout value.
<b>Azure</b>		
Account Name	Free text	Enter the Azure account name.
Account Key	Free text	Enter the Azure Account Key.

<b>Container Name</b>	Free text	Enter the Azure Container Name.
<b>Key ID</b>	Free text	Enter the Azure Key ID.
<b>Key Vault Client ID</b>	Free text	Enter the Azure Key Vault Client ID.
<b>Key Vault Client Secret</b>	Free text	Enter the Azure Key Vault Client Secret.
<b>AWS</b>		
<b>Bucket Name</b>	Free text	Enter the AWS Bucket Name.
<b>Access Key ID</b>	Free text	Enter the AWS Access Key ID.
<b>Secret Access Key</b>	Free text	Enter the AWS Secret Access Key.
<b>Key ID</b>	Free text	Enter the AWS Key ID.
<b>Region</b>	Dropdown list	Select the region associated with the AWS account.
<b>SFTP</b>		
<b>Server</b>	Free text	Enter SFTP server URL.
<b>Port</b>	Typically 22	Enter SFTP port. The default is 22.
<b>Server Fingerprint</b>	Free text	Enter the SFTP server fingerprint for authentication.
<b>Username</b>	Free text	Enter the username for SFTP connection.
<b>Password</b>	Free text	Enter the password for SFTP connection.
<b>Remote Path</b>	Free text	The folder path.
<b>Timeout</b>	1 to N seconds Default is 3600	Enter the connect timeout value.

## Recording Server

This section can only be modified by Administrators. The Recording Server page contains the settings for iceRecorder, the recording engine that runs iceRecording.

### RECORDING SERVER

---

#### GENERAL

Max Recording Length (sec)

---

#### IM RECORDING

Enabled ON

---

#### AUDIO RECORDING

Enabled ON

Lookback Recording OFF

Exclude Internal Calls OFF

Bulk Trunk-side Incoming ON

Bulk Trunk-side Outgoing OFF

---

All User Calls ON

---

#### SCREEN RECORDING

Enabled OFF

---

#### LEGACY RECORDING

Fail conversions in queue after (min)

Fail conversions in progress after (min)

The table below describes the options that can be changed on this page:

Parameter	Permissible Values	Description
<b>General</b>		
<b>Max Recording Length (sec)</b>	1 to N seconds	Enter maximum length of recording in seconds.

Parameter	Permissible Values	Description
<b>IM Recording</b>		
Enabled	On/Off	Select <i>On</i> to enable IM recording.
<b>Audio Recording</b>		
Enabled	On/Off	Select <i>On</i> to enable audio recording.
Lookback	On/Off	Select <i>On</i> to enable lookback recording. When enabled, once a user clicks the <i>Record</i> button, the entire conversation is recorded (from the point the user answers call), regardless of when during the conversation the user clicked the <i>Record</i> button. Note: This option applies to both audio and screen recording.
Exclude Internal Calls	On/Off	Select <i>On</i> to exclude internal calls. Note: This option applies to both audio and screen recording.
Bulk Trunk-side Incoming	On/Off	Select <i>On</i> to enable bulk trunk-side recording for incoming calls, including if the call is in the workflow Note: This option applies to both audio and screen recording.
Bulk Trunk-side Outgoing	On/Off	Select <i>On</i> to enable bulk trunk-side recording for outgoing calls. Note: This option applies to both audio and screen recording.
All Users Calls (open to selections below if Off)	On/Off	Select <i>On</i> to enable recording of all calls. Note: This option applies to both audio and screen recording.
User Initiated	On/Off	Select <i>On</i> to enable user-initiated recordings. Note: This option applies to both audio and screen recording.
Supervisor Initiated	On/Off	Select <i>On</i> to enable supervisor-initiated recordings. A supervisor can initiate recording through silent monitoring if this setting is turned on.

Parameter	Permissible Values	Description
		A new recording starts each time the user receives a call. Note: This option applies to both audio and screen recording.
Schedule	On/Off	Select <i>On</i> to enable scheduled recordings. Note: This option applies to both audio and screen recording.
Random (open to the selection below if On)	On/Off	Select <i>On</i> to enable random recordings. For this option, the system will record the number of calls entered in the Max Unsourced Recordings Per User field per user. After a recording has been evaluated, the system will record the user's next call. Note: This option only applies to audio recordings.
Max Unsourced Recordings Per User	1 to 124	Enter the number of unsourced recordings for each user. An unsourced recording is one that has not been evaluated and scored through the Journal. This feature allows iceRecording to record random recordings at the same pace with which contacts are evaluated. Note: This option applies to both audio and screen recording.
<b>Screen Recording</b>		
Enabled	On/Off	Select <i>On</i> to enable audio recording. Note: When Screen Recording is enabled Audio Recording will automatically be enabled.
<b>Legacy Recordings</b>		
Fail conversions in the queue after (min)	1 to 2147483646	The number of minutes before the conversion of legacy recordings in the queue will fail.

Parameter	Permissible Values	Description
Fail conversions in progress after (min)	1 to 2147483646	The number of minutes before the conversion of legacy recordings in progress will fail.

## Screen Recordings

This section can only be modified by Administrators.

The Screen Recordings page contains the settings for screen recording Proxy Network. -

### SCREEN RECORDINGS

#### PROXY SERVER

Server Name

Use Default Port

ON

User Name

Password

Root Directory

Alias Root Directory

#### PAUSE

Caption

Foreground

Background

## TRANSCODING

OFF 

## Proxy Recording To WMV

Original Video Codec Encoder Mode Peak Bit Rate Screen Capture Quality Time Per Frame Key Frame Distance Modify Frame Size OFF 

## WMV To MP4

Transcoded Container Format Transcoded Video Codec Transcoded Audio Codec



VENDOR

Vendor Name

Product Name

Product Info

Cur Version

Min Version

The table below describes the options that can be changed on this page.

Parameter	Permissible Values	Description
<b>Proxy Server</b>		
Server Name	Text	Name or IP address of the 3rd party server.
Use Default Port	On/off	Select <i>On</i> to use the default port or select <i>Off</i> to enter a server port number.
Server Port	1 to N	Port number for communication (if any).
User Name	Text	Login username.
Password	Text	Login password.
Root Directory	Text	Root directory of the recorded file. This is the same across all the recording servers for easy management.
Alias Root Directory	Text	UNC path to the root directory, accessible by the Recording Transcoder.
<b>Pause</b>		

Parameter	Permissible Values	Description
<b>Caption</b>	Text	Enter the text of the message displayed while recording is paused.
<b>Foreground</b>	Black, Blue, Green Cyan, Red, Magenta Yellow, White, Grey, Bright blue, Bright green, Bright cyan, Bright red, Bright magenta, Bright yellow, Bright white	The color the text in the caption appears.
<b>Background</b>	Black, Blue, Green Cyan, Red, Magenta Yellow, White, Grey, Bright blue, Bright green, Bright cyan, Bright red, Bright magenta, Bright yellow, Bright white	The color of the screen when screen recording is paused.
<b>Transcoding</b>	On/Off	Select On to have screen recordings created in MP4 format or select Off to view the screen recording on the web.
<b>Proxy Recording to WMV</b>		
<b>Original Video Codec</b>	Windows Media Video 9 Screen, Windows Media Video 9	Select the video codec of the WMV file encoded from a proxy screen recording. Default codec is Windows Media Video 9 Screen.
<b>Encoder Mode</b>	Encoded at a constant bit rate, Encoded at a variable bit rate	Select Encoded at a constant bit rate to specify the video will be encoded at a constant bit rate or select <i>Encoded at a variable bit rate</i> to specify that the video will be encoded at a variable bit rate. The default mode is <i>Encoded at a variable bit rate</i> .
<b>Peak Bit Rate</b>	0-125	Peak bit rate (in bits per second) of the video encoding when in Constant Bit Rate mode. Cannot be modified.
<b>Screen Capture Quality</b>	1-100	Quality of screen recordings, in the range of 1 to 100, with 100 being the highest quality. This parameter sets the quality criteria when in Variable

Parameter	Permissible Values	Description
		Bit Rate mode and may be used as a hint in Constant Bit Rate mode.
Time Per Frame	32-4000	The duration of each frame (ms). The default is 250 ms.
Key Frame Distance	0-800000	Time in between key frames (ms). This value specifies how often key frames appear in the video output. A typical value for Key Frame Distance is 20 to 50 times the Time Per Frame value, giving a typical value between 4 seconds (4000) and 6 seconds (6000). The smallest allowable value is Time Per Frame, and the largest allowable value is 200 times the Time Per Frame. Values outside of that range will result in an error.
Modify Frame Size	On/Off	Select <i>On</i> to change the size of the frame.
New Frame Width	176-2048	The width of the output video.
New Frame Height	144-1536	The height of the output video.
<b>WMV to MP4</b>		
Transcoded Container Format	MP4	Target container format.
Transcoded Video Codec	H.264	The video codec used in the container. H.264 is the only supported video code for mp4 for now.
Transcoded Audio Codec	ACC, MP3	The audio codec used in the container. For the mp4 container format, it can be either as ACC or mp3.
<b>Vendor</b>		
Vendor Name	Static – unchangeable	Name of the service provider used to create screen recording capability.
Product Name	Static – unchangeable	Name of product used for screen recording.

Parameter	Permissible Values	Description
Product Info	Static – unchangeable	Description of product used for screen recording.
Cur Version	Text	Current version of the product used.
Min Version	Static – unchangeable	Minimum version of the product required.

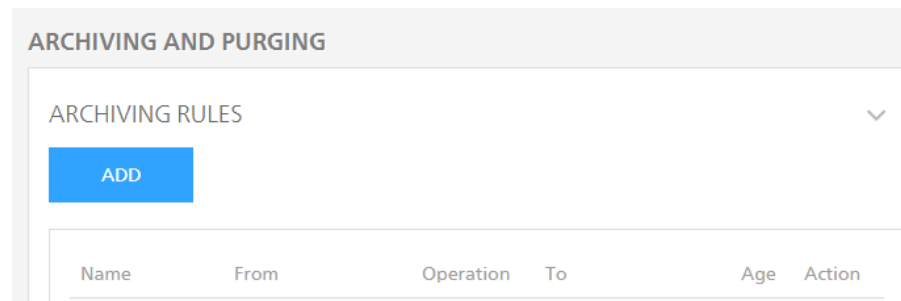
## Archiving and purging

This section can only be modified by Administrators. When a recorded conversation is archived the recording remains in a datastore. Purging is used to remove the record of a recording that is no longer required. For example, you may wish to purge archived recording files one month after they have been archived.

**Note:** Legacy Recordings are call recordings created on a previous version of the platform where the file format is .VOX or .WMA.

### Archiving:

Archiving rules allows the system to move/copy/delete from the datastore after a number of days from the time the recording was initially created.



To edit or delete an existing archive operation, click the pencil icon or the delete icon. A warning message appears when you click the garbage can icon.

To add an Archiving operation, complete the following steps:

1. Click *Add*. The Add Archiving options appear.

←
ARCHIVING RULES

ADD

Name

From

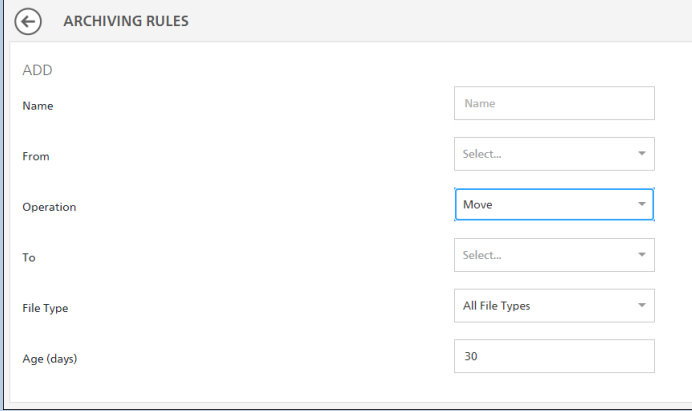
Operation

File Type

Age (days)

2. Fill in the fields. *For more information on the fields view the following table:*
3. Click *Add* to add the archiving operation or 'cancel' to discard the archiving operation.

Parameter	Permissible Values	Description
Name	Free text	Enter a descriptive name for the archive rule.
From	List of datastores from the drop-down	Select the datastore from which data will be drawn.
Operation	<ul style="list-style-type: none"> <li>▪ Copy</li> <li>▪ Move</li> <li>▪ Delete</li> </ul>	<p>Select one of the archiving operations. A copy is done before a move, which is done before a delete.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Operation <input style="width: 100px;" type="text" value="Select..."/></p> <p>File Type</p> <p>Age (days)</p> <div style="float: right; border: 1px solid black; padding: 2px;"> <p>Select...</p> <p>Copy</p> <p>Move</p> <p>Delete</p> </div> </div> <p>A delete operation will also delete the recording file if it is not in any other datastore.</p> <p>When <i>Move</i> is selected, additional options appear:</p>

		
<b>To</b>	List of datastores from the drop-down	Select the datastore to which data will be copied or moved. The 'To' field is only shown if the selected Operation is a <i>Copy</i> or <i>Move</i> .
<b>File Type</b>	List of file types from the drop-down	Select the file type that will be archived. Options include Audio, Screen Recording (MP4), Screen Recording (Proxy), Prompt, Voice Mail, Workflow Recording and Survey Audio Response.
<b>Age</b>	1 to N days	Enter the number of days of recordings in the datastore before archiving kicks in. For example, if 30 is entered, the archiving rule will run on the 30th day.

**Purging:**

Purging allows for the deletion of records from the datastore based on a series of criteria outlined below:

<b>PURGING</b>	
Enabled	ON <input checked="" type="checkbox"/>
<b>IM Recording</b>	
Delete IM recordings older than (days)	<input type="text" value="375"/>
<b>Audio Recording</b>	
Only purge audio recordings with no file	ON <input checked="" type="checkbox"/>
Delete audio recordings older than (days)	<input type="text" value="100"/>
<b>Screen Recording</b>	
Only purge screen recordings with no file	ON <input checked="" type="checkbox"/>
Delete screen recordings older than (days)	<input type="text" value="100"/>
When duplicate recordings exist, delete the recordings of type	<input type="text" value="None"/>
Delete duplicate recordings after (days)	<input type="text" value="30"/>
<b>Legacy Recording</b>	
Delete legacy recordings after they have been converted?	ON <input checked="" type="checkbox"/>
Delete converted legacy recordings after (days)	<input type="text" value="30"/>
<b>Evaluation</b>	
Delete evaluations older than (days)	<input type="text" value="100"/>

The following table provides more information on the options:

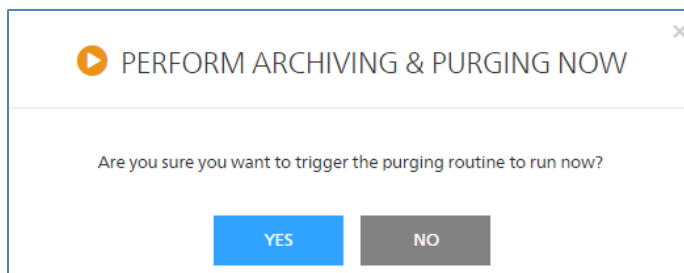
Parameter	Permissible Values	Description
Enabled	On/Off	Select <i>On</i> to enable purging.
<b>IM Recording</b>		
Delete IM recordings older than (days)	1 to N days Default is 375	Enter the number of days after which purging for IM recordings would kick in.
<b>Audio Recording</b>		
Only purge audio recordings with no file	On/Off	Select <i>On</i> to purge audio recordings that have corresponding records in the database but without the actual recording file.
Delete audio recordings older than (days)	1 to N days Default is 100	Enter the number of days after which purging for audio recordings would kick in.
<b>Screen Recording</b>		
Only purge screen recordings with no file	On/Off	Select <i>On</i> to purge screen recordings that have corresponding records in the database but without the actual recording file.
Delete screen recordings older than (days)	1 to N days Default is 100	Enter the number of days after which purging for screen recordings would kick in.
When duplicate recordings exist, delete the recordings of type	None PRXREC MP4	Select the file type of the duplicate screen recordings you want deleted.
Delete duplicate recordings after (days)	1 to N days Default is 30	Enter the number of days after which purging for screen recordings would kick in.
<b>Legacy Recording</b>		



Parameter	Permissible Values	Description
Delete legacy recordings after they have been converted?	On/Off	Select <i>On</i> to purge legacy recordings after they have been converted.
Delete converted legacy recordings after (days)	1 to N days Default is 30	Enter the number of days after which purging for converted legacy recordings would kick in.
<b>Evaluation</b>		
Delete evaluations older than (days)	1 to N days Default is 100	Enter the number of days after which purging for evaluations would kick in.

When you are done modifying your Purging settings, click *Save* to save the changes you have made or *Revert* to revert back to the original settings.

Click *Perform Purge Now* to clear the datastores as per the options you selected. Prior to the purge, you will receive a warning message: "Are you sure you want to trigger the purging routine to run now?"



## System

The System section in the sidebar contains information about server variables, core settings, iceMail, servers and language. By default, items in the System sidebar option are hidden.

A Switch Administrator can only view a subset of the parameters, whereas the Global Administrator will be able to view all the available settings in the General section.

## Server Variables

The Server Variables section allows users to modify variables used in workflow. The variables added to this section can allow users to turn on or off certain functionality used in workflow, such as offering callback. It can also be used to allow users to modify variables used in workflow, such as timer values used in queue treatment.


### Categories:

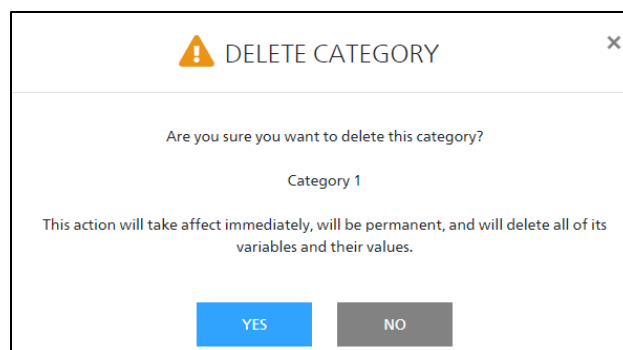
Categories allow you to group variables together.

#### Add a new server variable category

1. Click Add Category to add a new category to the page.
2. Enter the category details including name, notes, and user permissions.

#### Delete a server variable category

1. Click  to delete the category.
2. In the Delete Category window that appears, click Yes to delete the category and No to cancel.




Use the following table to understand the properties of a server variable category:

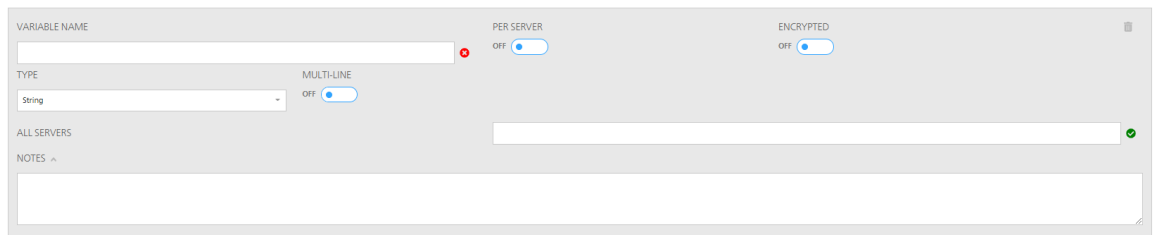
Parameter	Description
Category	Enter a name for the category.
Notes	Enter information regarding the category.
<b>User Permissions</b>	
Type	This is how members have been grouped. Options include Users, Teams, and Roles.
Members	Once a type has been selected, members can be specified.  Users: members are selected from a list of ice users Teams: members are selected from a list of ice teams Roles: members are selected based on their ice user type
Permission	Use this field to assign permissions for the selected category of sever variables.  Options include <i>View (View)</i> , <i>Edit (View / Edit)</i> , and <i>Full Control (View / Edit / Delete)</i> .
Action	Allows users with permissions to delete the user permissions.

## Variables:

Variables added to the page allow users to manage and modify certain functions in workflow.

### Add a new server variable

1. Click  to add a new server variable to the category.
2. Enter the variable details.




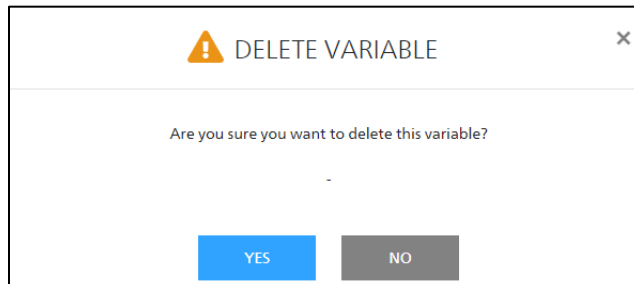
The screenshot shows a form for adding a new server variable. It contains the following elements:

- VARIABLE NAME:** A text input field with a red error icon.
- PER SERVER:** A toggle switch currently set to OFF.
- ENCRYPTED:** A toggle switch currently set to OFF.
- TYPE:** A dropdown menu currently set to 'String'.
- MULTI-LINE:** A toggle switch currently set to OFF.
- ALL SERVERS:** A text input field with a green checkmark icon.
- NOTES:** A large text area for additional information.

3. Click Save to save your changes or Revert to cancel the changes.

### Delete a server variable

1. Click  to delete the server variable from the category.
2. In the Delete Variable window that appears, click Yes to delete the variable and No to cancel.



Use the following table to understand the properties of a server variable:

Parameter	Description
Variable Name	Enter a name for the server variable.
Per Server	Use this toggle to set configurations for all servers or each server individually.
Encrypted	Use this toggle to encrypt the value of the variable when stored in the database.
Type	Select a variable type from the dropdown list. Options include: <ul style="list-style-type: none"> <li>• String</li> <li>• String (RegEx Validated) <ul style="list-style-type: none"> <li>- Opens another field to enter the regular expression.</li> </ul> </li> <li>• Integer</li> <li>• Boolean <ul style="list-style-type: none"> <li>- Displays a toggle to be used for setting the value of the variable.</li> </ul> </li> <li>• URL</li> </ul>
Multi-line	Enable this setting value to support Multi-line variables. This value is set to Off by default.
All Servers	Set the value of the variable to be applied for all servers. If the Per Server toggle is turned on, this option shows each server available for the system, allowing

Parameter	Description
	you to set a value to be applied for each server individually.
Notes	Enter information regarding the category.

## Core Settings

The core settings page allows Global Administrators to modify system settings including: core settings, workflow, virtual workflow sessions, UC, iceMail, icelidentity, Microsoft Graph settings and Services.

### Core

This section allows Global Administrators to modify the Global, Event Manager and IMR settings.

#### Global

Global	WARNING: Changes will not take place until iceServer is restarted.	
Event Mana...	SharePath	<input type="text" value="\\SERVER\Tenants\&lt;TENANT&gt;\"/>
IMR	<p>The path to the switch's base share location. e.g. \\SERVER\Tenants\&lt;TENANT&gt;\</p> <p>NOTE: It will include the trailing slash.</p>	

Global stores the SharePath, which identifies to the system, the location of the audio files. If the location of the audio files changes, the Global Administrator will be required to update the SharePath field accordingly.

#### Event Manager

Global	Client Queue Stats Update Interval (ms)	<input type="text" value="5000"/>
Event Mana...	Stats Database Reconnect Interval (s)	<input type="text" value="30"/>
IMR	Event Manager Debug Level	<input type="text" value="Errors Only"/>
	Server - iceA	Override <input checked="" type="checkbox"/>
	Server - iceB	Override <input checked="" type="checkbox"/>

Parameter	Permissible Values	Description
Client Queue Stats Update Interval (ms)	Text The default value is 5000.	Interval at which Event Manager will push queue stats to clients.
Stats Database Reconnect Interval (s)	Text The default value is 30.	Interval at which Event Manager will try to reconnect to the stats database.
Event Manager Debug Level	Options include: <ul style="list-style-type: none"> <li>• Errors Only</li> <li>• All Sent Messages</li> <li>• All Messages</li> </ul>	The trace level for Event Manager logging. Options are available to override the general settings on an individual server basis. Toggle the switch to override the general settings for the specified server and select the trace level from the dropdown list.

**IMR**

Global	Stale Heartbeat Duration (s)	30
Event Mana...		
IMR	Max Active Sends - User	5000
	Max Active Sends - Monitor	20000
	Max Active Sends - Admin	100
	IMR Debug Mask	<input type="checkbox"/> None <input checked="" type="checkbox"/> Info <input type="checkbox"/> Serious <input type="checkbox"/> Fatal <input type="button" value="x"/>
	Server - iceA	Override <input checked="" type="checkbox"/>
	Server - iceB	Override <input checked="" type="checkbox"/>
	TAPI Trace Level	All Messages
	Server - iceA	Override <input checked="" type="checkbox"/>
	Server - iceB	Override <input checked="" type="checkbox"/>

Parameter	Permissible Values	Description
Stale Heartbeat Duration (s)	Text The default value is 30.	Heartbeat interval for every single TAPI connection.

Parameter	Permissible Values	Description
Max Active Sends – User	Text The default value is 5000.	Maximum size of the outgoing message queue for TAPI messages going to iceBar.
Max Active Sends – Monitor	Text The default value is 20000.	Maximum size of the outgoing message queue for TAPI messages going to iceMonitor.
Max Active Sends - Admin	Text The default value is 100.	Maximum size of the outgoing message queue for TAPI messages going to iceAdministrator.
IMR Debug Mask	Options include: <ul style="list-style-type: none"> <li>• None</li> <li>• Info</li> <li>• Serious</li> <li>• Fatal</li> </ul>	Options to determine which log messages to send.
TAPI Trace Level	Options include: <ul style="list-style-type: none"> <li>• Disabled</li> <li>• Errors only</li> <li>• All Messages</li> </ul>	The trace level for TAPI logging. Options are available to override the general settings on an individual server basis. Toggle the switch to override the general settings for the specified server and select the trace level from the dropdown list.

## Workflow

This section allows Global Administrators to modify the workflow settings.

Max Building Block Stack Depth	<input type="text" value="50"/>
Routing Cycle Detection Count	<input type="text" value="10"/>
Queue Info Expiry Interval (s)	<input type="text" value="1800"/>
Send Email Protocol Timeout (ms)	<input type="text" value="15000"/>
Send Email Message Data Timeout (ms)	<input type="text" value="12000"/>
Close Autodials on Startup	OFF <input type="checkbox"/>
Supress Emergency Agent Not Found Message	OFF <input type="checkbox"/>
Workflow Action Cycle Detection Count	<input type="text" value="500"/>
Auto-Logon Defer Time (s)	<input type="text" value="120"/>
Change History Poll Interval (ms)	<input type="text" value="900000"/>
Inter-Server Heartbeat Interval (s)	<input type="text" value="15"/>
Max Parallel Alert	<input type="text" value="11"/>
Enable Smart Routing	ON <input checked="" type="checkbox"/>
Use IceBar DN for Email	OFF <input type="checkbox"/>
Use IceBar DN for IM	ON <input checked="" type="checkbox"/>
Startup Trace Level	<input type="text" value="Trace Level 2"/>
Server - iceA	Override <input type="checkbox"/>
Server - iceB	Override <input type="checkbox"/>
Startup Trace Mask	<input type="text" value="x All"/>
Server - iceA	Override <input type="checkbox"/>
Server - iceB	Override <input type="checkbox"/>

Parameter	Permissible Values	Description
<b>Max Building Block Stack Depth</b>	Text The default is 50.	Number of levels of allowed nested building block calls.
<b>Routing Cycle Detection Count</b>	Text The default is 10.	Maximum number of routing cycles in workflow before iceServer throws an error.
<b>Queue Info Expiry Interval (s)</b>	Text The default is 1800.	Interval which indicates how often queue info is refreshed by ice.
<b>Send Email Protocol Timeout (ms)</b>	Text The default is 15000.	Protocol timeout.



Parameter	Permissible Values	Description
Send Email Message Data Timeout (ms)	Text The default is 12000.	Timeout interval for ice to send email message data.
Close Autodials on Startup	On/Off	Enable this setting to close autodials on start-up.
Suppress Emergency Agent Not Found Message	On/Off	Enable this setting to suppress the emergency agent not found message.
Workflow Action Cycle Detection Count	Text The default is 500.	Maximum number of routing cycles in workflow before iceServer throws an error.
Auto-Logon Defer Time (s)	Text The default is 120.	Interval in seconds indicating how long to defer auto logon for a given user.
Change History Poll Interval (ms)	Text The default is 900000.	Interval in milliseconds indicating how often the change history table will be polled.
Inter-Server Heartbeat Interval (s)	Text The default is 15.	Interval in milliseconds indicating how often server instances exchange heartbeats.
Max Parallel Alert	Text The default is 11.	Maximum number of alerts to send at once.
Enable Smart Routing	On/Off	Enable this setting to enable smart routing.
Use iceBar DN for Email	On/Off	Enable this setting to allow ice to use the agent's iceBar DN to receive email contacts.
Use iceBar DN for IM	On/Off	Enable this setting to allow ice to use the agent's iceBar DN to receive IM contacts.
Startup Trace Level	<ul style="list-style-type: none"> <li>• Trace Level 0</li> <li>• Trace Level 1</li> </ul>	Trace setting for startup

Parameter	Permissible Values	Description
	<ul style="list-style-type: none"> <li>Trace Level 2</li> <li>Trace Level 3</li> </ul>	
<b>Startup Trace Mask</b>	<ul style="list-style-type: none"> <li>DBO</li> <li>System</li> <li>Switch</li> <li>Engine</li> <li>ACD Manager</li> <li>Queue Routing</li> <li>All</li> </ul>	Options indicating which workflow components will output trace logs.

## Virtual Workflow Sessions

Description:

ADD ^

Server

Session Name

UC Group ID

Contact Type

Number of Sessions

Restart Delay

Run Once  ON

Session Data

Server	Session Name	UC Group Id	Contact Type	Number Of Sessions	Restart Delay	Run Once	Session Data	Action

Parameter	Permissible Values	Description
<b>Server</b>	Dropdown list of available servers.	The selected server to run the virtual workflow session.
<b>Session Name</b>	Text	The name of the virtual workflow session.

Parameter	Permissible Values	Description
UC Group ID	Dropdown list of configured UC Groups	The selected UC Group ID.
Contact Type	<ul style="list-style-type: none"> <li>Voice</li> <li>Email</li> <li>IM</li> </ul>	The type of contact that the virtual workflow session is dealing with.
Number of Sessions	Text	The number of workflow sessions.
Restart Delay	Text	The number of seconds to delay between subsequent invocations of the session, if <i>Run Once</i> is off.
Run Once	On/Off	Turn this setting on to run the session only once.
Session Data	Text	The data passed into the virtual workflow session on start-up.

## UC

The section allows global administrators to modify the Global, Voice, IM, UCMA, ACS and Recording settings.

### Global

**Global**

Voice	Append SwitchID Param to SIP	OFF <input type="checkbox"/>
IM	URI	
UCMA		
ACS		
Recording		

Parameter	Description
<b>Append SwitchID Param to SIP URI</b>	<p>If enabled, ice will attempt to reach an ice agent via Teams. Instead of requiring each individual Teams Agent DID to be mapped for Direct Routing, the Direct Routing SBC will instead map the Teams Agents based on the SwitchID.</p> <p><b>Note:</b> New agents will no longer require ComputerTalk help desk to assist with SBC changes once the SwitchID has been provisioned in the Direct Routing SBC.</p>

### Voice

Agent Fallback Behaviour	None
Agent Receive DTMF	OFF <input type="checkbox"/>
Asserted Phone Uri Regex	^\+?\d{10,}\$
Call Waiting Interval (s)	20
Default Refer Mode	ON <input checked="" type="checkbox"/>
Hold Reminder Interval (s)	10
Play Music in PAQ on User Xfer	ON <input checked="" type="checkbox"/>
Password DTMF Timeout (s)	5
AV Reject Code	486
Telephone Command	OFF <input type="checkbox"/>
Treat SIP URI As Phone Number	OFF <input type="checkbox"/>

Parameter	Permissible Values	Description
Agent Fallback Behaviour	<ul style="list-style-type: none"> <li>None</li> <li>PSTN</li> <li>SIP</li> </ul>	<p>This setting specifies the fallback behaviour as:</p> <ul style="list-style-type: none"> <li>None: No fallback defined.</li> <li>PSTN: Fallback will retry the user's Remote DN without the Direct Routing as a PSTN call.</li> <li>SIP: Fallback to the user's IM SIP Address URI via Skype for Business Federation.</li> </ul>
Agent Receive DTMF	On/Off	Turn this setting on to allow agents to receive DTMF.
Asserted Phone URI Regex	Text	Regex for phone numbers.
Call Waiting Interval (s)	Text Default is 20.	The call waiting interval.
Default Refer Mode	On/Off	The default refer mode.
Hold Reminder Interval (s)	Text Default is 10.	Timeout interval for hold reminders
Play Music in PAQ on User Xfer	On/Off	Turn this setting on to allow ice to play music in an agent's PAQ when they transfer a contact.
Password DTMF Timeout (s)	Text Default is 5.	Timeout interval for a user to input their password when a password callback is initiated from ice.
AV Reject Code	Text Default is 486	The return code the server sends to the client when rejecting an AV contact.
Telephone Command	On/Off	Turn this setting on to allow telephone commands.
Treat SIP URI as Phone Number	On/Off	Turn this setting on to allow ice to treat SIP URIs as phone numbers.

IM

Max IM Keepalives	<input type="text" value="9"/>
IM Keepalive Interval (s)	<input type="text" value="540"/>
IM Reject Code	<input type="text" value="503"/>

Parameter	Permissible Values	Description
Max IM Keepalives	Text	The maximum number of IM Keepalive messages being sent from ice.
IM Keepalive Interval (s)	Text	Interval between IM Keepalive messages being sent from ice.
Asserted Phone URI Regex	Text	The code the server returns when rejecting an IM.

UCMA

Conference Deactivation Grace Period (hrs)	<input type="text" value="24"/>
Conference Endpoint	
Server - iceA	<input type="text"/>
Server - iceB	<input type="text"/>
Conference Inactivity Grace Period (hrs)	<input type="text" value="72"/>
TCP Idle Timeout (s)	<input type="text" value="1800"/>
Trusted Domains	<input type="text"/>
UCMA Tim Trace Level	<input type="text" value="Normal"/>
Server - iceA	Override <input checked="" type="checkbox"/>
Server - iceB	Override <input checked="" type="checkbox"/>

Parameter	Permissible Values	Description
<b>Conference Deactivation Grace Period (hrs)</b>	Text	Number of seconds that the TIM will delay before deactivating conferences.
<b>Conference Endpoint</b>	Text	Skype provisioning information.
<b>Conference Inactivity Grace Period (hrs)</b>	Text	Number of seconds that the TIM will delay before deactivating conferences due to inactivity.
<b>TCP Idle Timeout (s)</b>	Text	Interval of time that TCP connections to the server can remain idle before being closed.
<b>Trusted Domains</b>	Text	Comma delimited list of the domains that the server will accept connections from.

Parameter	Permissible Values	Description
<b>UCMA Tim Trace Level</b>	<ul style="list-style-type: none"> <li>• Off</li> <li>• Errors</li> <li>• Normal</li> <li>• Debug</li> <li>• Verbose</li> </ul>	Trace setting for UCMA connection.

**ACS**


Primary ACS Connection String	<input type="text"/>
Secondary ACS Connection String	<input type="text"/>
Active ACS Connection String	Primary ACS Connection String ▼
Wait Offhook Timeout (s)	<input type="text" value="30"/>
Offhook Idle Timeout (s)	<input type="text" value="30"/>
Test Call DN	<input type="text"/>
Offhook DN	<input type="text"/>
Server - iceA	<input type="text"/>
Server - iceB	<input type="text"/>
Event Grid Probe Interval (s)	<input type="text" value="600"/>
Chat Polling Interval (s)	<input type="text" value="5"/>

Parameter	Permissible Values	Description
<b>Primary ACS Connection String</b>	Text	The primary ACS endpoint.



Parameter	Permissible Values	Description
Secondary ACS Connection String	Text	The secondary ACS endpoint.
Active ACS Connection String	<ul style="list-style-type: none"> <li>Primary ACS Connection String</li> <li>Secondary ACS Connection String</li> </ul>	The active ACS connection string.
Wait Offhook Timeout (s)	Text	The timeout that will be used when alerting an ACS agent for a voice call before we deem the call to be unanswered.
Offhook Idle Timeout (s)	Text	The period of time that the ACS agent can remain offhook without actively handling a call (i.e. queued, outbound, etc). This feature helps to save ACS billing costs.
Test Call DN	Text	The DN for test calls to ACS.
Offhook DN	Text	The offhook DN for each server.
Event Grid Probe Interval (s)	Text	The interval used to periodically check the successful feedback loop of the ACS EventGrid webhook deliveries.
Chat Polling Interval (s)	Text	The interval used to poll for chat messages in the event that ACS EventGrid is not functional or configured.

## Recording

Enable Recording	ON 
Recording Manager URI	
Server - iceA	<input type="text" value="net.tcp://edp13ice05a.icelab.local:9001/iceRecordingManager"/>
Server - iceB	<input type="text" value="net.tcp://edp13ice05a.icelab.local:9001/iceRecordingManager"/>
Shared Password	<input type="text"/>

Parameter	Permissible Values	Description
Enable Recording	On/Off	Enable this setting to enable recording.
Recording Manager URI	Text	URI for the recorders.
Shared Password	Text	Shared password for the recorder.

### iceMail

Message Protocol Timeout (ms)	<input type="text" value="10000"/>
Message Data Timeout (ms)	<input type="text" value="120000"/>

Parameter	Permissible Values	Description
Message Protocol Timeout (ms)	Text	Protocol timeout.
Message Data Timeout (ms)	Text	Message timeout.

**iceIdentity**

Identity URL	<input type="text"/>
Login URL	<input type="text"/>
iceIMRService Redirect URI	<input type="text"/>
Accepted Referrers	<input type="text"/>
Refresh Token Expire Time (s)	<input type="text" value="600"/>
Access Token Expire Time (s)	<input type="text" value="301"/>
Cookie Expire Time (s)	<input type="text" value="60"/>
Azure AD Authority	<input type="text"/>
Azure AD Client ID	<input type="text"/>
Azure AD Secret	<input type="text"/>
ADFS Address	<input type="text"/>
OKTA Entity ID	<input type="text"/>
OKTA Metadata Location	<input type="text"/>

Parameter	Permissible Values	Description
<b>Identity URL</b>	Text	URL for Identity.
<b>Login URL</b>	Text	URL for login.
<b>iceIMRService Redirect URI</b>	Text	URI for iceIMRService redirects.
<b>Accepted Referrers</b>	Text	The accepted referrers.

Parameter	Permissible Values	Description
Refresh Token Expire Time (s)	Text	Interval which indicates how old the refresh token can be before it expires.
Access Token Expire Time (s)	Text	Interval which indicates how old the access token can be before it expires.
Cookie Expire Time (s)	Text	Interval which indicates how old a cookie can be before it expires.
Azure AD Authority	Text	The address for the Azure AD Authority.
Azure AD Client ID	Text	Application ID of the registration in Azure AD.
Azure AD Secret	Text	The Azure secret value.
ADFS Address	Text	The ADFS address.
OKTA Entity ID	Text	The OKTA entity ID.
OKTA Metadata Location	Text	The location of the OKTA metadata.

## Microsoft Graph Settings

This page can only be accessed by an Administrator. The section allows administrators to modify the Microsoft Graph Settings.

Azure Client ID	<input type="text"/>
Azure Tenant ID	<input type="text"/>
Azure API permissions	<input type="text"/>
Include Org Contact	ON <input checked="" type="checkbox"/>
Include Presence	ON <input checked="" type="checkbox"/>

Parameter	Description
Azure Client ID	Application ID of the registration in Azure AD.
Azure Tenant ID	Azure AD Tenant ID.
Azure API permissions	Include the full list of graph scopes that the application requires. If this is not specified, iceBar will assume User.Read and User.ReadBasic.All.
Include Org Contact	If enabled, organizational contacts (e.g. contacts created as mail contacts in a GAL) will be included in the search results.
Include Presence	If enabled, Teams presence will show on contact search results for organizational contacts.

## Services

Changes will not take place until service(s) are restarted.

**WARNING:** Changes will not take place until services(s) are restarted.

iceIMRService

**IMR HOST** ^

ice Reconnect Delay

Max Active Send

**EMAIL ALERT** ^

From Address

Alert Subject

SMTP Server

SMTP Server Port

SMTP Enable SSL ON

SMTP Username

SMTP Password

Parameter	Permissible Values	Description
<b>IMR Host</b>		
<b>iceReconnect Delay</b>	Text	On failed/disconnect to ice server, the client application will wait for this amount of time before attempting to reconnect to the ice server.
<b>Max Active Send</b>	Text	Maximum message buffer queued for messages between ice server and ice client connections. If this buffer reaches the maximum buffer size, messages will be dropped.

Parameter	Permissible Values	Description
<b>Email Alert</b>		
From Address	Text	The address that the email alert will be sent from.
Alert Subject	Text	The subject of the alert.
SMTP Server	Text	The SMTP server.
SMTP Server Port	Text	The SMTP server port.
SMTP Enable SSL	On/Off	Enable this setting to enable SSL.
SMTP Username	Text	SMTP username.
SMTP Password	Text	SMTP password.

## iceMail

The icemail page provides users with information regarding their iceMail accounts. Users can Add, Modify and Delete accounts. Through this page, users also have access to specific iceMail settings including Loop Prevention and Agent Replies.

### iceMail Accounts

Type	Protocol	Port	Display Name	Email Address	Server Name	User Name	Active	Action
External	POP3	IMAP4	<Default>	ice Email	ice@computer-talk.com	ice	ice Email	

The iceMail Accounts section provides information on each account that has been configured for the system and their state. Below is a table describing each attribute:

Parameter	Details
Type	Type of iceMail account. User can select from one of the following options listed below:

Parameter	Details																		
	<ul style="list-style-type: none"> <li>• Internal</li> <li>• External</li> </ul>																		
<b>Protocol</b>	<p>Email transfer protocol the account will be using. User can select from one of the following options listed below:</p> <ul style="list-style-type: none"> <li>• IMAP4</li> <li>• IMAP4-SSL</li> <li>• IMAP4-OAUTH2</li> <li>• POP3</li> <li>• SMTP</li> <li>• SMTP-SSL</li> <li>• SMTP-IP-Auth</li> <li>• SMTP-User-Auth</li> <li>• SMTP-OAUTH2</li> </ul>																		
<b>Use Default Port (open to selections below if Off)</b>	<p>Select On to use the default port configured for each protocol listed above or select Off to use the value entered in the Port field below. The default port for each protocol is as follows:</p> <table> <tbody> <tr> <td>IMAP4</td> <td>143</td> </tr> <tr> <td>IMAP4-SSL</td> <td>993</td> </tr> <tr> <td>IMAP4-OAUTH2</td> <td>993</td> </tr> <tr> <td>POP3</td> <td>110</td> </tr> <tr> <td>SMTP</td> <td>25</td> </tr> <tr> <td>SMTP-SSL</td> <td>587</td> </tr> <tr> <td>SMTP-IP-Auth</td> <td>25</td> </tr> <tr> <td>SMTP-User-Auth</td> <td>587</td> </tr> <tr> <td>SMTP-OAUTH2</td> <td>587</td> </tr> </tbody> </table>	IMAP4	143	IMAP4-SSL	993	IMAP4-OAUTH2	993	POP3	110	SMTP	25	SMTP-SSL	587	SMTP-IP-Auth	25	SMTP-User-Auth	587	SMTP-OAUTH2	587
IMAP4	143																		
IMAP4-SSL	993																		
IMAP4-OAUTH2	993																		
POP3	110																		
SMTP	25																		
SMTP-SSL	587																		
SMTP-IP-Auth	25																		
SMTP-User-Auth	587																		
SMTP-OAUTH2	587																		
<b>Port</b>	Port used to connect to the email server.																		
<b>Display Name</b>	The name displayed with the email address.																		
<b>Server Name</b>	Name of the email server.																		
<b>User Name</b>	User name used for account authentication.																		
<b>Password</b>	Password used for account authentication.																		
<b>Email Address</b>	The email address associated with the iceMail account. This email address will be used send and receive emails.																		
<b>Active</b>	Indicates whether the iceMail account is active or not.																		



Parameter	Details
Action	Allows a user to edit the iceMail account settings or delete the iceMail account.

Users with Administrator privileges or higher have the ability to add, delete or edit iceMail accounts.

← ICEMAIL

HELP ^

ADD v

Type

Protocol

Use default port ON

Display Name

Server Name

User Name

Password

Email Address

License Overflow Email

Activate ON

Note: For no authentication on SMTP accounts, leave the username and password fields blank

SERVER ASSIGNMENTS v

ASSIGNED SERVER

UNASSIGNED SERVERS Show deactivated servers  OFF

Server  Assign

To add an iceMail account:

1. Select the *Add* button in the top left corner of the page. The Add iceMail page will appear.
2. Fill the form. Details of the fields are in the table above.
3. Click *Add* in the blue banner at the bottom of the page.

To delete an iceMail account:

1. Select the trash icon in the row of the iceMail account you would like to delete.
2. The 'Delete Mail Account' message will appear. Click *Yes* to delete the account or click *No* to keep the account.

To edit an iceMail account:

2. Select the Edit button (pencil icon) under the Action column. The Edit iceMail page will appear.
3. Edit the desired fields.
4. Click *Save* to save the changes. Click *Revert* to cancel the changes.
5. If you clicked *Save*, the 'Save Mail Account' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

## Settings

SETTINGS ^

Poll for new email every

Limit download per account flush ON

Limit download per account flush to (emails)

Pause inbound queue while processing outbound messages OFF

Prevent sending multiple compose reply messages ON

---

**Loop Prevention**

Allow a maximum of (emails)

from the same address every

---

**Agent Replies**

Restrict replies to be from handling agent only OFF

---

Activate detailed trace ON

Max memory usage for message caching (MB)

Parameter	Details
<b>Poll for new email every</b>	The interval indicating how often iceMail will poll for new emails.
<b>Limit download per account flush</b>	Enable this setting to limit download per account flush.
<b>Limit download per account flush to (emails)</b>	The number of emails to limit download per account flush.

Parameter	Details
Pause inbound queue while processing outbound messages	Enable this setting to pause inbound queue while processing outbound messages.
Prevent sending multiple compose reply messages.	Enable this setting to prevent sending multiple compose reply messages.
<b>Loop Prevention</b>	
Allow a maximum of (email) from the same address every (time)	The number of emails allowed per configured interval.
<b>Agent Replies</b>	
Restrict replies to be from handling agent only	Enable this setting to restrict replies to be from handling agents only.
Activate detailed trace	Enable this setting to activate detailed trace.
Max memory usage for message caching (MB)	The maximum memory usage for message caching.

## Servers

The servers section contains information regarding the ice servers in the system. This section provides information regarding the server's state, associated contact IDs, and connection time. All users have access to this section. However, global administrators have the ability to activate servers, deactivate servers, and edit server information. They also have the ability to add a server to the list in this section.

**SERVICES**

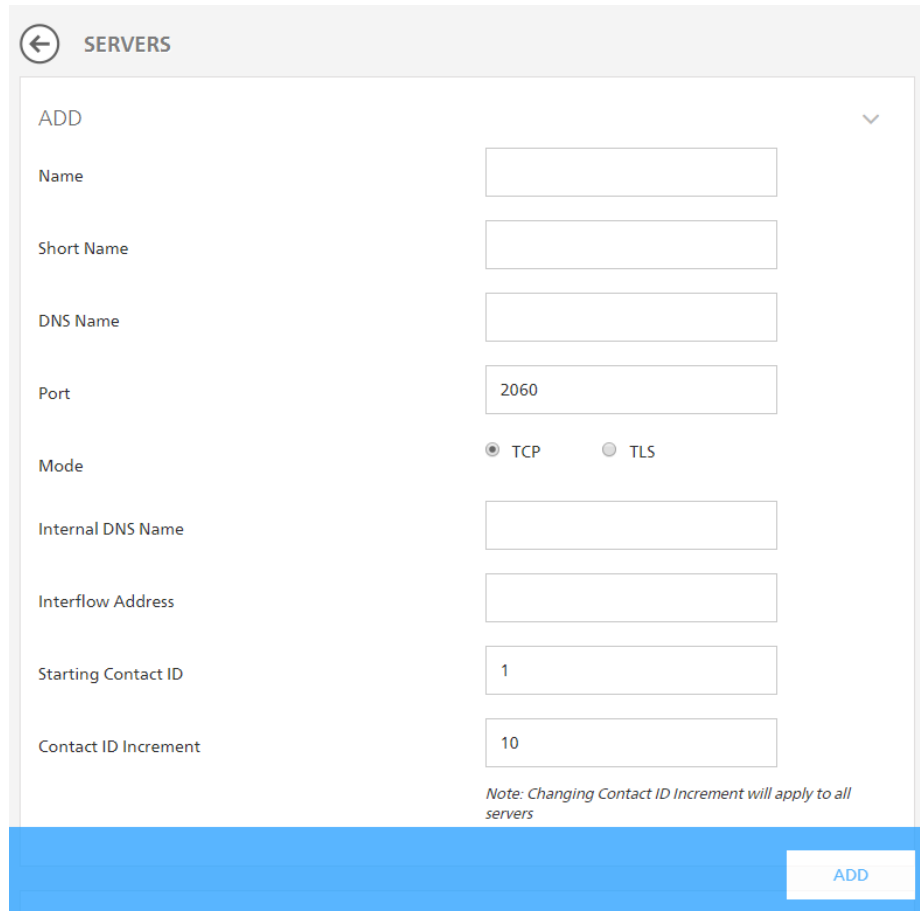
ICE SERVERS ▼

[ADD](#) Show deactivated servers  ON

ID	Name	Short Name	DNS Name	Port	Mode	Internal DNS Name	Interflow Address	Starting Contact ID	Contact ID Increment	State	Connection Time	Action	Active
1	iceA	iceA	iceA.computer-talk.com	2060	TCP	iceA.computer-talk.com	I	318	10	Connected	12.10.53:16		ON <input checked="" type="checkbox"/>
2	iceB	iceB	iceB.computer-talk.com	2060	TCP	iceB.computer-talk.com		1000	10	Closed	-N/A-		OFF <input type="checkbox"/>

Parameter	Details
<b>ID</b>	A unique identifier for each server added to this list.
<b>Name</b>	The name given to the server.
<b>Short Name</b>	A shortened name given to the server up to 4 characters. This name will appear in iceMonitor and iceReporting.
<b>DNS Name</b>	The external DNS name used to communicate with the server.
<b>Port</b>	Internal port connecting to the server.
<b>Mode</b>	Security protocol required to establish connection with the server.
<b>Internal DNS Name</b>	The internal DNS name used for validation during server start up. If this field is modified, a server restart is required to implement changes.
<b>Interflow Address</b>	The SIP address that will be used to move voice contacts to the server.
<b>Starting Contact ID</b>	The first contact entering the system will start with this contact ID. This field is disabled for active servers. To modify, server must be deactivated. If this field is modified, a server restart is required to implement changes.
<b>Contact ID Increment</b>	Every contact after the first will be assigned an ID incremented by this number. An entry into this field will be applied to all servers. If this field is modified, a server restart is required to implement changes.
<b>State</b>	Indicates whether the sever is connected or disconnected.
<b>Connection Time</b>	The amount of time the server has been in a Connected state.
<b>Action</b>	Allows a user to edit the settings of the server. This option is only available for Global Administrators.
<b>Active</b>	Select On to activate

A Global Administrator has privileges to add new servers and modify existing servers.



The screenshot shows the 'SERVERS' page in iceManager. At the top left, there is a back arrow icon and the text 'SERVERS'. Below this, the word 'ADD' is displayed in the top left corner of the form area, with a small downward arrow icon to its right. The form contains the following fields and options:

- Name: Text input field
- Short Name: Text input field
- DNS Name: Text input field
- Port: Text input field with the value '2060' entered
- Mode: Radio button options for 'TCP' (selected) and 'TLS'
- Internal DNS Name: Text input field
- Interflow Address: Text input field
- Starting Contact ID: Text input field with the value '1' entered
- Contact ID Increment: Text input field with the value '10' entered

At the bottom right of the form area, there is a blue banner with a white button labeled 'ADD'. Below the form, a note reads: "Note: Changing Contact ID Increment will apply to all servers".

To add a new server:

1. Select the *Add* button in the top left corner of the page. The Add Server page will appear.
2. Fill the form. Details of the fields are in the table above.
3. Click *Add* in the blue banner at the bottom of the page.

To edit an existing server:

← SERVERS

EDIT ↑ ↓ 2 of 3

Name

Short Name

DNS Name

Port

Mode  TCP  TLS

Internal DNS Name

Interflow Address

Starting Contact ID

Contact ID Increment

*Note: Changing Contact ID Increment will apply to all servers*

REVERT SAVE

1. Select the Edit button (pencil icon) under the Action column. The Edit Server page will appear.
2. Edit the desired fields.
3. Click *Save* to save the changes. Click *Revert* to cancel the changes.
4. If you clicked *Save*, the 'Save ice Server' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

**Note:** Modifying the fields Internal DNS Name, Starting Contact ID, or Contact ID Increment will require a server restart before changes are implemented.

## Languages

This section can only be modified by Global Administrators. This section allows Global Administrators to control the languages offered in iceManager and iceSurvey.

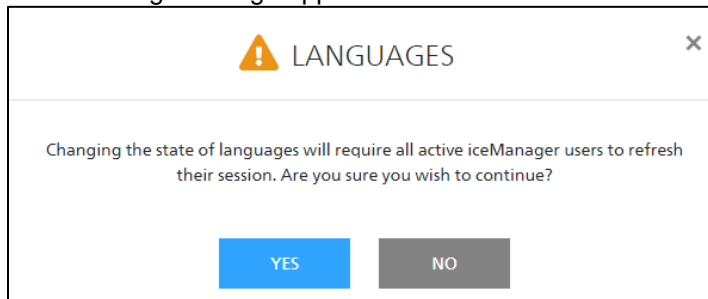
LANGUAGES			
Name	Order		Enabled
English (Canada)	0	↓	<input checked="" type="checkbox"/>
English (US)	1	↑ ↓	<input type="checkbox"/>
Français (Canada)	2	↑ ↓	<input type="checkbox"/>
Español (México)	3	↑	<input type="checkbox"/>

To turn on a language option:

1. Select the toggle under the Enabled column.



2. The following message appears:



3. Select Yes to enable the language, or No to cancel.

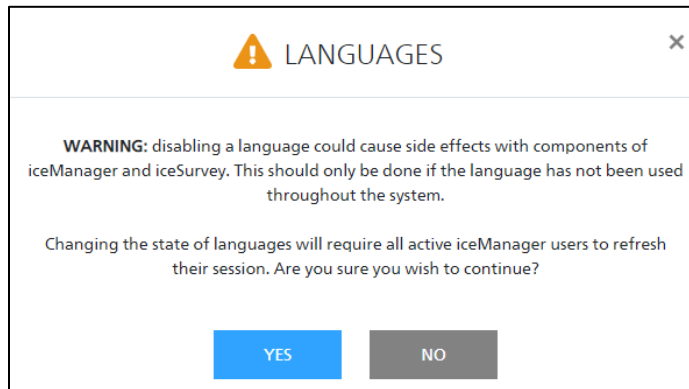
To turn off a language option:

4. Select the toggle under the Enabled column.



5. The following message appears:





6. Select Yes to disable the language, or No to cancel.



## Chapter 4: iceJournal

The Journal provides the ability to search for interactions by queue, user, contact type, date range and other criteria. Contact details are shown when a particular record is selected.

Using iceJournal, you can:

- Search for recorded and in-progress contacts.
- Display details on selected contact. A contact can be of type voice, email or IM.
  - For a voice contact, playback of the recording is available (if it was recorded).
  - For email, the email subject, body, and attachments, if any, can be viewed.
  - For IM, the conversation between the Web chat user and the user is displayed.
- A team lead, supervisor or administrator can evaluate the handling user's performance on the selected contact

## iceJournal

When you first click the *Journal* tab, the following screen appears. Search options and results are on the right side of the screen and filters are along the left side of the screen.

The screenshot displays the 'iceJournal' interface. At the top, a navigation bar includes 'HOME', 'MONITOR', 'JOURNAL', 'SURVEY', 'REPORTS', 'ADMINISTRATOR', 'CAMPAIGN', 'ICEBAR', and 'ACTIVE CONTACTS'. The user is logged in as 'JUJIE (1301) Administrator' and is logged off at '23:36:10'. The main interface is divided into three sections: 'FILTER BY:', 'QUEUES', and 'RESULTS'.

**FILTER BY:** This section on the left contains several filter options:

- Interaction Type: A dropdown menu.
- Voice:
- Email:
- Instant Message:
- Contact Info: A dropdown menu.
- Evaluation:
- Recording:
- Survey:
- Miscellaneous:

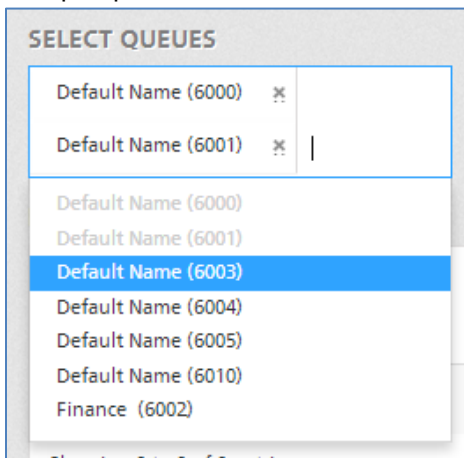
**QUEUES:** This section contains two dropdown menus: 'Select queues...' and 'Select users...'. Below these is a 'DATE RANGE' section with a date picker set to 'February 09, 2023 - March 10, 2023' and a 'SEARCH CONTACTS' button.

**RESULTS:** This section features a search input field labeled 'Search results' with 'Previous' and 'Next' buttons. Below the search field is a table with the following columns: Contact ID, Type, Date, Duration, Sender (ANI), Recipient (DNIS), User Name, Queue, and User Data. The table is currently empty, displaying the message 'No contacts found with given search parameters'. Below the table, it shows 'Showing 0 to 0 of 0 entries' and a 'Display 10 records' dropdown menu with 'Previous' and 'Next' buttons. At the bottom of the filter section are 'UPDATE' and 'CLEAR ALL' buttons.

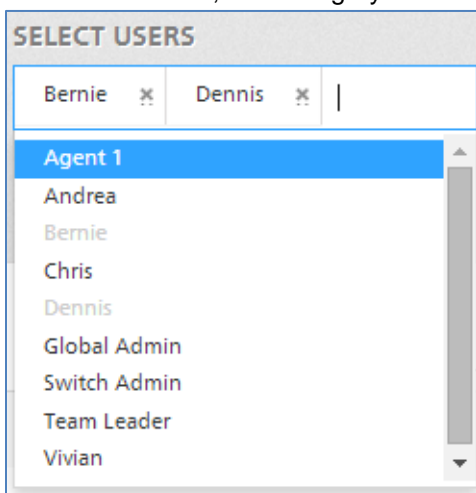
## Searching for an interaction

To search for an interaction, complete the following steps:

1. If you are looking for the results for a queue or multiple queues, find and select the appropriate queues from the 'Select Queues' drop-down. You can search one queue or multiple queues. To delete a selection, click the grey x beside the name.



2. If you are looking for the results for a user or multiple users, find and select the appropriate users from the 'Select Users' drop-down. You can search for one user or multiple users. To delete a selection, click the grey x beside the name.



- Select a date range based on options in the 'Date Range' drop-down.

If you select custom range, two calendars appear. The calendars on the left can be used to select the 'From' and 'To' date and times. Alternatively, you can use the YYYY/MM/DD format to select your date range.

- Click *Search Contacts*. The Results section refreshes with items that match the filter criteria.

Contact ID	Type	Date	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data
471	Voice	2023-02-06 03:41:54 PM	00:00:07	agent one (agentone)				
461	Voice	2023-02-06 03:38:30 PM	00:00:08	agent one (agentone)				
451	Voice	2023-02-06 03:37:13 PM	00:01:02	agent one (agentone)				
401	Voice	2023-02-03 09:02:39 AM	00:00:08	agent one (agentone)				
361	Voice	2023-02-02 01:08:17 PM	00:00:14	agent one (agentone)				

You can change the number of records to display by changing the "Display" drop-down.

The search results contain pertinent information about the call, email, or IM. The table below describes the fields in the results frame.

Column	Description
Contact ID	The identification of the contact.
Type	Type of interaction. Possible values are IM, Voice, and Email.
Date	Date and time of the interaction.
Duration	The length of time of the interaction.
Sender (ANI)	The SIP address, email address or phone number of the person who called the contact center.
Recipient (DNIS)	The SIP address, email address or phone number that received the instant message, email or voice call.
User Name	Name of the user who handled the interaction.
Queue	Name of the queue with Queue ID.
User Data	<p>This field contains information on the contact. Depending on the interaction type, different information is displayed.</p> <p>For voice interactions, the caller ID and the caller's responses to menu prompts may be displayed. It may also contain notes from the previous agent.</p> <p>For email interactions, user data can be empty, or it can contain notes from the previous agent.</p> <p>For instant messages, user data contains the website URL from which they entered into a chat session. It can also contain the contact's responses to menu prompts.</p>


You can sort results by any of the columns in the table. You can also filter results by Interaction Type or Advanced Filters.

- To filter the results by the channel it came in, select the relevant check boxes in the Interaction Type menu and click *Update*.
- To filter by items in the Advanced Filters section, fill in the appropriate fields and click *Update*. To cancel, click *Clear All*.

The table on page 165 explains the advanced filters that are available. Only the advanced filters that have been modified from the default option will be used to filter results.

## Advanced Filters

Parameter	Description
<b>Contact Info</b>	
<b>Contact ID</b>	Enter the Contact ID of interest.
<b>User Data</b>	<p>This field contains information on the contact. Depending on the interaction type, different information is displayed.</p> <p>For voice interactions, the caller ID and the caller's responses to menu prompt may be displayed. It can also contain notes from the previous agent.</p> <p>For email interactions, user data can be empty, or it can contain notes from the previous agent.</p> <p>For instant messages, user data contains the website URL from which they entered into a chat session. It can also contain the contact's responses to menu prompts.</p>
<b>Sender (ANI)</b>	The SIP address, email address or phone number of the person who called the contact center.
<b>Receiver (DNIS)</b>	The SIP address, email address or phone number the sender had dialed, emailed, or IM'd.
<b>Subject</b>	The subject of the email.
<b>User Event</b>	<p>Select the User Event associated with the contact. Options include:</p> <ul style="list-style-type: none"> <li>• Conferenced</li> <li>• Conferencing</li> <li>• Consulted</li> </ul>

 Interaction Type ▾

- Voice
- Email
- Instant Message

 Contact Info ▾

Contact ID

User Data

Sender (ANI)


Receiver (DNIS)

Subject

User Event

▾

	<ul style="list-style-type: none"> <li>• Consulting</li> <li>• In meeting</li> <li>• Placed external contact</li> <li>• Placed internal contact</li> <li>• Received direct contact</li> <li>• Received queued contact</li> <li>• Received self parked contact</li> <li>• Received transferred direct contact</li> <li>• Received transferred queued contact</li> </ul>
<b>Evaluation</b>	
<b>Evaluation Status</b>	<p>Select from the drop-down list containing the current evaluation status of the recording. Options that you can select are listed below:</p> <ul style="list-style-type: none"> <li>• Not Evaluated</li> <li>• Being Evaluated</li> <li>• Evaluated</li> <li>• Unknown</li> </ul>
<b>Evaluator ID</b>	Type the ID of an evaluator to filter results by the interactions that he/she evaluated.
<b>Recording</b>	
<b>Recording Modalities</b>	<p>Select the recording modality associated with the contact you are searching. Options that you can select are listed below:</p> <ul style="list-style-type: none"> <li>• Any</li> <li>• Voice</li> <li>• Screen Recording</li> </ul>
<b>Recording Trigger</b>	Options that you can select are listed in Appendix B: Recording Triggers on page 204.


 Evaluation ▼

Evaluation Status

-- Choose a status -- ▼

Evaluator ID

Enter Number

 Recording ▼

Recording Modalities:


-- Choose a modality -- ▼

Recording Trigger

-- Choose a trigger -- ▼

Recording Initiator ID

Enter Number

 Survey ▼

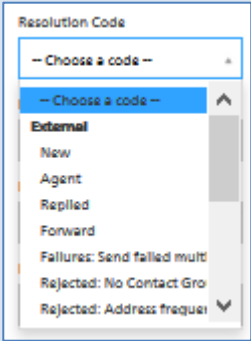
Survey

-- Choose survey -- ▼

Survey Run

-- Choose survey run -- ▼



<b>Recording Initiator ID</b>	To find results of recordings that were initiated by a person, enter the ID of the person in this field.
<b>Survey</b>	
<b>Survey</b>	Select the Survey name for the survey used by the contact. Options include all surveys created within the system.
<b>Survey Run</b>	Select the Survey Run name for the survey used by the contact. Options include all the survey runs created within the system.
<b>Miscellaneous</b>	
<b>Resolution Code</b>	Select from the drop-down list containing resolution codes configured for your contact center.  
<b>ice Servers</b>	Select the ice server used when the contact entered the system.

☰ Miscellaneous ▼

Resolution Code

-- Choose a code -- ▼

ice Servers

-- Choose ice server -- ▼

UPDATE

CLEAR ALL

To open the Details frame for the entry you are interested in, select the entry from the 'Results' frame.

### RESULTS

Previous **1** Next

Contact ID	Type	Date	Duration	Sender (ANI)
247	Voice	2020-11-03 12:43:18 PM	00:12:06	Dennis
246	Voice	2020-11-03 12:27:57 PM	00:05:01	Dennis
245	Voice	2020-11-03 12:16:41 PM	00:00:15	Dennis
244	Voice	2020-11-03 12:14:33 PM	00:00:15	Dennis
243	Voice	2020-11-03 11:58:25 AM	00:00:15	Dennis
242	Voice	2020-11-03 11:54:55 AM	00:00:15	Dennis
241	Voice	2020-11-03 11:51:36 AM	00:02:03	Dennis

Showing 1 to 7 of 7 entries 1 row selected

Display  records Previous **1** Next

### DETAILS

Contact ID: **247** Duration: **00:12:06** X

🕒 **Start Time** November 03, 2020 12:43:18 PM

🕒 **End Time** November 03, 2020 12:55:24 PM

Contact Modalities: Voice

Sender: **Dennis** (dennis@computer-talk.com) [🔗](#)

Receiving Address: ice@computertalksandbox.com

Contact Group Name: Voice

User Data:

Users: Dennis (1002)

Queues: Default Name (6000) (6000)

Server: ( ice.computertalk.com )

Recording Trigger: Bulk User

#### CONTACT SEGMENTS

ID	Start Time	Agents	Queues	Recording
0	2020-11-03 12:43:18 p.m.			
	2020-11-03 12:44:50	1002 (Received queued)		<a href="#">Jump to</a>

## Interpreting the Details Frame

The Details frame contains information about the call, email, or IM. The table below describes the fields in the Details frame.

Field	Description
<b>Contact ID</b>	Identification of the contact
<b>Duration</b>	The duration of the contact, from when the contact is established on the system (including time in workflow, queue time and handling time by an agent) to when the interaction has completed.
<b>Start Time, End Time</b>	The start date and time, as well as the end date and time, are displayed here.
<b>Contact Modalities</b>	A list of the modalities that were used during the interaction is displayed here.
<b>Sender</b>	The phone number, SIP address, or email of the contact who initiated the interaction is displayed here.
<b>Receiving Address</b>	The phone number, SIP address, the email of the Email Group or the URI of the UC Group that received the contact
<b>Contact Group Name</b>	Name of the contact group that received the contact. Contact Group is configured in iceAdministrator.
<b>User Data</b>	<p>This field contains information on the contact. Depending on the interaction type, different information is displayed.</p> <p>For voice interactions, the caller ID and the caller's responses to menu prompts might be displayed. It can also contain notes from the previous agent.</p> <p>For email interactions, user data can be empty, or it can contain notes from the previous agent.</p> <p>For instant messages, user data contains the website URL from which they entered into a chat session. It can also contain the contact's responses to menu prompts.</p>

Field	Description
<b>Users</b>	The name and ID of the users who handled the interaction are displayed here.
<b>Handled Queues</b>	The name and ID of the queues the interaction occurred in.
<b>Server</b>	The ice server used when the contact entered the system.
<b>Resolution Code section</b>	This section contains options for selecting resolution codes. This section appears for interactions that involve email. Select the appropriate resolution code from the <i>Choose a code</i> drop-down and click <i>Apply</i> .
<b>Contact Segments section</b>	<p>A Contact segment is made anytime the agent Roster of the call changes.</p> <p>The contact Segments table gives a list of agents that were present on that segment of the call, what queues the call was handled from and the time when the segment was generated.</p> <p>This section contains information about interactions including the recordings. Depending on the interaction type, different information is displayed. If the recording was not enabled and recordings were not made, the Recording column will be empty.</p> <p>For voice interactions, the ID of the agent who handled was handling the contact during this segment of the call is displayed. The reason why the agent has been added to this segment is also displayed. Where available, the recording can be heard and also downloaded from this section. The playback speed can be adjusted by clicking on the speed icon next to the play button and toggling through the available options (0.5x, 1x, 1.5x and 2x). If a recording is not available, the message “No file is available for this recording” is displayed. Under the Recording column, ‘Jump to’ allows you to jump to the selected segment within the recording.</p> <p>For email interactions, the email icon and the subject of the email are displayed. To view and/or download a copy of the email, click the down arrow. In the expanded view, you will see the From address, To address, any Cc’d emails, Sent</p>

Field	Description
	<p>date and time, Subject line, and message. Under the transcript is the <i>Download</i> button – click to download a copy of the transcript.</p> <p>For instant message interactions, the IM icon is displayed. To view and/or download a copy of the IM transcript, click the down arrow. In the expanded view, you will see the conversation stream. Under the transcript is the <i>Download</i> button – click to download a copy of the transcript.</p> <p><u>File formats for downloaded files</u> Voice calls can be downloaded in MP3 format. Email can be downloaded in .eml format, which can be opened in a number of common mail viewers. Instant messages can be downloaded as a text file.</p>
<b>Evaluation section</b>	<p>This section contains options for evaluations. If the interaction has not been evaluated, you can select the appropriate form from the <i>Evaluate</i> drop-down. If the interaction has already been evaluated, you can view the evaluation results or delete the existing evaluation.</p>
<b>Survey</b>	<p>This section contains information regarding the survey that this contact participated in. The information includes:</p> <ul style="list-style-type: none"> <li>• Survey Name</li> <li>• Survey Run Name</li> <li>• Completion Address</li> <li>• Completion Modality</li> <li>• State</li> </ul>
<b>Purging</b>	<p>This section allows administrators to purge voice and screen recordings. To view the purging options, click the grey arrow in the right corner of the section. You can delete specific segments of a recording using the segment ID checkbox or choose to delete the entire recording.</p> <p><b>Caution:</b> Recordings that have been purged cannot be recovered. Please ensure that you do not purge any recordings you may need in the future.</p>

You can close the Details section by clicking the *X* at the top right corner of the section. To view another entry using the same search results, click on that entry in the Results frame. To find another entry, change your search options and click *Search*.

## Contact Segments

The Contact Segments section contains the recording or text transcript of the interaction. You may interact with it if you have the appropriate access level. This section also contains evaluation options and Survey details.

There are 3 possible scenarios in this section:

1. There are no transcripts.

CONTACT SEGMENTS				
ID	Start Time	Agents	Queues	Recording
0	2020-11-10 4:19:41 p.m.			

2. You don't have permission to access transcripts.

CONTACT SEGMENTS				
ID	Start Time	Agents	Queues	Recording
0	2020-11-03 12:43:18 p.m.			
1	2020-11-03 12:44:50 p.m.	1002 (Received queued call)	6000	
2	2020-11-03 12:55:24 p.m.			

3. Transcripts are available for viewing and download.

CONTACT SEGMENTS				
ID	Start Time	Agents	Queues	Recording
0	2022-06-14 10:58:26 a.m.			<a href="#">Jump to 00:00:00</a>
1	2022-06-14 10:59:15 a.m.	3283 (Received queued call)	3001	<a href="#">Jump to 00:00:47</a>

VOICE [DOWNLOAD](#)

▶ 1x 00:00  09:50 🔊

In the following section, you will see examples of Details frame for voice, email, and IM interactions.

## Voice Interactions

Below is a screenshot of Details section for a Voice Interaction. For more information on the information in each field, refer to Interpreting the Details Frame on page 169.

### DETAILS

Contact ID: **4341571** Duration: **00:09:52**

**Start Time** June 14, 2022 10:58:26 AM  
**End Time** June 14, 2022 11:08:18 AM

Contact Modalities: Voice  
Sender: [REDACTED]  
Receiving Address: [REDACTED]  
Contact Group Name: [REDACTED]  
User Data:  
Users: [REDACTED] (3283)  
Handled Queues: Technical Support (3001)  
Server: [REDACTED]  
Recording Trigger: Bulk Trunk Incoming

### CONTACT SEGMENTS

ID	Start Time	Agents	Queues	Recording
0	2022-06-14 10:58:26 a.m.			<a href="#">Jump to 00:00:00</a>
1	2022-06-14 10:59:15 a.m.	3283 (Received queued call)	3001	<a href="#">Jump to 00:00:47</a>

### VOICE

[DOWNLOAD](#)

1x 00:00 09:50

### EVALUATION

This contact is yet to be evaluated.

[EVALUATE](#)



## Email Interactions

Below is a screenshot of Details section for an email interaction. For more information on the information in each field, refer to Interpreting the Details Frame on page 169.

### DETAILS

Contact ID: **1519**

Duration: **00:10:21**

✕

---

🕒

**Start Time** November 10, 2020 04:16:55 PM

🕒

**End Time** November 10, 2020 04:27:16 PM

---

Contact Modalities: Email

Sender: **Fred**(fred@gmail.com)

Receiving Address: ice@icescape.com

Contact Group Name:

User Data:

Users:

Queues: Email - Team 6 (7016)

Server: ( ice.computertalk.com )

---

### RESOLUTION CODE

Resolution Code: Replied (External)

EDIT

---

### CONTACT SEGMENTS

ID	Start Time	Agents	Queues	Recording
0	2020-11-10 4:16:55 p.m.			
1	2020-11-10 4:24:57 p.m.	1061 (Received queued email)	7016	

---

### EMAIL

2020-11-10 04:27:16 PM

↓ DOWNLOAD
⤴

---

2020-11-10 04:16:25 PM

↓ DOWNLOAD
⤴

---

### EVALUATION

This contact is yet to be evaluated.

EVALUATE ▾

---

### SURVEY

AGENT FEEDBACK SURVEY

🗑
⤴

## Instant Messaging Interactions

Below is a screenshot of Details section for an instant message interaction. For more information on the information in each field, refer to Interpreting the Details Frame on page 169.

### DETAILS

Contact ID:

**1470**

Duration:

**00:35:51**

---

**Start Time**

November 02, 2020 08:44:04 AM

**End Time**

November 02, 2020 09:19:55 AM

---

Contact Modalities: IM

Sender: **Fred** (Fred@icescape.com)

Receiving Address: ice@computertalksandbox.com

Contact Group Name: Default

User Data:

Users: Mackenzie (1061)

Queues: Chat - Team 6 (7516)

Server: ( ice.computertalk.com )

---

### CONTACT SEGMENTS

ID	Start Time	Agents	Queues	Recording
0	2020-11-02 8:44:04 a.m.			
1	2020-11-02 9:16:04 a.m.	1061 (Received queued IM)	7516	

---

### INSTANT MESSAGE

DOWNLOAD

---

### EVALUATION

This contact is yet to be evaluated.

EVALUATE ▾

---

### SURVEY

No survey responses available for this contact

## Evaluating an interaction

To evaluate an interaction, select a form from the *Evaluate* drop-down.

**DETAILS**

Contact ID: **1521**      Duration: **00:20:52**

---

**Start Time**      November 10, 2020 04:20:58 PM  
**End Time**      November 10, 2020 04:41:50 PM

---

Contact Modalities:      Voice  
Sender:      **Dennis** (dennis@computer-talk.com) 📧  
Receiving Address:      ice@computertalksandbox.com  
Contact Group Name:      Default  
User Data:  
Users:      Dennis      (1011)  
Queues:      Voice - Team 1 (6011)  
Server:      ( ice.computertalk.com )

---

**CONTACT SEGMENTS**

ID	Start Time	Agents	Queues	Recording
0	2020-11-10 4:20:58 p.m.			
1	2020-11-10 4:21:40 p.m.	1011 (Received queued call)	6011	
2	2020-11-10 4:41:50 p.m.			

---

**EVALUATION**

This contact is yet to be evaluated.

**EVALUATE** ▾

---

**SURVEY**

The evaluation form appears in the browser window.

**EVALUATION CHRISTINA**

**DETAILS**

Contact ID: **5295**      Duration: **00:02:03**

**Start Time**      Jun 15, 2022, 2:09:32 p.m.  
**End Time**      Jun 15, 2022, 2:09:35 p.m.

**EVALUATION**

This contact is being evaluated by **WJ**.  
Evaluation Started: June 15, 2022 04:29:28 PM  
Evaluation Form: Customer Service (1)

**INTERACTION**

Contact Modalities:      Voice  
Sender:      Christina  
Receiving Address:      [REDACTED]  
Contact Group Name:      Voice  
User Data:  
Users:      Julie (1301)  
Queues:      Sales Voice Queue (6001)  
Server:      [REDACTED]  
Recording Trigger:      Bulk Trunk Flopping

**VOICE**

**MEDIA TRANSCRIPTS**

---

**GREETING**

Introduction      ☆ ☆ ☆ ☆ ☆      0%      Comment: [REDACTED]      0 / 4000

Friendliness      NOT VERY FRIENDLY    SOMEWHAT FRIENDLY    FRIENDLY    VERY FRIENDLY      0%      Comment: [REDACTED]      0 / 4000

Said hello      ☆ ☆ ☆ ☆ ☆      0%      Comment: [REDACTED]      0 / 4000

---

**GREETING TOTALS**      0%      Comment: [REDACTED]      0 / 4000

It is recommended that you fill out the comment section so that people viewing the evaluation will understand the reasoning behind the scores.

Once you are finished evaluating, click *Submit*. You must complete all fields to submit the evaluation.

If you accidentally selected *Evaluate*, click the arrow in the top or bottom-left of the evaluation page to go back to the results and detail screen. You can delete the evaluation using the *Delete* button.

**Note:** When evaluating an email or IM contact, the contact transcript will open in a floating window so that users may fill out the evaluation form and view the transcript at the same time.

## Viewing an evaluation

To view an evaluation, scroll to the evaluation section and click *View Evaluation*.

The screenshot displays the 'EVALUATION CHRISTINA' interface. It is divided into several sections:

- DETAILS:** Shows Contact ID 5295, Duration 00:02:03, Start Time (Jun 15, 2022, 2:01:22 p.m.), and End Time (Jun 15, 2022, 2:03:25 p.m.).
- EVALUATION:** A note states 'This contact has been evaluated by 99' and 'Evaluation Completed: June 15, 2022 04:23:28 PM'. It also lists 'Evaluations Form: Customer Service [1]'.
- INTERACTION:** Lists Contact Medias: Voice, Christina; and Recording Address, Contact Group Name, User Data, Users, Queues, Name, and Recording Trigger.
- VOICE:** Shows a media player for 'Julia (1341)' with 'Sales Voice Queue:80010' and 'Bulk Trunk Incoming'.
- GREETING:** A table of evaluation results:
 

Category	Rating	Score	Percentage	Comment
Introduction	★★★★★	1,00/1	100%	Comment
Friendliness	NOT VERY FRIENDLY   SOMEWHAT FRIENDLY   FRIENDLY   <b>VERY FRIENDLY</b>	1,00/1	100%	Comment
Said hello	★★★★★	1,00/1	100%	Comment
<b>GREETING TOTALS</b>		3/3	100%	Comment

**Note:** You cannot modify this form.




## Survey Responses

This section displays the name of the survey that the customer participated in. It also provides the option to view and delete the Survey Response.

**Note:**

- Survey Responses will only be displayed if the contact participated in an active survey and the response is complete, or if the Survey Run is complete.
- All Survey Responses are also available in iceReporting.

### CONTACT SEGMENTS

ID	Start Time	Agents	Queues	Recording
EVALUATION				
This contact is yet to be evaluated.				
<a href="#">EVALUATE</a>				
SURVEY				
 CUSTOMER SERVICE <span style="float: right;"> </span>				
<a href="#">VIEW SURVEY RESPONSES</a>				

To view the Survey Response, select the *View Survey Responses* button in the Survey section of the detail view.

### SURVEY


 CUSTOMER SERVICE
  

[VIEW SURVEY RESPONSES](#)

The Survey Response page opens displaying the contact's details, all survey responses, scores, and score totals.

### SURVEY RESPONSE

#### DETAILS

 Contact ID: **14905**    Duration: **00:02:18**  
 Start Time: Dec. 3, 2020, 1:04:10 p.m.    End Time: Dec. 3, 2020, 1:06:28 p.m.

#### INTERACTION

Contact Modalities: Voice  
 Sender: Jason (j@computer.com)  
 Receiving Address: crow@computer.com  
 Contact Group Name: Survey Inbound  
 User Data: Joe (1000)  
 Queues: Voice Q (6002)  
 Server:

#### EVALUATION

This contact is yet to be evaluated.

#### CUSTOMER SERVICE

Completion Address: sipj@computer.com  
 Completion Modality: Voice  
 State: Completed

Survey Introduction	n/a
Purpose of the call	n/a
Representative's attitude during the call	93%
Survey Conclusion	n/a

**67% Totals**

#### SURVEY INTRODUCTION

Category Total Score: **N/A**

Hello, The following survey is regarding your last phone call with a Widget Corporation representative. It will take approximately 2 minutes to complete.

#### PURPOSE OF THE CALL

Category Total Score: **N/A**

## Purging Recordings

This section is only available for administrators. This allows administrators to delete call and screen recordings.

**Caution:** Purged recordings are not recoverable. Please ensure that you will not need the recording in the future before purging it.

To purge a recording, click the grey arrow to open the section.

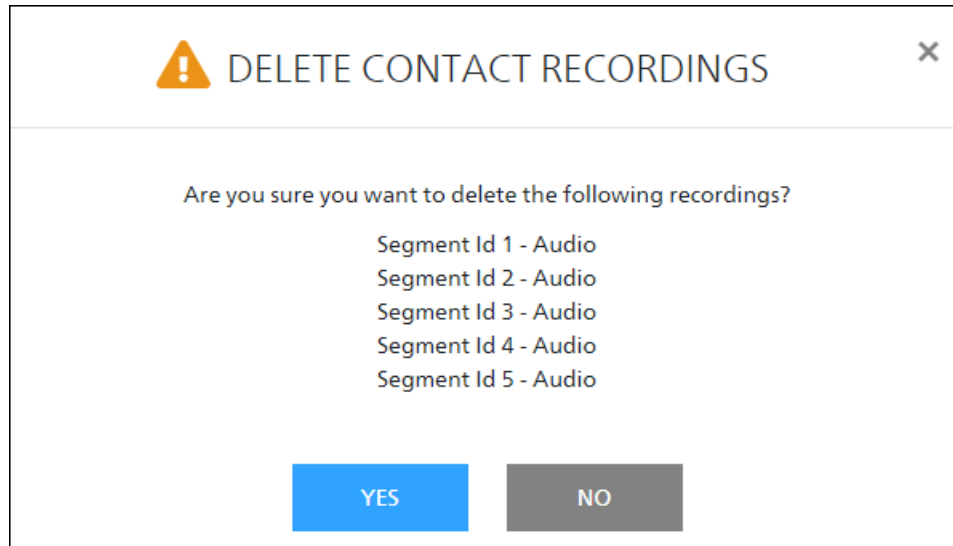
The screenshot shows a user interface with four main sections: VOICE, EVALUATION, SURVEY, and PURGING. The VOICE section includes a play button, a volume icon, a speed control set to 1x, a progress bar from 00:00:00 to 00:00:07, and a DOWNLOAD button. The EVALUATION section contains the text "This contact is yet to be evaluated." and an EVALUATE button with a dropdown arrow. The SURVEY section contains the text "No survey responses available for this contact". The PURGING section is at the bottom and contains a downward-pointing arrow icon, which is highlighted with a red square.

Click the checkbox next to the contact segment(s) you would like to remove or click *Select Everything* to select all segments. Click *Delete* to delete the segments.

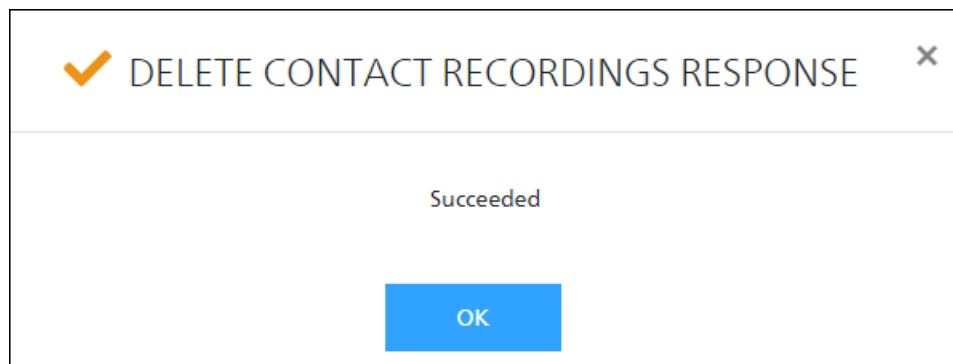
The screenshot shows a window titled "PURGING" with a table of segments. The table has columns for "Audio", "MP4", and "PRX", each with a checkbox. A "SELECT EVERYTHING" button is located to the right of the checkboxes. Below the table, there are five rows, each with a "SELECT ALL" button. At the bottom right of the window is a "DELETE" button with a trash icon.

Segment Id	Audio	MP4	PRX	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SELECT EVERYTHING
1	<input type="checkbox"/>			SELECT ALL
2	<input type="checkbox"/>			SELECT ALL
3	<input type="checkbox"/>			SELECT ALL
4	<input type="checkbox"/>			SELECT ALL
5	<input type="checkbox"/>			SELECT ALL

The following window will open. To confirm your selection, click Yes. To cancel, click No.



The recording has successfully been deleted.



**Note:** the recording player will be removed from the Details panel if you have deleted all segments.







## Chapter 5: Active Contacts

Active Contacts provides the ability to search for interactions by queue, user, contact type, time range and other criteria. Contact details are shown when a particular record is selected.

Using Active Contacts, you can:

- Search for active contacts in the system.
- Search for contacts that entered the system today.
- Only Administrators have access to the information on this tab.

## Active Contacts

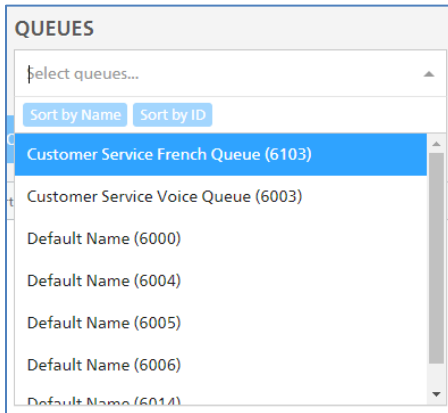
When you first click the *Active Contacts* tab, the following screen appears. Search options and results are on the right side of the screen and filters are along the left side of the screen.

The screenshot displays the 'Active Contacts' interface. At the top, a navigation bar includes 'MONITOR', 'JOURNAL', 'SURVEY', 'REPORTS', 'ADMINISTRATOR', 'CAMPAIGN', 'ICEBAR', and 'ACTIVE CONTACTS'. The user is identified as 'JULIE (1301) Administrator' and is 'LOGGED OFF' at '21:04:38'. Below the navigation bar, there are three tabs: 'ICE SERVERS', 'QUEUES', and 'USERS'. The 'ICE SERVERS' tab is selected, showing a dropdown menu for 'Choose ice server...' and a 'SEARCH CONTACTS' button. The 'QUEUES' tab shows a dropdown for 'Select queues...' and a 'CLEAR' button. The 'USERS' tab shows a dropdown for 'Select users...' and an 'UPDATE ACTIVE CONTACTS' button. On the left side, there is a filter panel for 'ACTIVE CONTACTS' with a 'Contact Type / State' dropdown and several checkboxes: Voice, IM, Email, Autodial, Waiting, In Workflow, Active, and Inactive. Below these is an 'UPDATE' button. Further down is an 'Advanced Filters' section with input fields for 'Contact ID', 'Subject', and 'Start Time', each with an 'UPDATE' button. At the bottom left is a 'CLEAR ALL' button. The main content area is a table with columns: ID, Type, Name, Address, State, Start Time, Server, Email Tracking Number, Subject, and User Data. The table is currently empty, displaying 'No Rows To Show'. At the bottom right, there is a pagination indicator '0 to 0 of 0' and 'Page 0 of 0'.

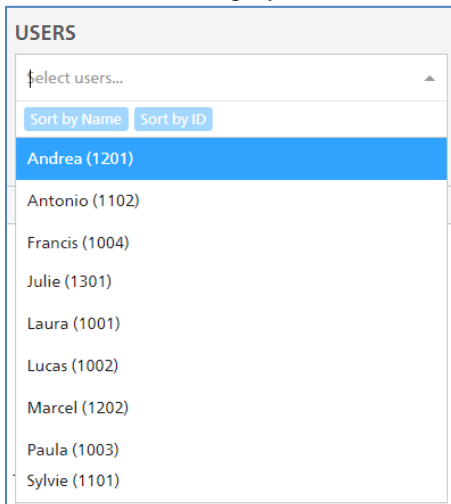
## Searching for an interaction

To search for an interaction, complete the following steps:

1. If you are looking for the results for a specific ice server, find and select the appropriate ice server from the 'ice Servers' drop-down. You can search one server or multiple servers. To delete a selection, click the grey x beside the server name.
2. If you are looking for the results for a queue or multiple queues, find and select the appropriate queues from the 'Queues' drop-down. You can search one queue or multiple queues. To delete a selection, click the grey x beside the name.



3. If you are looking for the results for a user or multiple users, find and select the appropriate users from the 'Users' drop-down. You can search for one user or multiple users. To delete a selection, click the grey x beside the name.



4. Click *Search Contacts*. The Results section refreshes with items that match the filter criteria.

ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Number	Subject
> 1735	Voice	Kathika	sipKathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM			
> 1736	Voice	Richard	sipRichard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM			
> 1737	Voice	Nicholas	sipNicholas@computer-talk.com	Ended	Jun 25, 2021 01:36:11 PM	Jun 25, 2021 01:36:11 PM			
> 1738	Voice	Rick	sipRick@computer-talk.com	Ended	Jun 25, 2021 01:36:14 PM	Jun 25, 2021 01:36:14 PM			

You can change the number of contacts to display by using the Action menu.

The search results contain pertinent information about the call, email, or IM. The table below describes the fields in the results frame.

Column	Description
<b>ID</b>	The identification of the contact.
<b>Type</b>	Type of interaction. Possible values are IM, Voice, and Email.
<b>Name</b>	The name of the person who contacted the contact center.
<b>Address</b>	The SIP address, email address or phone number of the person who contacted the contact center.
<b>State</b>	<p>State of an interaction. Possible values are Waiting, workflow, Active, Inactive, and Ended.</p> <p>Waiting: in IVR, waiting for a user            workflow: in IVR, not waiting for user (in self-service)            Active: being actively handled by the user            Inactive: still with the user, not being actively handled            Ended: interaction with contact has been completed</p>

Column	Description
	<b>Note: Only Global Administrators can see contacts with an Ended State.</b>
Start Time	The time when the contact entered the system.
End Time	The time when the contact was released from the system.
Server	The ice server associated with the contact.
Email Tracking	The Tracking ID for the email interaction.
Subject	The Subject line of an email interaction. This field is only populated for email contacts.
User Data	<p>This field contains information on the contact. Depending on the interaction type, different information is displayed.</p> <p>For voice interactions, the caller ID and the caller's responses to menu prompts may be displayed. It may also contain notes from the previous agent.</p> <p>For email interactions, user data can be empty, or it can contain notes from the previous agent.</p> <p>For instant messages, user data contains the website URL from which they entered into a chat session. It can also contain the contact's responses to menu prompts.</p>

You can sort results by any of the columns in the table. You can also filter results by Interaction Type or Advanced Filters.

- To filter the results by the channel it came in or the state of the interaction, select the relevant check boxes in the 'Contact Type / State' menu and click *Update*.

↻ Contact Type / State ▼

Voice

IM

Email

Autodial

---

Waiting

In Workflow

Active

Inactive

Ended

UPDATE

- To filter by items in the Advanced Filters section, fill in the appropriate fields and click *Update*. To cancel, click *Clear All*.

## Advanced Filters

Parameter	Description
<b>Contact ID</b>	Enter the Contact ID of interest.
<b>Subject</b>	Enter the Subject line for the email of interest.
<b>Start Time / End Time</b>	Enter a date-time range to filter the search results.

👤 Advanced Filters ▼

Contact ID

Enter Number

Subject

Start Time

📅 Pick a date-time

End Time

📅 Pick a date-time

UPDATE
CLEAR ALL

## Columns Options

The Results table provides information for each contact. Click the Columns heading on the left of the table and use the checkboxes to show and hide the information.

The screenshot shows the 'Columns' menu on the left side of the interface. The menu items are: ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Number, Subject, and User Data. Each item has a checkbox next to it. The table below shows the following data:

ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking
> 1735	Voice	Kathika	sipKathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM		
> 1736	Voice	Richard	sipRichard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM		
> 1737	Voice	Nicholas	sipNicholas@computer-talk.com	Ended	Jun 25, 2021 01:36:11 PM	Jun 25, 2021 01:36:11 PM		
> 1738	Voice	Rick	sipRick@computer-talk.com	Ended	Jun 25, 2021 01:36:14 PM	Jun 25, 2021 01:36:14 PM		

The gallery will refresh with the selected columns. By default, all columns are displayed on the table.

**Note:** Use the search field to find a column name in the list.

## Column Headers

### Column Header Actions

Click the *Actions* button on the right side of the column name as shown below to open the menu of options.

The screenshot shows the 'Actions' button on the right side of the column name 'Type' highlighted with a red box. The table below shows the following data:

ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Number	Subject
> 1735	Kathika		sipKathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM			
> 1736	Voice	Richard	sipRichard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM			
> 1737	Voice	Nicholas	sipNicholas@computer-talk.com	Ended	Jun 25, 2021 01:36:11 PM	Jun 25, 2021 01:36:11 PM			
> 1738	Voice	Rick	sipRick@computer-talk.com	Ended	Jun 25, 2021 01:36:14 PM	Jun 25, 2021 01:36:14 PM			

☰	▼	
📌 Pin Column	Ctrl+Alt+P	>
Autosize This Column	Ctrl+Alt+Q	
Autosize All Columns	Ctrl+Alt+A	
Size Columns To Fit	Ctrl+Alt+F	
Clear Filter From This Column	Ctrl+Alt+C	
Clear Filters From All Columns	Ctrl+Alt+X	
Restore Default Columns	Ctrl+Alt+Z	
Pagination	Ctrl+Alt+I	>
Show Sidebar	Ctrl+Alt+T	>
Hide Sidebar	Ctrl+Alt+T	

Select an option from the menu to configure the columns and rows in the table. The table below explains the menu options provided.

Column Heading Menu Options	
Menu Option	Function
<b>Pin Column</b>	Select this option to lock the column on to one side of the table. Options include: <ul style="list-style-type: none"> <li>▪ Pin Left</li> <li>▪ Pin Right</li> <li>▪ No Pin</li> </ul>
<b>Autosize This Column</b>	Resize the selected column to only the necessary width.
<b>Autosize All Columns</b>	Resize all columns to only the necessary width.
<b>Size Columns To Fit</b>	Resize all columns to only the minimum width.
<b>Clear Filter From This Column</b>	Remove all filters added to the selected column.
<b>Clear Filters From All Columns</b>	Remove all filters from all columns in the table.
<b>Restore Default Columns</b>	Revert column settings to the previous version.
<b>Pagination</b>	Sets the number of rows displayed in the table.



Column Heading Menu Options	
Menu Option	Function
	<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <ul style="list-style-type: none"> <li>✓ Auto</li> <li>10</li> <li>100</li> <li>1000</li> <li>Off</li> </ul> </div> <p>Auto will fit as many rows as possible without using a scrollbar. Off to turn off pagination and display all rows on the same page.</p>
<b>Show Sidebar</b>	Display sidebar options including Filter and Column settings.
<b>Hide Sidebar</b>	Hide sidebar options including Filter and Column settings.

## Column Header Sorting

Select the column name to sort the rows in the table by the selected column.

ICE SERVERS		QUEUES		USERS			
-- Choose ice server --		Select queues...		Select users...			
SEARCH CONTACTS		CLEAR		UPDATE ACTIVE CONTACTS			
ID	Type	Name	Address	State	Start Time	End Time	Server
> 1735	Voice	Kathika	sipKathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM	
> 1736	Voice	Richard	sipRichard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM	
> 1737	Voice	Nicholas	sipNicholas@computer-talk.com	Ended	Jun 25, 2021 01:36:11 PM	Jun 25, 2021 01:36:11 PM	
> 1738	Voice	Rick	sipRick@computer-talk.com	Ended	Jun 25, 2021 01:36:14 PM	Jun 25, 2021 01:36:14 PM	

ICE SERVERS		QUEUES		USERS			
-- Choose ice server --		Select queues...		Select users...			
SEARCH CONTACTS		CLEAR		UPDATE ACTIVE CONTACTS			
ID	Type	Name	Address	State	Start Time	End Time	Server
> 1738	Voice	Rick	sipRick@computer-talk.com	Ended	Jun 25, 2021 01:36:14 PM	Jun 25, 2021 01:36:14 PM	
> 1737	Voice	Nicholas	sipNicholas@computer-talk.com	Ended	Jun 25, 2021 01:36:11 PM	Jun 25, 2021 01:36:11 PM	
> 1736	Voice	Richard	sipRichard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM	
> 1735	Voice	Kathika	sipKathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM	

## Filter Options

Click the Filters heading on the left of the table and use the data points available to filter your list of contacts.

The screenshot shows the iceManager interface with three dropdown menus at the top: ICE SERVERS (Choose ice server), QUEUES (Select queues), and USERS (Select users). Below these are buttons for SEARCH CONTACTS, CLEAR, and UPDATE ACTIVE CONTACTS. A search bar is present above the table. The table has columns for ID, Type, Name, Address, State, Start Time, End Time, Server, and Email Tracking. On the left, a 'Columns' list is visible, and a 'Filters' section is highlighted with a red box, showing a search bar and a dropdown menu with 'Contains' selected. Below the dropdown is a 'Filter...' input field and a 'Reset Filter' button. The table contains three rows of contact data.

ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking
1735	Voice	Kathika	sip:Kathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM		
1736	Voice	Richard	sip:Richard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM		
1737	Voice	Nicholas	sip:Nicholas@computer-talk.com	Ended	Jun 25, 2021 01:36:11 PM	Jun 25, 2021 01:36:11 PM		

This close-up shows the 'Filters' section of the interface. It includes a search bar, a 'Columns' list, and a 'Filters' list. The 'Address' filter is expanded, showing a dropdown menu with 'Contains' selected. Below the dropdown is a 'Filter...' input field and a 'Reset Filter' button. The 'State' filter is also visible below.

The gallery will refresh according to the filter conditions selected.

**Note:** Use the search field to find a column name in the list.


## Right-click menu options

Right-click on a row in the table to perform additional tasks, such as route contacts to users from queue.

The screenshot shows the 'Active Contacts' gallery interface. At the top, there are three dropdown menus for 'ICE SERVERS', 'QUEUES', and 'USERS'. Below these are three buttons: 'SEARCH CONTACTS', 'CLEAR', and 'UPDATE ACTIVE CONTACTS'. The main area is a table with columns: ID, Type, Name, Address, State, Start Time, End Time, Server, and Email Tracking Num. A right-click context menu is open over the row for contact ID 1741 (Name: Nick), showing three options: 'Release Contact', 'Route Contact to User', and 'Route Contact to Queue'.

ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Num
> 1735	Voice	Kathika	sipKathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM		
> 1736	Voice	Richard	sipRichard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM		
> 1737	Voice	Nicholas	sipNicholas@computer-talk.com	Ended	Jun 25, 2021 01:36:11 PM	Jun 25, 2021 01:36:11 PM		
> 1738	Voice	Rick	sipRick@computer-talk.com	Ended	Jun 25, 2021 01:36:14 PM	Jun 25, 2021 01:36:14 PM		
> 1741	Voice	Nick	sipNick@computer-talk.com	InWorkflow	Jun 25, 2021 03:17:09 PM	Jan 01, 0001 02:42:28 AM		

The table below provides information on right click menu options in the Active Contacts gallery.

Active Contacts Right-Click Menu	
Menu Option	Function
<b>Release Contact</b>	<p>Select this option to release (end) the contact.</p> <p>When this option is selected, the following window appears:</p>  <p>Click <i>Yes</i> to release the contact or click <i>No</i> or <i>x</i> to close the window.</p> <p><b>Note:</b> This option is only available for active contacts.</p>
<b>Remove Contact From Queue</b>	<p>Remove the contact from queue.</p> <p>When this option is selected, the following window appears to select a queue from:</p>

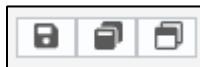
Active Contacts Right-Click Menu													
Menu Option	Function												
	<div data-bbox="540 394 950 772"> <p>SELECT A QUEUE TO REMOVE THIS CONTACT</p> <table border="1"> <thead> <tr> <th>Queue ID</th> <th>Queue Name</th> </tr> </thead> <tbody> <tr> <td>7000</td> <td>IM Queue</td> </tr> </tbody> </table> <p>1 To 1 of 1    &lt; &lt; Page 1 of 1 &gt; &gt;</p> <p>Ok Cancel</p> </div> <p><b>Caution:</b></p> <ul style="list-style-type: none"> <li>• This option should only be used if the contact is queued in 2 separate queues.</li> <li>• If this option is selected while the contact is waiting in a single queue, the contact will be removed from queue, but will also remain in workflow.</li> </ul>	Queue ID	Queue Name	7000	IM Queue								
Queue ID	Queue Name												
7000	IM Queue												
<b>Route Contact to User</b>	<p>Route the contact to a specific user.</p> <p>When this option is selected, the following window appears to select a user from:</p> <div data-bbox="540 1209 1036 1663"> <p>SELECT A USER TO ROUTE THIS CONTACT</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>1004</td> <td>Francis</td> <td>Not Ready</td> </tr> <tr> <td>1001</td> <td>Laura</td> <td>Ready</td> </tr> <tr> <td>1003</td> <td>Paula</td> <td>Ready</td> </tr> </tbody> </table> <p>1 To 3 of 3    &lt; &lt; Page 1 of 1 &gt; &gt;</p> <p>Ok Cancel</p> </div>	ID	Name	State	1004	Francis	Not Ready	1001	Laura	Ready	1003	Paula	Ready
ID	Name	State											
1004	Francis	Not Ready											
1001	Laura	Ready											
1003	Paula	Ready											
<b>Route Contact to Queue</b>	<p>Route the contact to a specific queue.</p> <p>When this option is selected, the following window appears to select a queue from:</p>												

Active Contacts Right-Click Menu									
Menu Option	Function								
	<div data-bbox="540 396 1032 848"> <p>SELECT A QUEUE TO ROUTE THIS CONTACT</p> <table border="1"> <thead> <tr> <th>Queue ID</th> <th>Queue Name</th> </tr> </thead> <tbody> <tr> <td>6500</td> <td>Email Queue</td> </tr> <tr> <td>6001</td> <td>Sales Voice Queue</td> </tr> <tr> <td>6002</td> <td>Tech Support Voice Queue</td> </tr> </tbody> </table> <p>1 To 3 of 3    &lt; &lt; Page 1 of 1 &gt; &gt;</p> <p>Ok Cancel</p> </div>	Queue ID	Queue Name	6500	Email Queue	6001	Sales Voice Queue	6002	Tech Support Voice Queue
Queue ID	Queue Name								
6500	Email Queue								
6001	Sales Voice Queue								
6002	Tech Support Voice Queue								
<b>View Email</b>	<p>Select this option to view the email interaction history.</p> <div data-bbox="540 976 1104 1488"> <p>EMAIL</p> <p>Subject: Re: Service  From: Michael&lt;Michael@gmail.com&gt;  To: ice&lt;ice&gt;  Cc:</p> <p>Hi Erin,  Thanks very much for the quick and helpful response.</p> <p>ATTACHMENTS:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Size</th> <th>Mime Type</th> <th>Download</th> </tr> </thead> <tbody> <tr> <td>image001.jpg</td> <td>2241888</td> <td>image/jpeg</td> <td></td> </tr> </tbody> </table> <p>Ok</p> </div> <p><b>Note:</b> This option is only available for email contacts.</p>	Name	Size	Mime Type	Download	image001.jpg	2241888	image/jpeg	
Name	Size	Mime Type	Download						
image001.jpg	2241888	image/jpeg							




## Layout Options

The following options allow you to save configurations in the form of a layout.

These options will allow you to save your layout changes or revert your changes.



The table below provides information for each layout option.

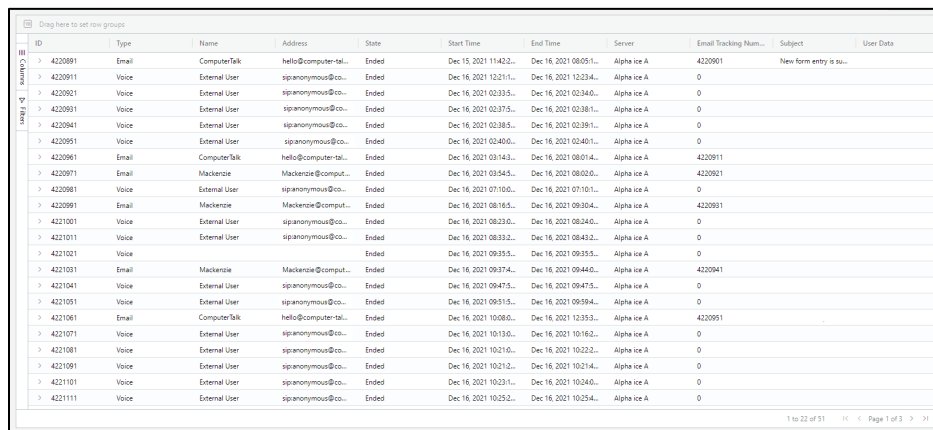
Active Contacts Layout Options	
Toolbar Item	Function
	Use this button to save the layout changes.
	Use this button to restore your layout to a previously saved layout.
	Use this button to reset your layout to the default settings.

## Row Groups

Click and drag columns to the top of the grid to categorize or group the rows in the grid.

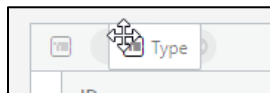
An example of using Row Groups:

1. Click Search Contacts and view the active contacts in your system.

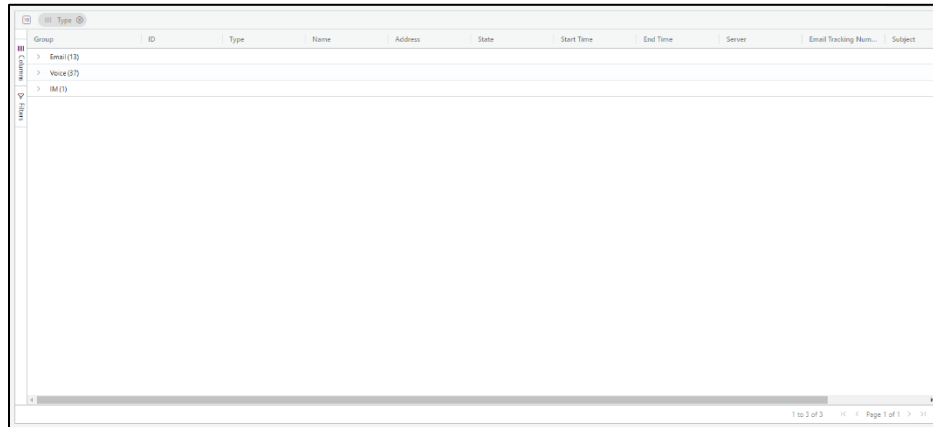


ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Num...	Subject	User Data
4220891	Email	ComputerTalk	hello@computer-tal...	Ended	Dec 15, 2021 11:42:...	Dec 16, 2021 08:05:1...	Alpha Ice A	4220901	New form entry is su...	
4220911	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 12:21:1...	Dec 16, 2021 12:23:4...	Alpha Ice A	0		
4220921	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 02:33:5...	Dec 16, 2021 02:34:...	Alpha Ice A	0		
4220931	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 02:37:5...	Dec 16, 2021 02:38:1...	Alpha Ice A	0		
4220941	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 02:38:5...	Dec 16, 2021 02:39:1...	Alpha Ice A	0		
4220951	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 02:40:...	Dec 16, 2021 02:40:1...	Alpha Ice A	0		
4220961	Email	ComputerTalk	hello@computer-tal...	Ended	Dec 16, 2021 03:14:3...	Dec 16, 2021 08:01:4...	Alpha Ice A	4220911		
4220971	Email	Mackenzie	Mackenzie@comput...	Ended	Dec 16, 2021 03:54:5...	Dec 16, 2021 08:02:...	Alpha Ice A	4220921		
4220981	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 07:10:...	Dec 16, 2021 07:10:1...	Alpha Ice A	0		
4220991	Email	Mackenzie	Mackenzie@comput...	Ended	Dec 16, 2021 08:16:5...	Dec 16, 2021 09:30:4...	Alpha Ice A	4220931		
4221001	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 08:23:...	Dec 16, 2021 08:24:...	Alpha Ice A	0		
4221011	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 08:33:2...	Dec 16, 2021 08:43:2...	Alpha Ice A	0		
4221021	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 09:35:5...	Dec 16, 2021 09:35:5...	Alpha Ice A	0		
4221031	Email	Mackenzie	Mackenzie@comput...	Ended	Dec 16, 2021 09:37:4...	Dec 16, 2021 09:44:...	Alpha Ice A	4220941		
4221041	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 09:47:5...	Dec 16, 2021 09:47:5...	Alpha Ice A	0		
4221051	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 09:51:5...	Dec 16, 2021 09:59:4...	Alpha Ice A	0		
4221061	Email	ComputerTalk	hello@computer-tal...	Ended	Dec 16, 2021 10:06:0...	Dec 16, 2021 12:35:3...	Alpha Ice A	4220951		
4221071	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 10:13:0...	Dec 16, 2021 10:16:2...	Alpha Ice A	0		
4221081	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 10:21:0...	Dec 16, 2021 10:22:3...	Alpha Ice A	0		
4221091	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 10:21:2...	Dec 16, 2021 10:21:4...	Alpha Ice A	0		
4221101	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 10:23:1...	Dec 16, 2021 10:24:0...	Alpha Ice A	0		
4221111	Voice	External User	sipanonymous@cc...	Ended	Dec 16, 2021 10:25:2...	Dec 16, 2021 10:25:4...	Alpha Ice A	0		

2. Click and drag the Type column to the top of the grid.



3. The rows are now grouped by Type:



The screenshot shows a web-based data grid interface. At the top, there is a header bar with a search icon and the text "Type". Below the header is a table with the following columns: Group, ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Mem..., and Subject. The table contains three rows, each representing a nested group:

Group	ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Mem...	Subject
> Email (17)										
> Voice (57)										
> IM (1)										

On the left side of the grid, there is a vertical sidebar with a tree view showing the hierarchy of groups. At the bottom right of the grid, there is a pagination control showing "1 to 3 of 3" and "Page 1 of 1".

**Note:** You can add multiple columns to the top of the grid to created nested groups.



## Appendix A: Adding to Allowed sites

This section explains how to add iceManager to the list of allowed sites on your browser. Steps for adding allowed sites to Microsoft Edge, Google Chrome, and Firefox can be found below.

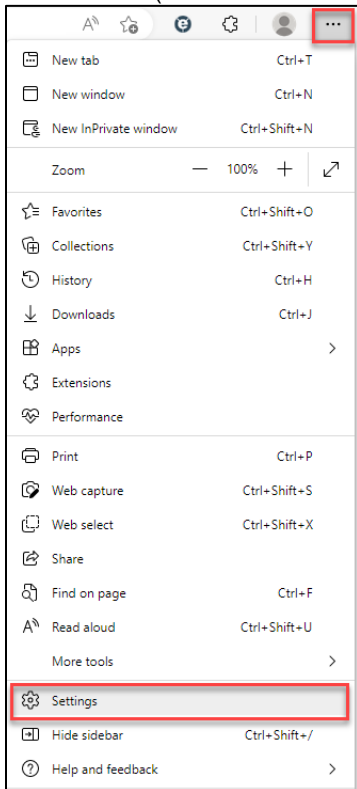


## Microsoft Edge

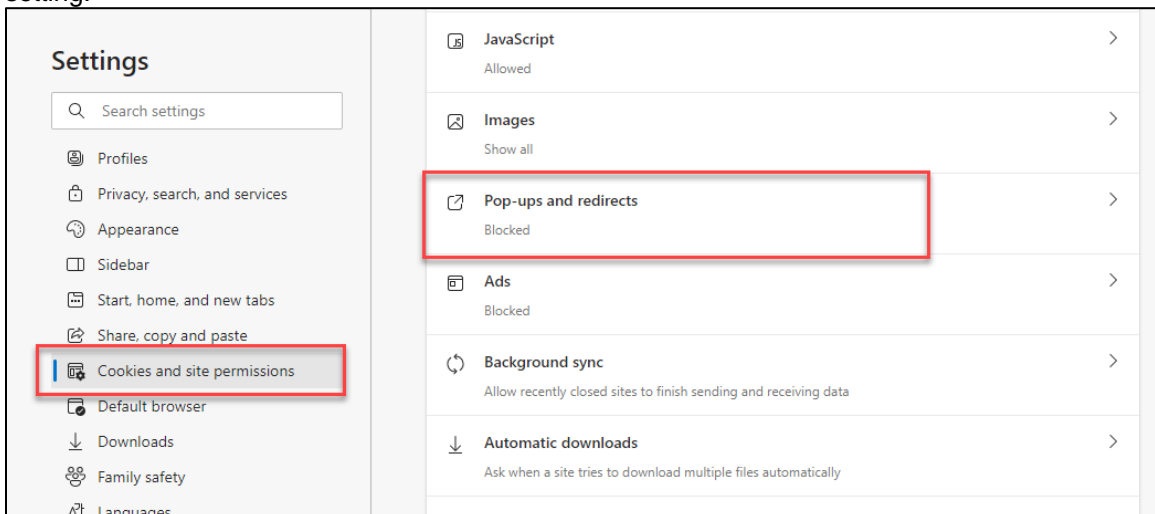
You can allow pop-up windows to open in a Web site by adding the Web site to the **Allowed sites** list.

To do this, follow these steps:

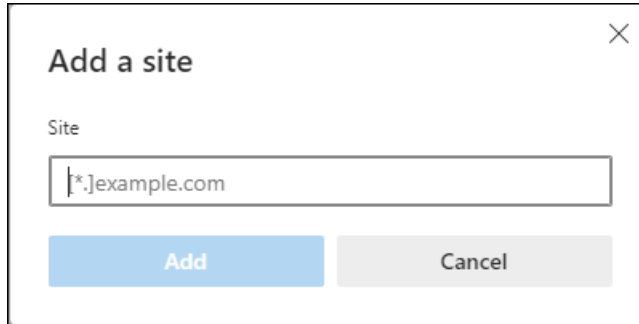
1. Open a Microsoft Edge browser window.
2. In the Menu (three dots in the top right corner), select *Settings*.



3. Navigate to the *Cookies and site permissions* section and find the *Pop-ups and redirects* setting.



4. In the 'Allow' section, click the *Add* button and type the address of the website. Then click *Add*.




The image shows a dialog box titled "Add a site" with a close button (X) in the top right corner. Below the title is the label "Site" and a text input field containing the text "\*.example.com". At the bottom of the dialog are two buttons: "Add" (blue) and "Cancel" (grey).

5. The website should no longer be blocked by the Pop-up Blocker.


Source: <https://support.microsoft.com/en-us/microsoft-edge/block-pop-ups-in-microsoft-edge-1d8ba4f8-f385-9a0b-e944-aa47339b6bb5>

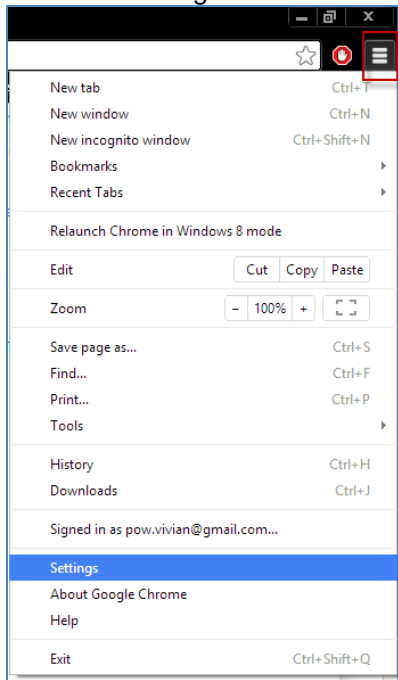
## Google Chrome

To see blocked pop-ups for a site, follow the steps listed below:

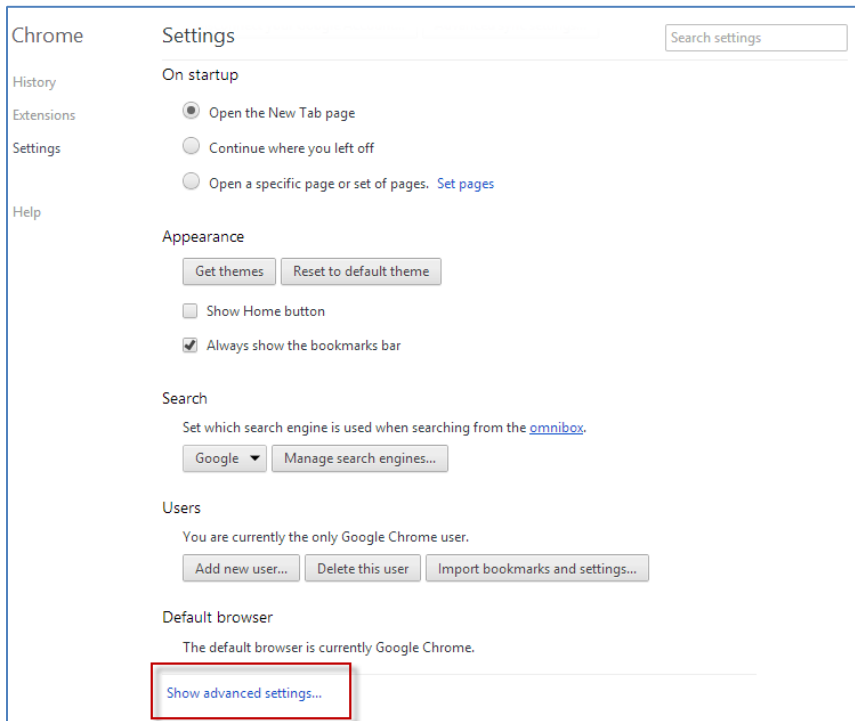
1. If pop-ups have been blocked, you'll see the  icon in the address bar. Click the icon to see a list of the blocked pop-ups.
2. Click the link for the pop-up window that you'd like to see.
3. To always see pop-ups for the site, select "Always show pop-ups from [site]." The site will be added to the exceptions list, which you can manage in the Content Settings dialog.

To manually allow pop-ups from a site, follow the steps below:

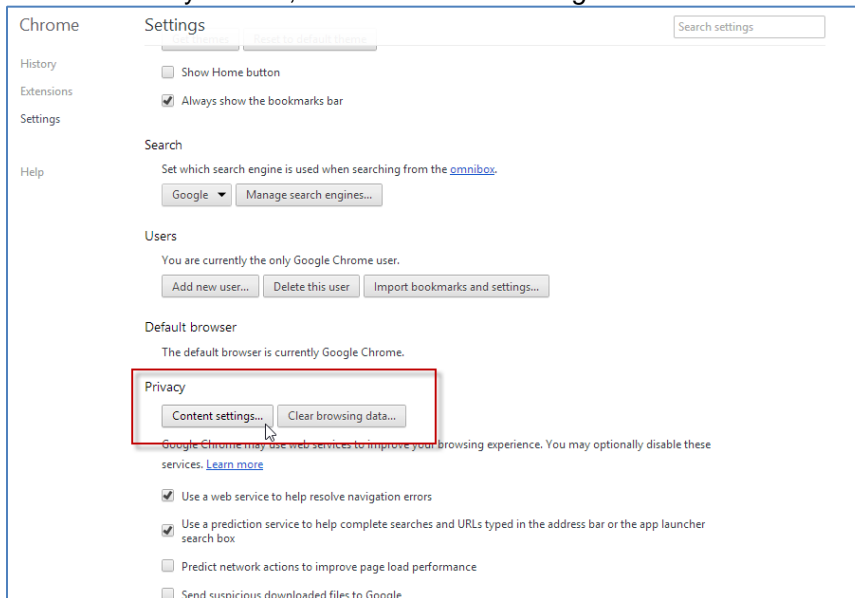
1. Click the Chrome menu  on the browser toolbar.
2. Select *Settings*.



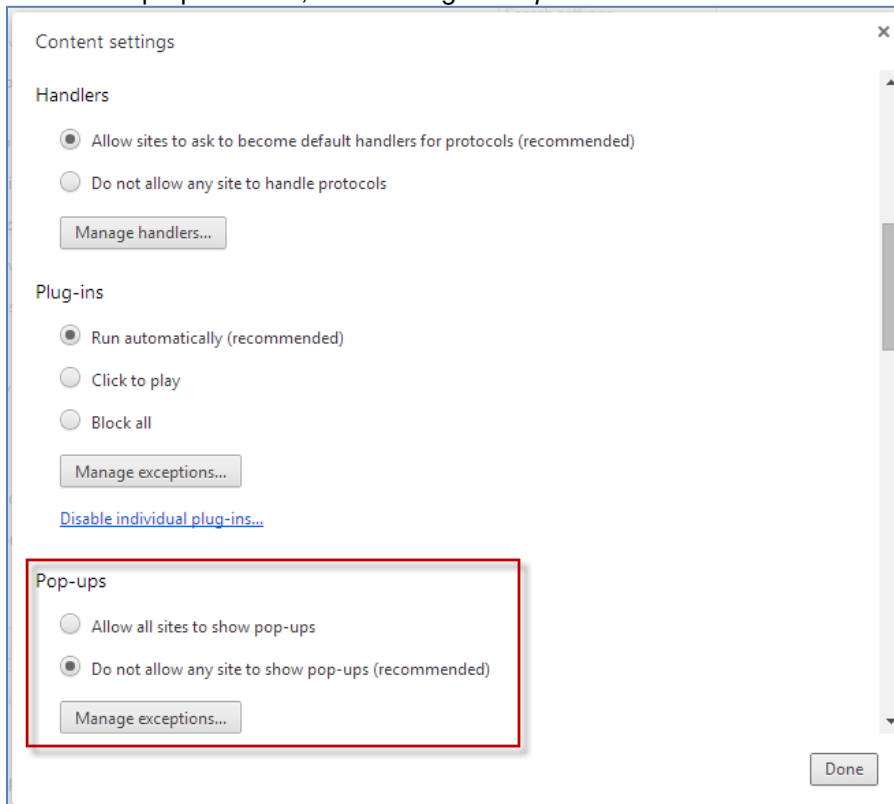
3. Click *Show advanced settings*.



#### 4. In the Privacy section, click the *Content settings* button.

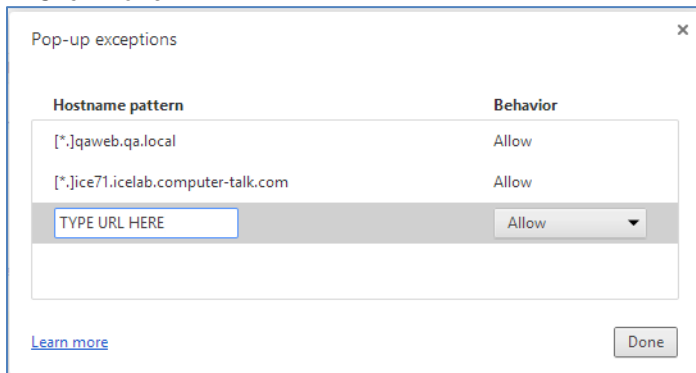


5. In the Pop-ups section, click *Manage exceptions*.



6. Either select to allow all sites or click *Manage exceptions*.

7. Click *Done*.



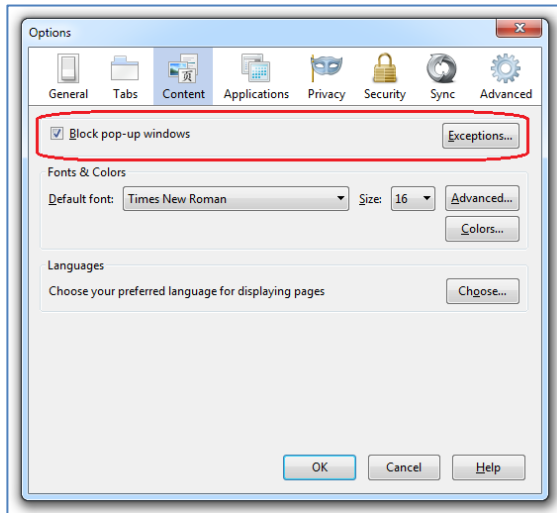
The website should no longer be blocked by the Pop-up Blocker.

Source: <https://support.google.com/chrome/answer/95472?hl=en>

## Firefox

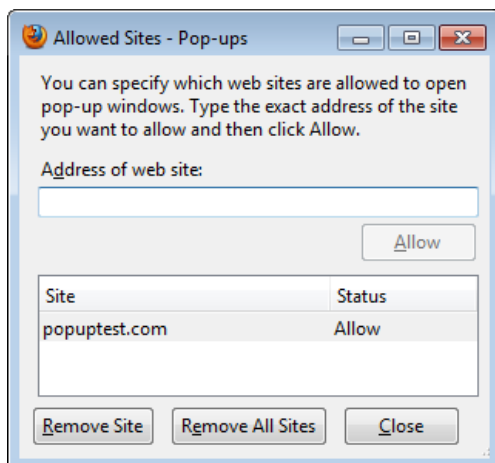
To access the pop-up blocker settings:

1. Click the menu button  and choose *Options*
2. Select the *Content* panel.



In the content panel:

- **Block pop-up windows:** Uncheck this to disable the pop-up blocker altogether.
- **Exceptions:** This is a list of sites that you want to allow to display pop-ups.



*Allow.* Click this to add a website to the exceptions list.

Source: <https://support.mozilla.org/en-US/kb/pop-blocker-settings-exceptions-troubleshooting>



## Appendix B: Recording Triggers

The table below describes the recording triggers that you can use to filter iceJournal results.

Recording Triggers	
Recording Trigger	Description
<b>Any Trigger</b>	Consider all trigger types.
<b>User Initiated</b>	The recording is initiated when a user clicks the <i>Recording Notification</i> button on iceBar.
<b>Supervisor Initiated</b>	The recording is initiated when a Supervisor uses the <i>Silent Monitoring</i> button on iceBar.
<b>Bulk Trunk</b>	All calls on either the inbound (Bulk Trunk – Incoming) or the outbound trunk (Bulk Trunk – Outgoing) are recorded.
<b>Bulk Trunk Outgoing</b>	All calls on outbound trunks are recorded.
<b>Bulk Trunk Incoming</b>	All calls on inbound trunks are recorded.
<b>Bulk User</b>	All conversations associated with users are recorded.
<b>Scheduled User</b>	Recordings for a particular user are scheduled for a specific date and time.
<b>Scheduled Queue</b>	Recordings for a particular queue are scheduled for a specific date and time.
<b>Scheduled DNIS/UC Group</b>	Recordings for a particular DNIS/UC Group are scheduled for a specific date and time.

<b>Recording Triggers</b>	
<b>Recording Trigger</b>	<b>Description</b>
<b>Scheduled ANI</b>	Recordings for a particular ANI are scheduled for a specific date and time.
<b>Scheduled Duration</b>	Record anything greater than the configured amount of time. Note: this can only be used when lookback recording has been enabled.
<b>Scheduled Multiple Parameters</b>	This trigger refers to recordings that were triggered based one two or more parameters. For example, you can use a trigger recording for calls that have a certain ANI and certain DNIS. Calls with those triggers will appear in the iceJournal filter when this trigger is selected.



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