computer talk

ice

Manager

User Manual

Server Version 12

Part Number: UM_iM_12.x_E_20230929
iceManager and iceJournal for ice server version 12.x

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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

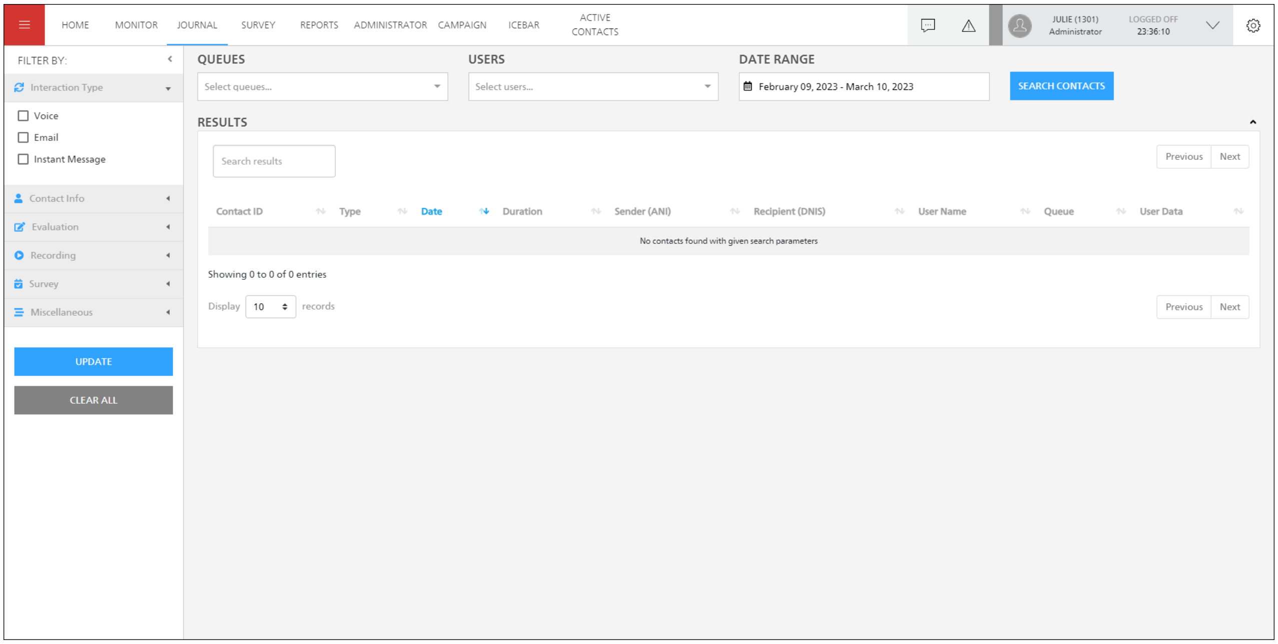
This chapter includes information about the iceManager site – responsive design, how to navigate the iceManager site, how to sign in, and access permissions. Once you are familiar with the interface of iceManager, you may refer to subsequent chapters for information on the different components of iceManager. 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.

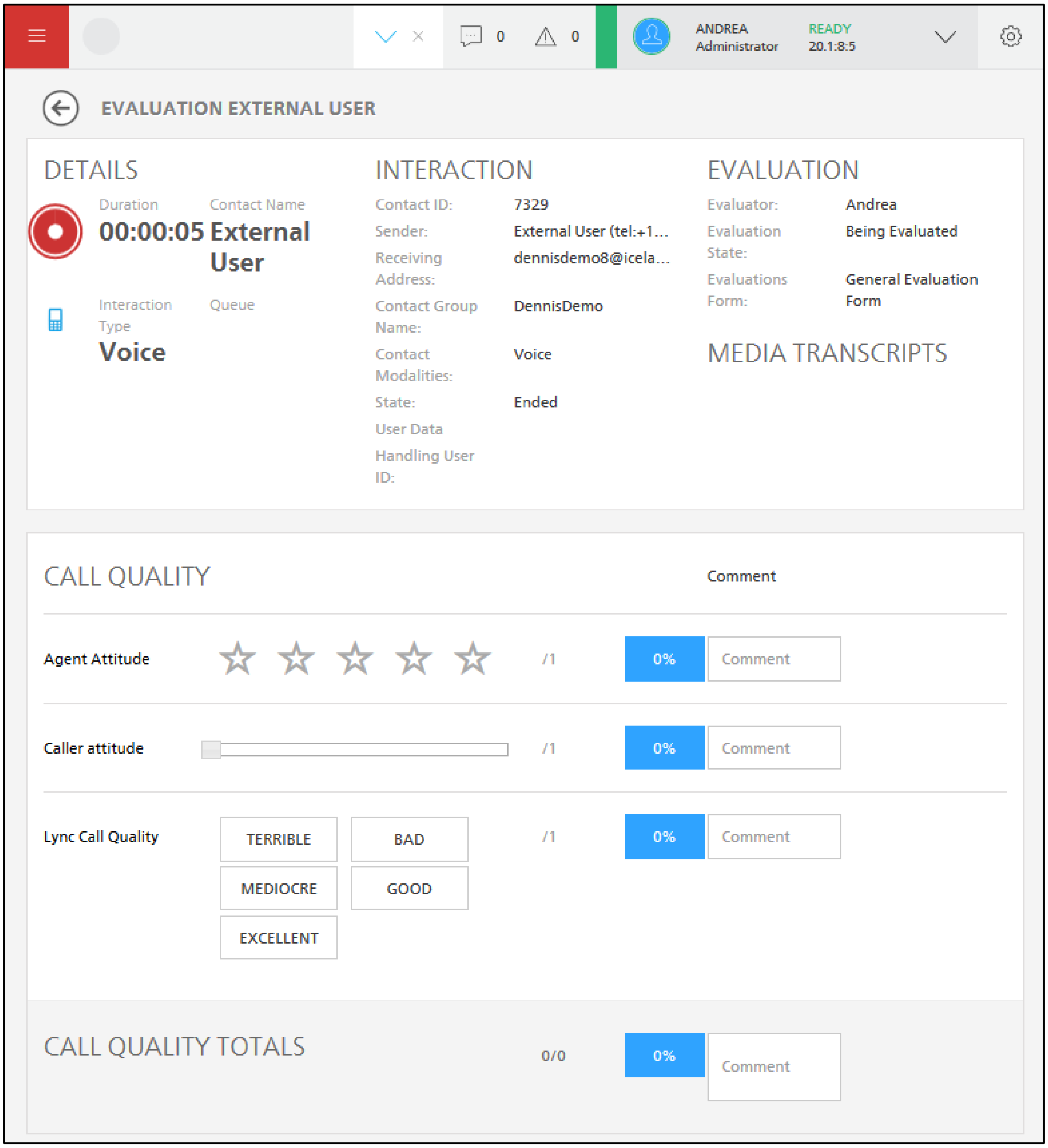
Responsive Design

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.

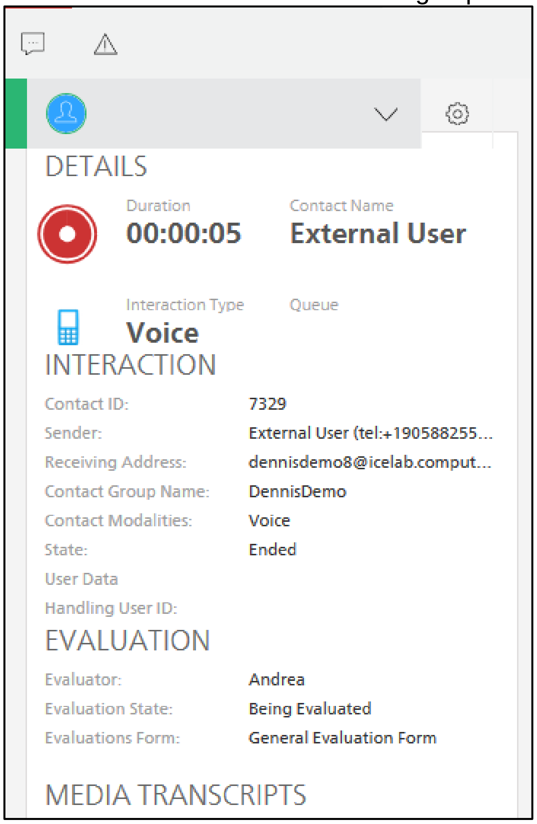
The screen below shows the viewing experience on a desktop monitor.

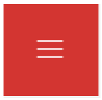


The screen below shows the viewing experience on a tablet.



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.

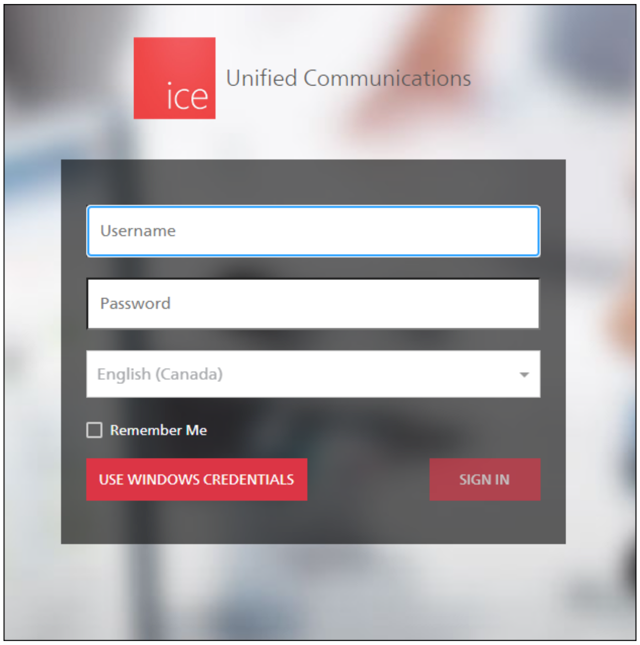
To access the iceManager website, open the web browser and type in the URL for the website. If you do not know the URL, contact your ice administrator.

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.

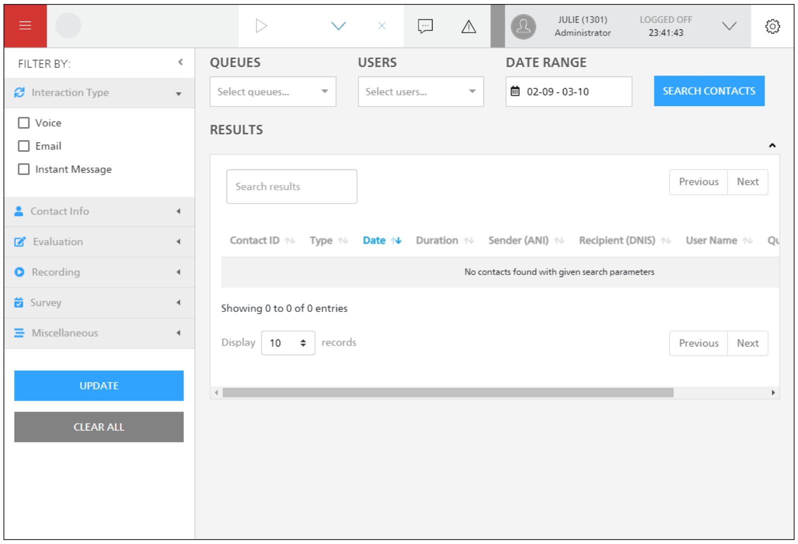
Follow these steps to sign into iceManager:

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

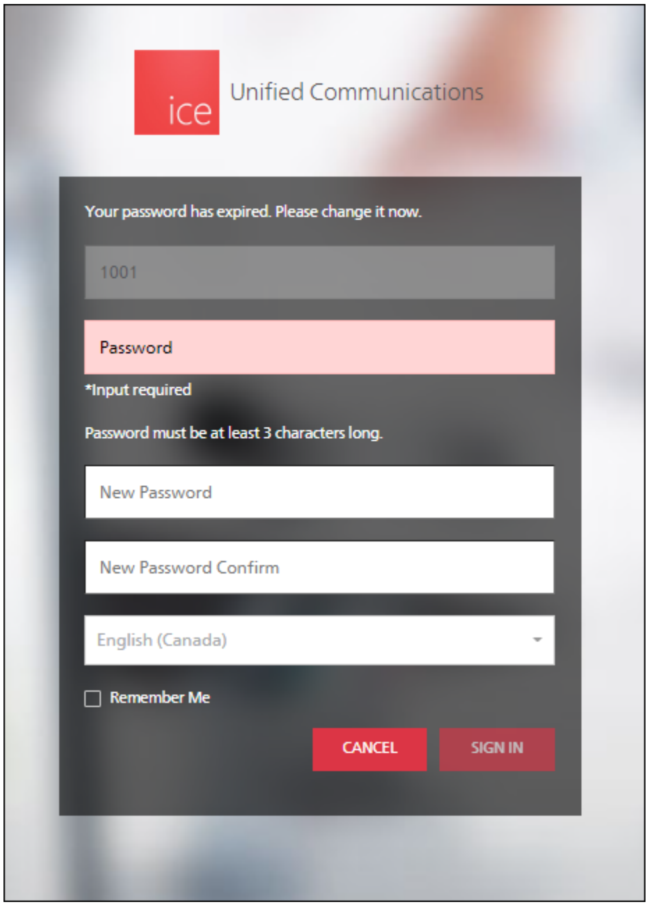
   Note: this option is not recommended for shared computers.
6. Click *Sign In*.
7. Once you have signed in, you will see the Journal page.



Expired Password

<u>Follow the steps below to change your password:</u>

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.



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.

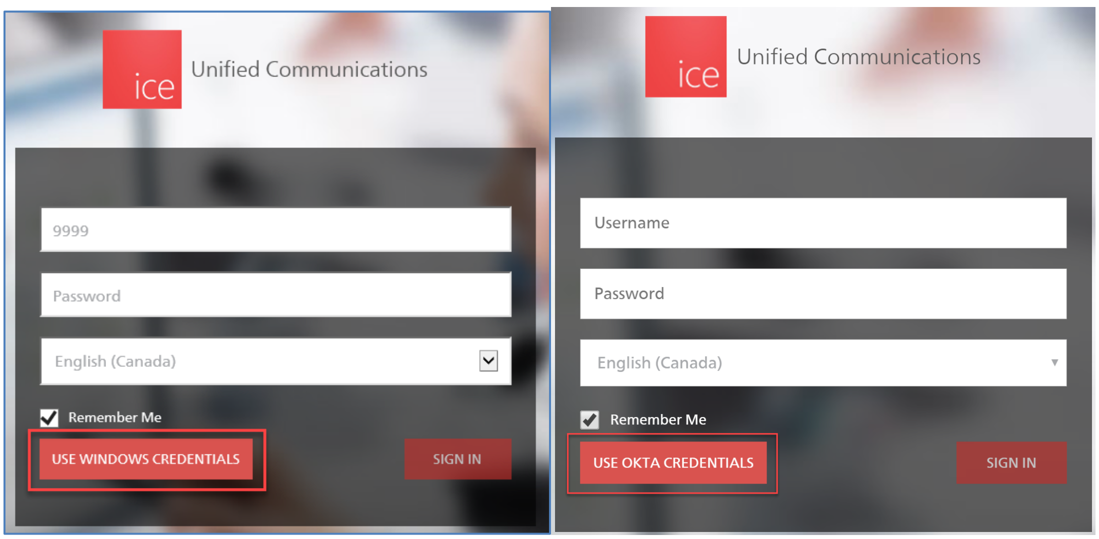
Single Sign-On

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.



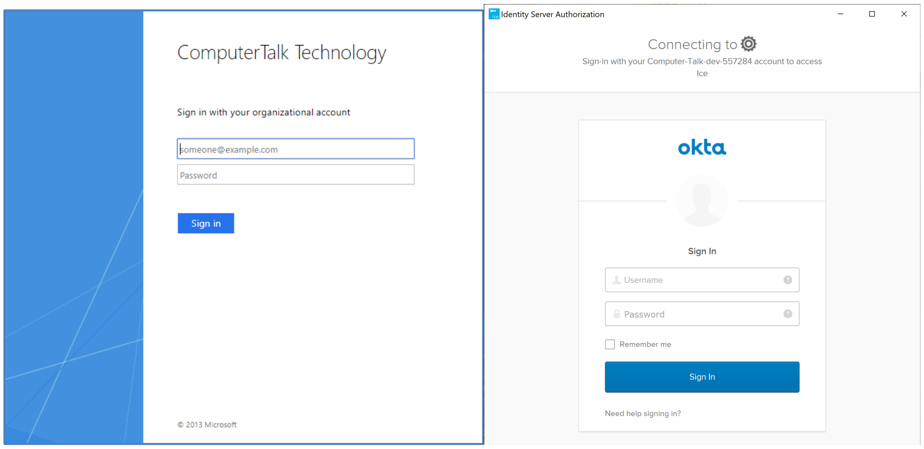
1. Click the *Use Windows Credentials* or the *Use Okta Credentials* button.

   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.

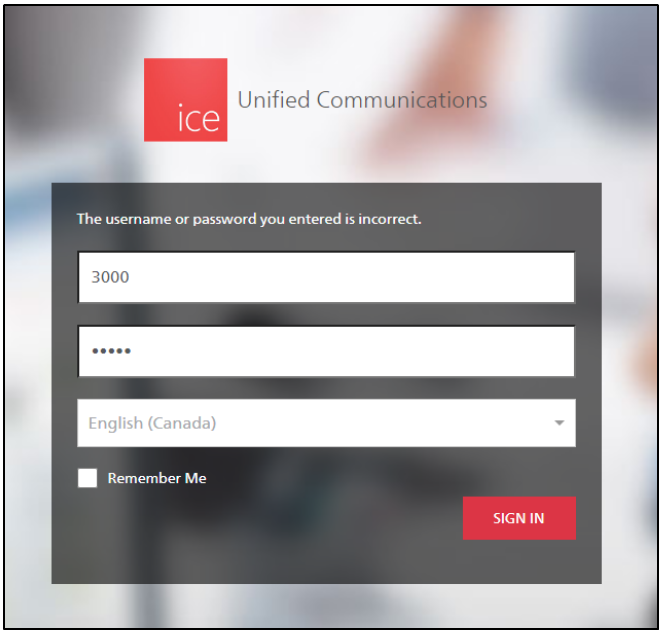
   Note: This dialog box may look different, depending on the way your administrator has configured the system.


ComputerTalk Technology
Sign in with your organizational account
someone@example.com
Password
Sign in
© 2013 Microsoft
Identity Server Authorization
Connecting to
Sign-in with your Computer-Talk-dev-557284 account to access Ice
okta
Sign In
Username
Password
Remember me
Sign In
Need help signing in?

Common Error and Warning Messages

Authentication error

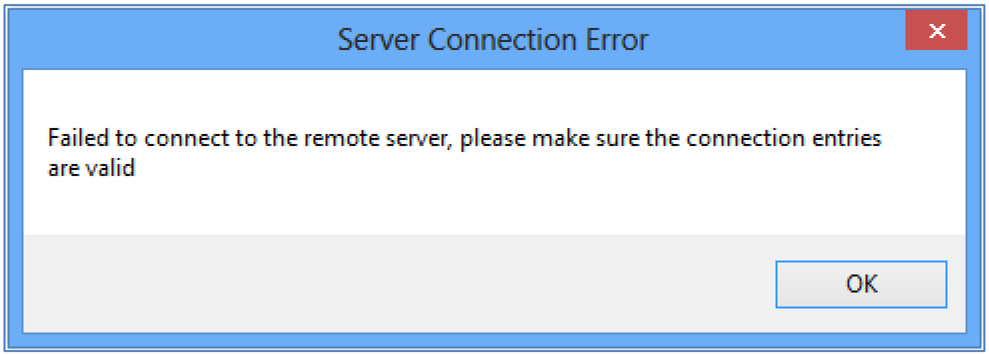
If a user types the wrong User ID or the wrong password, the following message appears.



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."

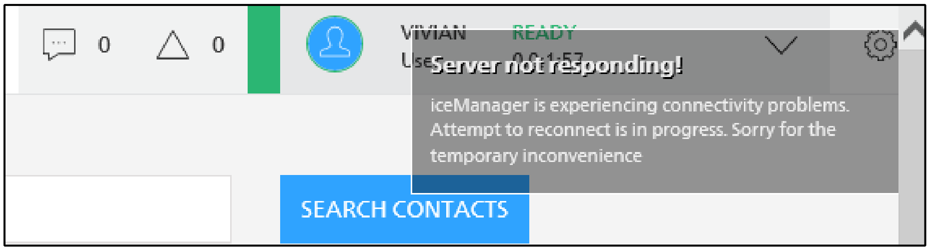
This error message indicates that the server is potentially experiencing a problem with connection. Please contact your ice administrator.

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
Tabs					
Home	✓	✓	✓	✓	✓
Monitor	✓	✓	✓	✓	✓
Reports	✓	✓	✓	✓	✓
Journal	✓	✓	✓	✓	✓
Administrator (download)*		✓	✓	✓	✓
Campaign (download)				✓	✓
iceBar (download)	✓	✓	✓	✓	✓
Functionality					
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
Settings					
Journal Settings					
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					✓

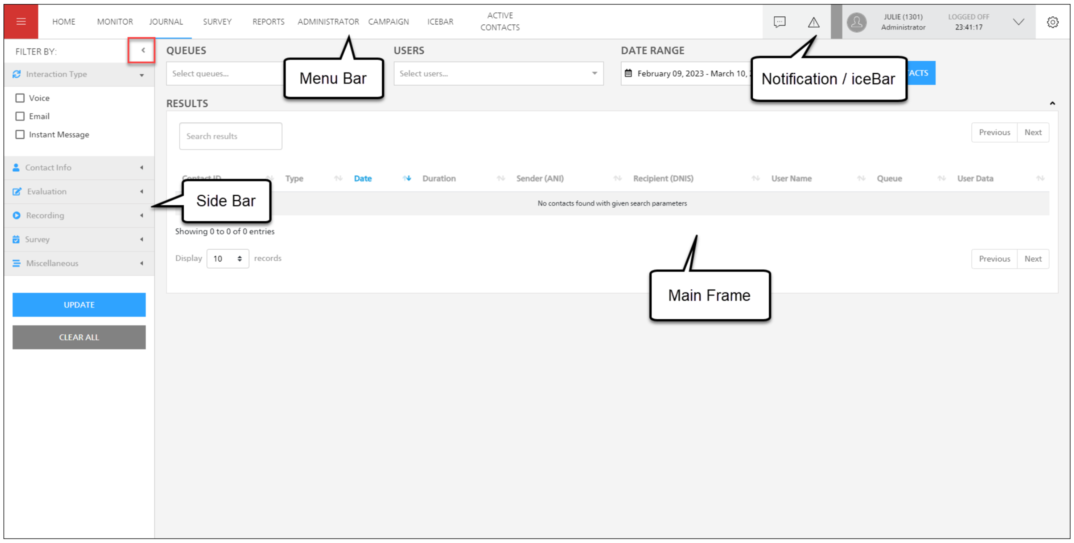
*** The iceAdministrator application can be downloaded by On-Prem customers. Cloud solution customers will have access to Citrix through the tab.**

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.



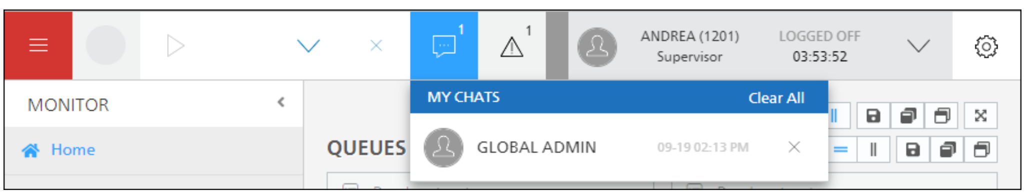
Note: To hide the sidebar, click the sideways pointing arrow, highlighted by the square box above.

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.

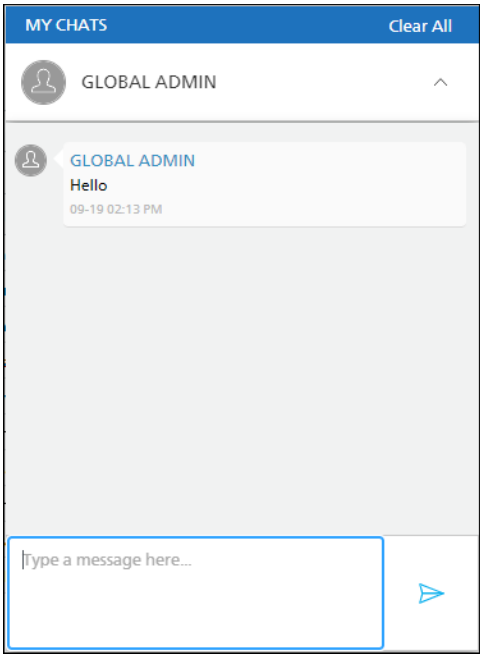


You can respond to the Quick Text message when the dialog box appears by clicking on the conversation.

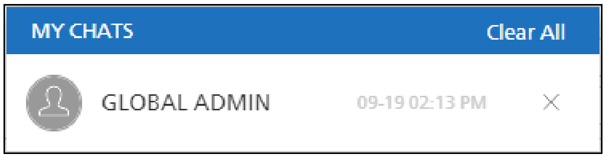
The conversation is kept until that entry in the drop-down list is permanently removed. To permanently remove the conversation from the list, click the *X* located on the right side of the drop-down dialog box.

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:



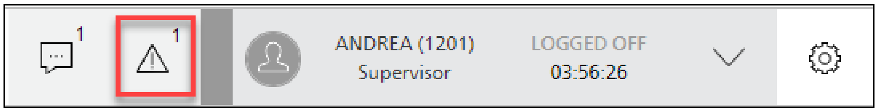
Now you can click on the *X* to delete the conversation.



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.

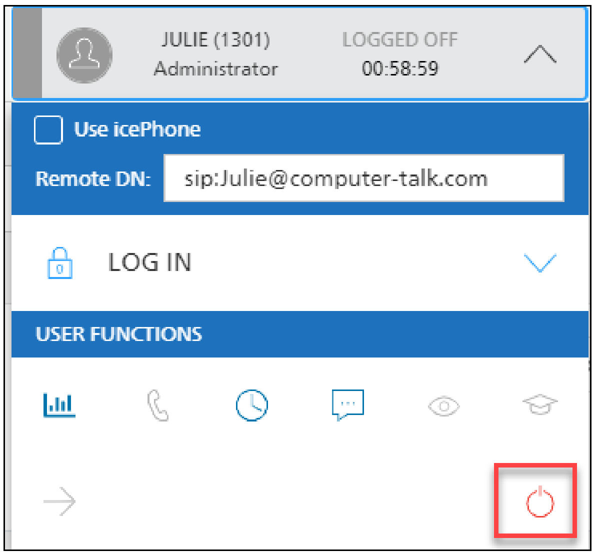


iceBar for web

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.

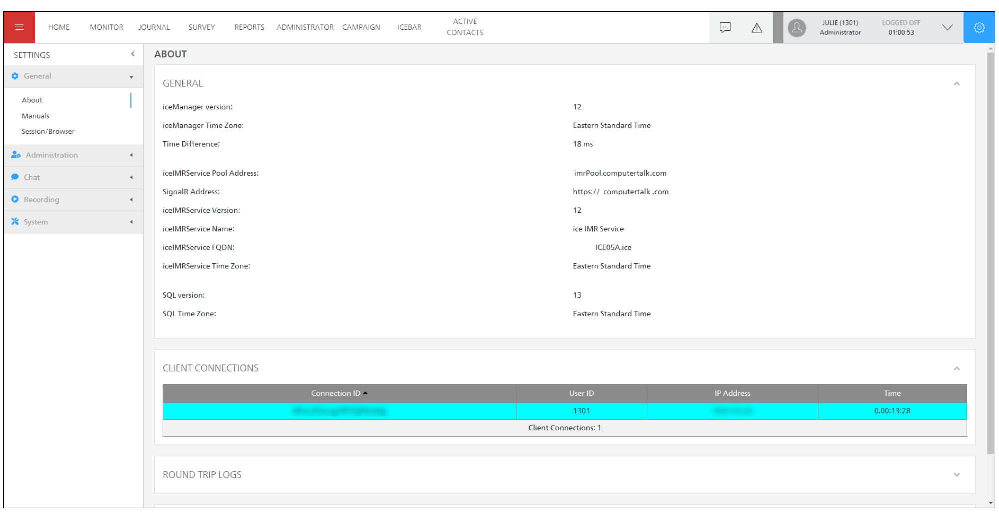
Logging out

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:



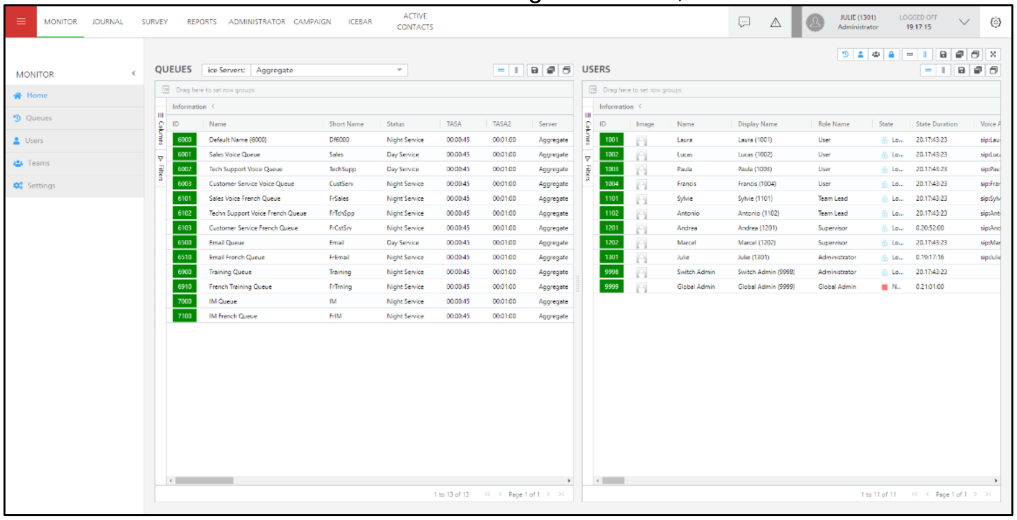
For more information about settings, refer to Chapter 3: Settings.

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.



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

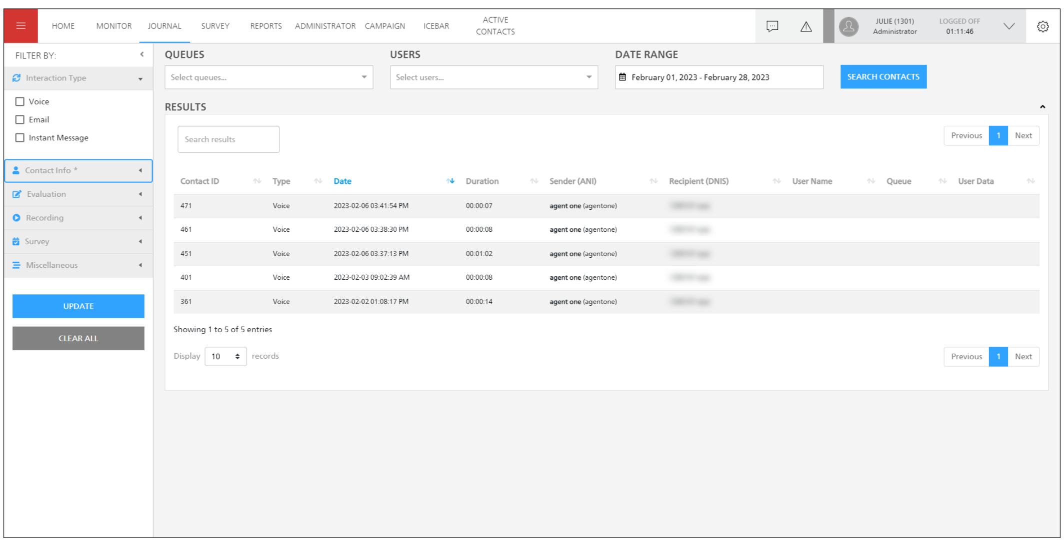
Journal tab

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.

<u>Using iceJournal, you can:</u>

- Search for recorded and in-progress contacts.
- Display details for a selected contact. A contact can be of type voice, email or IM.
  - o For a voice contact, playback of the recording is available (if it was recorded).
  - o For email, the email subject, body, and attachments, if any, can be viewed.
  - o 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.

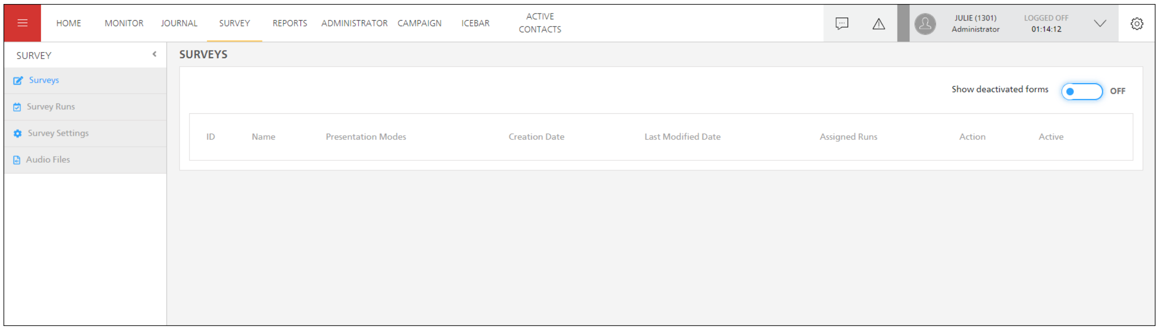
The following screenshot shows the results of an iceJournal search:



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

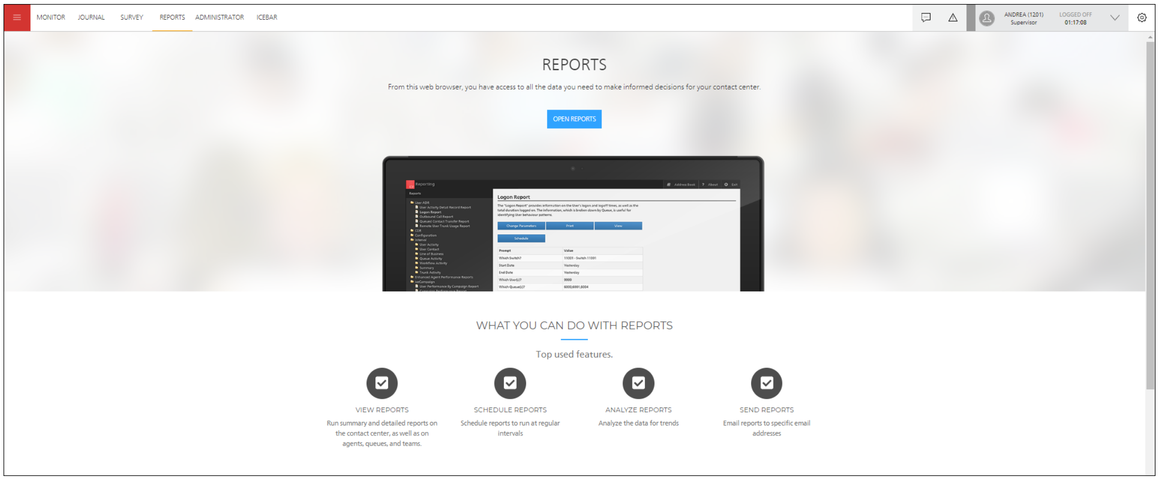
Survey Tab

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.



Reports Tab

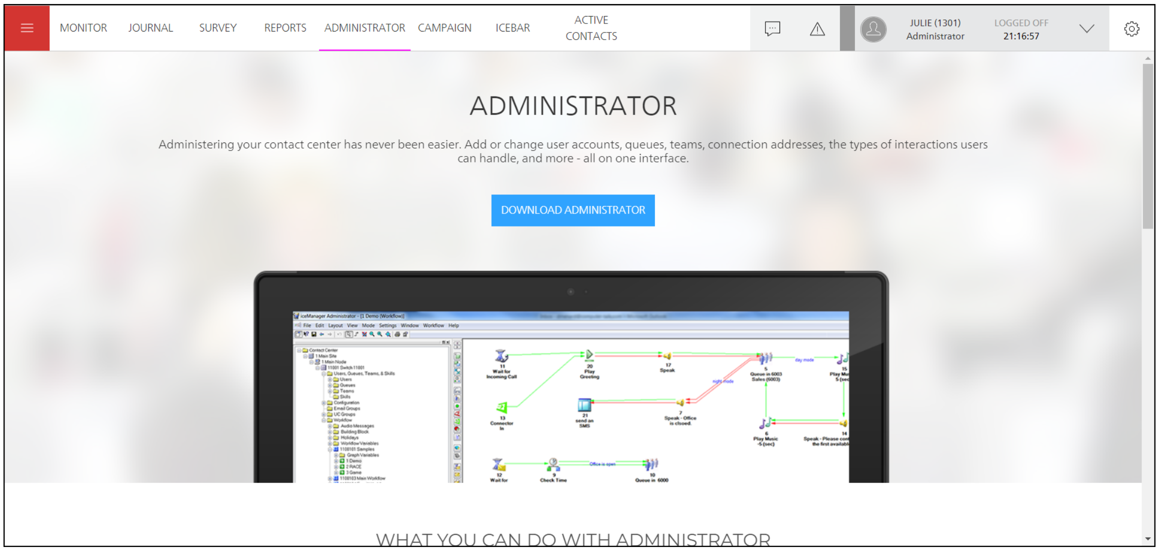
From the Reports tab, you can open iceReporting to run and schedule reports.



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

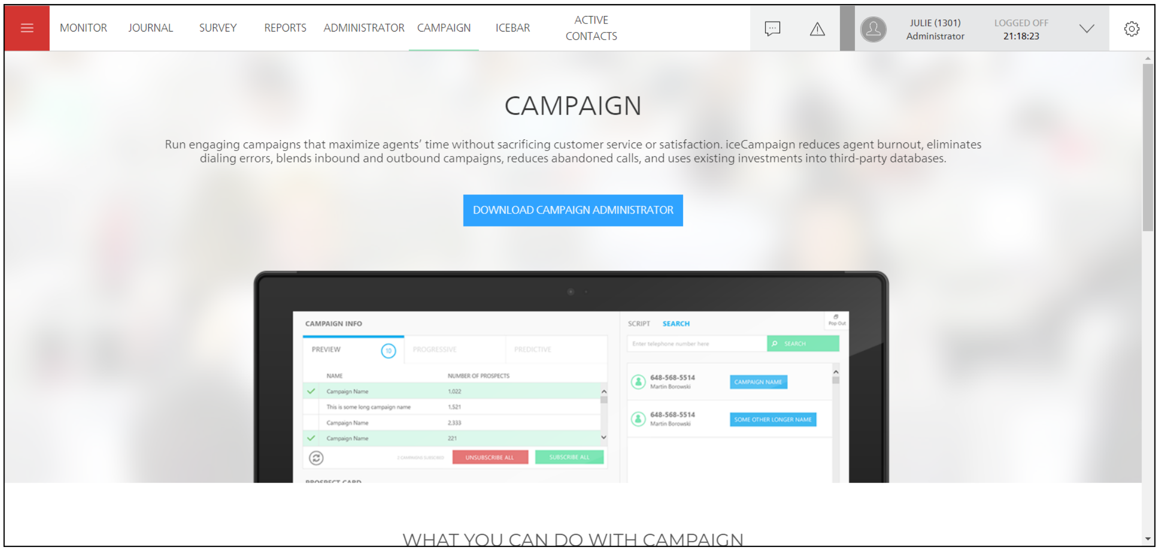
As an on-prem customer, you can download and install iceAdministrator from the Administrator tab. As a cloud customer, you will have access to Citrix through the Administrator tab. For more information on iceAdministrator, refer to the iceAdministrator User Manual. For information on iceWorkflow Designer,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



Campaign Tab

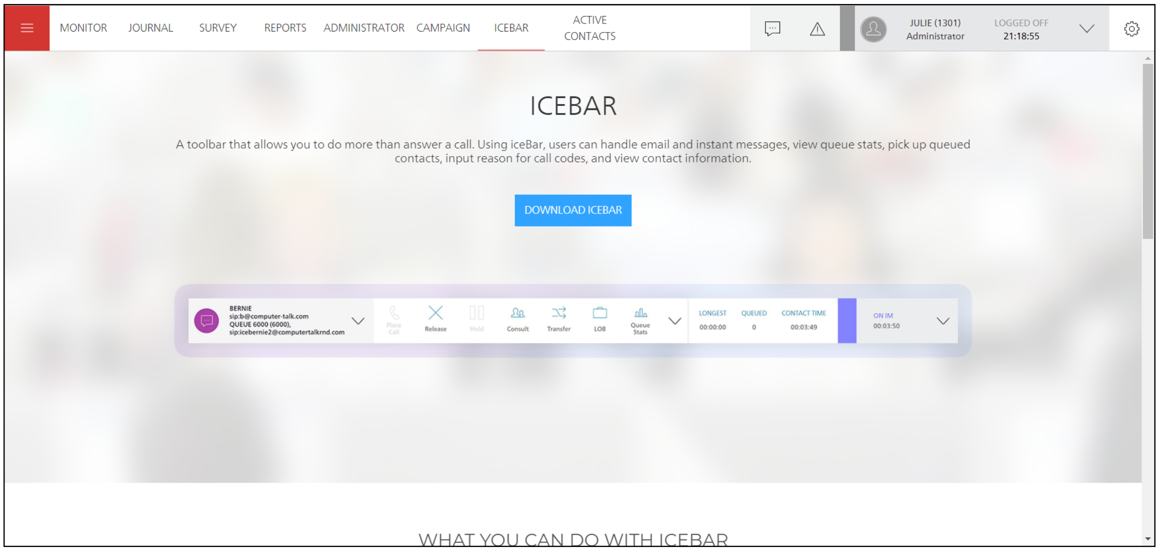
iceCampaign is an outgoing calls module for ice. From the Campaign tab, you can download iceCampaign Administrator that you will use to create and schedule campaigns.

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.



iceBar Tab

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



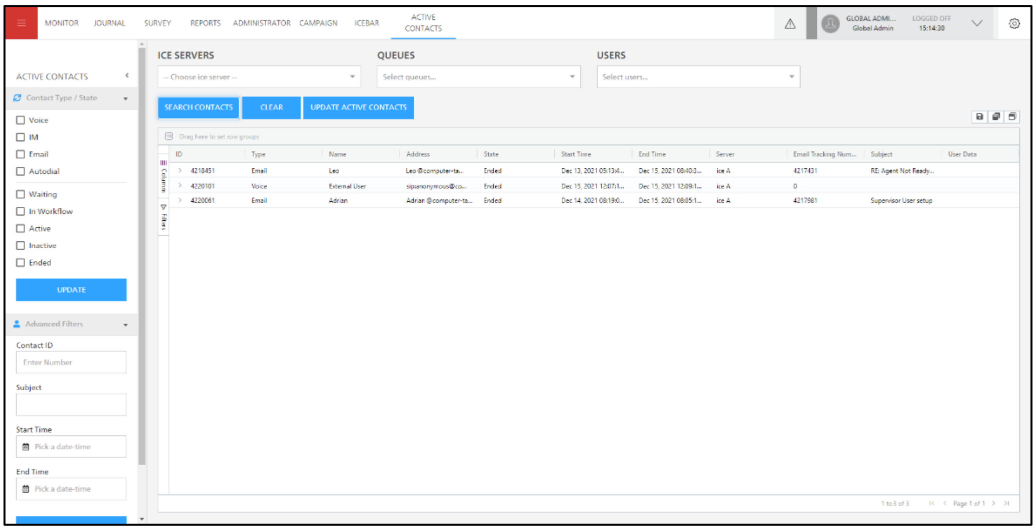
Active Contacts Tab

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.

<u>Using Active Contacts, you can:</u>

- 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:



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

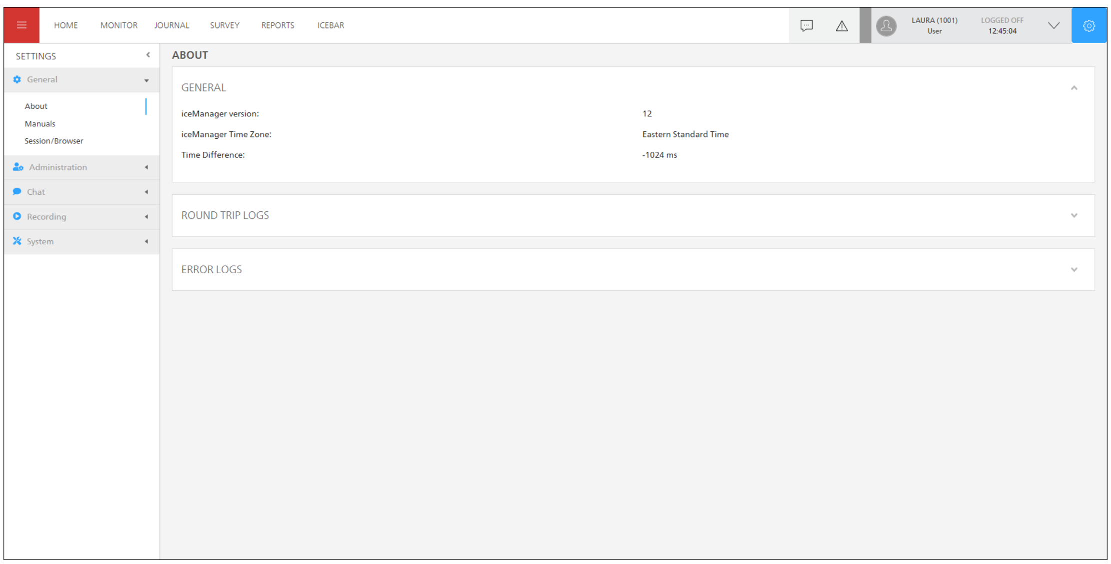
The General section in the sidebar contains information about browser settings, language, users, manuals, and ice. By default, items in the General sidebar option are shown.

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.

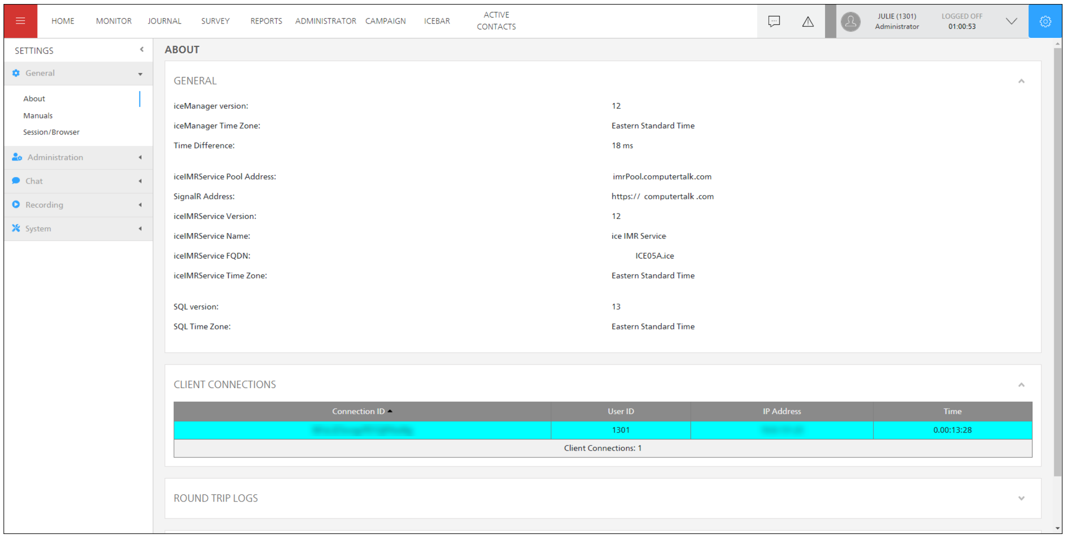
Note: you can collapse the individual items in the sidebar into the header by clicking the downward pointing arrow.

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

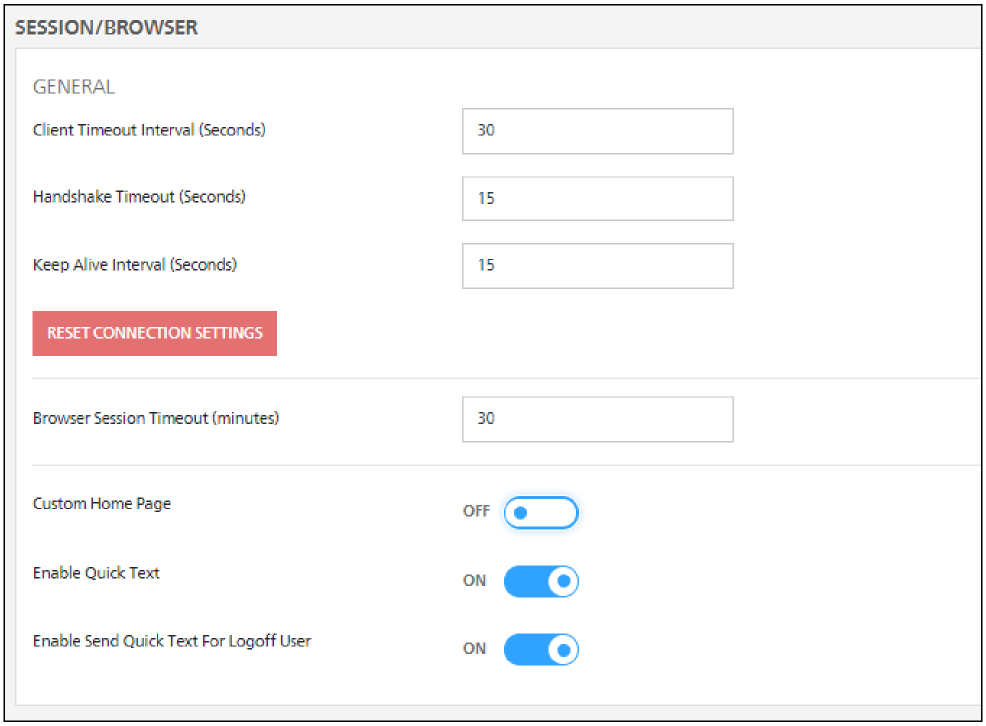
Launch our Education and Documentation site to find a full set of manuals and e-learning material. You will need a user name and password to gain access. Please contact your administrator if you do not have one.

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.



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

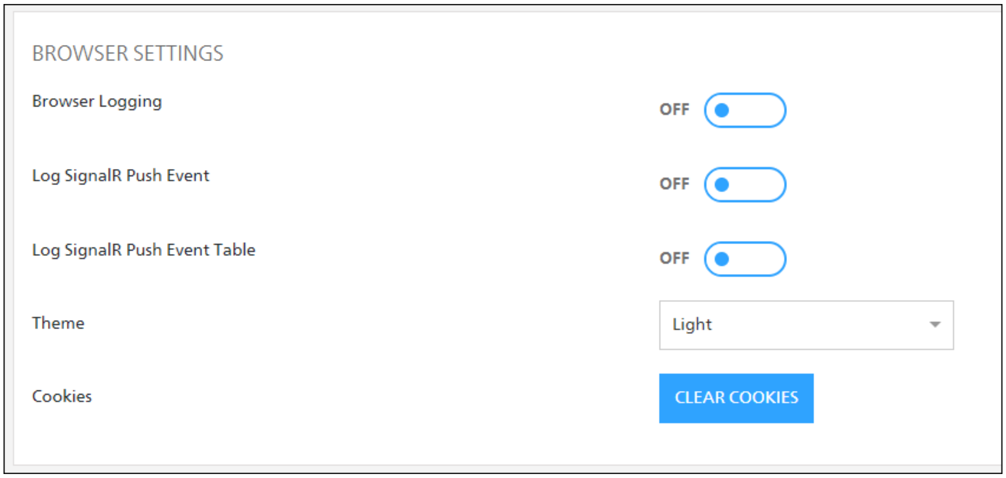
Parameter	Allowable values	Description
Client Timeout Interval	The default is 30 seconds	The server considers the client disconnected if it hasn't received a message (including keep-alive) in this interval. It could take longer than this timeout interval for the client to be marked disconnected due to how this is implemented. The recommended value is double the Keep-Alive Interval value.
Handshake Timeout	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.
Keep-Alive Interval	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.
Browser Session Timeout	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.
Custom Home Page	On/Off	Will enable or disable the custom home page. When this is set to *On*, you can configure the custom URL link that will display in the Home Page.
Enable Quick Text	On/Off	Will enable or disable Quick Text capabilities in iceMonitor and iceBar for web.
Enable Send Quick Text To Logoff User	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

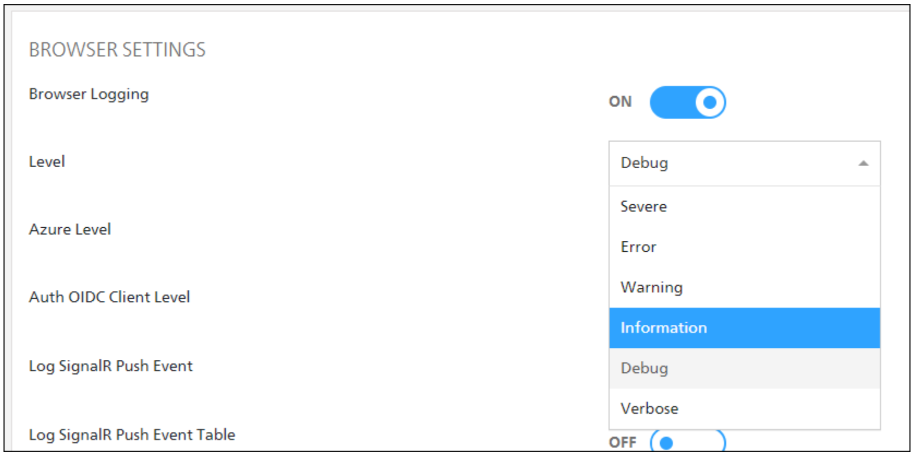
The below screenshot displays the default view of the Browser Settings for Global Administrators and Switch Administrators.



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

Parameter	Allowable values	Description
Browser Logging	On/Off	Select *On* to enable logging to the browser console. By default, Browser Logging is disabled.
Log SignalR Push Event	On/Off	Select *On* to enable logging of SignalR Push Event to browser. SignalR Push Event logs single events one at a time where: • "Count" is the number of messages received. • "Last" is the time it took to receive your last message. • "Max", "Min" and "Avg" are based on all your received messages so far. By default, Log SignalR Push Event is disabled.
Log SignalR Push Event Table	On/Off	Select *On* 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.

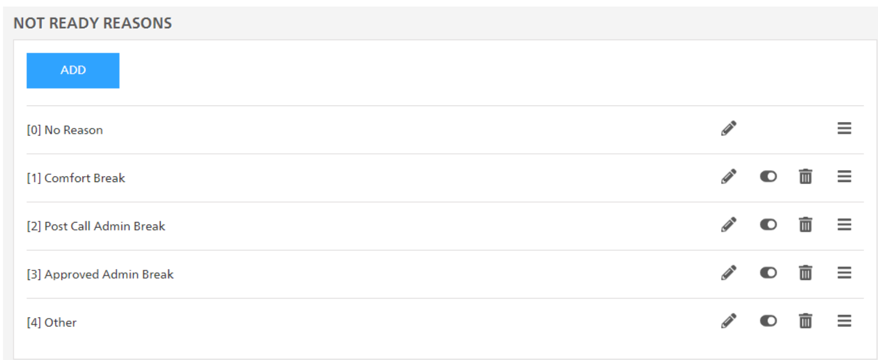

BROWSER SETTINGS
Browser Logging
ON
Level
Debug
Severe
Error
Warning
Information
Debug
Verbose
Azure Level
Auth OIDC Client Level
Log SignalR Push Event
Log SignalR Push Event Table
OFF

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.

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.

<u>To delete a Not Ready Reason:</u>

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.

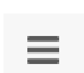
<u>Disable a Not Ready Reason:</u>

- 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.

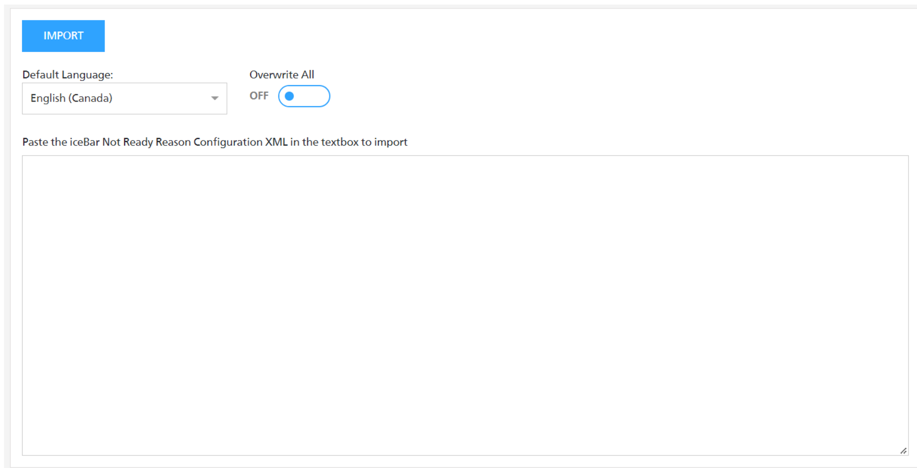
<u>Reorder a Not Ready Reason:</u>

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



<u>To import Not Ready Reasons from XML format:</u>

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:

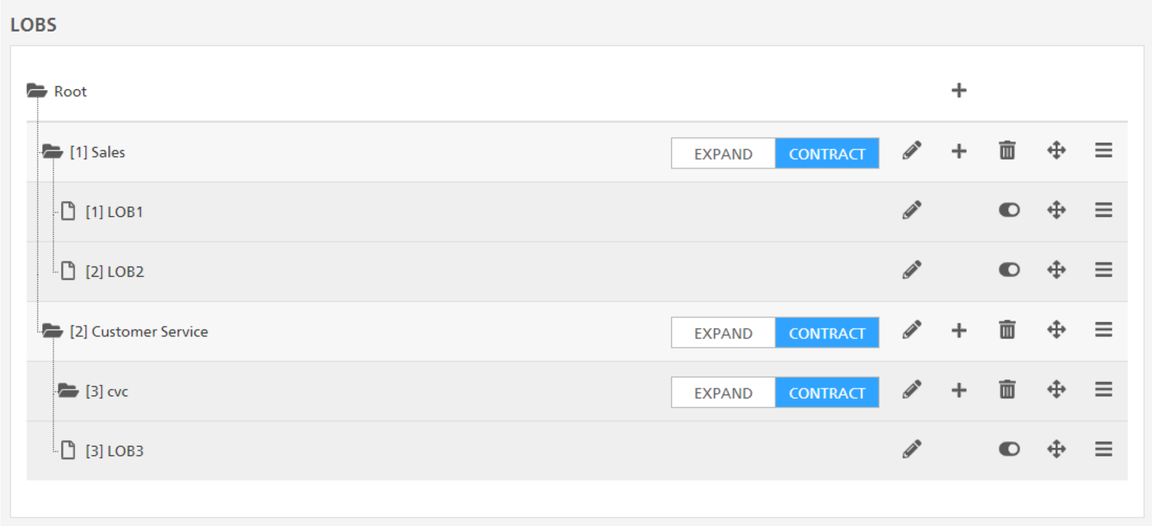


4. Click the Import button to import the Not Ready Reasons.
5. New Not Ready Reason fields open populated with your imported Not Ready Reasons.
6. If you clicked *Save*, the 'Not Ready Reasons Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert,* the 'Revert Changes'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

Line of Business Codes

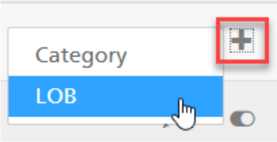
This section allows users to view the Line of Business (LOB) codes that have been configured for the system. Users with administrator privileges or higher are also able to add, edit, disable, or move LOBs.

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

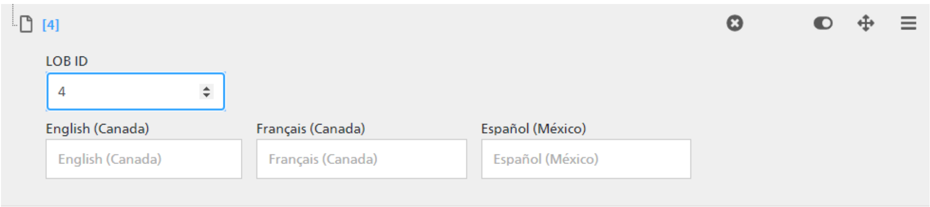


To add an LOB:

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.



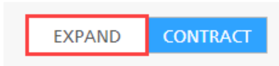
3. Enter the English and French names for the new LOB.



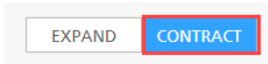
4. Click *Save* to save the changes. Click *Revert* to cancel the changes.
5. If you clicked *Save*, the 'LOBS Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert,* the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No* to keep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

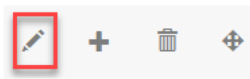


- Click Contract on the LOB category to contract this category in the LOB window on iceBar.



To edit an LOB:

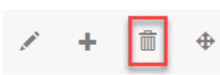
1. Select the pencil icon in the row of the LOB you would like to edit.



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.

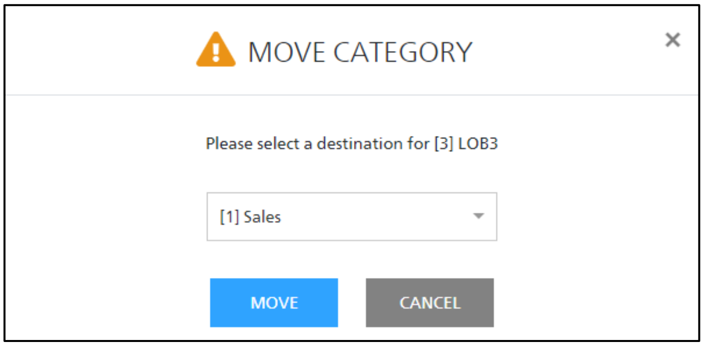
Disable an LOB:

- 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 you like to move the LOB.



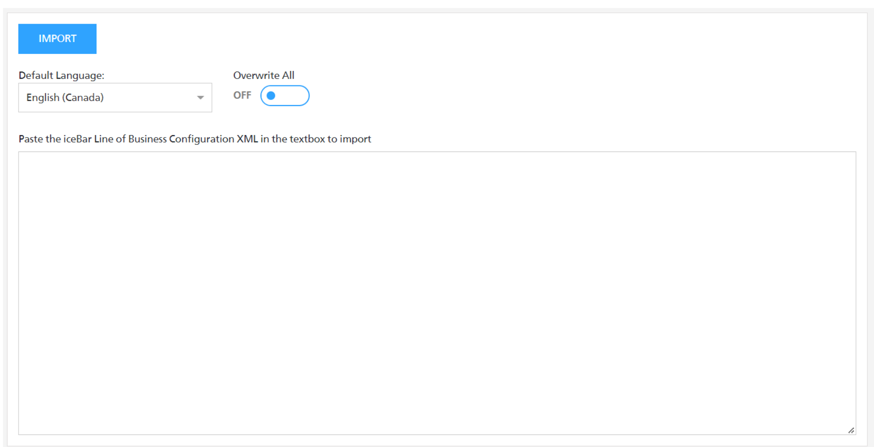
3. Click *Move* to successfully move the LOB to another category.

<u>Reorder an LOB or Category:</u>

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

<u>To import LOBs from XML format:</u>

1. From the dropdown list, select the default language for the LOBs you are you 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:



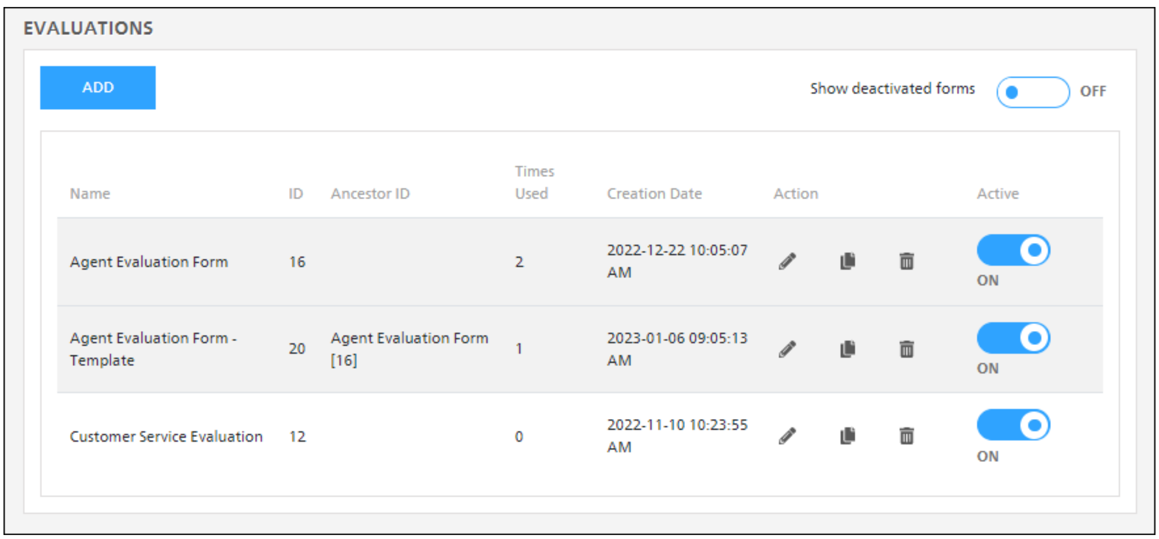
4. Click the Import button to import the LOBs.

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.



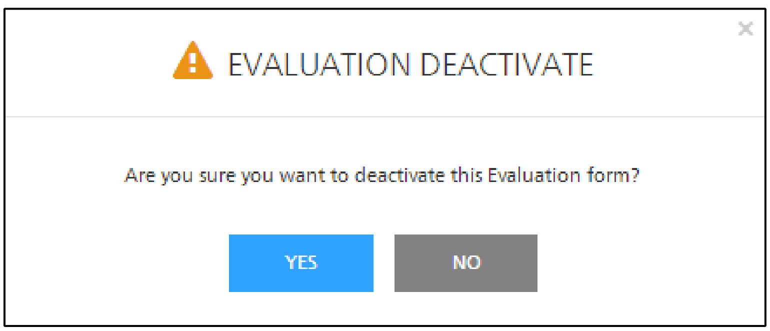
The table below explains each column:

Column	Description
Name	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.
ID	Identification number of the form. Allows you to differentiate between evaluation forms with the same name.
Ancestor ID	Identification number of the parent form, that is, the form where it was copied from.

Times Used	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.
Creation Date	The date and time the evaluation form was created.
Action	Icons that you click to edit, clone, and delete existing evaluation forms.
Active	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.

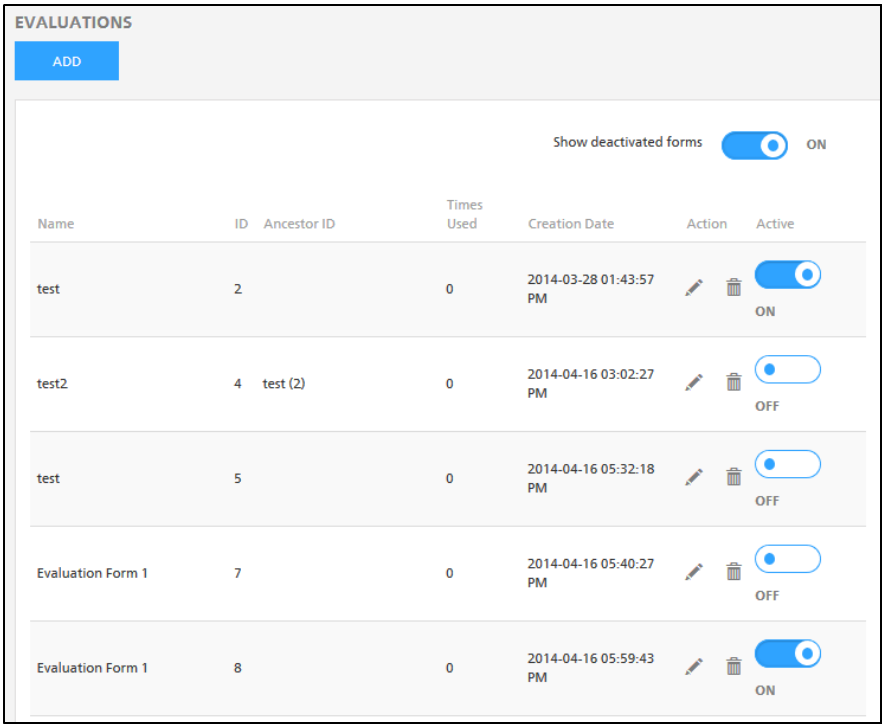
To deactivate the evaluation form, flip the Active toggle off. An “Are you sure you want to deactivate this Evaluation form?” message appears.



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

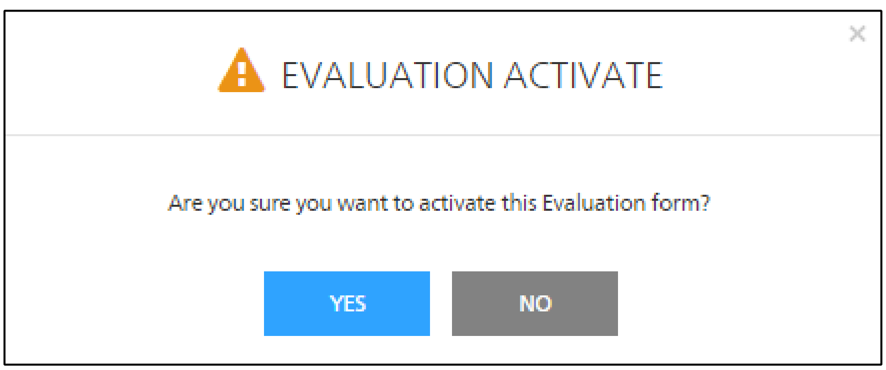
Once you click *Yes* you will see the ‘Evaluation deactivate succeeded’ message.

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.



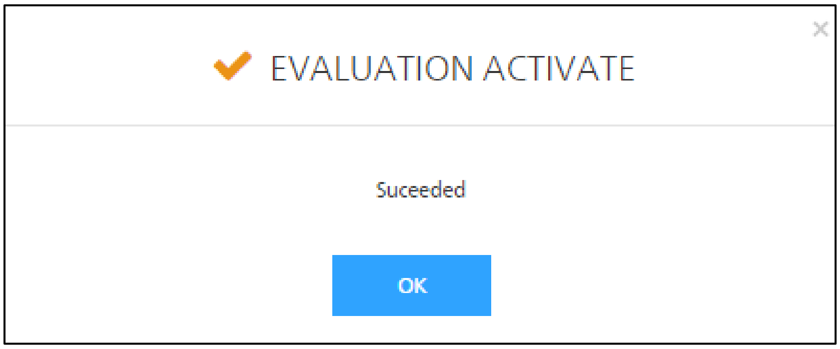
To reactivate a form, toggle the Active switch On.

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

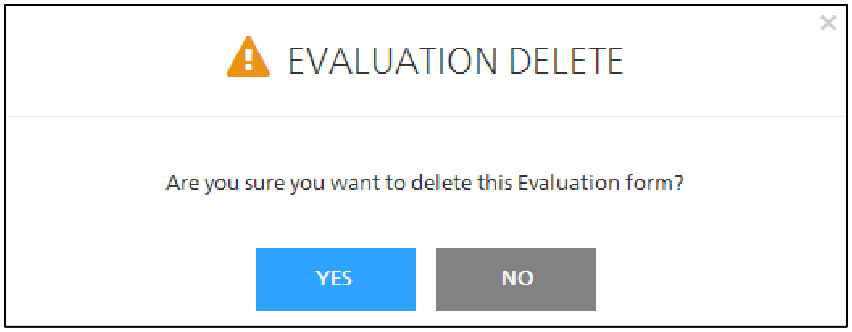


To proceed, click *Yes*. To cancel, click *No*.

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.

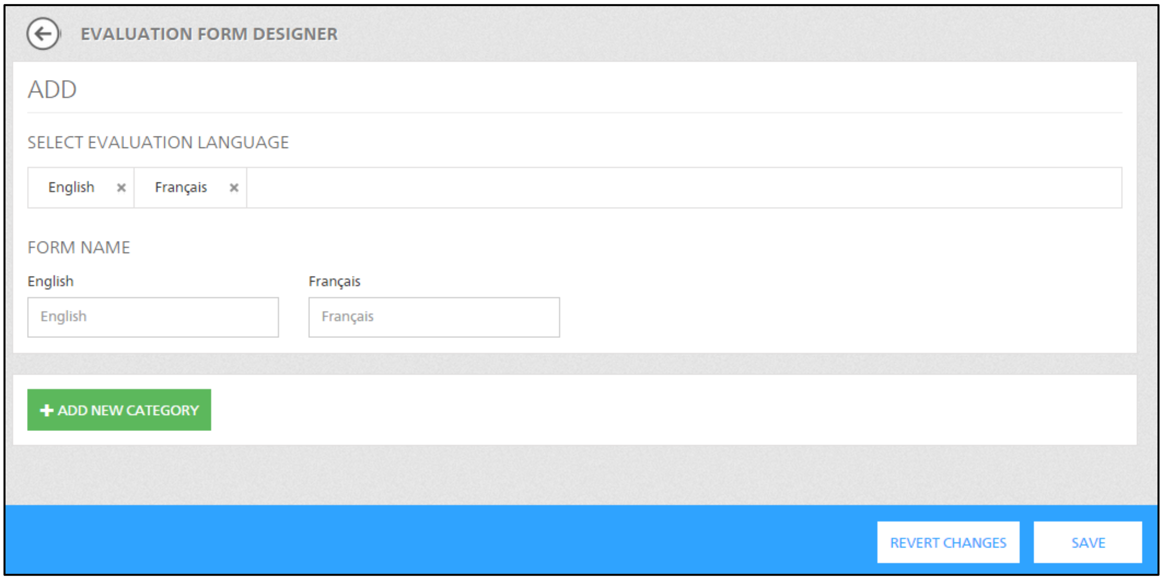
Important: Evaluation form deletion will delete all evaluations associated with it. You will not be able to view reports on evaluation results for deleted forms.

Creating a New Evaluation Form

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

1. Click *Add*.

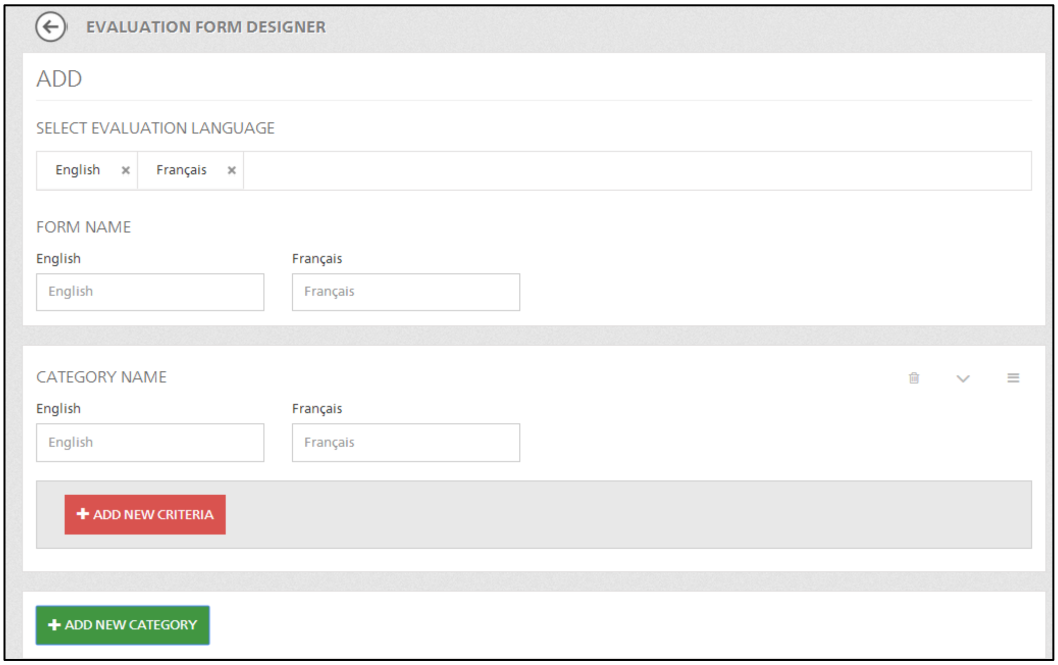
   The Evaluation form designer appears.



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.

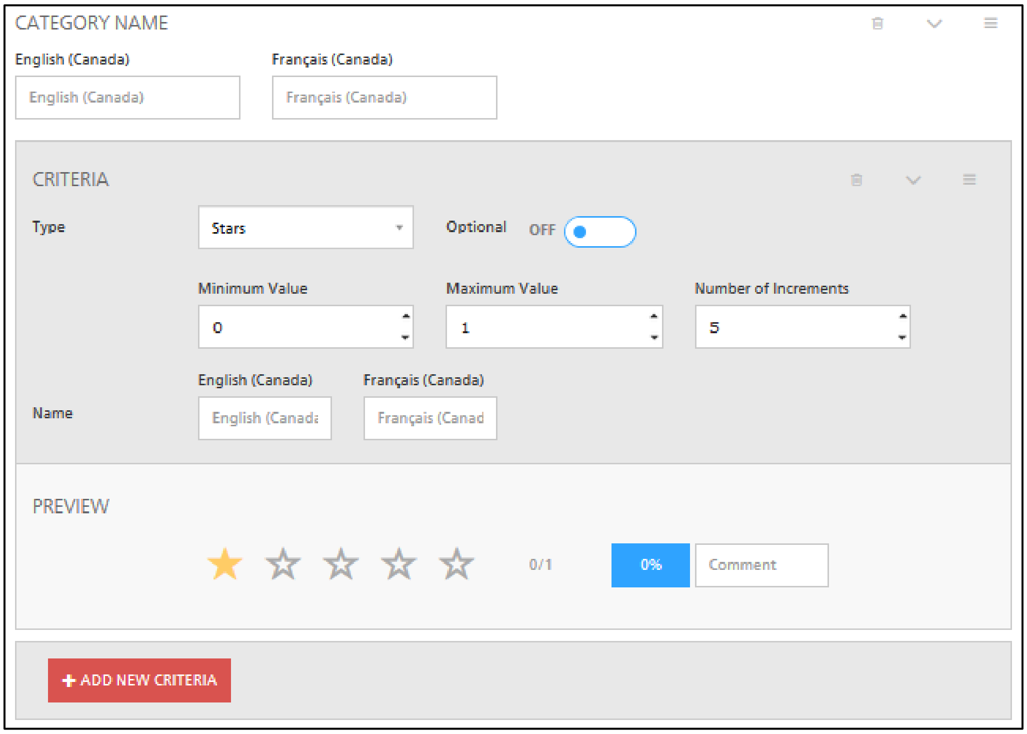
3. Enter the name of the form. The recommended length for names is less than 25 characters.

4. Click *Add New Category* to add a new group of questions. Fill in the name field(s).



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

   The criteria area expands to show additional options.



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.
Category		
Category Name	Free text	Enter category name.
Criteria		
Criteria Type	▪ Stars ▪ Buttons ▪ Drop Down ▪ Slider	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	Enter the number of increments, reflecting how each star, button, drop-down or slider marker increments in score value. The maximum number of increments for each Criteria Type is as follows: ▪ Stars – max 10 ▪ Buttons – max 5 ▪ Drop Down – max 10 ▪ Slider – max 100
Criteria Name	Free text	Enter criteria name.

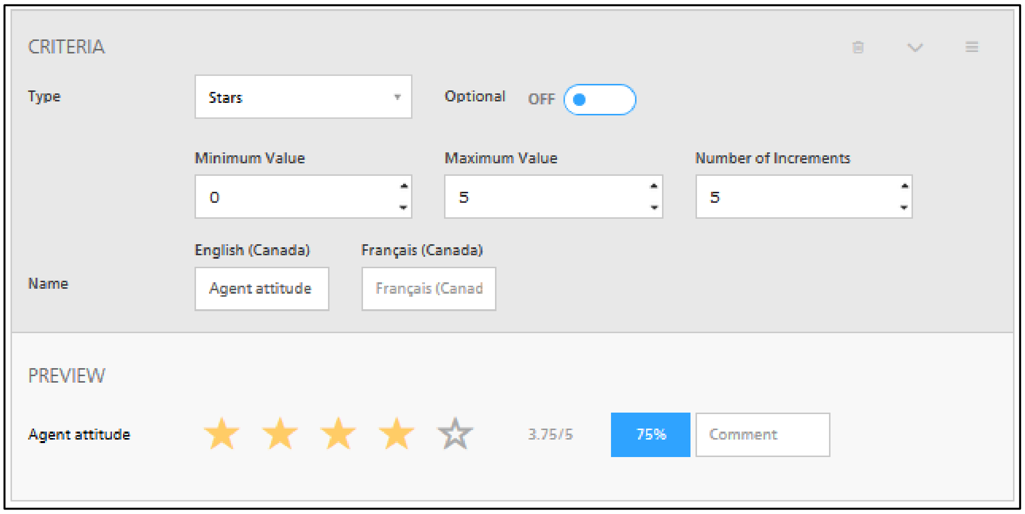
Criteria Types

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		✓

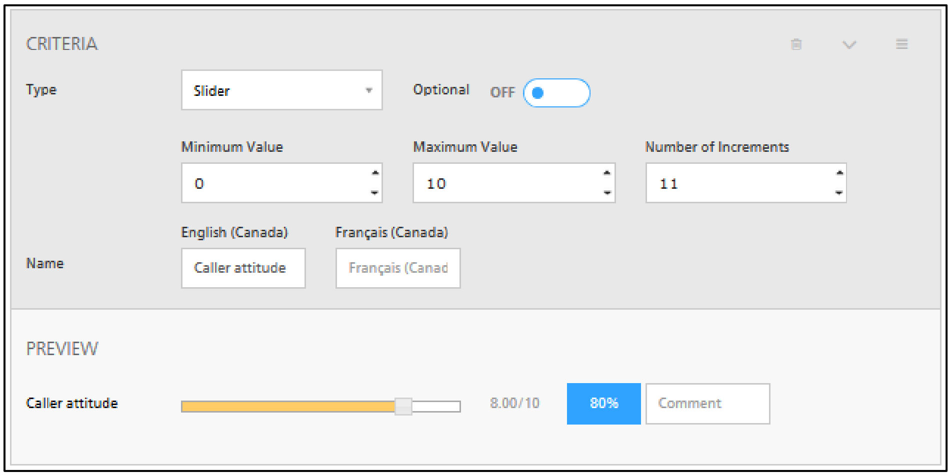
Stars

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



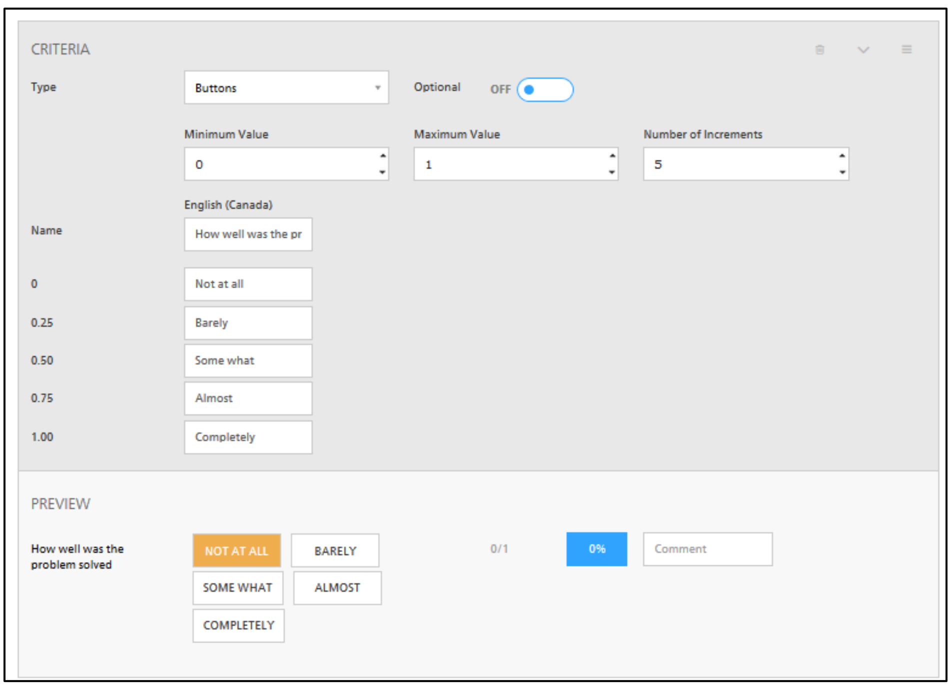
Slider

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



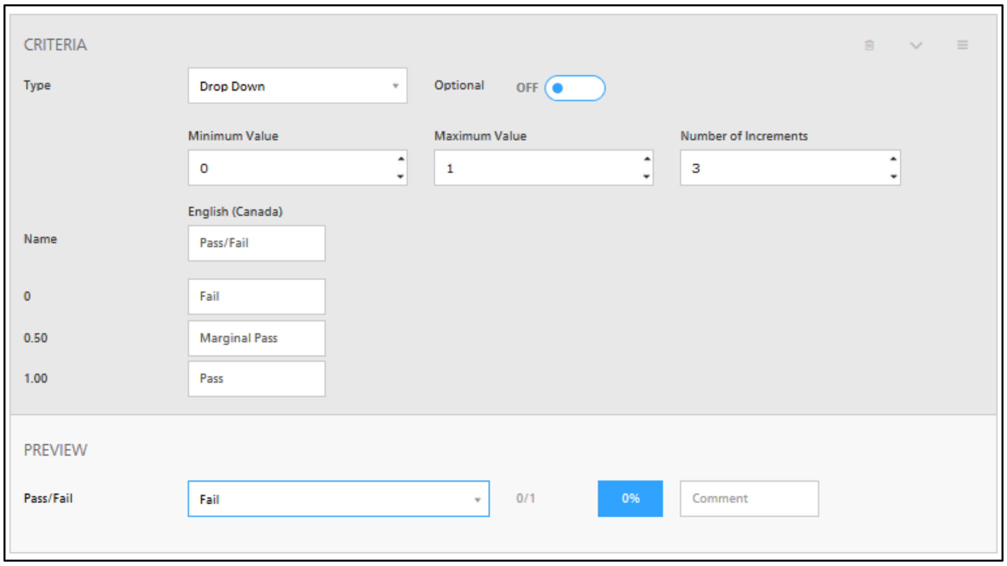
Buttons

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



Drop Down

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



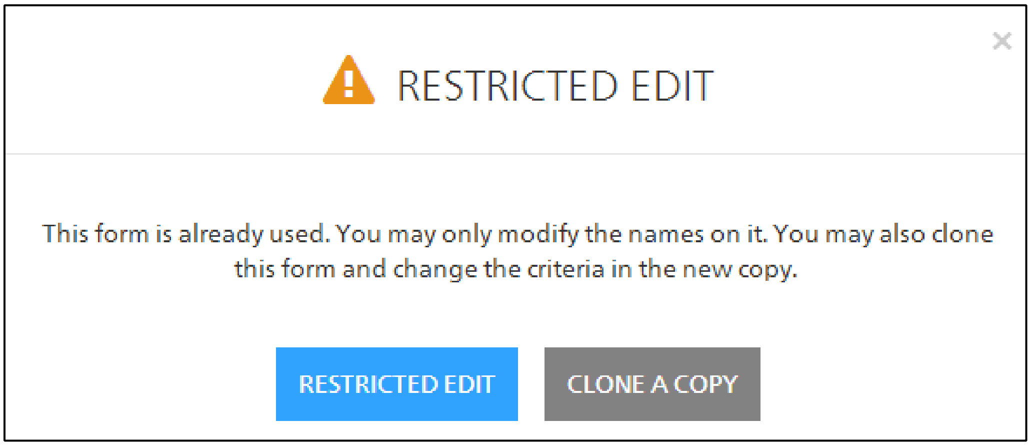
Once you are finished, click *Add*. If you wish to cancel this form, click at the top of the page.

The 'Revert Evaluation' message will appear.

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.

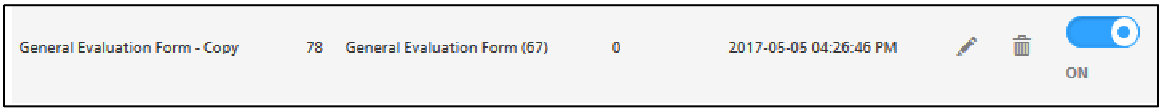
- To add or delete categories and criteria to the evaluation form, select *Clone a Copy*.
    - When a clone is created, new report entries are also created in the database. You can add, delete, and modify all parts of the evaluation form.
- To make modifications to the wording of a category or criteria, 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.

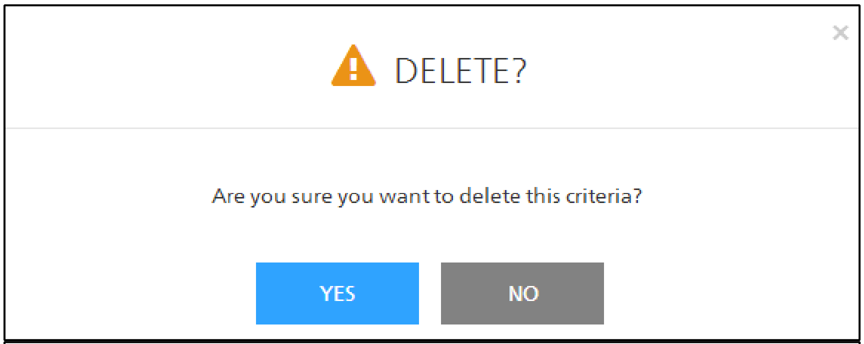
In this mode, you can add evaluation languages and modify all aspects of each criterion. Clone a copy duplicates the structure, using the original as a template for the cloned version.

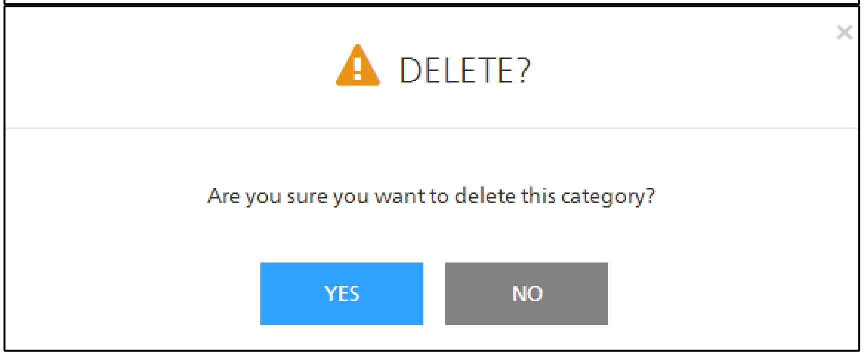


Delete Criteria or Category

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?”



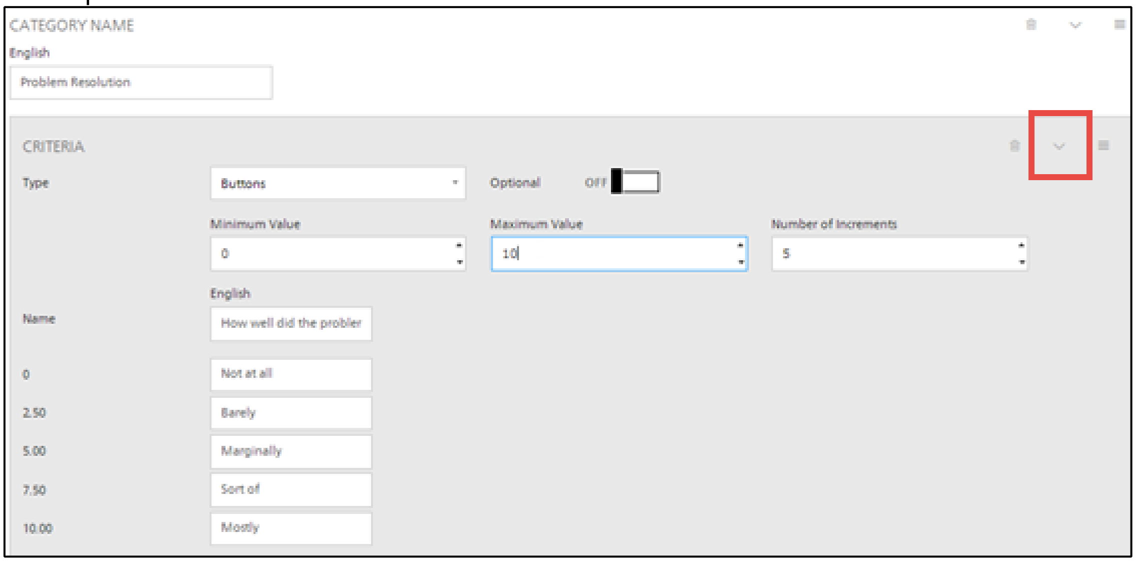


Click *Yes* to proceed with the deletion and click *No* to cancel the deletion.

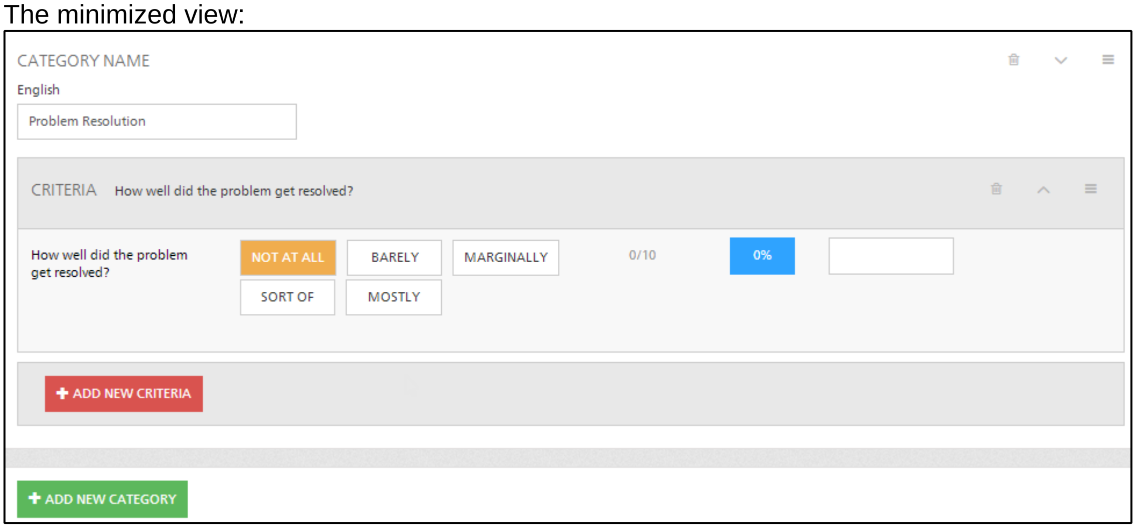
Minimize Criteria or Category

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

The expanded view:

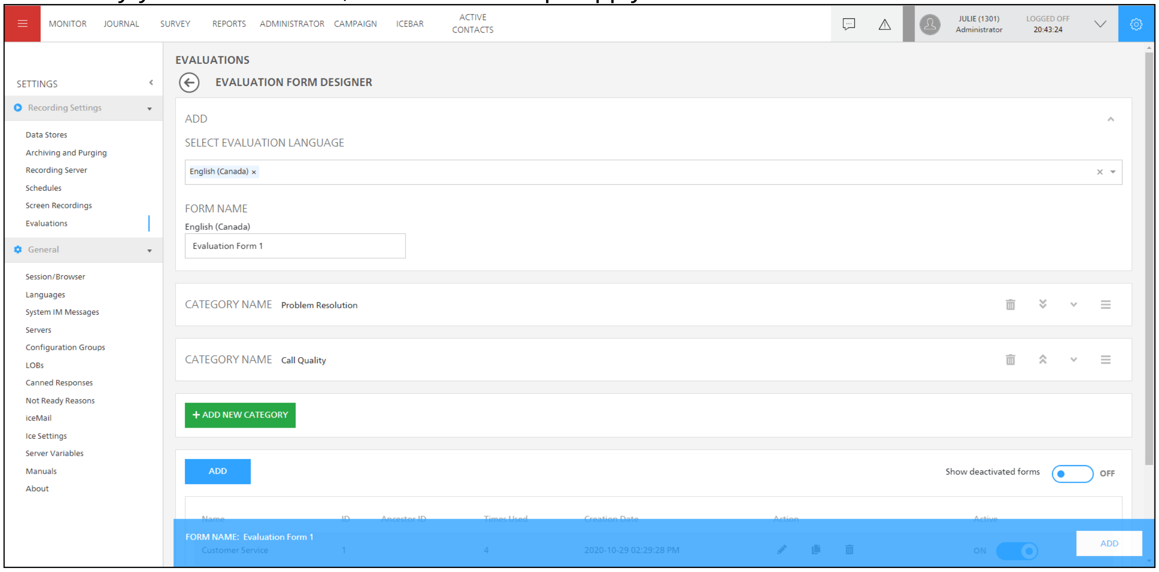


The minimized view:

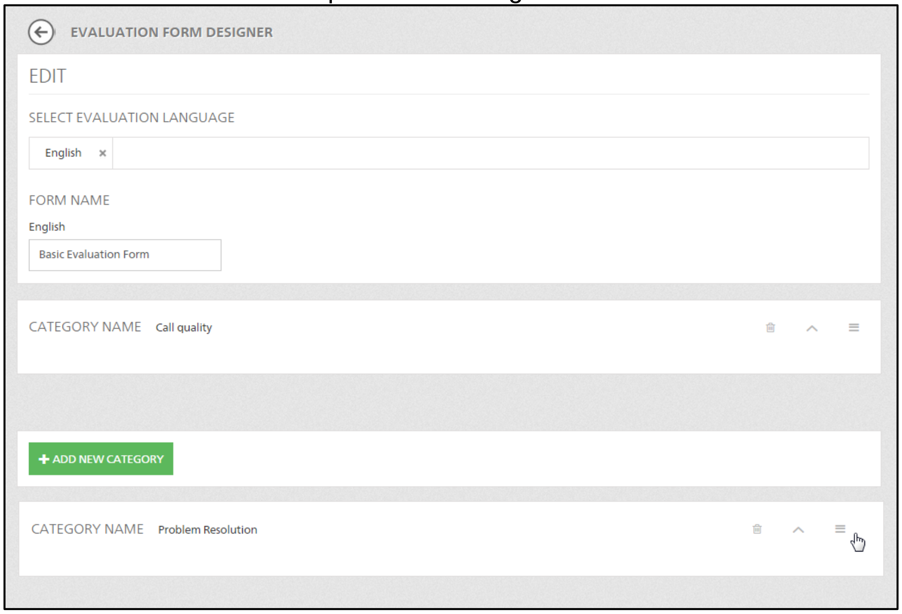


Move Criteria or Category

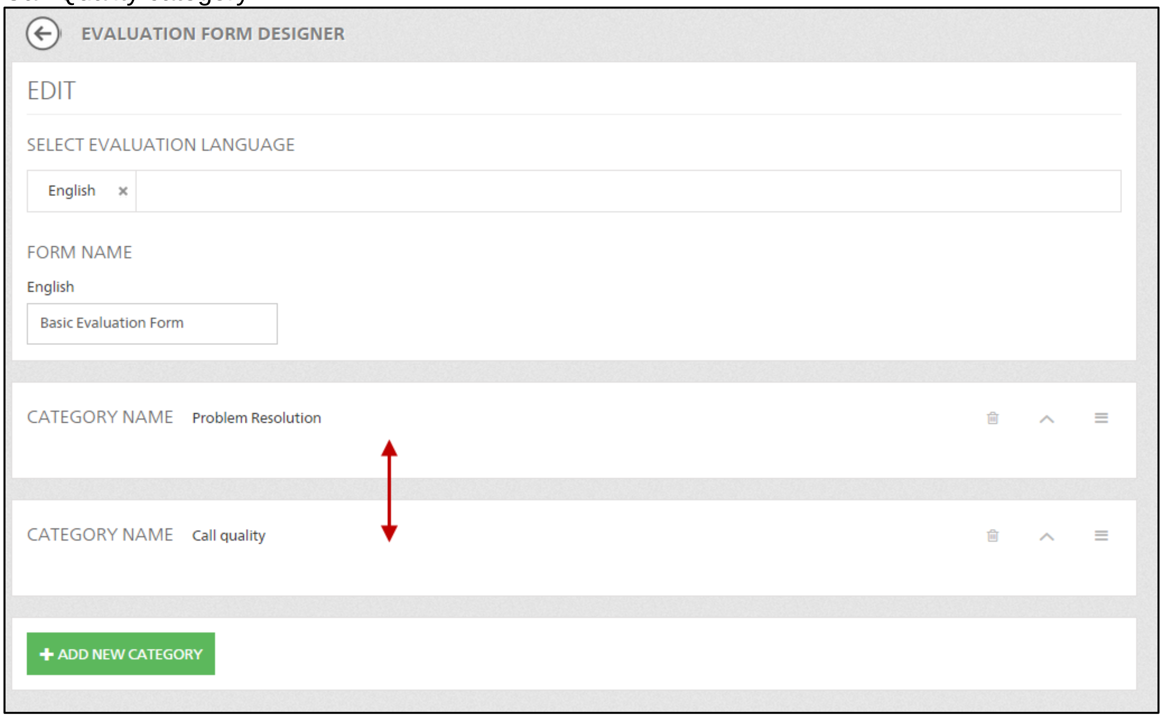
It is recommended that you minimize categories prior to moving them because it is easier to drag and drop smaller sections of the page. The way you move a category is the same as the way you move criteria, so the same steps apply.



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.

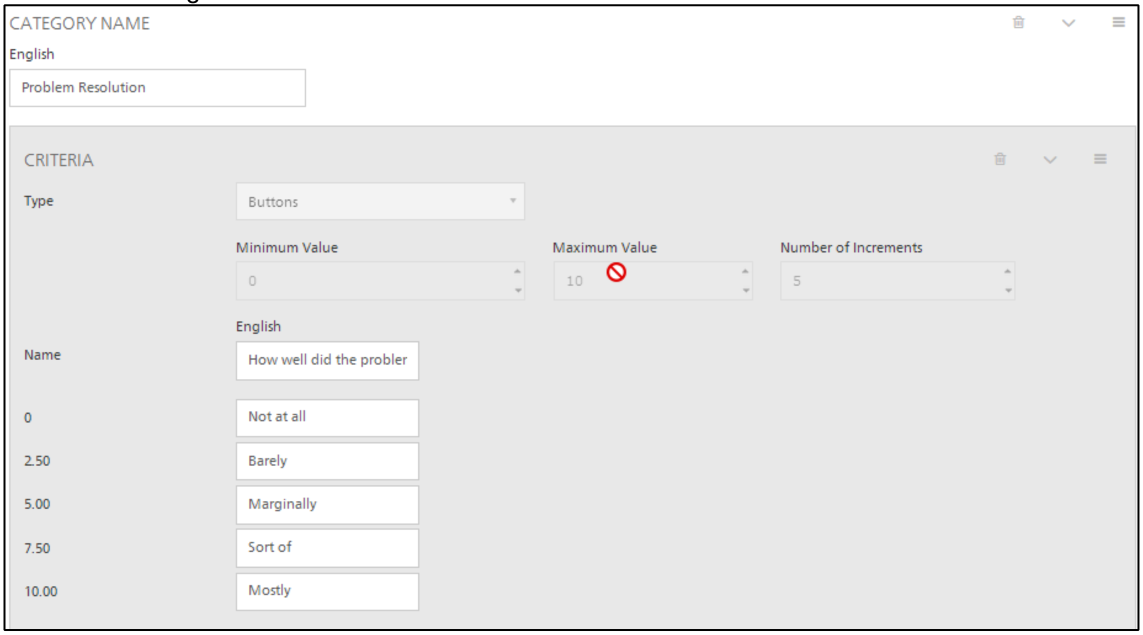


In the screenshot below, the Problem Resolution category has been placed above the Call Quality category.



Restricted edit

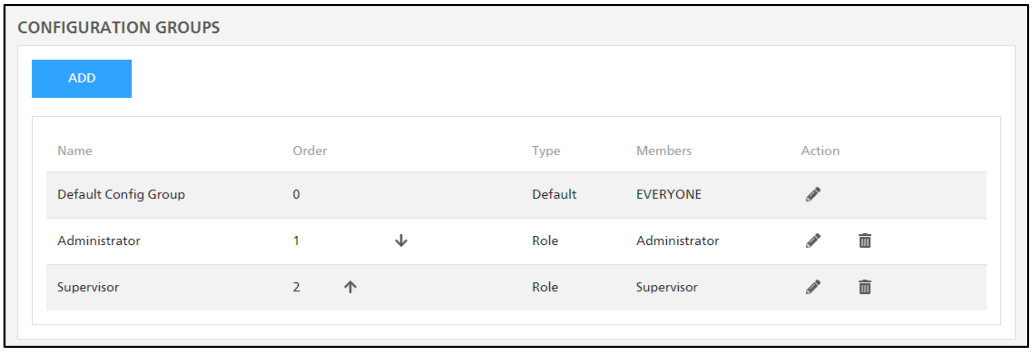
In Restricted edit mode, you can change the category name and the content in the text fields. You can also add a new evaluation language. However, elements within each criterion (e.g., Type, Minimum Value, Maximum Value, and Number of Increments) cannot be changed.



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

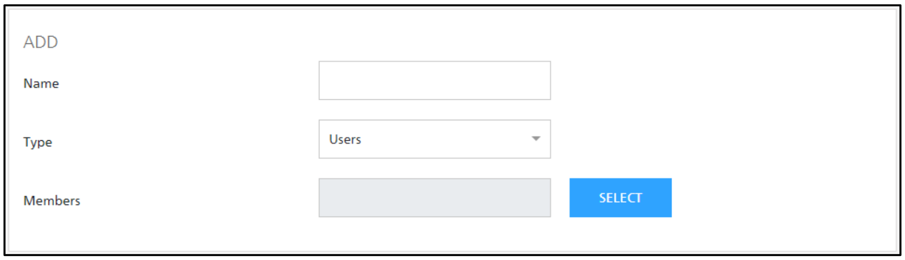
The configuration groups section allows an administrator to group a set of users and apply specific settings to only those users.



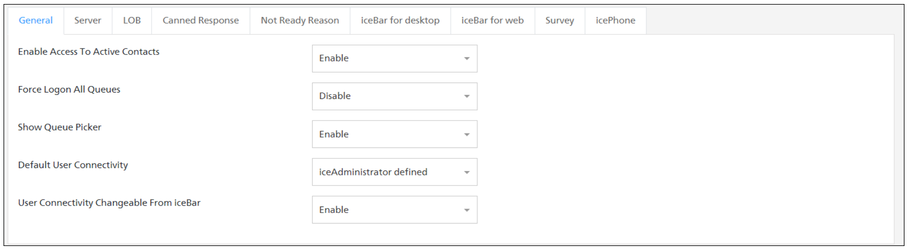
Column Heading	Details
Name	The name of the configuration group.
Order	This illustrates the hierarchy of the configuration groups. If a configuration item is set to be inherited, it would inherit from a parent group that they also belong to. Use the arrows to change the order of the configuration group.
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
Action	Allows users with administrator privileges or higher to edit or delete the configuration groups. All other user types cannot add or modify configuration groups

<u>To add a configuration group:</u>

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

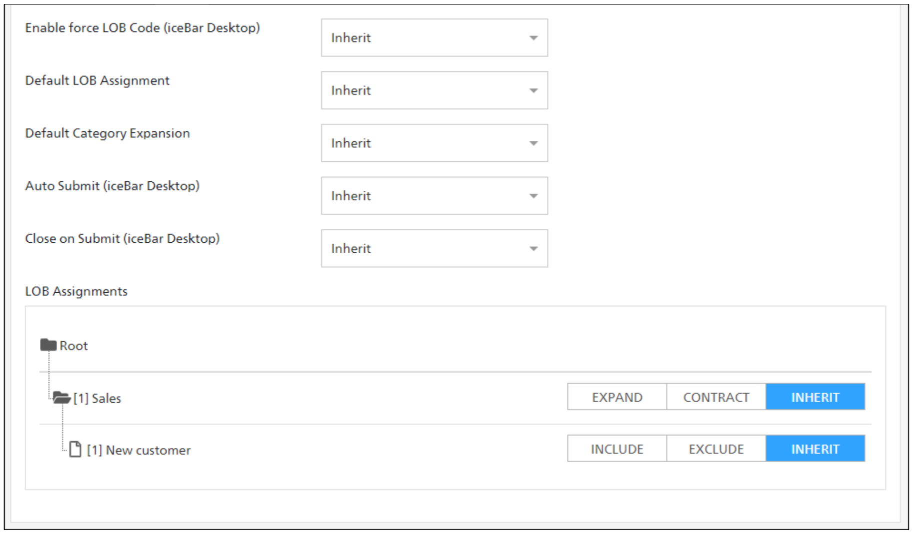


3. Configure the General properties.

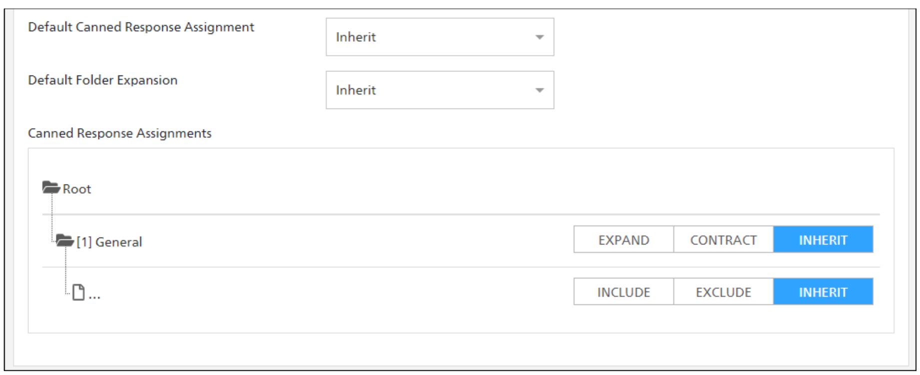


4. Configure the Server Assignments.

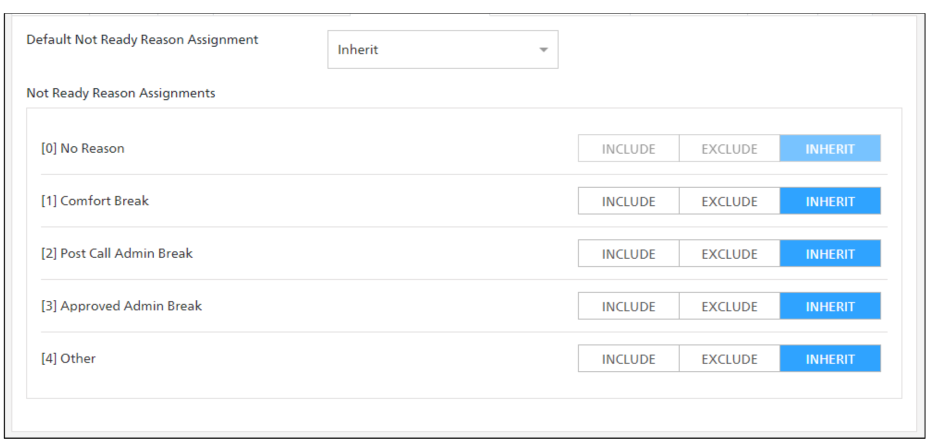
5. Configure the LOB Assignments.



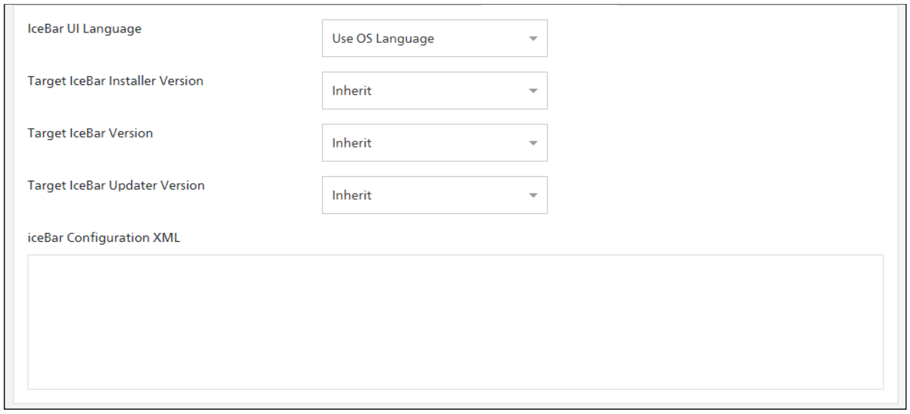
6. Configure the Canned Responses if your ice system allows IM handling.



7. Configure the Not Ready Reasons.



8. Configure the iceBar for Desktop.



9. Configure the iceBar for Web.

10. Configure the Survey Permissions, if applicable.

11. Configure the icePhone settings, if applicable.

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 – *Users*, *Teams*, or *Role*
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
General	
Enable Access to Active Contacts	Options include *Enable*, *Disable*, and *Inherit* which will decide whether this configuration group has access to the Active Contacts tab. 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. **Note:** Only users with administrator privileges or higher can have access to the Active Contacts tab.
Force Logon All Queues	Options include *Enable*, *Disable* and *Inherit* which will decide whether this configuration group will be forced to logon to all assigned queues. 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.
Show Queue Picker	Options include *Enable, Disable* and *Inherit* which will decide whether this configuration group has access to the queue picker. 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.
Default User Connectivity	Options include *iceAdministrator defined, icePhone* and *Inherit* which will decide the default connectivity for users in this configuration group. If this setting is set to iceAdministrator defined, it will set the remote DN field in the global iceBAR XML to blank, prompting the server to use the iceAdministrator configuration when the agent logs into ice. If set to icePhone, it will set the remote DN field to “8:acs:” which informs the server that the agent will use icePhone. The Inherit 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 *Enable, Disable* and *Inherit* 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.
Server	
Assigned Server	Shows all the ice servers that the configuration group has been assigned to. To remove a server from this list select the *remove* 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 *add* 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.
LOB	
Enable force LOB Code (iceBar Desktop)	Options include *Enable*, *Disable*, and *Inherit* 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 **Enable force LOB Code** is set to *Enable*. 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 *Include, Exclude*, and *Inherit* which will decide whether this configuration group has access to the default LOB assignment. 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.
Default Category Expansion	Options are *Expand, Contract*, and *Inherit* which will decide whether this configuration group's LOBs will be viewed in expanded or contracted form by default. 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.
Auto Ready (iceBar Desktop)	This option is available when **Enable force LOB Code** is set to *Enable*. Options are *Enable*, *Disable* and *Inherit* which will decide whether this configuration group will automatically enter into the ready state after submitting the LOB assignments. 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 Seconds Before Setting Agent to Ready (iceBar Desktop)	This option is available when **Enable force LOB Code** is set to *Enable*. 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 *Enable, Disable*, and *Inherit* 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 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.

Configuration Group Properties	
Parameter	**Details**
Number of Seconds Before Auto Submit After LOB Selection (iceBar Desktop)	This option is available when **Auto Submit** is set to *Enable*. Enter the number of seconds this configuration group will have between assigning LOBs and automatic submission.
Close on Submit	Options are *Enable, Disable*, and *Inherit* which will decide whether this configuration group will need to manually close the iceBar LOB window after submitting their LOBs. 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.
LOB Assignments	Shows all available categories and LOBs. Users have the options *Include*, *Exclude*, or *Inherit* for each LOB. 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. By default, this field is set to *Inherit*.
Canned Response	
Default Canned Response Assignment	Options are *Include, Exclude*, and *Inherit* which will decide whether this configuration group has access to the default Canned Response assignment. 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.
Default Folder Expansion	Options are *Expand, Contract*, and *Inherit* which will decide whether this configuration group's Canned Responses will be viewed in expanded or contracted form by default. 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.

Configuration Group Properties	
Parameter	**Details**
Canned Response Assignments	Shows all available folders and Canned Responses. Users have the options *Expand*, *Contract*, or *Inherit* for each folder. Users have the options *Include*, *Exclude*, or *Inherit* for each Canned Response. 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. By default, this field is set to *Inherit*.
Not Ready Reason	
Default Not Ready Reason Assignment	Options are *Include, Exclude*, and *Inherit* which will decide whether this configuration group has access to the default Not Ready Reason assignment. 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.
Not Ready Reason Assignments	Shows all available Not Ready Reasons. Users have the options *Include*, *Exclude*, or *Inherit* for each Not Ready Reason. 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. By default, this field is set to *Inherit*.
iceBar for desktop	
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 *Inherit* 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 *Inherit* and *Release\Latest*. Release\Latest will use the latest version within the Release channel folder. **Note:** 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**
	versions. Users also have options *Inherit* and *Release\Latest*. Release\Latest will use the latest version within the Release channel folder. **Note:** Only Global Administrator has access to this configuration option.
Target iceBar Updater Version	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. This dropdown shows all available iceBar versions. Users also have options *Inherit* and *Release\Latest*. Release\Latest will use the latest version within the Release channel folder. **Note:** Only Global Administrator has access to this configuration option.
iceBar Configuration XML	Contains the iceBar configuration settings in xml format. **Note:** The override=”always” attribute in the Queues element in the iceBar configuration will be added if *Force Logon All Queues* is enabled.
iceBar for Web	
Enable web iceBar	Options include *Enable*, *Disable*, and *Inherit* which will decide whether this configuration group has access to iceBar for web. 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.
Enable Set User Data	Options include *Enable*, *Disable*, and *Inherit* which will decide whether this configuration group has access to modifying the User Data field. 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.
Maximum PAQ Number	Options include *Custom* and *Inherit* which will decide the number of rows this configuration group has in their PAQ. The Custom option displays a field to enter the number of PAQ rows for this configuration group. The Inherit option forces the system to look at a parent configuration group

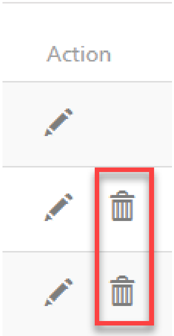
Configuration Group Properties	
Parameter	**Details**
	that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
iceBar Buttons	Options include *Custom* and *Inherit* which will decide the buttons displayed on the iceBar 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. 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.
Survey	
Surveys	Options include *None, View (View), Edit (View / Edit)*, 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.
Survey Runs	Options include *None, View (View), Edit (View / Edit)*, 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.
Survey Response	Options include *None, View (View), Delete (View / Delete)*, 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.
Configuration Groups	Displays the current configuration groups that have been added to the system.

Configuration Group Properties	
Parameter	**Details**
icePhone	
Close Window on Release	Options include *Enable, Disable* and *Inherit.* 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.

<u>To delete a configuration group:</u>

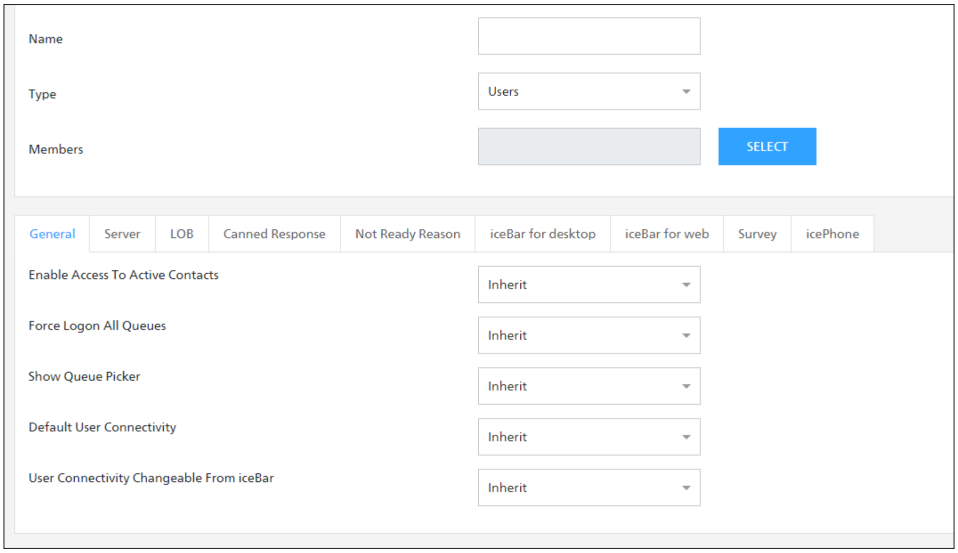
1. Under 'Action', select the trash icon in the row of the group you would like to delete.



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

<u>To edit a configuration group:</u>

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



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.

<u>Configure iceBar for Web</u>

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.

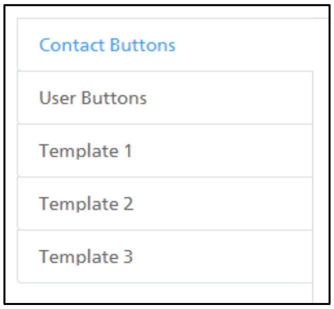
Buttons panel summary		
Button	**Available when**	**Use Button to…**
Answer	Alerting with a contact.	Answer a call alerting at your workstation if off-hook.
Release	On a contact.	End the contact you are on.
Place Call	Logged on and not handling another call.	Place a call to another user, or to an external 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.



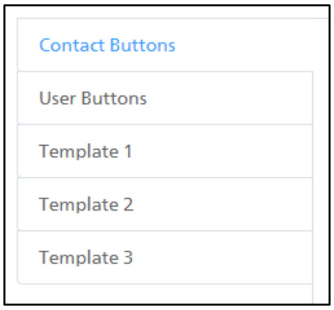
Note: Templates 1, 2, and 3 can be used to create and save alternative layouts. Templates can be copied and imported into the Contact Buttons or User Buttons pages. Refer below to learn how to copy and import templates.

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.

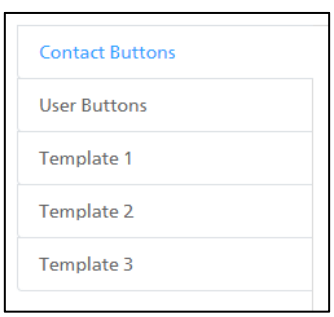
3. The column on the left shows the other buttons available for the user to add to the toolbar. The column on the right shows the buttons currently displayed on the toolbar.
4. In the column on the right, highlight the button that you wish to remove from the Buttons panel.
5. Click  to move the selected 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

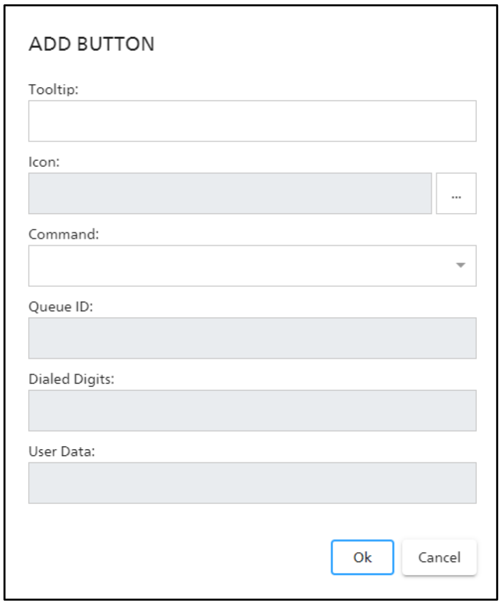
iceBar for Web allows you to add custom buttons with additional capabilities. It also allows you to edit the appearance of a particular button by changing some of its properties, such as its icon, tool tip, and caption. Custom Buttons can be edited further, as detailed in the steps that follow.

<u>To add a new button:</u>

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



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



3. Add the information about the new button.

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

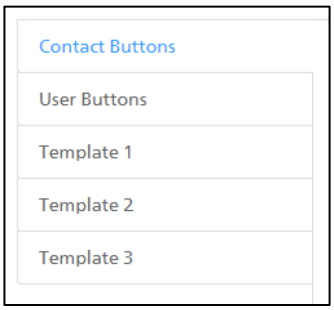
4. Click OK to add the new button or click Cancel to discard your changes.
5. Click Save to save your changes.

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

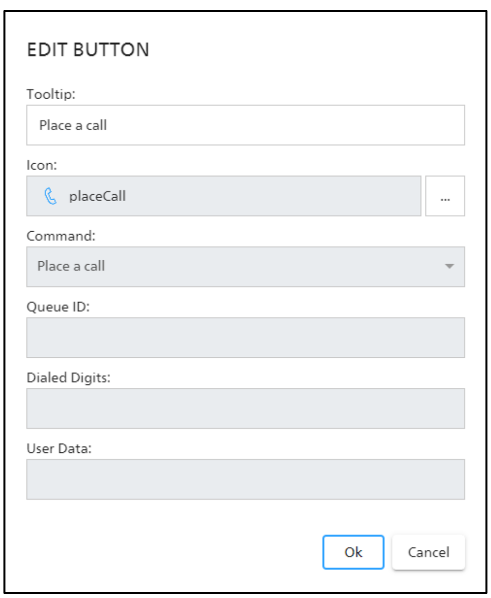
Add Button Options	
Parameter	**Description**
User Data	Enter User Data to be associated with this button, if applicable.

<u>To edit a button:</u>

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



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:

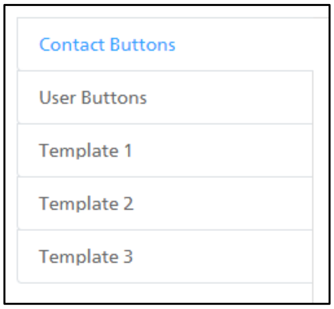


5. Make the desired changes outlined in the table below.
6. Click OK to apply your changes or click Cancel to discard your changes.
7. Click Save to save your changes.

Edit Button Options	
Parameter	**Description**
Tooltip	Edit the text that will be displayed in the tooltip section.
Icon	Change the icon. 1. Click the ellipsis button to open the ‘select icon’ window. 2. Click on the desired icon you wish to use 3. Click *OK* to apply your changes or *Cancel* to discard your changes.
Command	Click the dropdown menu to select the command that you wish to associate with this button. **Note:** This option is only available for new icons.
Queue ID	Enter a Queue ID to be associated with this button, if applicable. **Note:** This option is only available for new icons.
Dialed Digits	Enter Dialed Digits to be associated with this button, if applicable. **Note:** This option is only available for new icons.
User Data	Enter User Data to be associated with this button, if applicable. **Note:** This option is only available for new icons.

<u>To delete a button:</u>

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



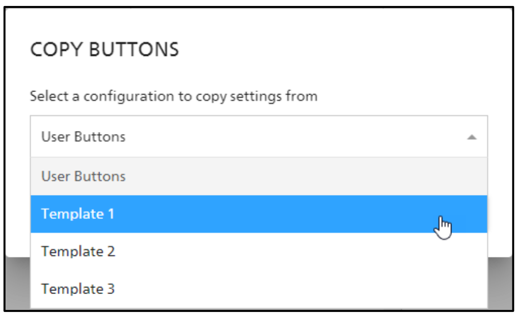
2. Locate the button you wish to delete on any of the columns that appear.

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:

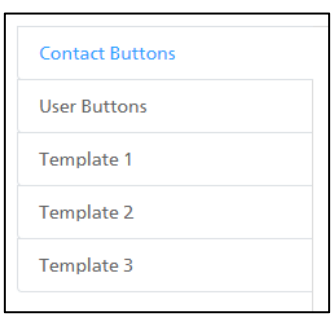
1. Navigate to the Contact Buttons or User Buttons page that you wish to configure.
2. Click the Copy button.
3. In the window that appears, select a page you wish to copy from by highlighting it in the drop-down list.



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.

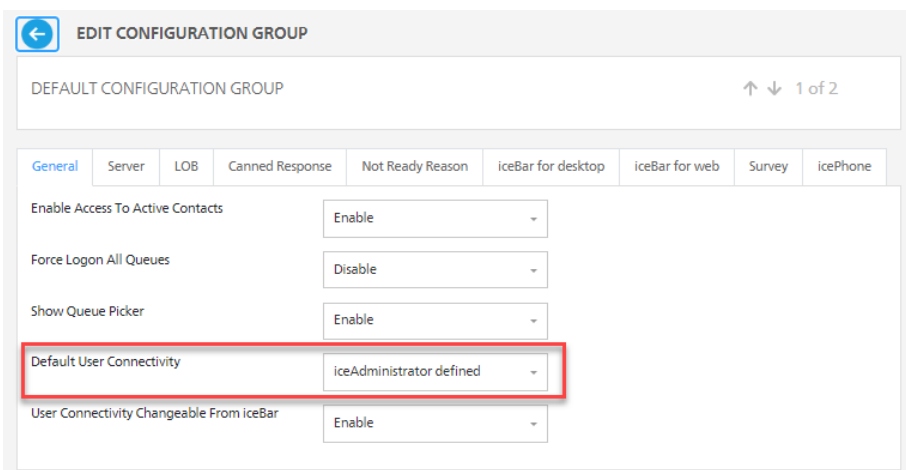
For more information on the settings in iceAdministrator, refer to the iceAdministrator User Manual.

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.

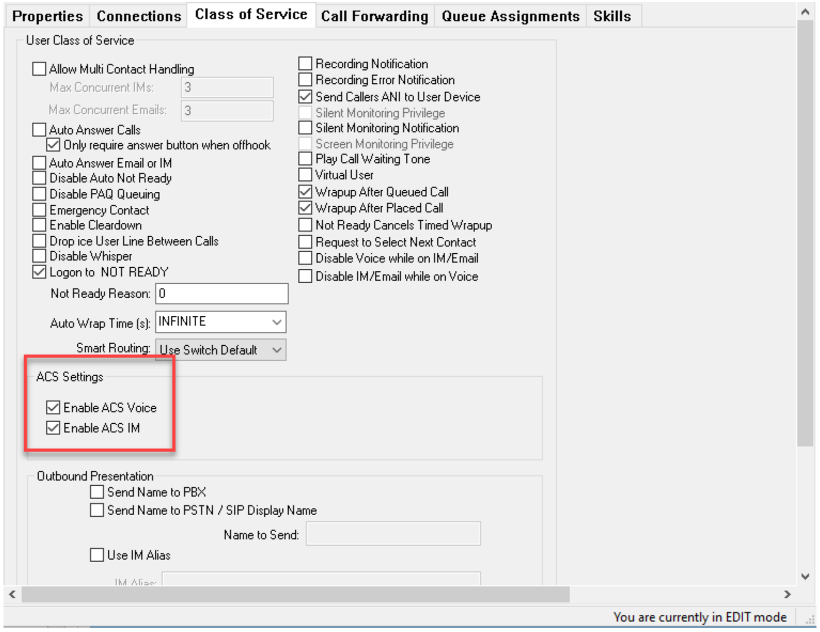
<u>In iceManager</u>

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

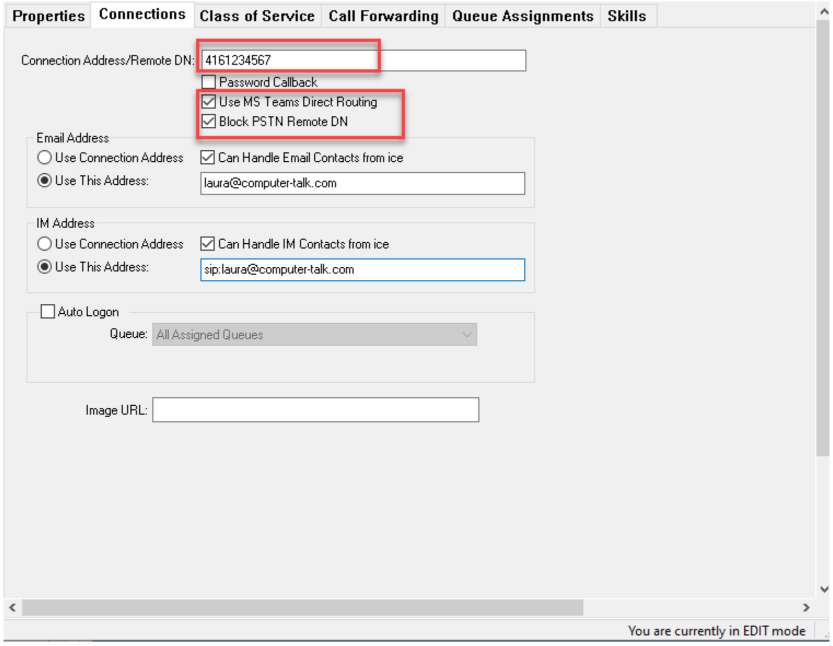


<u>In iceAdministrator</u>

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



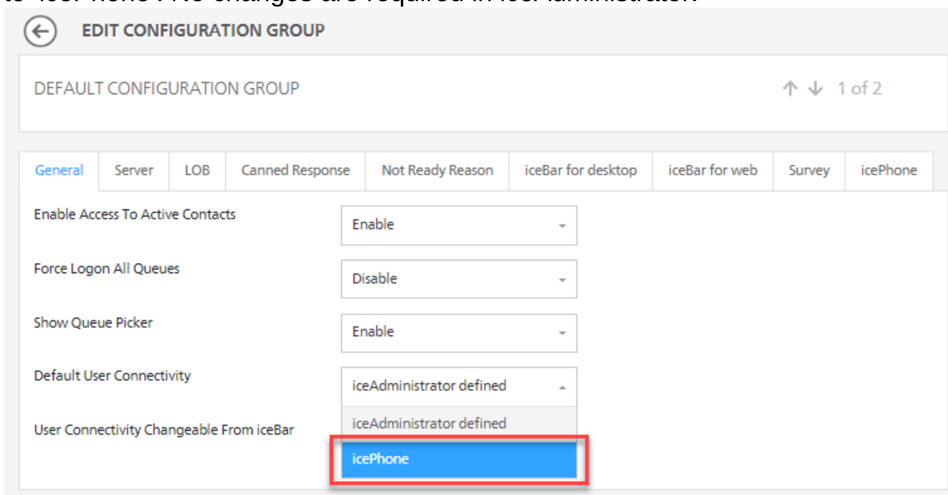
2. In the user’s Connections tab, set the Connection address to their Direct Routing number.
3. Ensure both *Use MS Teams Direct Routing* and *Block PSTN Remote DN* are enabled.
   Note: *Use MS Teams Direct Routing* and *Block PSTN Remote DN* can only be enabled by the Global Administrator. If you require these settings to be enabled, please contact Computer Talk.



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

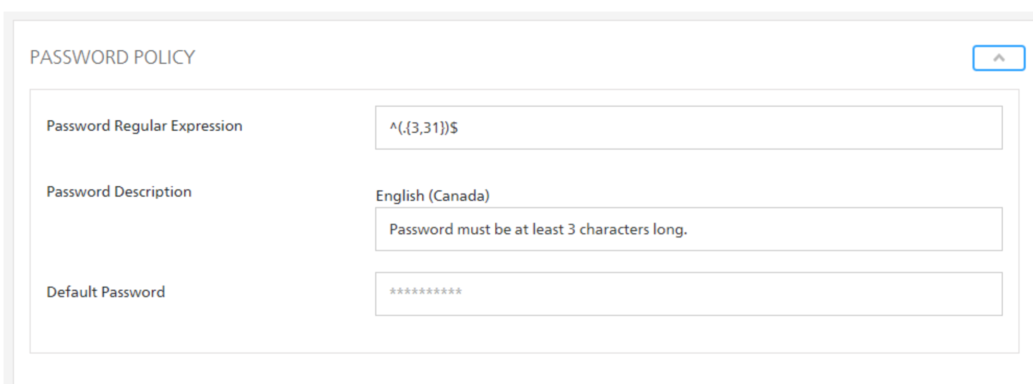
Open Configuration Groups in iceManager, and set the *Default User Connectivity* to 'icePhone'. No changes are required in iceAdministrator.



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.

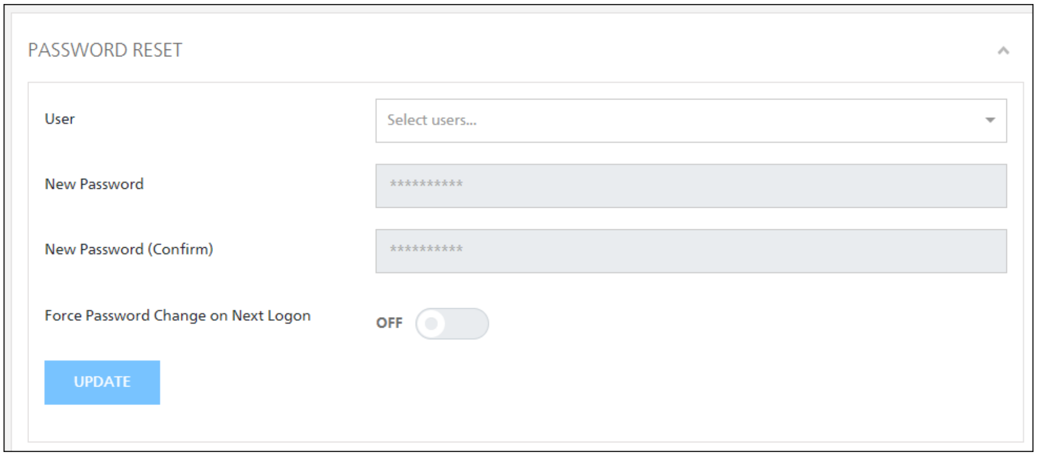


Parameter	Permissible Values	Description
Password Regular Expression	Regex	Enter the password requirements and limitations using regular expression.

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.

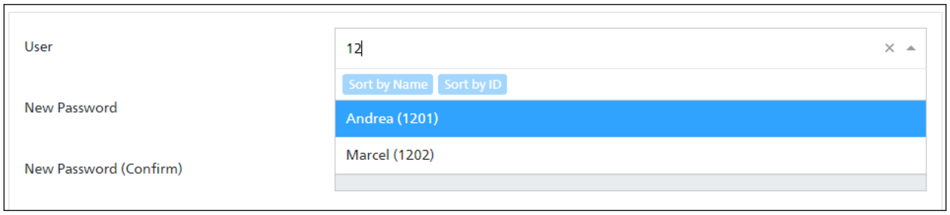
Password Reset:

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

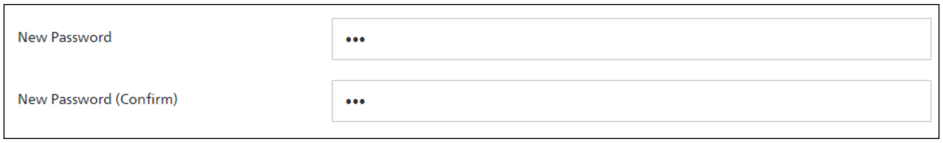


To reset a user's password, follow the steps below:

1. Select the user from the drop down list.



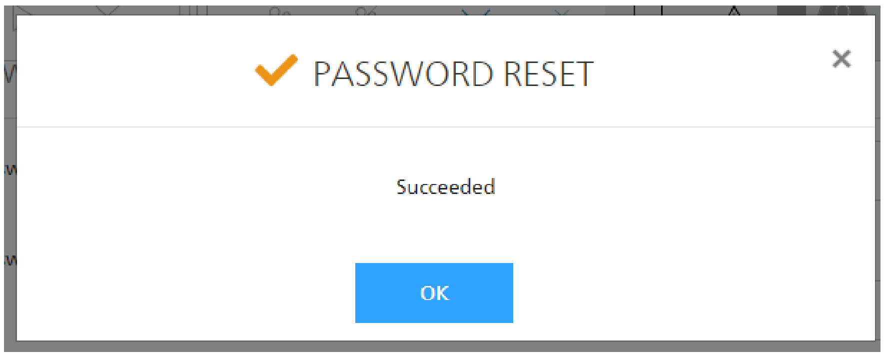
2. Enter the user's new password in the *New Password*, and the *New Password (Confirm)* fields.



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.

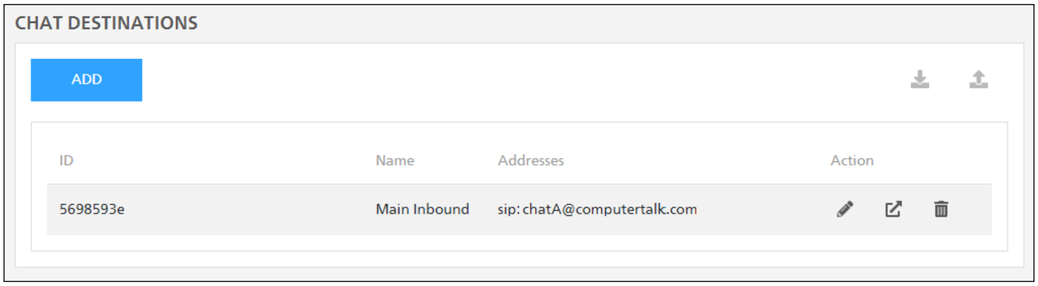


Chat

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

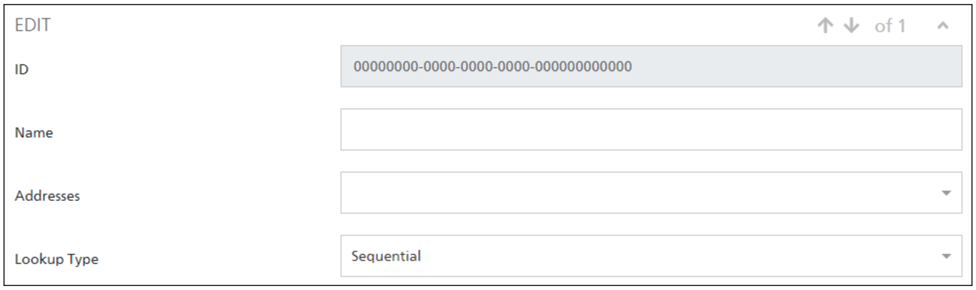
The Chat Destinations section allows an administrator to configure the chat destination settings.



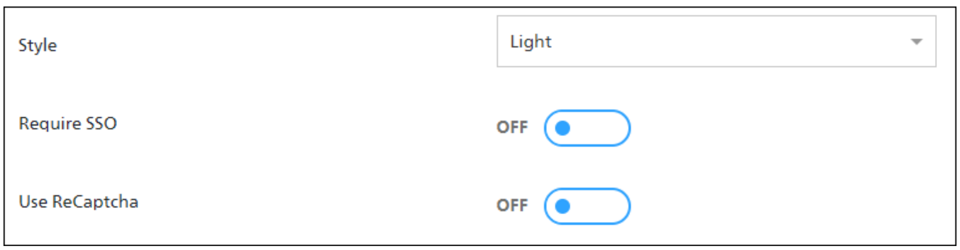
Column Heading	Details
ID	The chat destination ID.
Name	The name given to the chat destination.
Addresses	The sip addresses of the chat destination.
Action	Allows users with administrator privileges or higher to edit or delete the destination. All other user types cannot add or modify chat destinations.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

<u>To add a chat destination:</u>

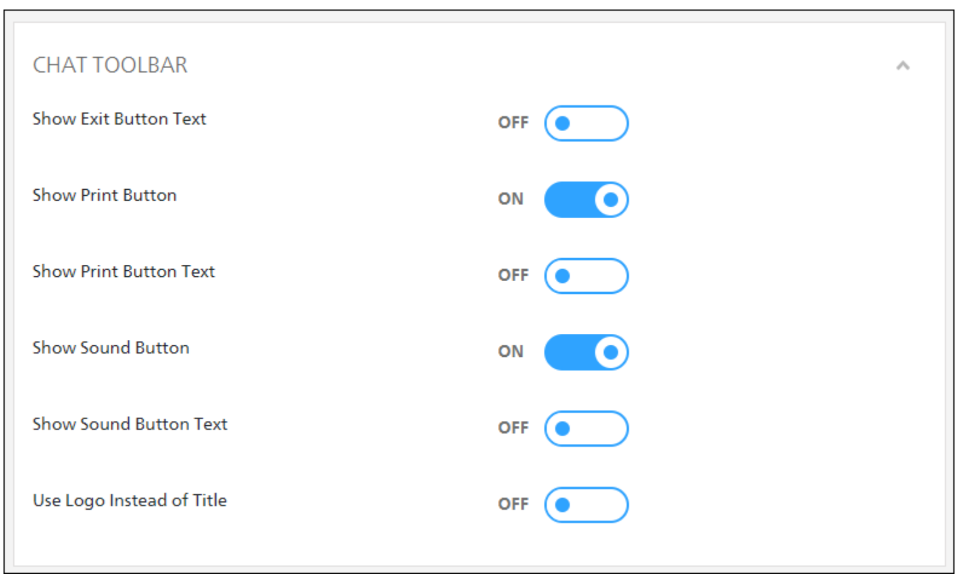
1. Select the *Add* button in the top left corner.
2. Configure the Name, Addresses, and Lookup Type.



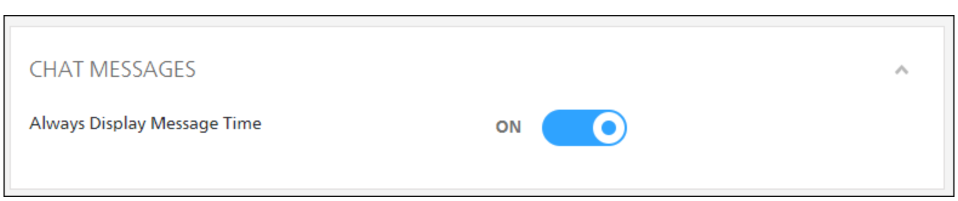
3. Configure the Style, Require SSO and Use ReCaptcha settings.



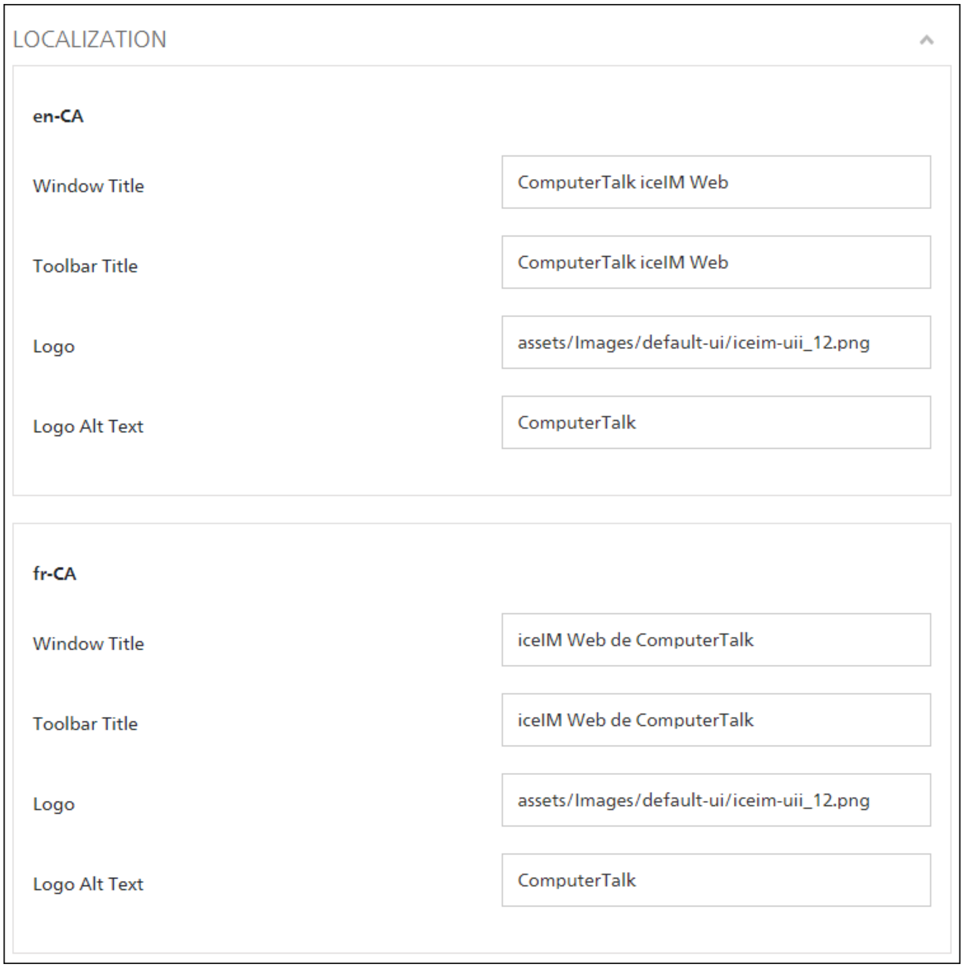
4. Configure the Chat Toolbar settings.



5. Configure the Chat Messages setting.



6. Configure the Localization settings for the appropriate languages.



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

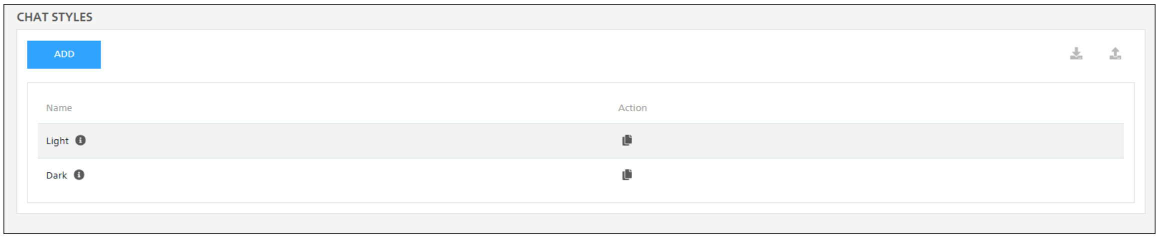
Chat Destination Properties	
Parameter	**Details**
ID	System generated ID for the chat destination
Name	The unique name given to this chat destination.
Addresses	The destination chat address(es).
Lookup Type	Options include Sequential or Round-robin.
Style	Select from the default (light or dark) chat 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.
Chat Toolbar	
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.
Chat Messages	
Always Display Message Time	Options include On/Off. Enable this setting to always display the message time.
Localization	
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

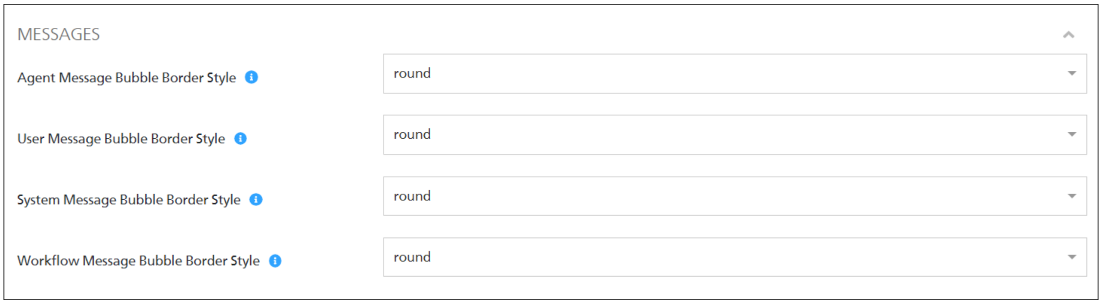
This section allows users to create and configure the chat styles that appear in the customer facing iceChat window. Users with administrator privileges are able to add, edit and delete chat styles.

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

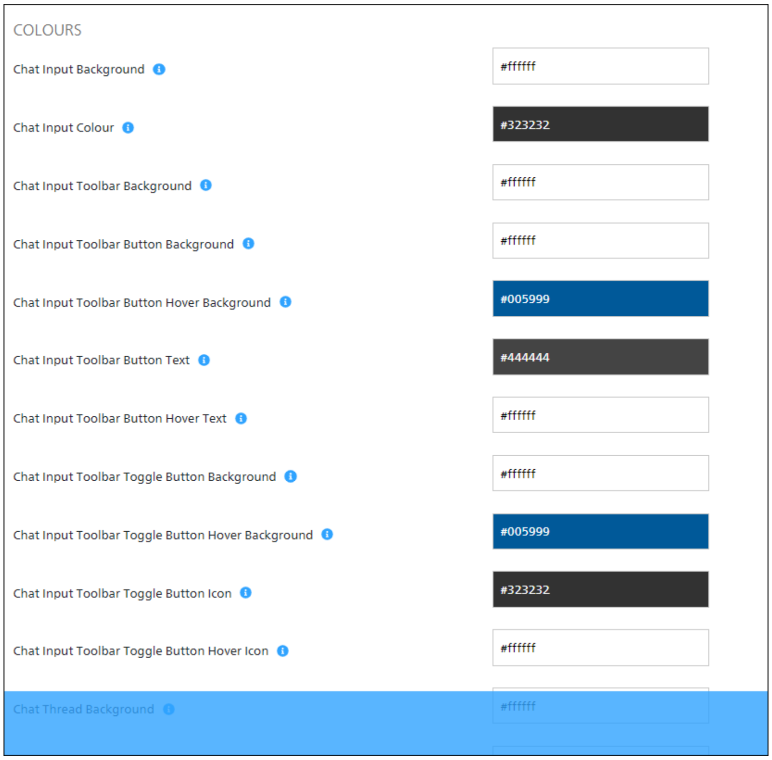


To add a Chat Style:

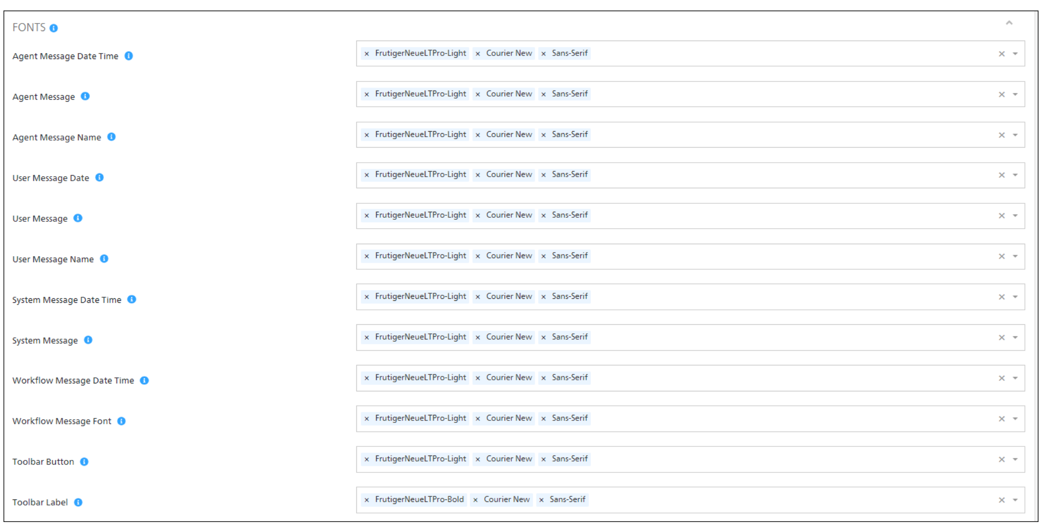
1. Click the blue *Add* button in the top left corner.
2. Enter a unique name for your new chat style.
3. Configure the messages section.



4. Configure the colours section.



5. Configure the fonts section.



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.
Messages	
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.
Colours	
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.

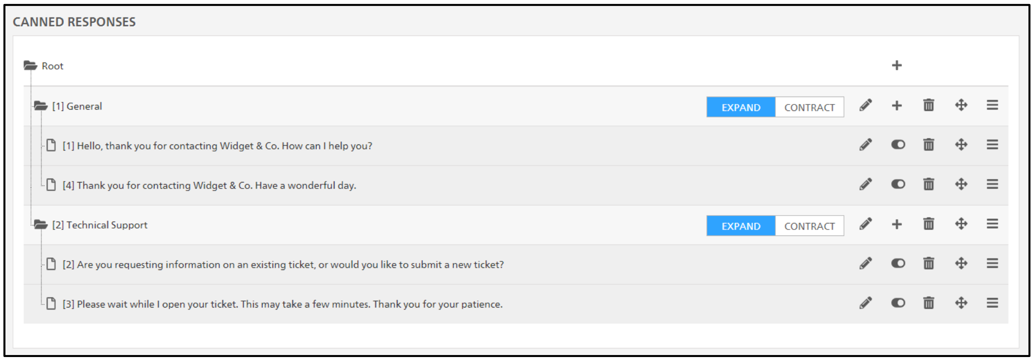
Chat Style Properties	
Parameter	**Details**
User Message	The colour used for the outgoing message text. Defaults to #323232.
User Message Name	The colour used for the name of the outgoing message. Defaults to #063554.
System Message Bubble Background	The background colour of the system message bubble. 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.
Fonts	
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.

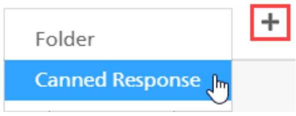
Canned Responses

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.

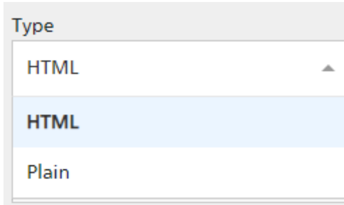


<u>To add a Canned Response:</u>

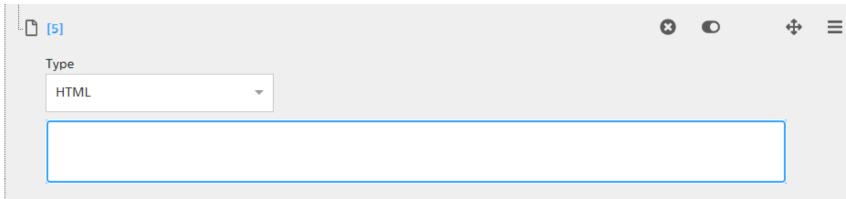
1. Choose a folder under which you want to add a Canned Response.
2. Click the *add* (+) button in the same row as the chosen folder. Select Canned Response from the list. A new entry will be added to the folder.



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



4. Enter the Canned Response into the field.



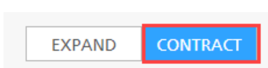
5. Click *Save* to save the changes. Click *Revert* to cancel the changes.
6. If you clicked *Save*, the 'Canned Responses Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert,* the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No*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

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

<u>Expand or contract a Canned Response folder:</u>

- 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.



<u>To edit a Canned Response:</u>

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.

<u>To delete a Canned Response:</u>

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.

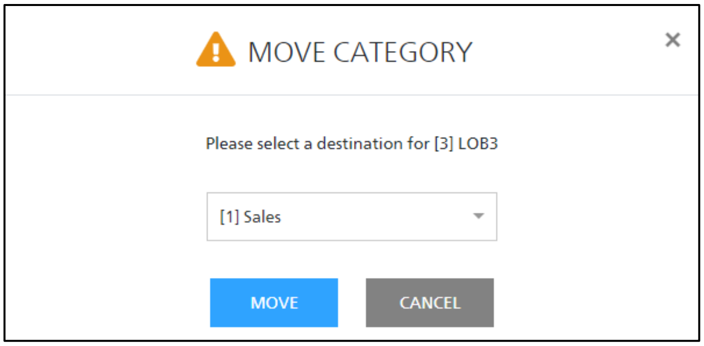
<u>Disable a Canned Response:</u>

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

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

<u>To move a Canned Response:</u>

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.



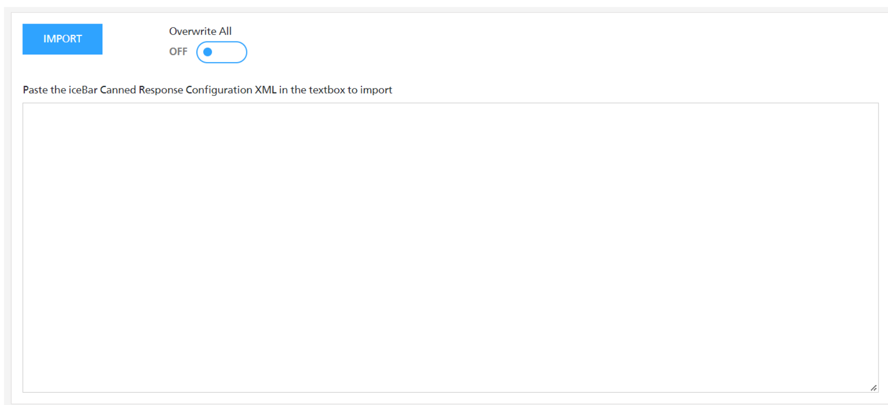
3. Click *Move* to successfully move the Canned Response to another folder.

Reorder a Canned Response or folder:

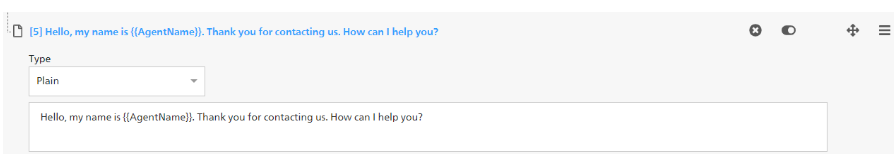
- Use the hamburger button to reorder the Canned Responses and categories.

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:



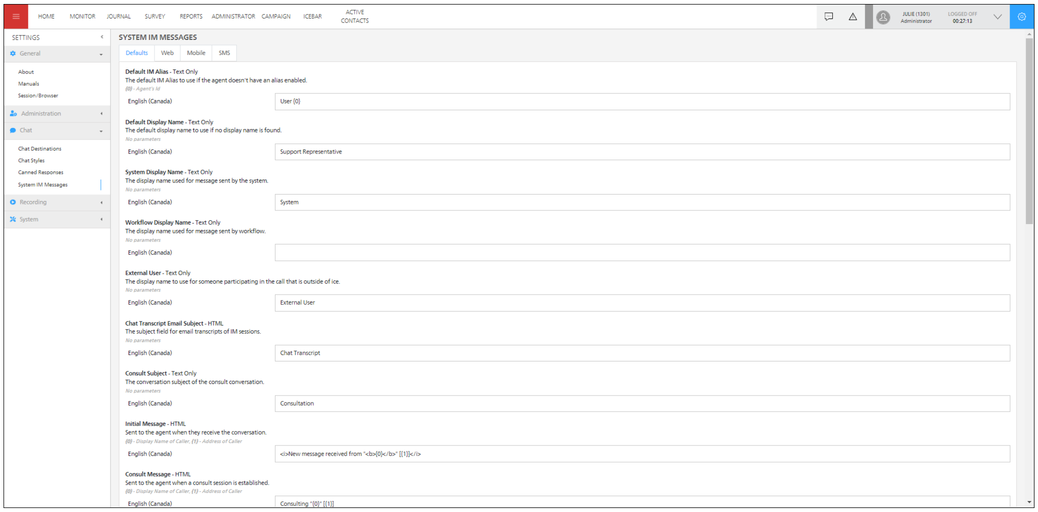
3. Click the Import button to import the Canned Responses.
4. New Canned Response fields open populated with your imported Canned Responses.



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.



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

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

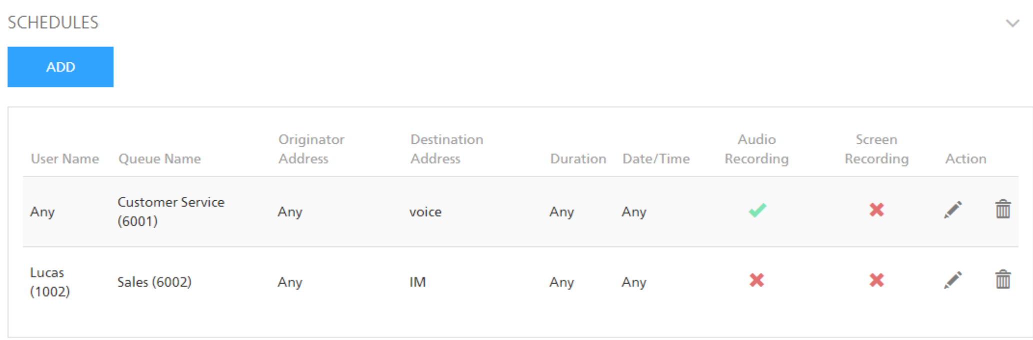
Recording settings

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.

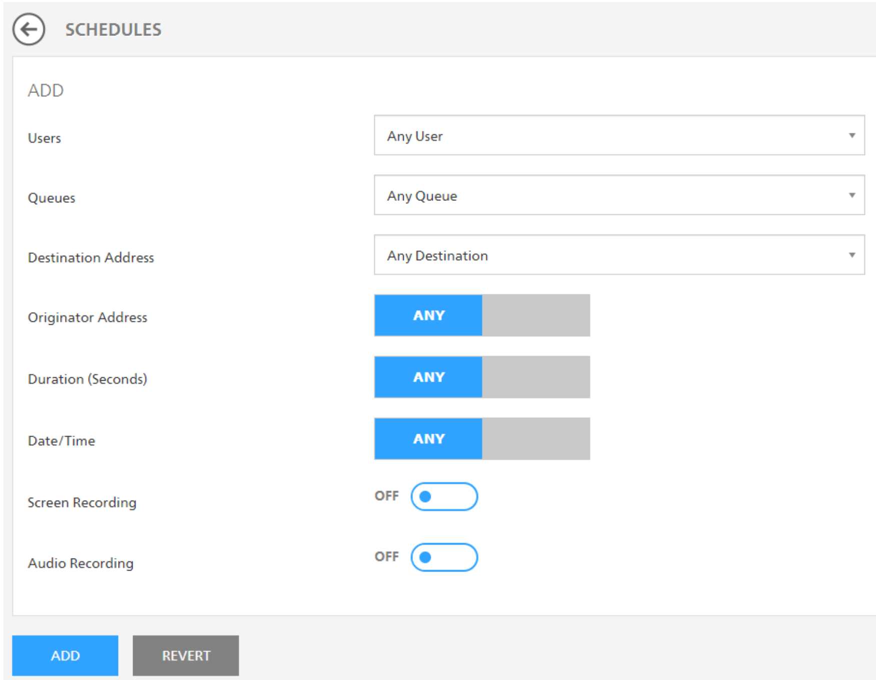
To add, delete, or change recording schedules, click *Schedules*. A list of existing recording schedules displays, along with the option to:



Add a schedule

To add a schedule, following these steps:

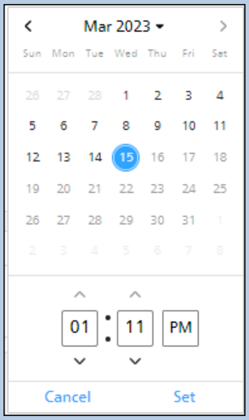
1. Click the *Add* button. The following display appears on top of the existing schedules:



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.

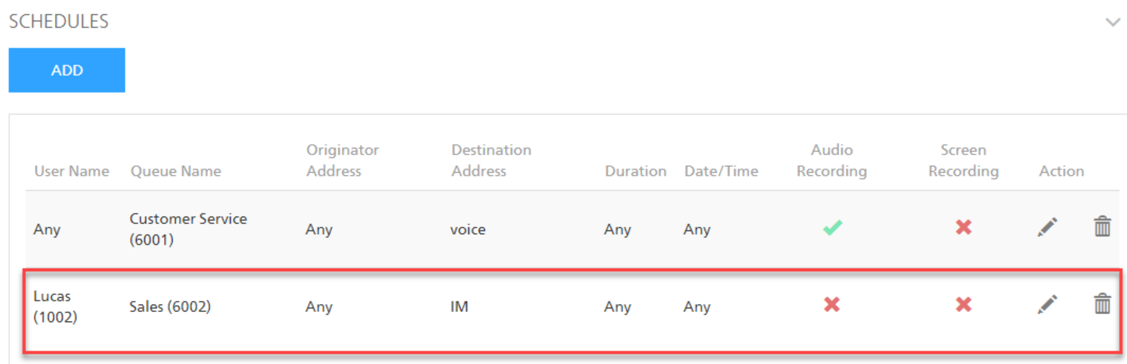
   The table below explains the parameters. These are "And" conditions. For example, if User 1000 and Queue 6000 are selected, only calls received by User 1000 from Queue 6000 will be recorded. For "Or" conditions, you have to create another recording schedule.

Parameter	Allowable values	Description
Users	List of users from the drop-down	Select a user from a list of users configured in the switch. *Any User* can be selected if recording schedule is not for a specific user.
Queues	List of queues from the drop-down	Select a queue from a list of queues configured in the switch. *Any Queue* can be selected if recording schedule is not for a specific queue.
Destination Address	List of addresses from the drop-down	Enter a destination address such as a SIP endpoint. *Any Destination* can be selected if recording schedule is not for a specific destination.
Originator Address	Free text	Enter originator address such as ANI or select *Any* 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 *Specific* to enter a start and end date and time for recordings or select *Any* if not selecting a specific date and time.
Start Date/Time	The date selected from calendar and time from the drop-down	Select starting date and time of date range if the Date/Time field is set to *Specific*. 1. To select a start date, click on the field next to Start Date/Time. A calendar appears:  2. Select the date. Use the forward and backward arrows where necessary. 3. Select the time. Use the arrows where necessary. 4. Click *Set* to confirm your selection.
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 *Specific*. Follow the steps listed in Start Date/Time to select the End Date and Time.
Audio Recording	Off/On	Select *On* to record audio.
Screen Recording	Off/On	Select *On* to record the agent's screen.

3. 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*.

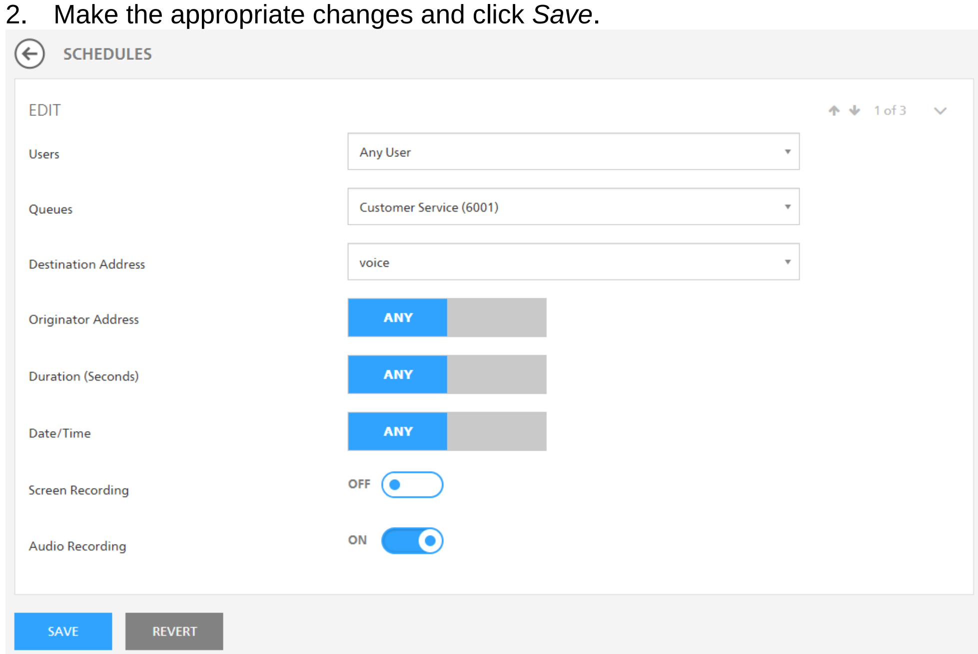
   The new schedule appears on the bottom of the list.



Edit a Schedule

<u>To edit a schedule:</u>

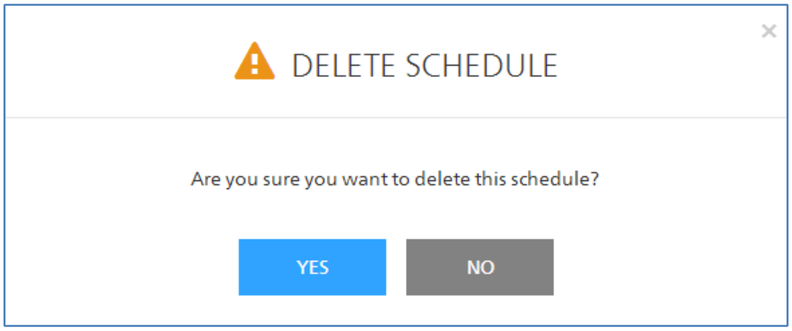
1. Click the pencil icon located in the Action column.
2. Make the appropriate changes and click *Save*.



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.



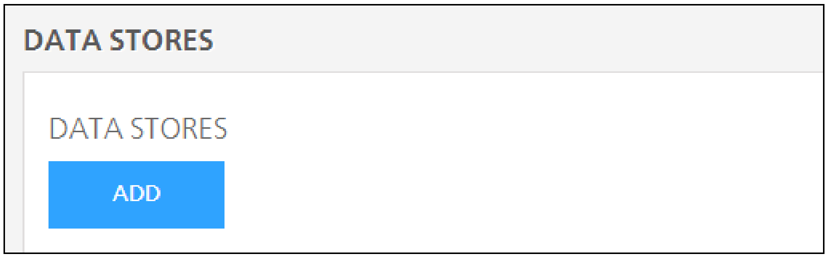
Once you click *Yes* the schedule is removed from the list.

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.



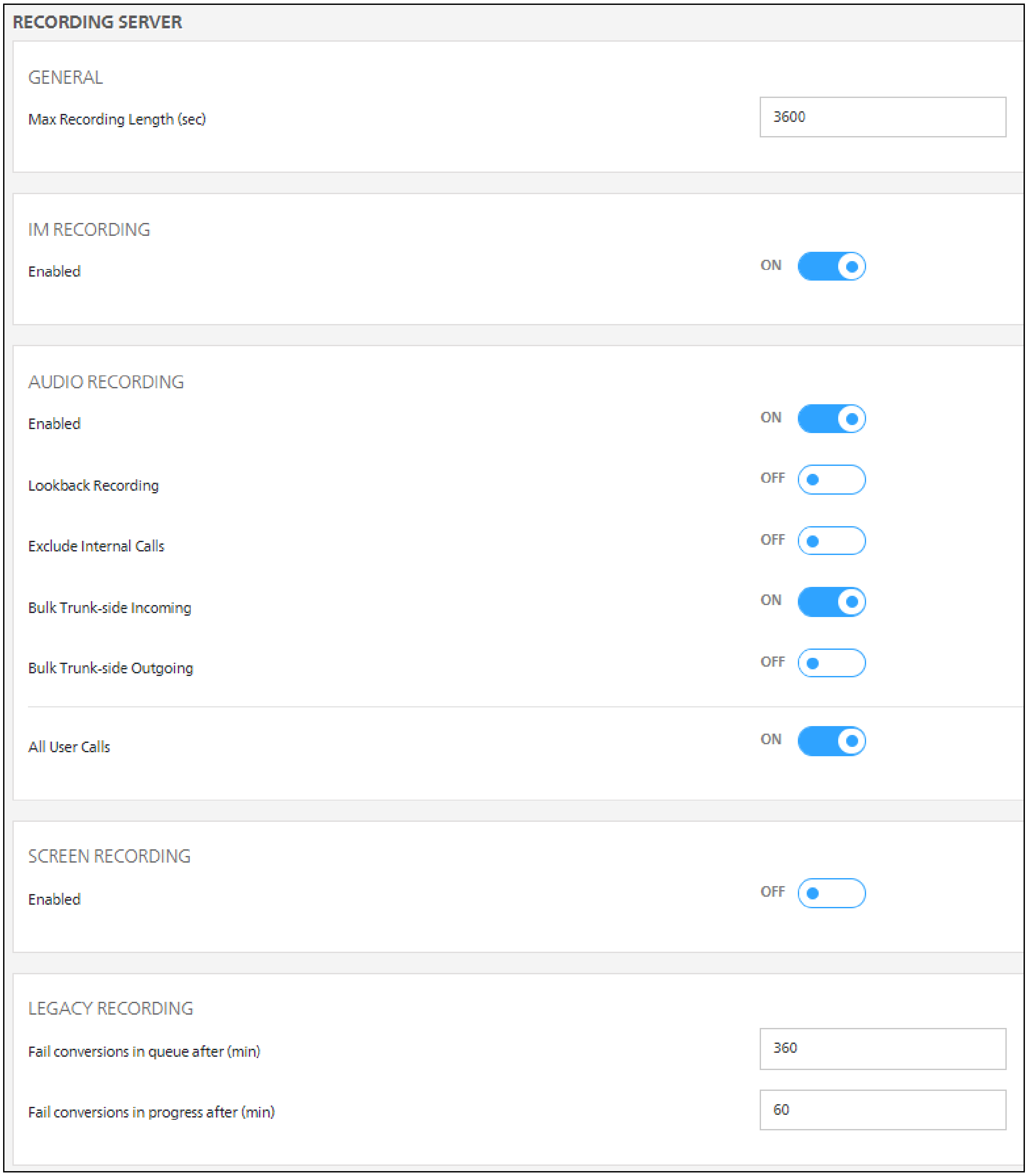
The table below describes the parameters that can be configured.

Parameter	Permissible Values	Description
Datastore		
Name	Free text	Enter datastore name.
FTP		
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.
Network		
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.
Azure		
Account Name	Free text	Enter the Azure account name.
Account Key	Free text	Enter the Azure Account Key.

Container Name	Free text	Enter the Azure Container Name.
Key ID	Free text	Enter the Azure Key ID.
Key Vault Client ID	Free text	Enter the Azure Key Vault Client ID.
Key Vault Client Secret	Free text	Enter the Azure Key Vault Client Secret.
AWS		
Bucket Name	Free text	Enter the AWS Bucket Name.
Access Key ID	Free text	Enter the AWS Access Key ID.
Secret Access Key	Free text	Enter the AWS Secret Access Key.
Key ID	Free text	Enter the AWS Key ID.
Region	Dropdown list	Select the region associated with the AWS account.
SFTP		
Server	Free text	Enter SFTP server URL.
Port	Typically 22	Enter SFTP port. The default is 22.
Server Fingerprint	Free text	Enter the SFTP server fingerprint for authentication.
Username	Free text	Enter the username for SFTP connection.
Password	Free text	Enter the password for SFTP connection.
Remote Path	Free text	The folder path.
Timeout	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.



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

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

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

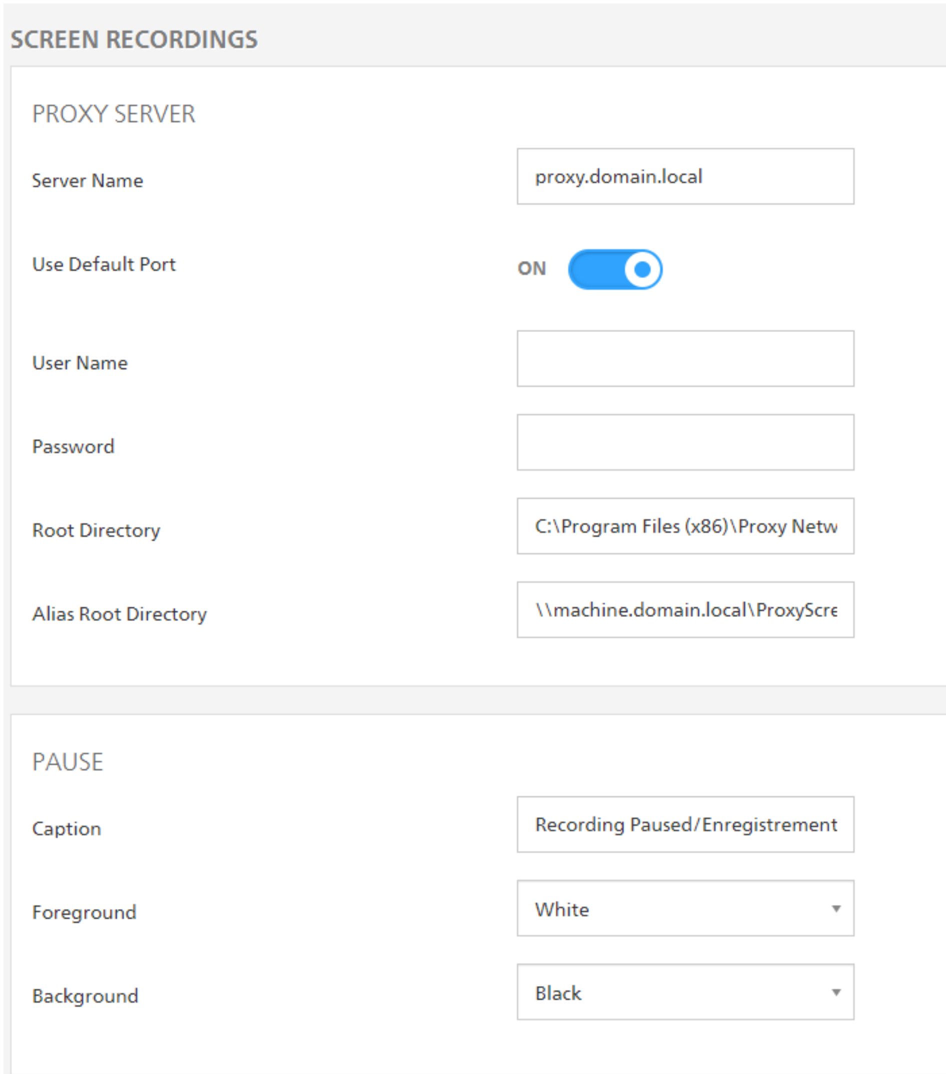
Parameter	Permissible Values	Description
		A new recording starts each time the user receives a call. Note: This option applies to both audio and screen recording.
Schedule	On/Off	Select *On* to enable scheduled recordings. Note: This option applies to both audio and screen recording.
Random (open to the selection below if On)	On/Off	Select *On* to enable random recordings. For this option, the system will record the number of calls entered in the Max Unscored 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 Unscored Recordings Per User	1 to 124	Enter the number of unscored recordings for each user. An unscored 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.
Screen Recording		
Enabled	On/Off	Select *On* to enable audio recording. Note: When Screen Recording is enabled Audio Recording will automatically be enabled.
Legacy Recordings		
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.

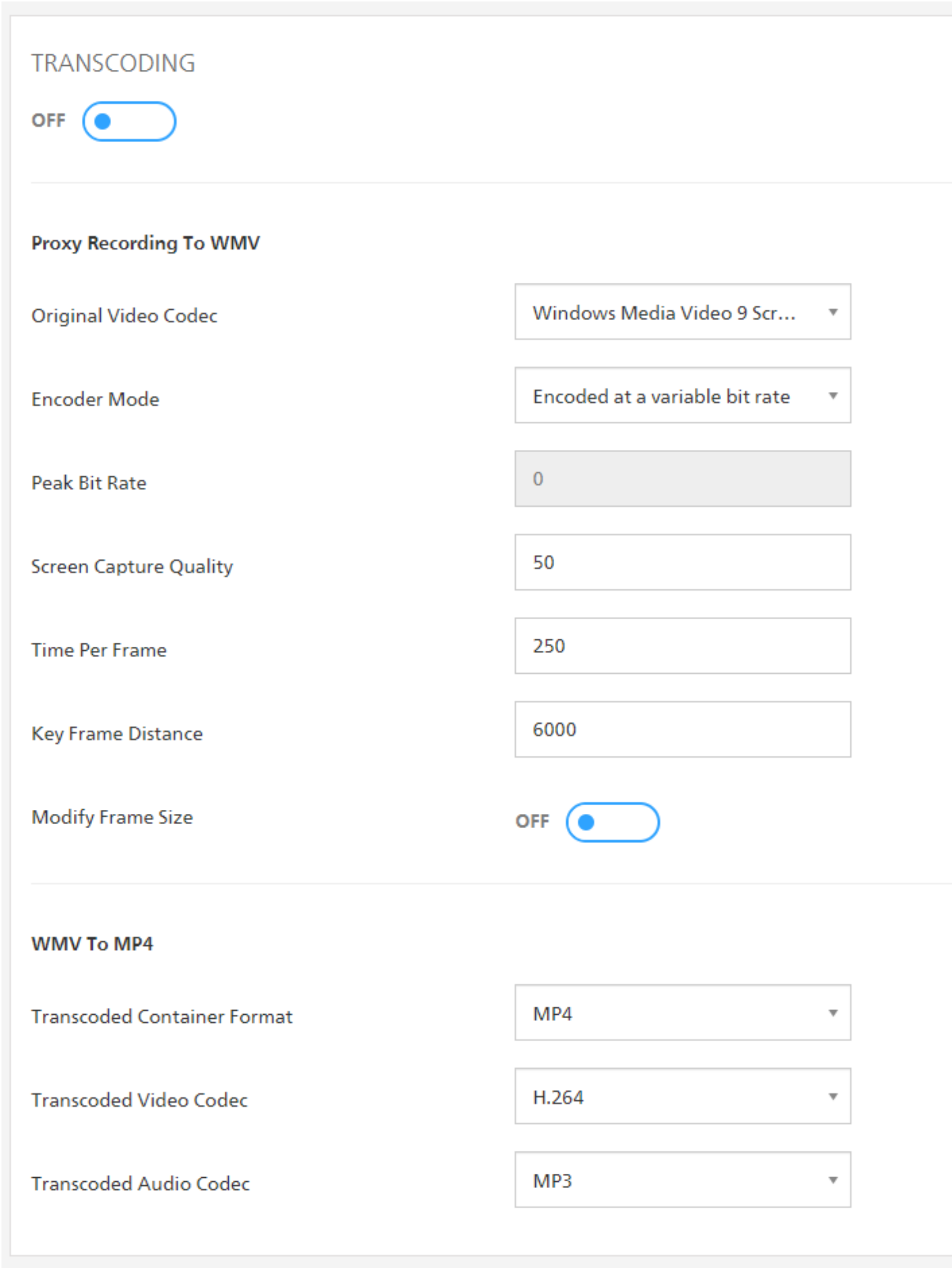
Parameter	Permissible Values	Description
Fail conversions in progress after (min)	1 to 2147483646	The number of minutes before the conversion of legacy recordings in progress will fail.

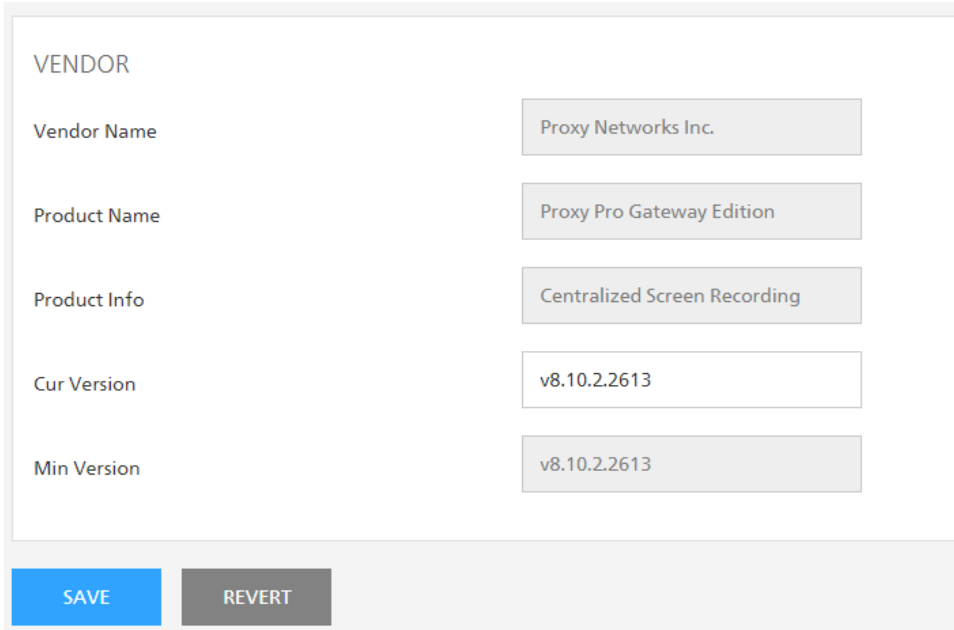
Screen Recordings

This section can only be modified by Administrators.

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




TRANSCODING
OFF
Proxy Recording To WMV
Original Video Codec
Windows Media Video 9 Scr...
Encoder Mode
Encoded at a variable bit rate
Peak Bit Rate
0
Screen Capture Quality
50
Time Per Frame
250
Key Frame Distance
6000
Modify Frame Size
OFF
WMV To MP4
Transcoded Container Format
MP4
Transcoded Video Codec
H.264
Transcoded Audio Codec
MP3



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

Parameter	Permissible Values	Description
Proxy Server		
Server Name	Text	Name or IP address of the 3rd party server.
Use Default Port	On/off	Select *On* to use the default port or select *Off* 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.
Pause		

Parameter	Permissible Values	Description
Caption	Text	Enter the text of the message displayed while recording is paused.
Foreground	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.
Background	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.
Transcoding	On/Off	Select On to have screen recordings created in MP4 format or select Off to view the screen recording on the web.
Proxy Recording to WMV		
Original Video Codec	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.
Encoder Mode	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 *Encoded at a variable bit rate* to specify that the video will be encoded at a variable bit rate. The default mode is *Encoded at a variable bit rate*.
Peak Bit Rate	0-125	Peak bit rate (in bits per second) of the video encoding when in Constant Bit Rate mode. Cannot be modified.
Screen Capture Quality	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 *On* 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.
WMV to MP4		
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.
Vendor		
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.

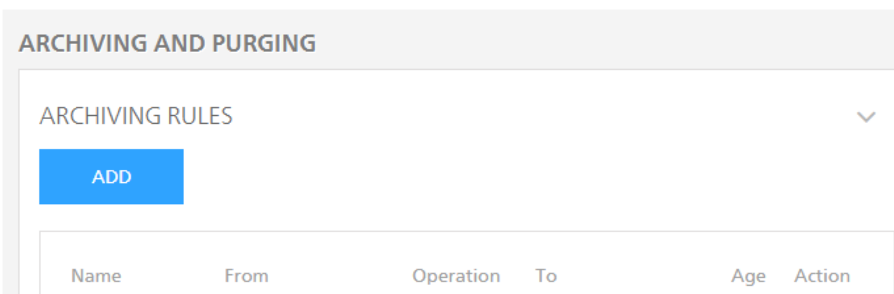
Archiving and purging

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:

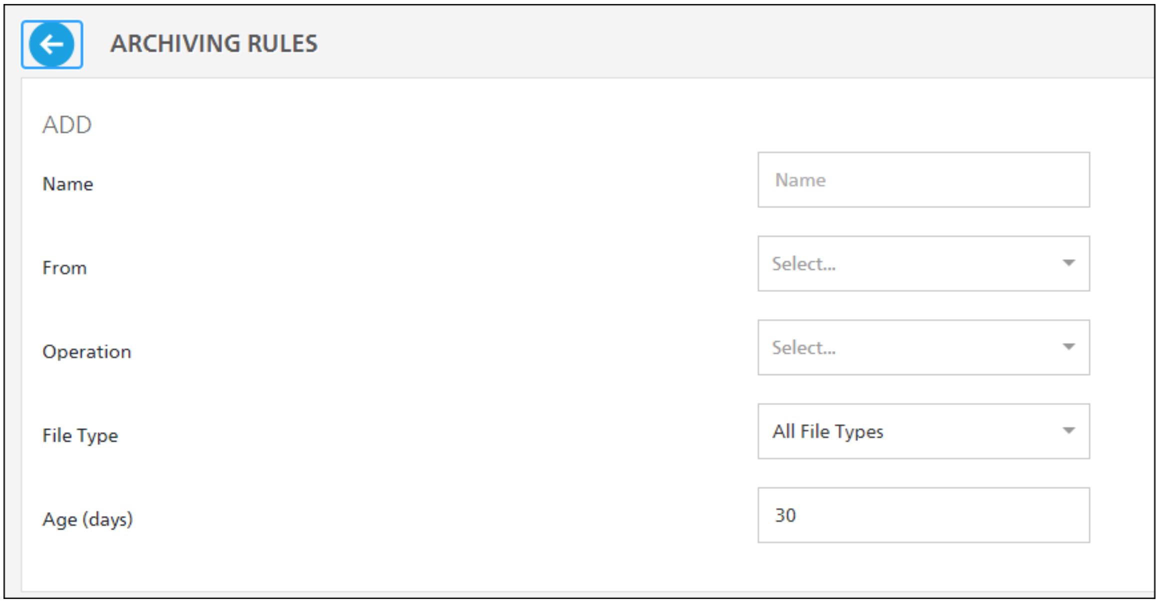
Archiving rules allows the system to move/copy/delete from the datastore after a number of days from the time the recording was initially created.



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.

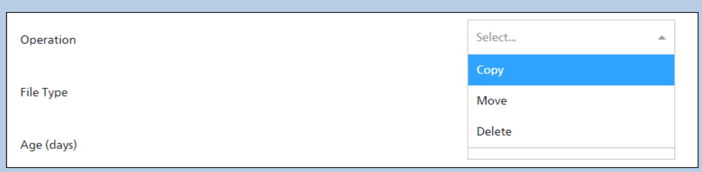
To add an Archiving operation, complete the following steps:

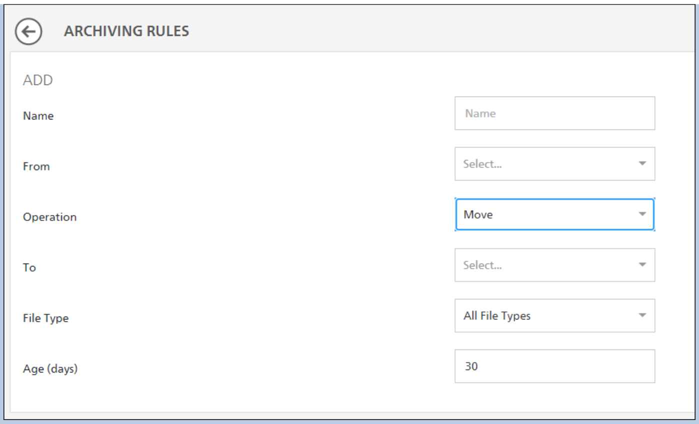
1. Click *Add*. The Add Archiving options appear.



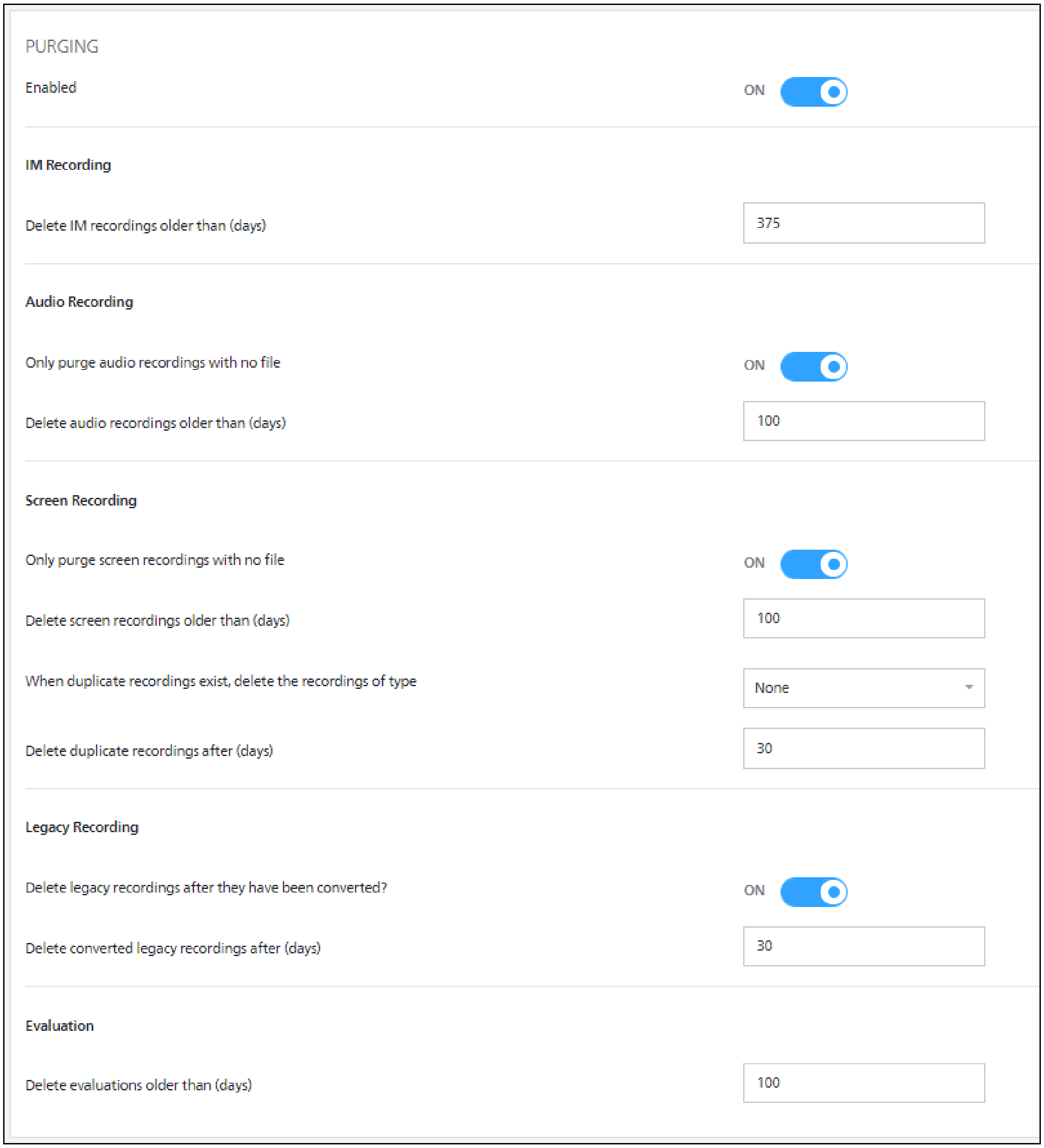
2. Fill in the fields. *For more information on the fields view the following table:*

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	▪ Copy ▪ Move ▪ Delete	Select one of the archiving operations. A copy is done before a move, which is done before a delete.  A delete operation will also delete the recording file if it is not in any other datastore. When *Move* is selected, additional options appear:

		
To	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 *Copy* or *Move*.
File Type	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.
Age	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:



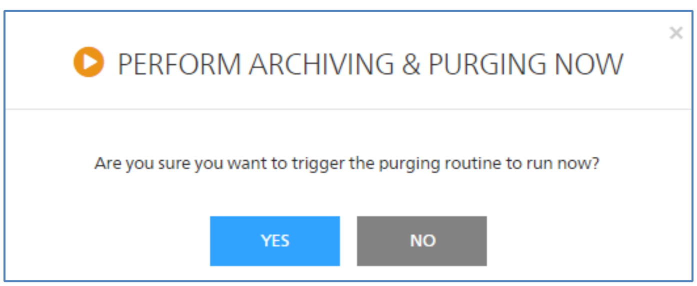
The following table provides more information on the options:

Parameter	Permissible Values	Description
Enabled	On/Off	Select *On* to enable purging.
IM Recording		
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.
Audio Recording		
Only purge audio recordings with no file	On/Off	Select *On* 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.
Screen Recording		
Only purge screen recordings with no file	On/Off	Select *On* 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.
Legacy Recording		

Parameter	Permissible Values	Description
Delete legacy recordings after they have been converted?	On/Off	Select *On* 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.
Evaluation		
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:

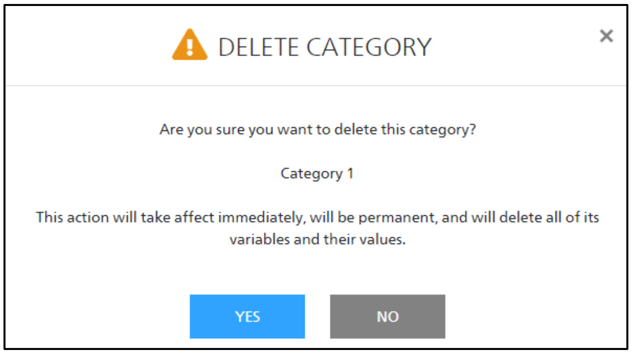
Categories allow you to group variables together.

<u>Add a new server variable category</u>

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

<u>Delete a server variable category</u>

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:

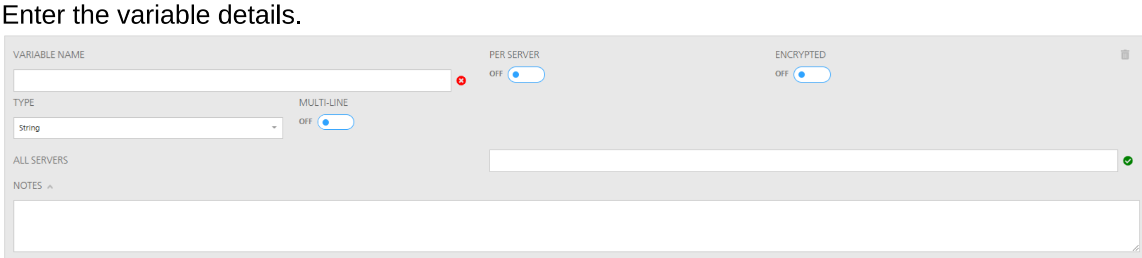
Parameter	Description
Category	Enter a name for the category.
Notes	Enter information regarding the category.
User Permissions	
Type	This is how members have been grouped. Options include Users, Teams, and Roles.
Members	Once a type has been selected, members can be specified. Users: members are selected 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 *View (View)*, *Edit (View / Edit)*, and Full Control (View / Edit / Delete).
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

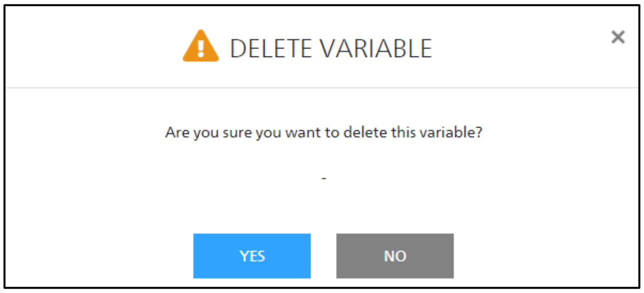
1. Click to add a new server variable to the category.
2. Enter the variable details.



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:
	• String
	• String (RegEx Validated)
	  - Opens another field to enter the regular expression.
	• Integer
	• Boolean
	  - Displays a toggle to be used for setting the value of the variable.
	• URL

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.

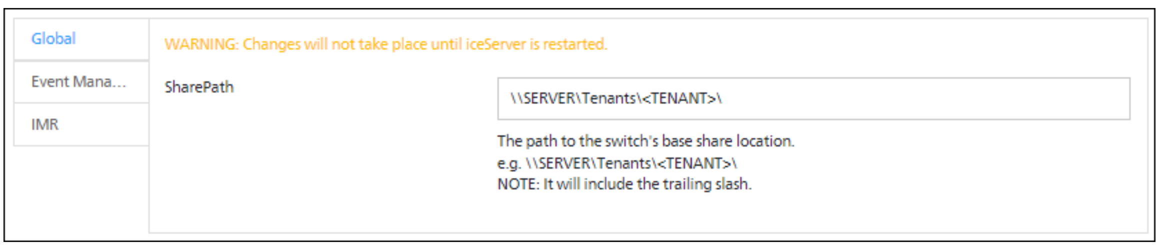
Core Settings

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

Core

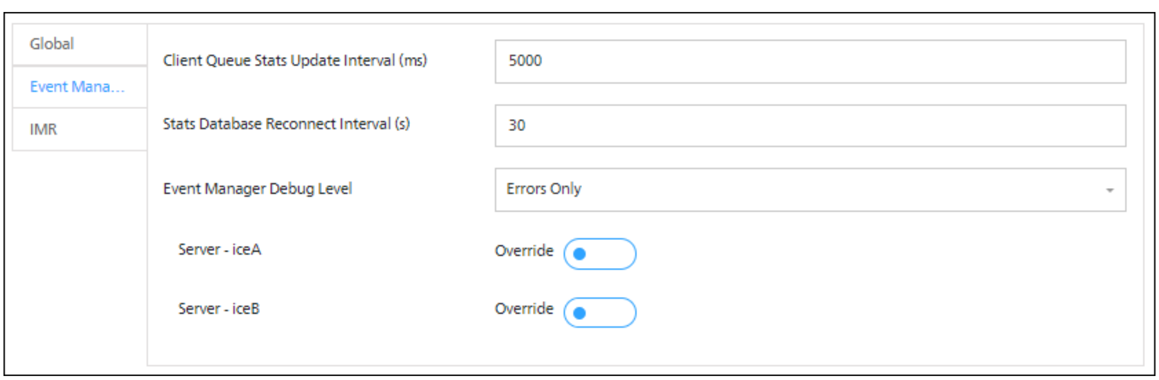
This section allows Global Administrators to modify the Global, Event Manager and IMR settings.

Global



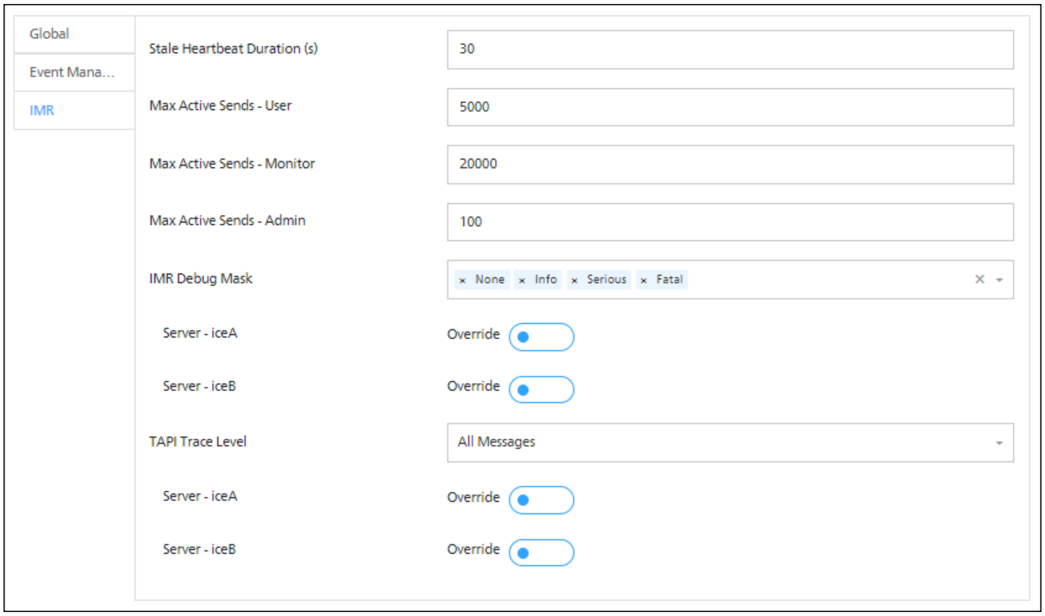
Global stores the SharePath, which identifies to the system, the location of the audio files. If the location of the audio files changes, the Global Administrator will be required to update the SharePath field accordingly.

Event Manager



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: • Errors Only • All Sent Messages • All Messages	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

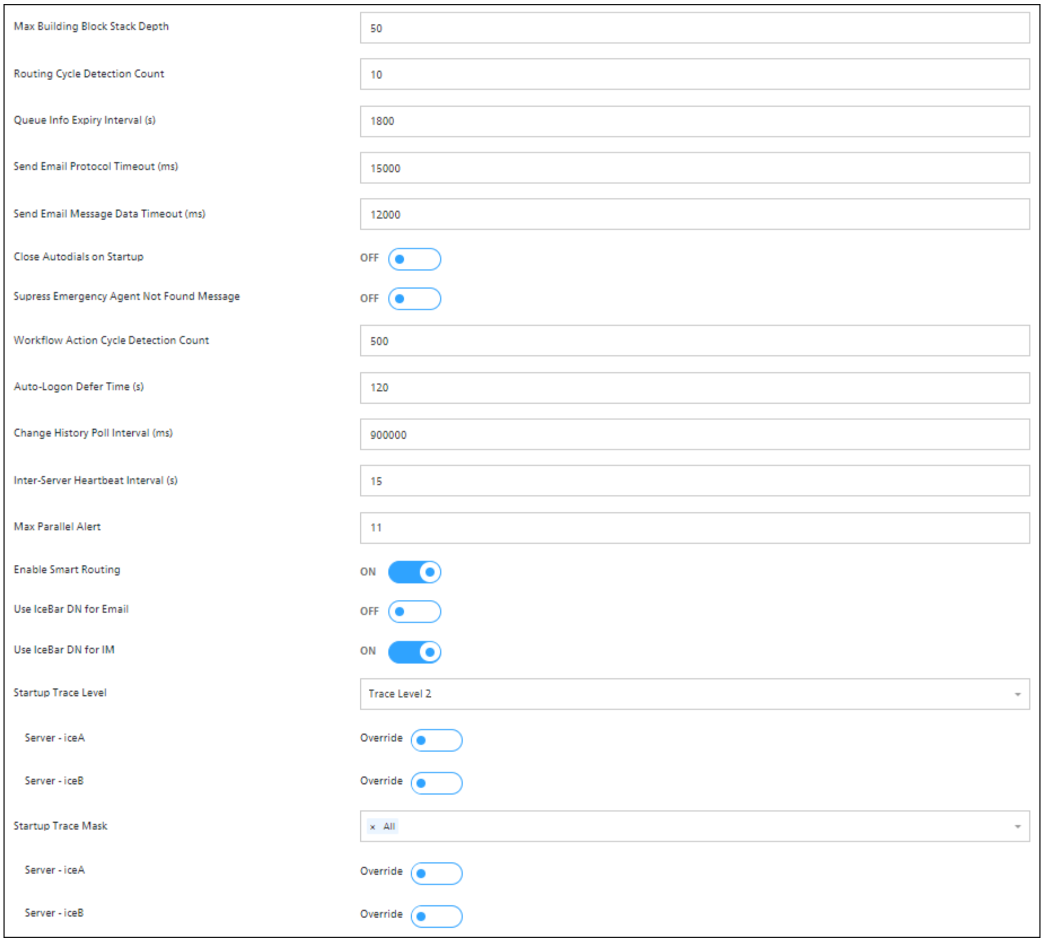


Parameter	Permissible Values	Description
Stale Heartbeat Duration (s)	Text The default value is 30.	Heartbeat interval for every single TAPI connection.

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: • None • Info • Serious • Fatal	Options to determine which log messages to send.
TAPI Trace Level	Options include: • Disabled • Errors only • All Messages	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.



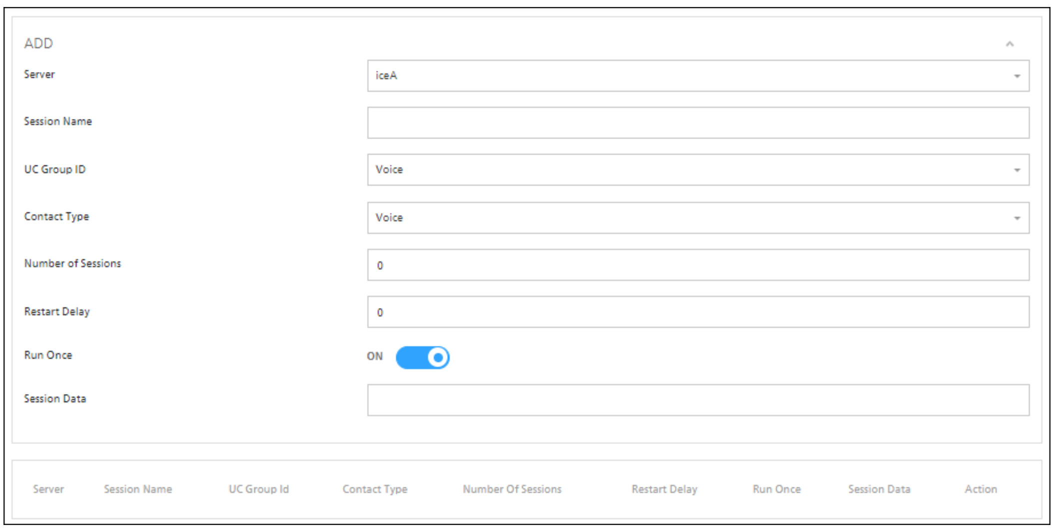
Parameter	Permissible Values	Description
Max Building Block Stack Depth	Text The default is 50.	Number of levels of allowed nested building block calls.
Routing Cycle Detection Count	Text The default is 10.	Maximum number of routing cycles in workflow before iceServer throws an error.
Queue Info Expiry Interval (s)	Text The default is 1800.	Interval which indicates how often queue info is refreshed by ice.
Send Email Protocol Timeout (ms)	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	• Trace Level 0 • Trace Level 1	Trace setting for startup

Parameter	Permissible Values	Description
	• Trace Level 2 • Trace Level 3	
Startup Trace Mask	• DBO • System • Switch • Engine • ACD Manager • Queue Routing • All	Options indicating which workflow components will output trace logs.

Virtual Workflow Sessions

Description:



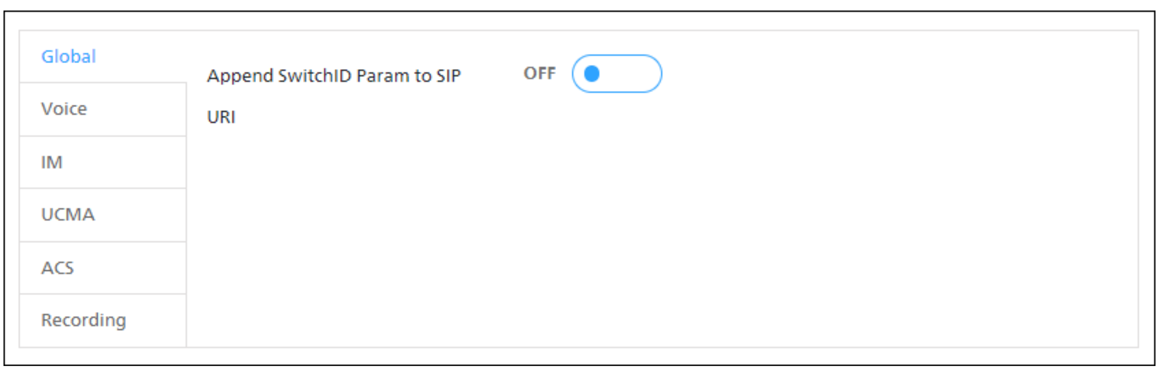
Parameter	Permissible Values	Description
Server	Dropdown list of available servers.	The selected server to run the virtual workflow session.
Session Name	Text	The name of the virtual workflow session.

Parameter	Permissible Values	Description
UC Group ID	Dropdown list of configured UC Groups	The selected UC Group ID.
Contact Type	• Voice • Email • IM	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 *Run Once* 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

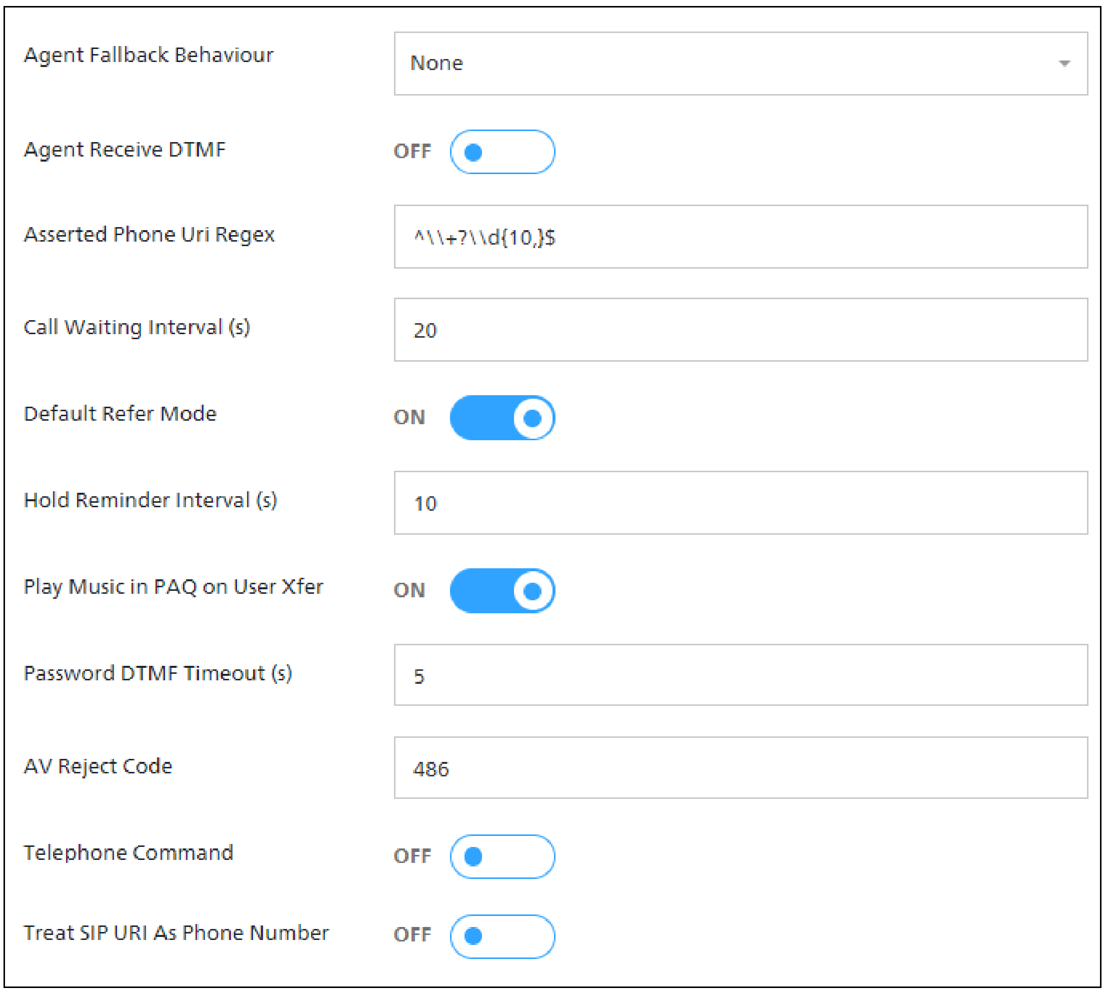
The section allows global administrators to modify the Global, Voice, IM, UCMA, ACS and Recording settings.

<u>Global</u>



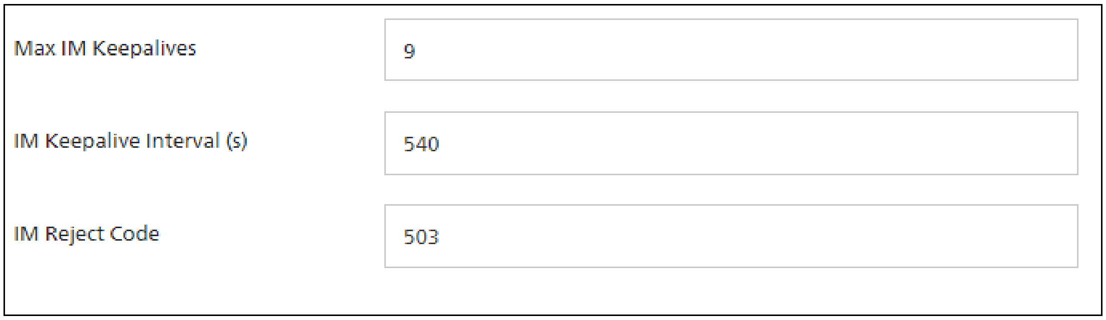
Parameter	Description
Append SwitchID Param to SIP URI	If enabled, ice will attempt to reach an ice agent via Teams. Instead of requiring each individual Teams Agent DID to be mapped for Direct Routing, the Direct Routing SBC will instead map the Teams Agents based on the SwitchID. **Note:** New agents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

<u>Voice</u>



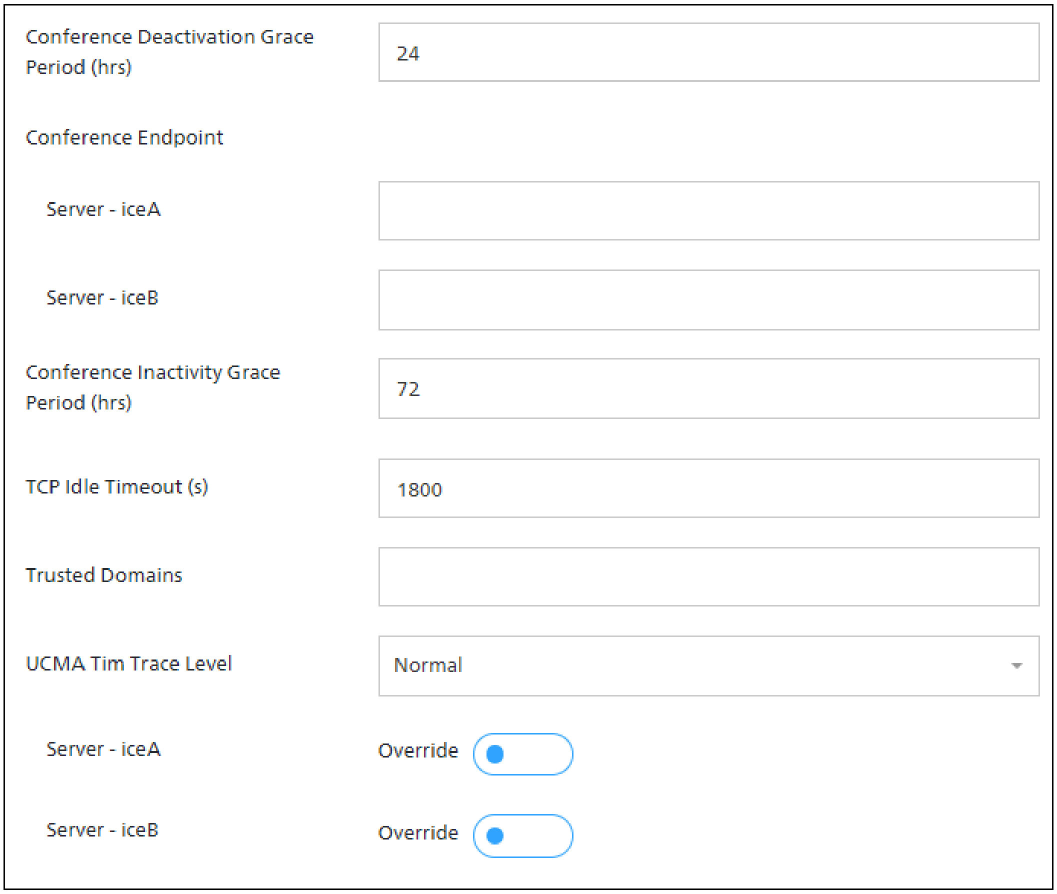
Parameter	Permissable Values	Description
Agent Fallback Behaviour	• None • PSTN • SIP	This setting specifies the fallback behaviour as: • None: No fallback defined. • PSTN: Fallback will retry the user's Remote DN without the Direct Routing as a PSTN call. • SIP: Fallback to the user's IM SIP Address URI via Skype for Business Federation.
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



Parameter	Permissable 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.

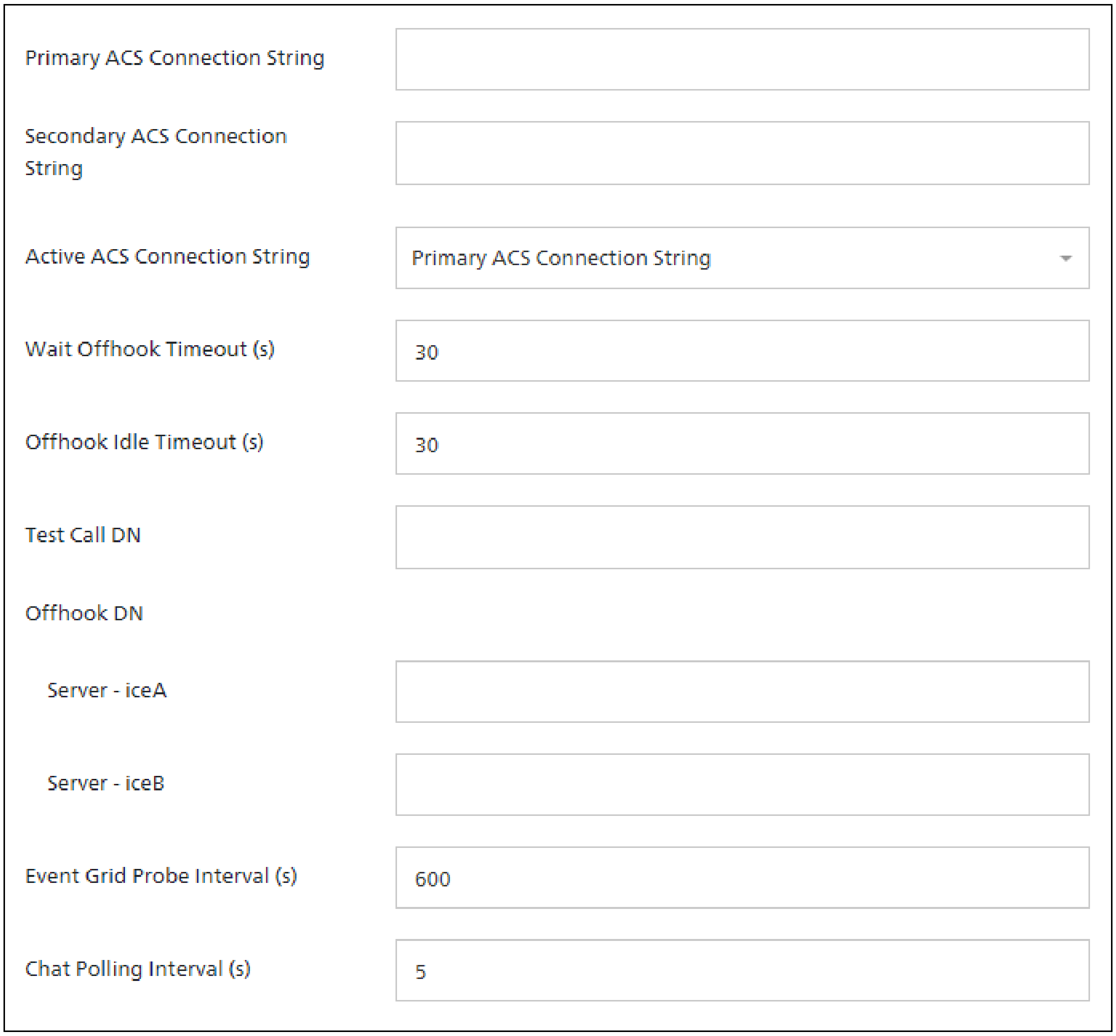
UCMA



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

Parameter	Permissable Values	Description
UCMA Tim Trace Level	• Off • Errors • Normal • Debug • Verbose	Trace setting for UCMA connection.

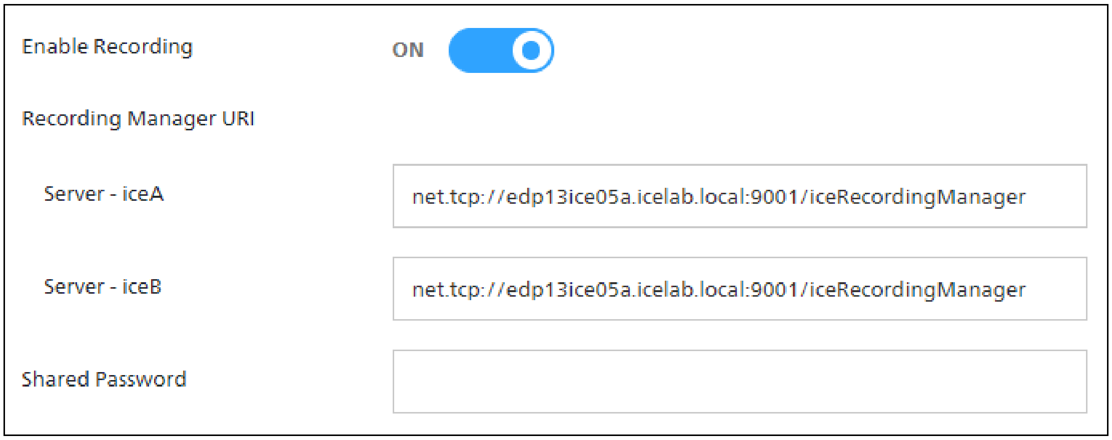
ACS



Parameter	Permissible Values	Description
Primary ACS Connection String	Text	The primary ACS endpoint.

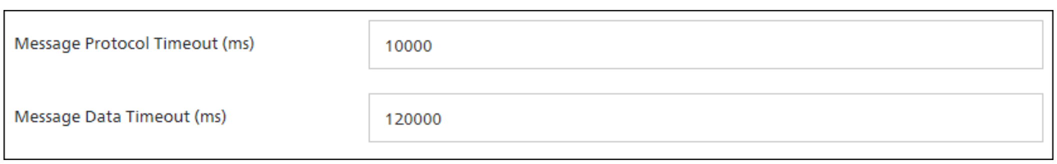
Parameter	Permissible Values	Description
Secondary ACS Connection String	Text	The secondary ACS endpoint.
Active ACS Connection String	• Primary ACS Connection String • Secondary ACS Connection String	The active ACS connection string.
Wait Offhook Timeout (s)	Text	The timeout that will be used when alerting 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



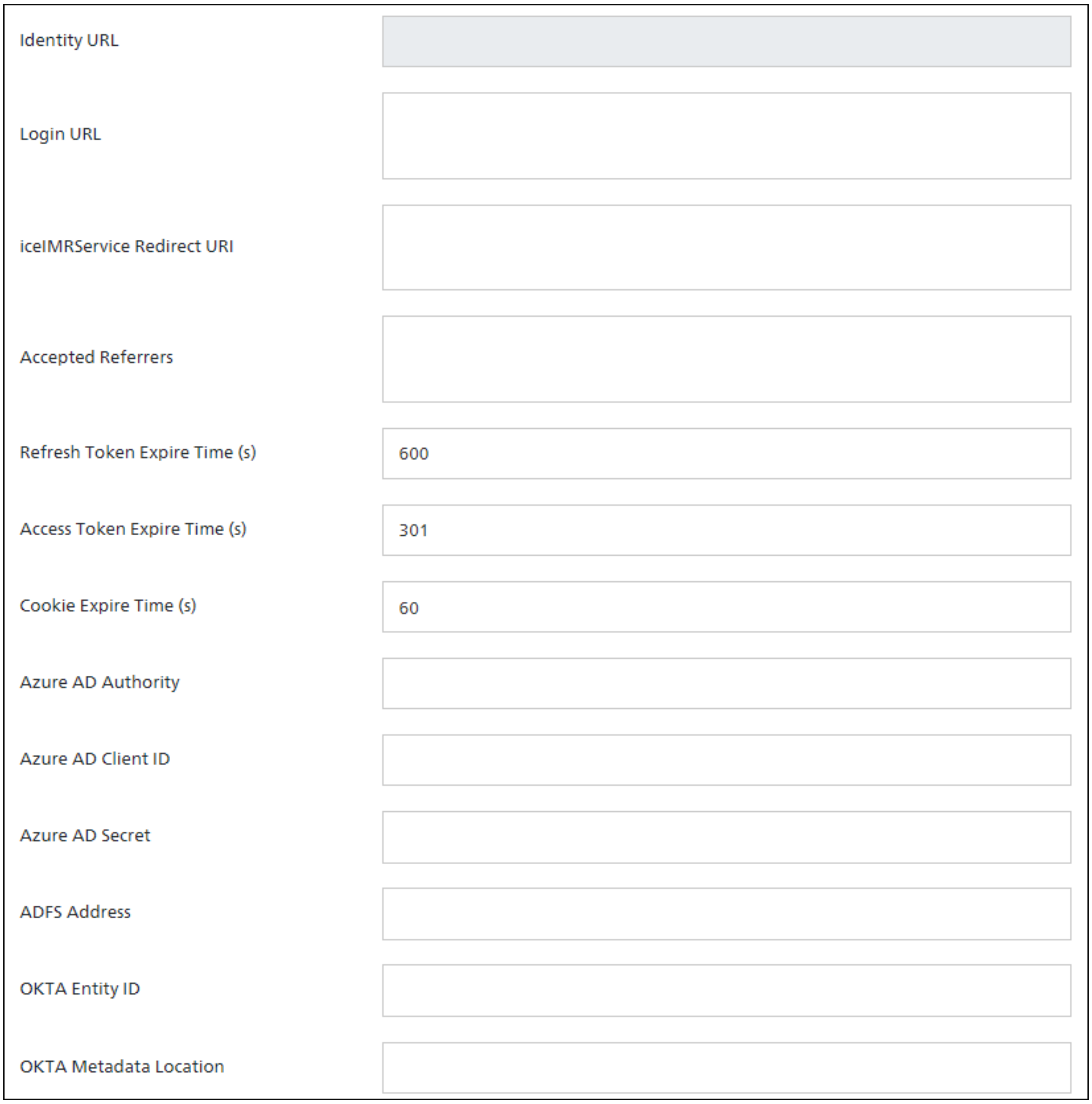
Parameter	Permissable Values	Description
Enable Recording	On/Off	Enable this setting to enable recording.
Recording Manager URI	Text	URI for the recorders.
Shared Password	Text	Shared password for the recorder.

iceMail



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

iceIdentity

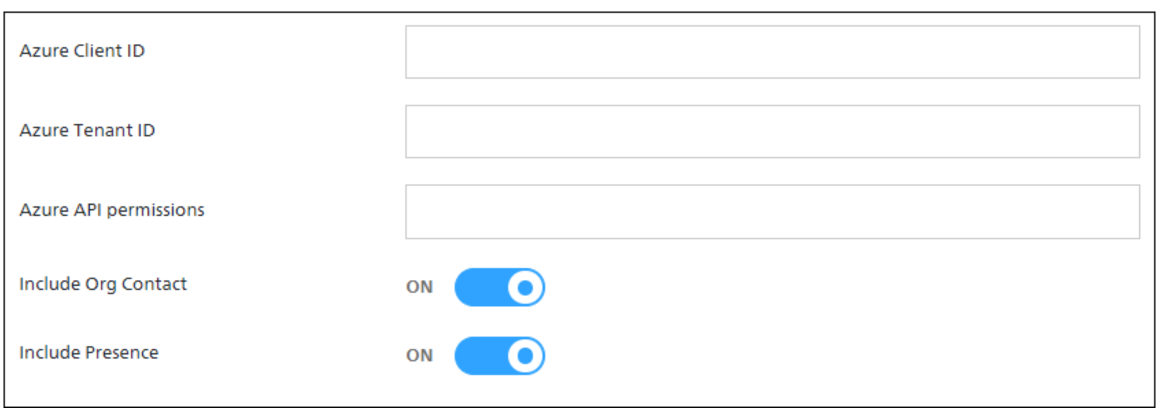


Parameter	Permissable Values	Description
Identity URL	Text	URL for Identity.
Login URL	Text	URL for login.
iceIMRService Redirect URI	Text	URI for iceIMRService redirects.
Accepted Referrers	Text	The accepted referrers.

Parameter	Permissable 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

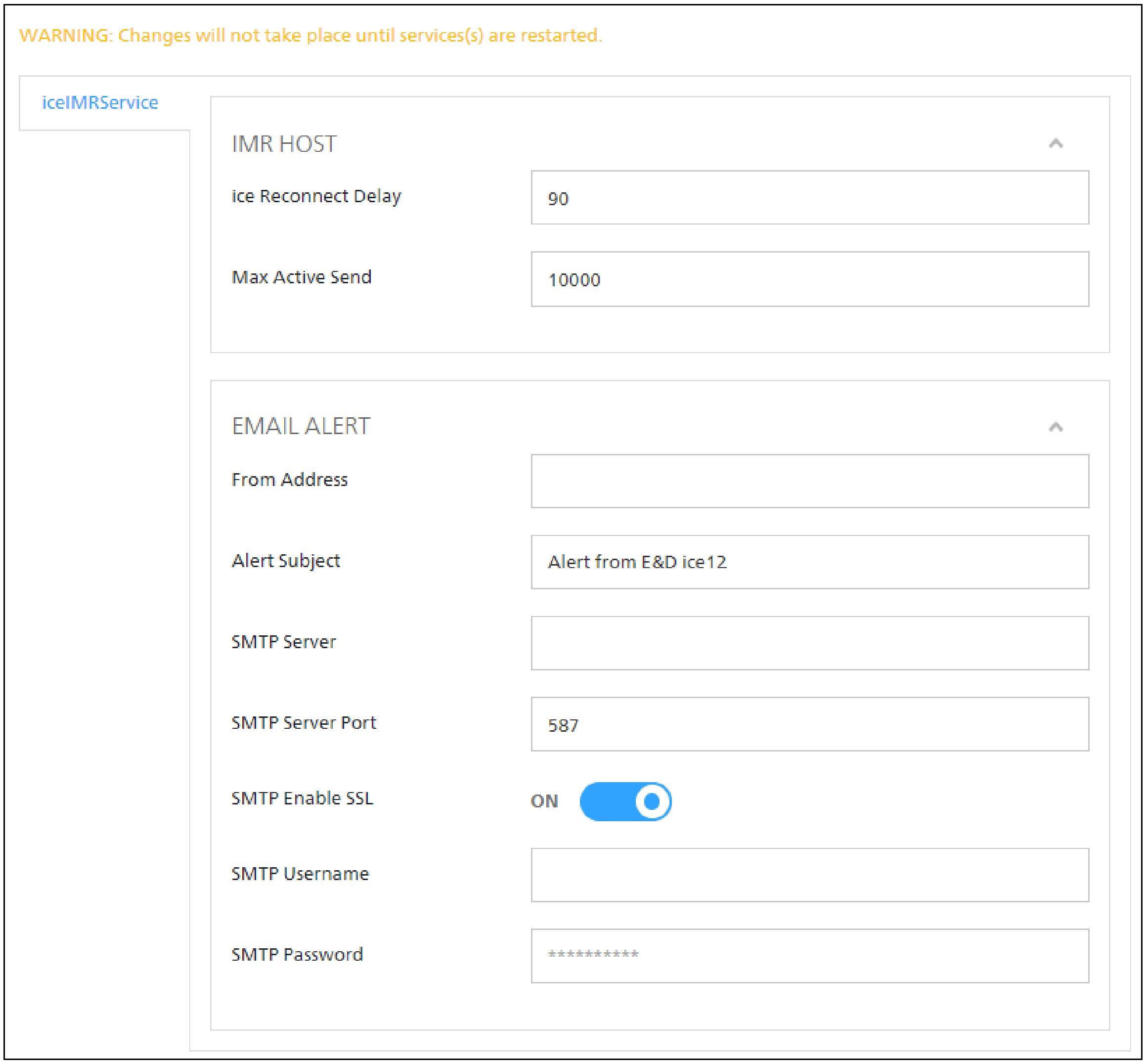
This page can only be accessed by an Administrator. The section allows administrators to modify the Microsoft Graph Settings.



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.



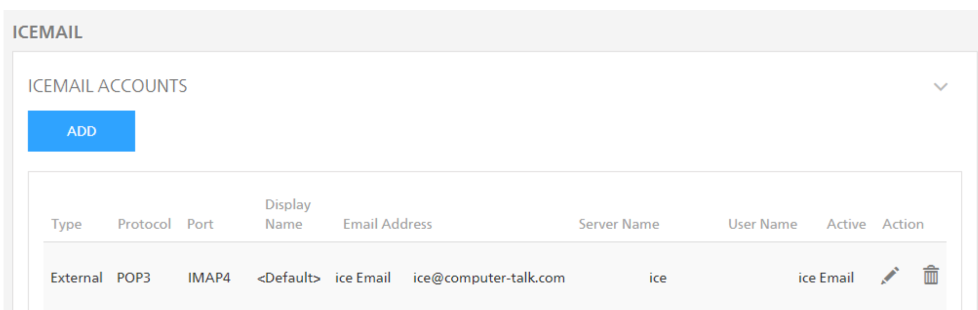
Parameter	Permissable Values	Description
IMR Host		
iceReconnect Delay	Text	On failed/disconnect to ice server, the client application will wait for this amount of time before attempting to reconnect to the ice server.
Max Active Send	Text	Maximum message buffer queued for messages between ice server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

Parameter	Permissable Values	Description
Email Alert		
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



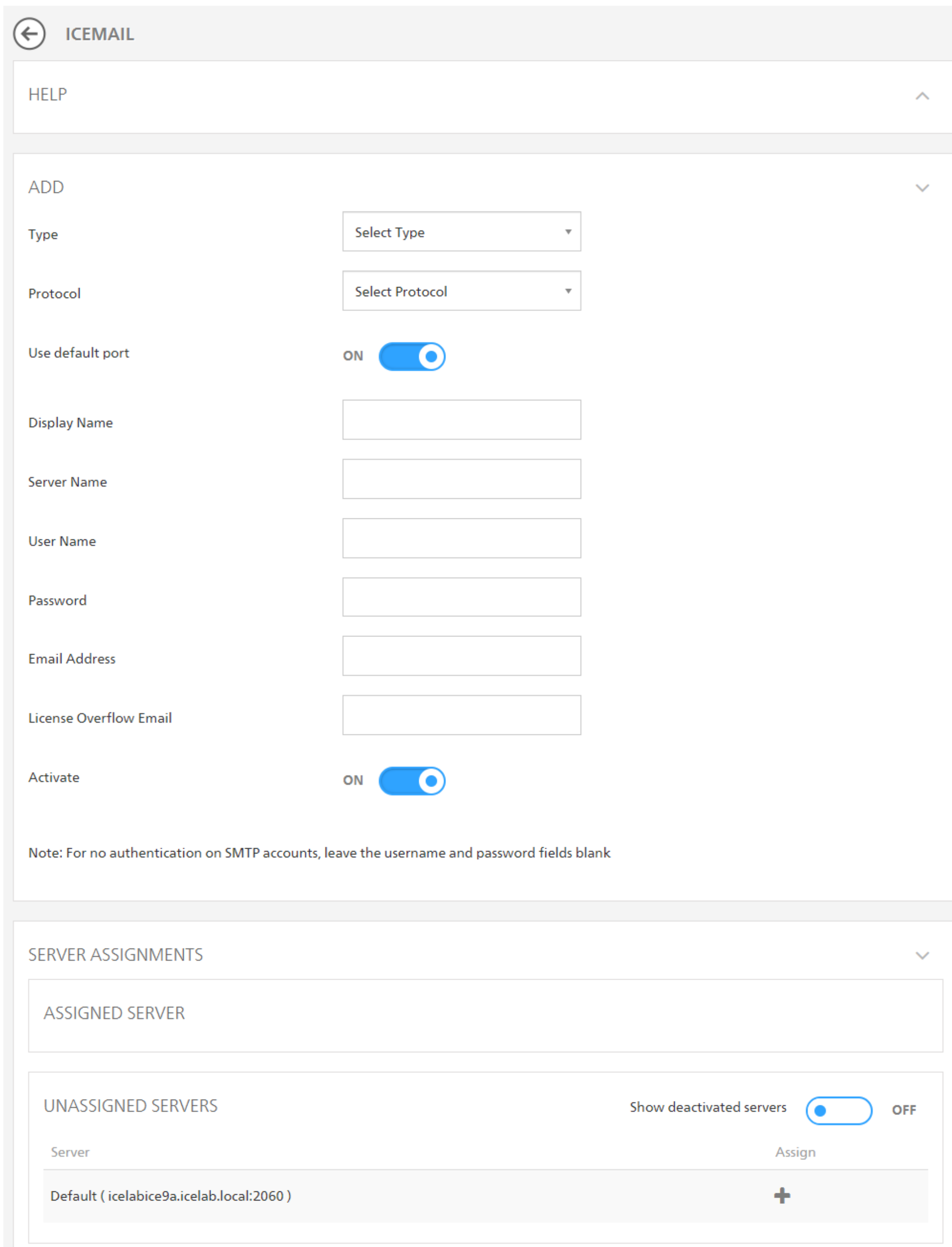
The iceMail Accounts section provides information on each account that has been configured for the system and their state. Below is a table describing each attribute:

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

Parameter	Details
	• Internal • External
Protocol	Email transfer protocol the account will be using. User can select from one of the following options listed below: • IMAP4 • IMAP4-SSL • IMAP4-OAUTH2 • POP3 • SMTP • SMTP-SSL • SMTP-IP-Auth • SMTP-User-Auth • SMTP-OAUTH2
Use Default Port (open to selections below if Off)	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: 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
Port	Port used to connect to the email server.
Display Name	The name displayed with the email address.
Server Name	Name of the email server.
User Name	User name used for account authentication.
Password	Password used for account authentication.
Email Address	The email address associated with the iceMail account. This email address will be used send and receive emails.
Active	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.



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.

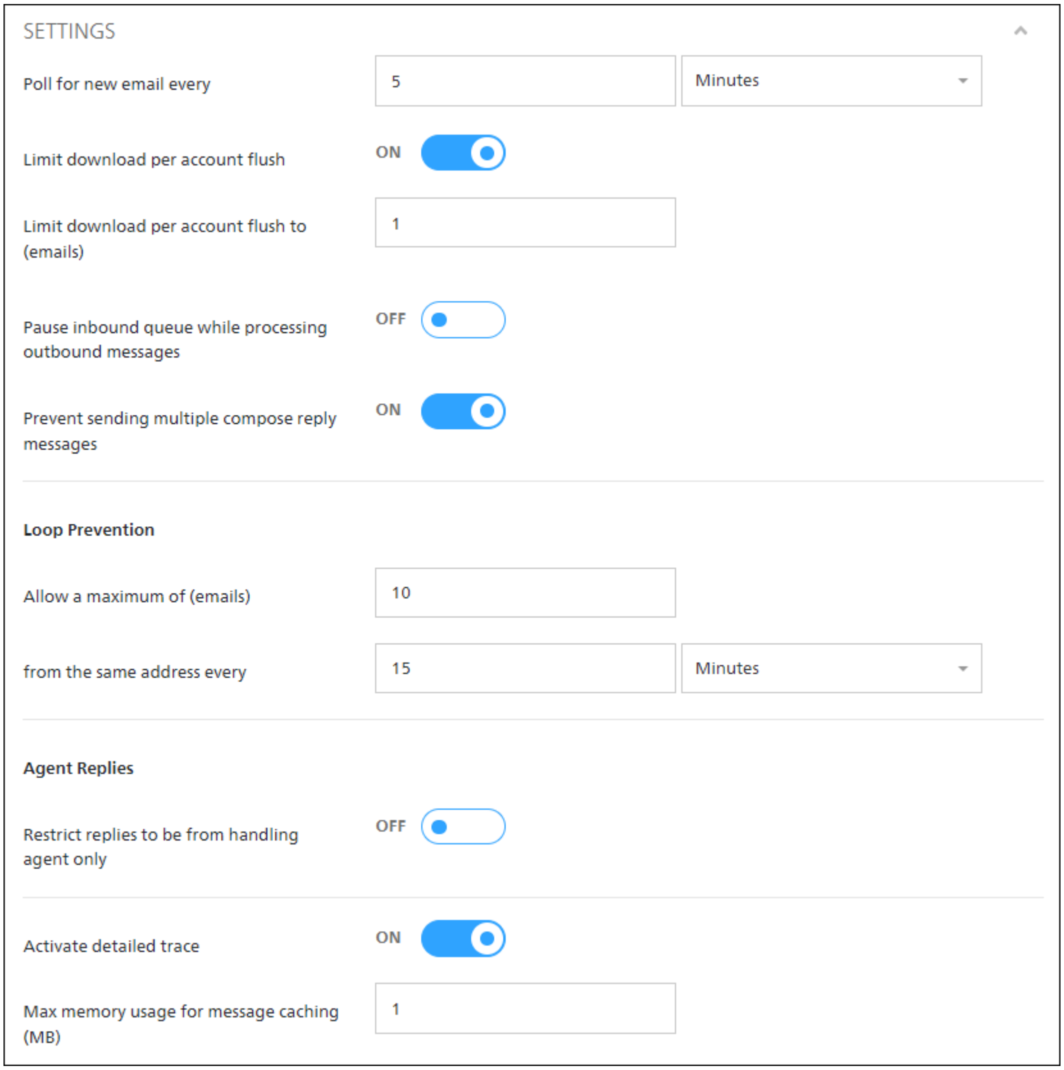
To delete an iceMail account:

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

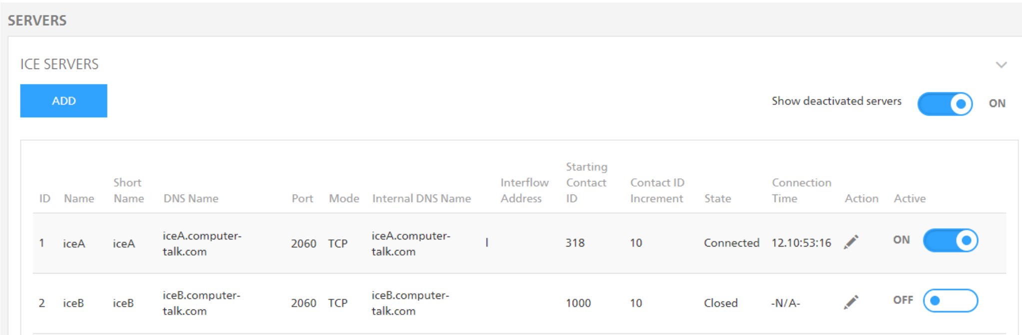


Parameter	Details
Poll for new email every	The interval indicating how often iceMail will poll for new emails.
Limit download per account flush	Enable this setting to limit download per account flush.
Limit download per account flush to (emails)	The number of emails to limit download per account flush.

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.
Loop Prevention	
Allow a maximum of (email) from the same address every (time)	The number of emails allowed per configured interval.
Agent Replies	
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.

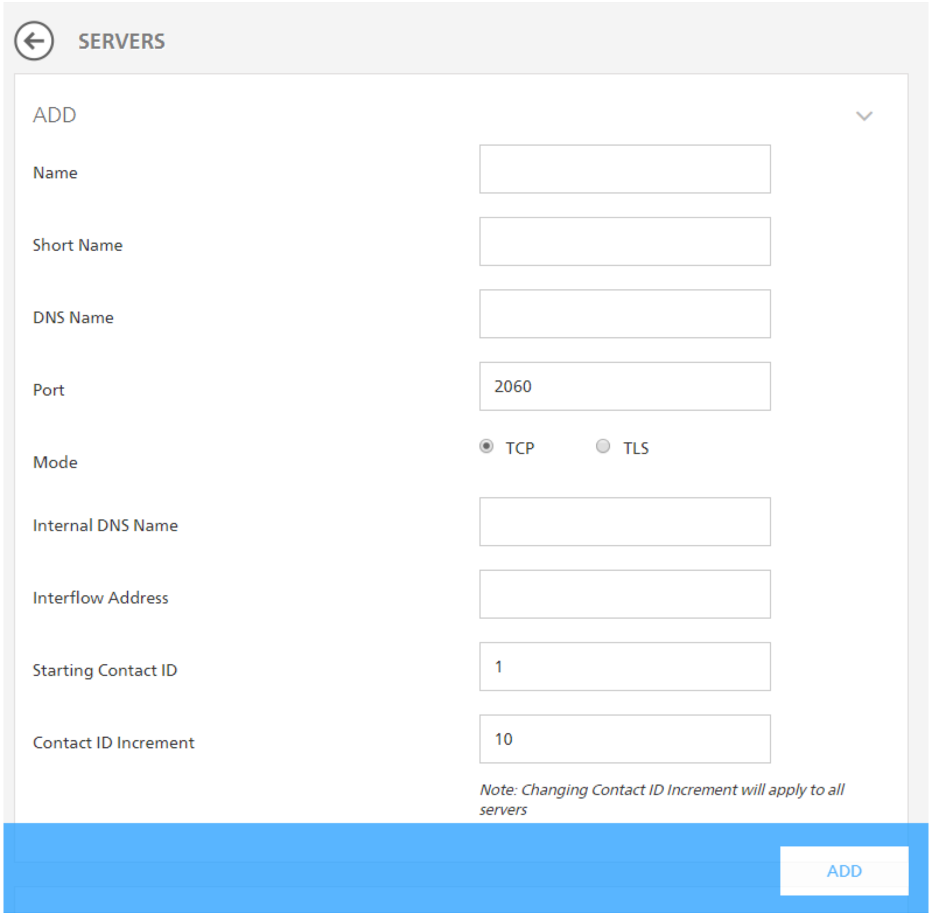
Servers

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.



Parameter	Details
ID	A unique identifier for each server added to this list.
Name	The name given to the server.
Short Name	A shortened name given to the server up to 4 characters. This name will appear in iceMonitor and iceReporting.
DNS Name	The external DNS name used to communicate with the server.
Port	Internal port connecting to the server.
Mode	Security protocol required to establish connection with the server.
Internal DNS Name	The internal DNS name used for validation during server start up. If this field is modified, a server restart is required to implement changes.
Interflow Address	The SIP address that will be used to move voice contacts to the server.
Starting Contact ID	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.
Contact ID Increment	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.
State	Indicates whether the sever is connected or disconnected.
Connection Time	The amount of time the server has been in a Connected state.
Action	Allows a user to edit the settings of the server. This option is only available for Global Administrators.
Active	Select On to activate

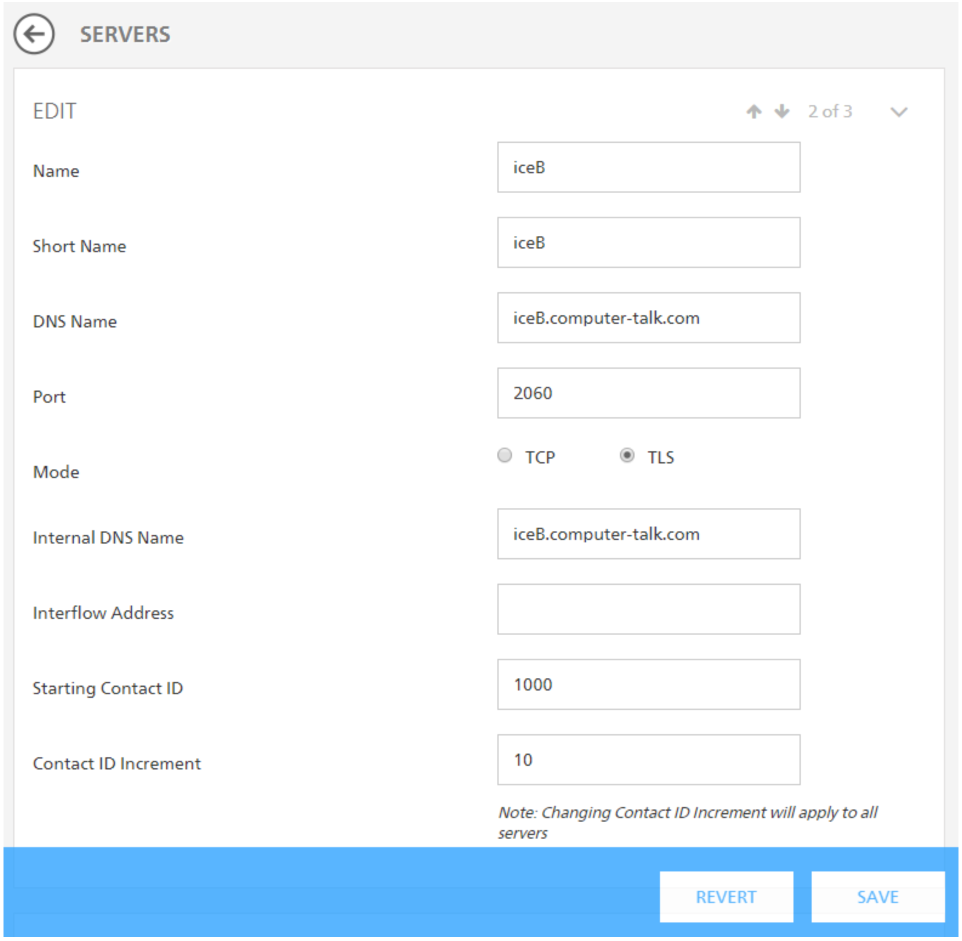
A Global Administrator has privileges to add new servers and modify existing servers.



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:

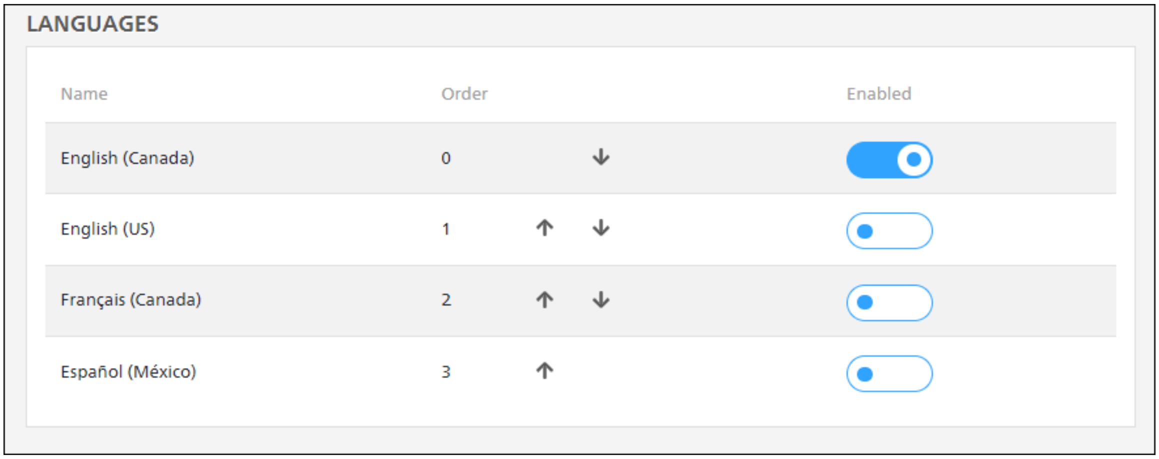


1. Select the Edit button (pencil icon) under the Action column. The Edit Server page will appear.
2. Edit the desired fields.
3. Click *Save* to save the changes. Click *Revert* to cancel the changes.
4. If you clicked *Save*, the 'Save ice Server' message will appear. Click *OK* to complete the change. 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

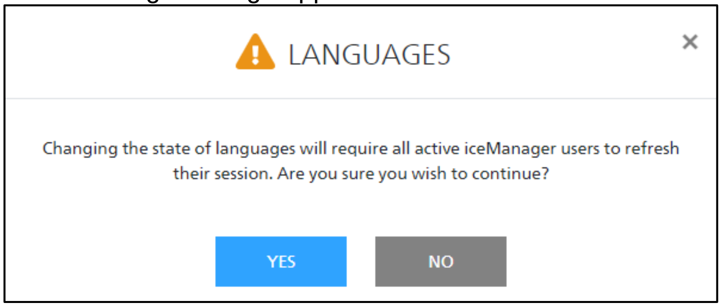
This section can only be modified by Global Administrators. This section allows Global Administrators to control the languages offered in iceManager and iceSurvey.



To turn on a language option:

1. Select the toggle under the Enabled column.

2. The following message appears:

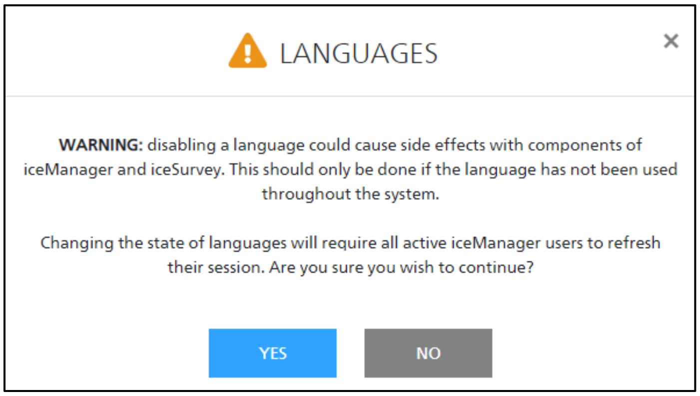


3. Select Yes to enable the language, or No to cancel.

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

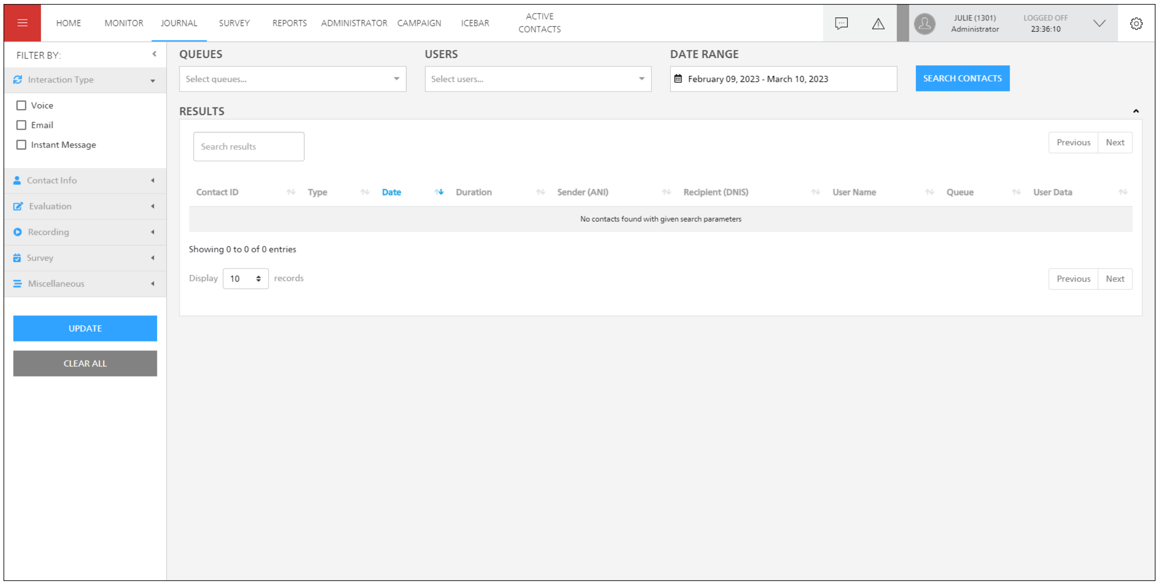
The Journal provides the ability to search for interactions by queue, user, contact type, date range and other criteria. Contact details are shown when a particular record is selected.

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

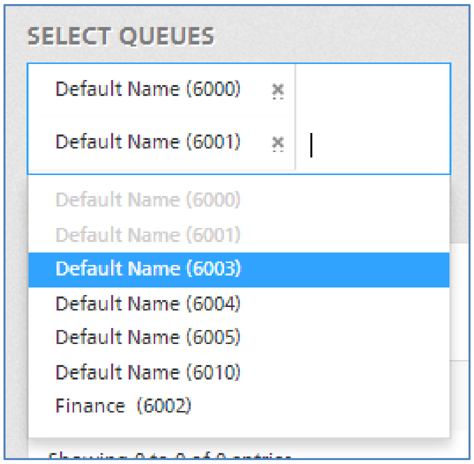
When you first click the *Journal* tab, the following screen appears. Search options and results are on the right side of the screen and filters are along the left side of the screen.



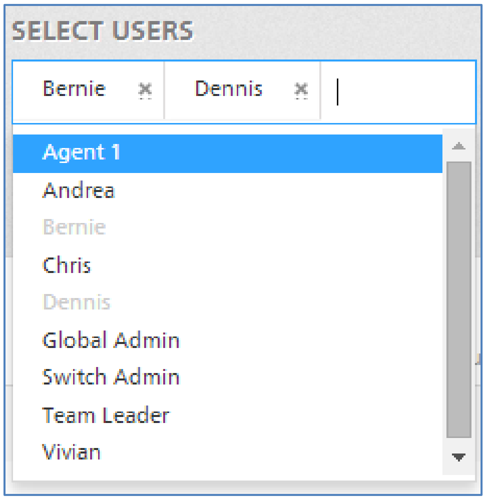
Searching for an interaction

To search for an interaction, complete the following steps:

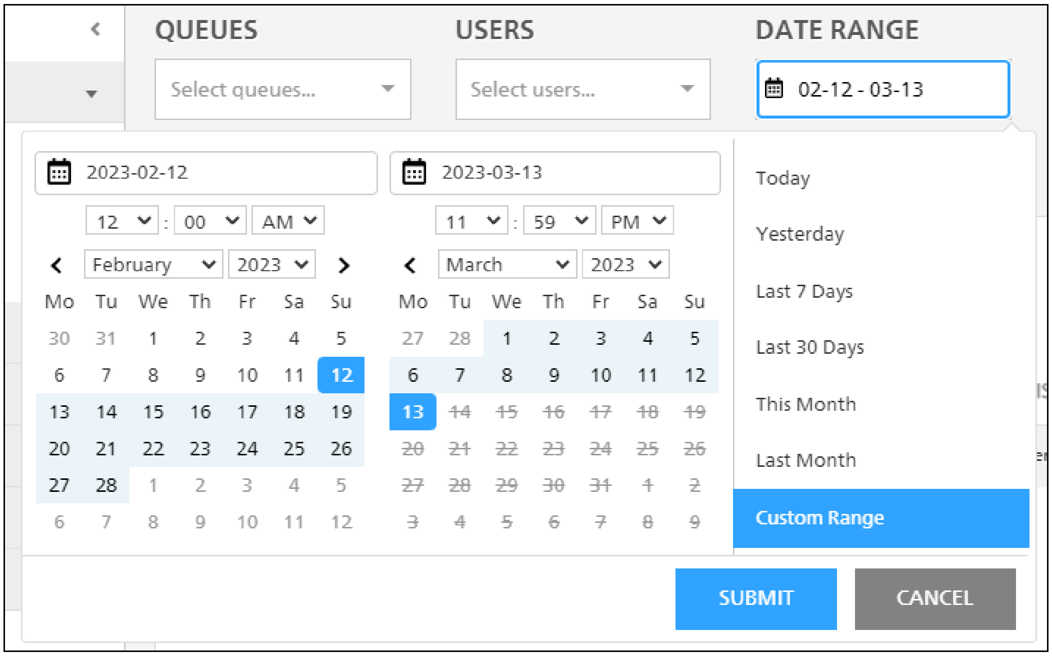
1. If you are looking for the results for a queue or multiple queues, find and select the appropriate queues from the ‘Select Queues’ drop-down. You can search one queue or multiple queues. To delete a selection, click the grey x beside the name.



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.

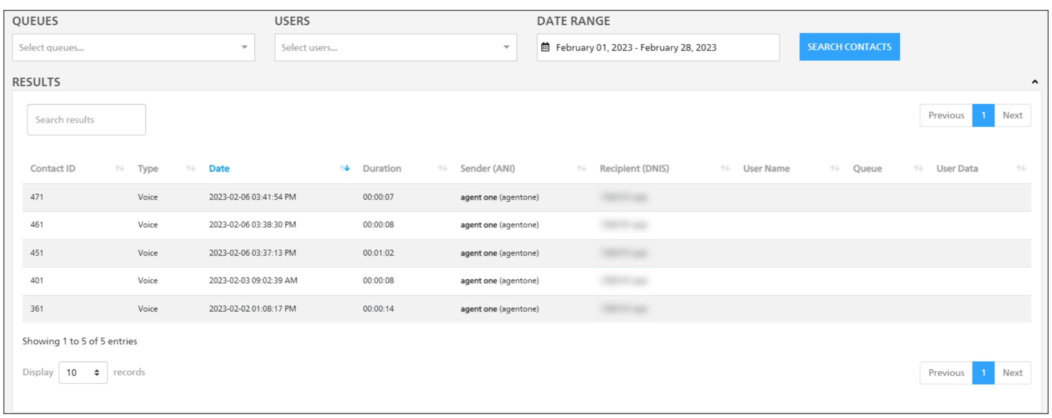


3. Select a date range based on options in the ‘Date Range’ drop-down.



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.

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



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	This field contains information on the contact. Depending on the interaction type, different information is displayed. 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. For email interactions, user data can be empty, or it can contain notes from the previous agent. 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.

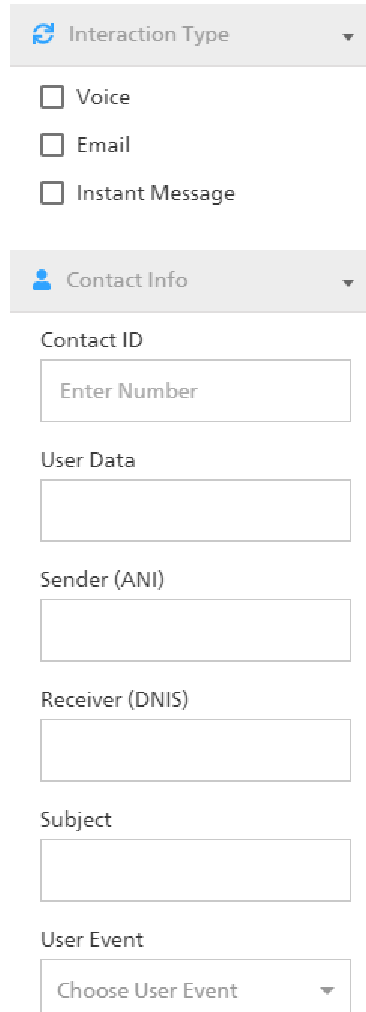
You can sort results by any of the columns in the table. You can also filter results by Interaction Type or Advanced Filters.

- 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*.

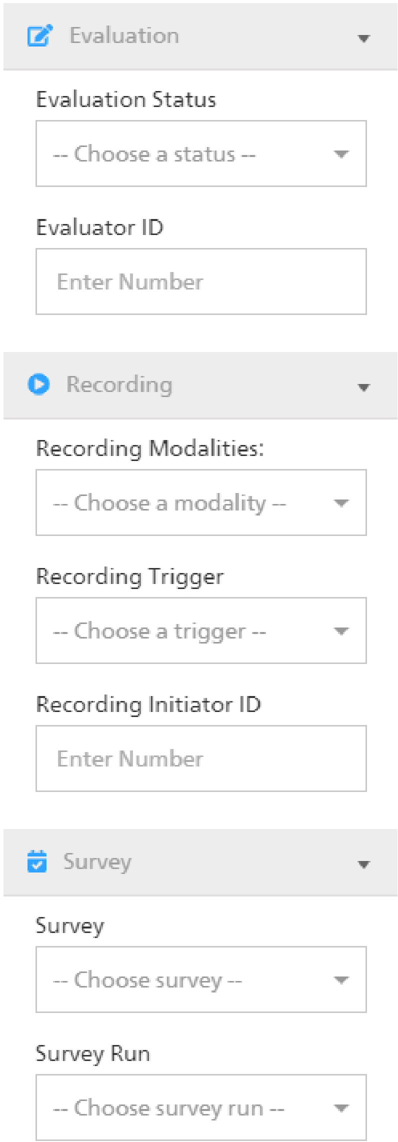
The table on page 165 explains the advanced filters that are available. Only the advanced filters that have been modified from the default option will be used to filter results.

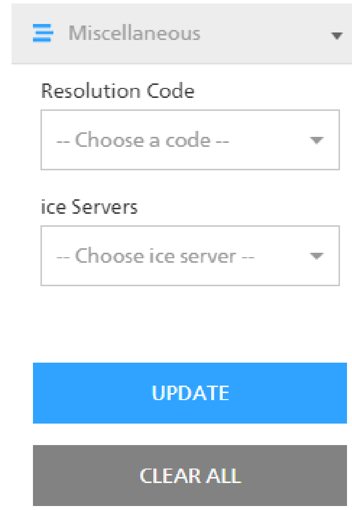
Advanced Filters

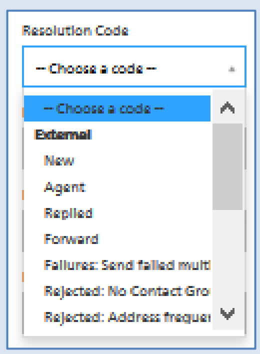
Parameter	Description
Contact Info	
Contact ID	Enter the Contact ID of interest.
User Data	This field contains information on the contact. Depending on the interaction type, different information is displayed. For voice interactions, the caller ID and the caller's responses to menu prompt may be displayed. It can also contain notes from the previous agent. For email interactions, user data can be empty, or it can contain notes from the previous agent. 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.
Sender (ANI)	The SIP address, email address or phone number of the person who called the contact center.
Receiver (DNIS)	The SIP address, email address or phone number the sender had dialed, emailed, or IM'd.
Subject	The subject of the email.
User Event	Select the User Event associated with the contact. Options include: • Conferenced • Conferencing • Consulted



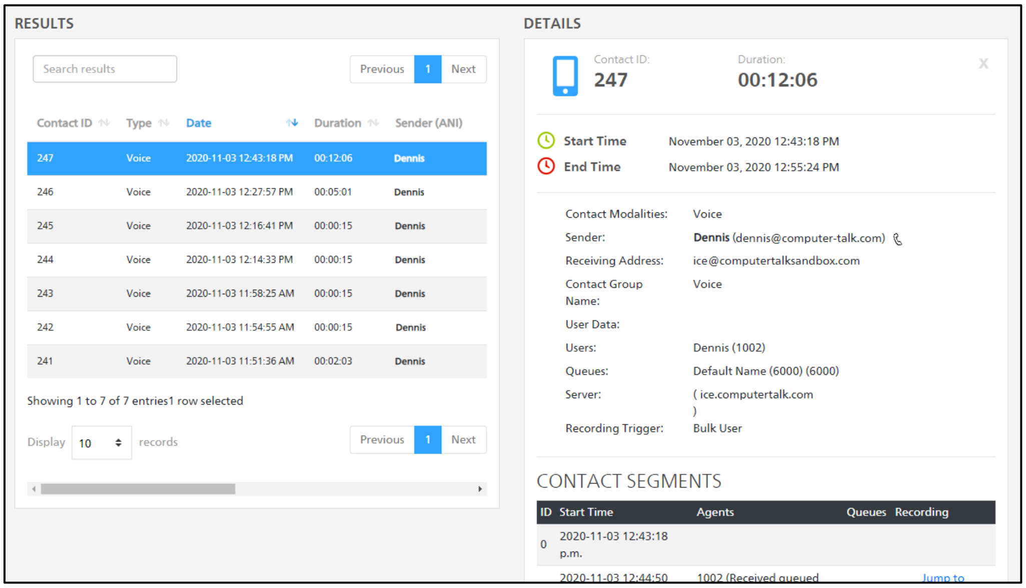
	• Consulting • In meeting • Placed external contact • Placed internal contact • Received direct contact • Received queued contact • Received self parked contact • Received transferred direct contact • Received transferred queued contact
Evaluation	
Evaluation Status	Select from the drop-down list containing the current evaluation status of the recording. Options that you can select are listed below: • Not Evaluated • Being Evaluated • Evaluated • Unknown
Evaluator ID	Type the ID of an evaluator to filter results by the interactions that he/she evaluated.
Recording	
Recording Modalities	Select the recording modality associated with the contact you are searching. Options that you can select are listed below: • Any • Voice • Screen Recording
Recording Trigger	Options that you can select are listed in Appendix B: Recording Triggers on page 204.





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

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


RESULTS
DETAILS
Search 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 entries1 row selected
Display 10 records
Contact ID: 247
Duration: 00:12:06
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.

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
Contact ID	Identification of the contact
Duration	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.
Start Time, End Time	The start date and time, as well as the end date and time, are displayed here.
Contact Modalities	A list of the modalities that were used during the interaction is displayed here.
Sender	The phone number, SIP address, or email of the contact who initiated the interaction is displayed here.
Receiving Address	The phone number, SIP address, the email of the Email Group or the URI of the UC Group that received the contact
Contact Group Name	Name of the contact group that received the contact. Contact Group is configured in iceAdministrator.
User Data	This field contains information on the contact. Depending on the interaction type, different information is displayed. 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. For email interactions, user data can be empty, or it can contain notes from the previous agent. 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.

Field	Description
Users	The name and ID of the users who handled the interaction are displayed here.
Handled Queues	The name and ID of the queues the interaction occurred in.
Server	The ice server used when the contact entered the system.
Resolution Code section	This section contains options for selecting resolution codes. This section appears for interactions that involve email. Select the appropriate resolution code from the *Choose a code* drop-down and click *Apply*.
Contact Segments section	A Contact segment is made anytime the agent Roster of the call changes. 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. 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. 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. 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

Field	Description
	date and time, Subject line, and message. Under the transcript is the *Download* button – click to download a copy of the transcript. 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 *Download* button – click to download a copy of the transcript. <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.
Evaluation section	This section contains options for evaluations. If the interaction has not been evaluated, you can select the appropriate form from the *Evaluate* drop-down. If the interaction has already been evaluated, you can view the evaluation results or delete the existing evaluation.
Survey	This section contains information regarding the survey that this contact participated in. The information includes: • Survey Name • Survey Run Name • Completion Address • Completion Modality • State
Purging	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. **Caution:** Recordings that have been purged cannot be recovered. Please ensure that you do not purge any recordings you may need in the future.

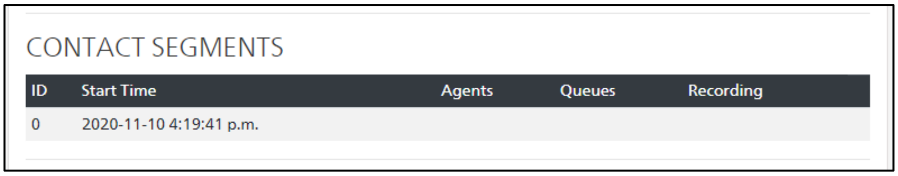
You can close the Details section by clicking the *X* at the top right corner of the section. To view another entry using the same search results, click on that entry in the Results frame. To find another entry, change your search options and click *Search*.

Contact Segments

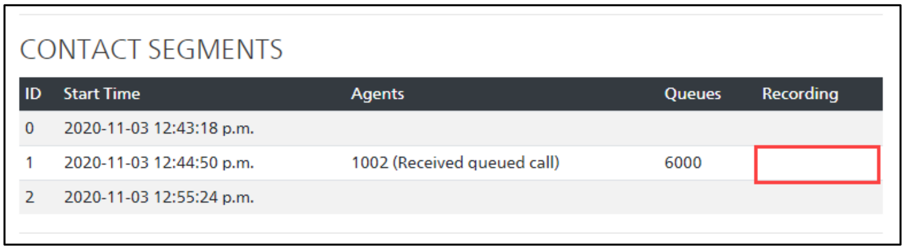
The Contact Segments section contains the recording or text transcript of the interaction. You may interact with it if you have the appropriate access level. This section also contains evaluation options and Survey details.

<u>There are 3 possible scenarios in this section:</u>

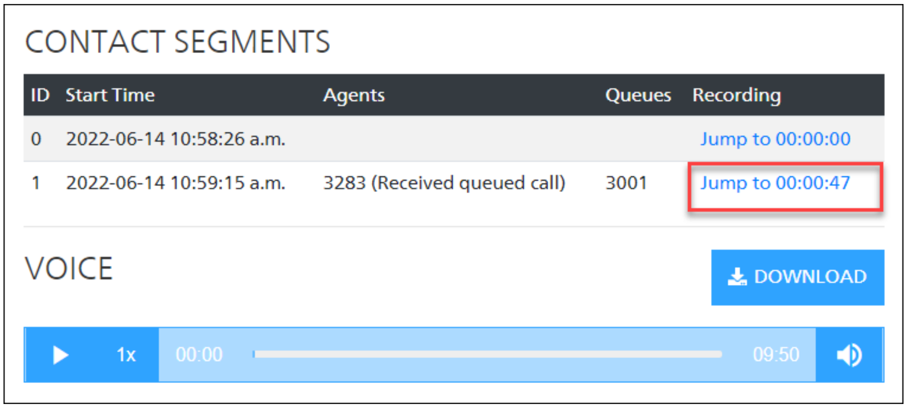
1. There are no transcripts.



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



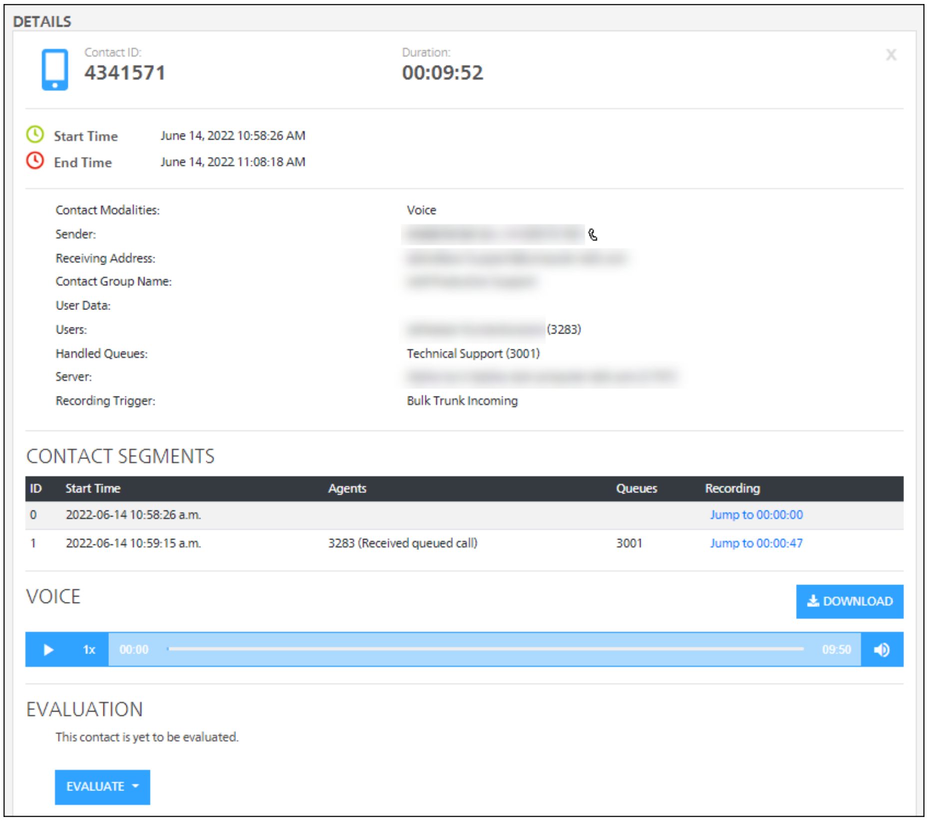
3. Transcripts are available for viewing and download.



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

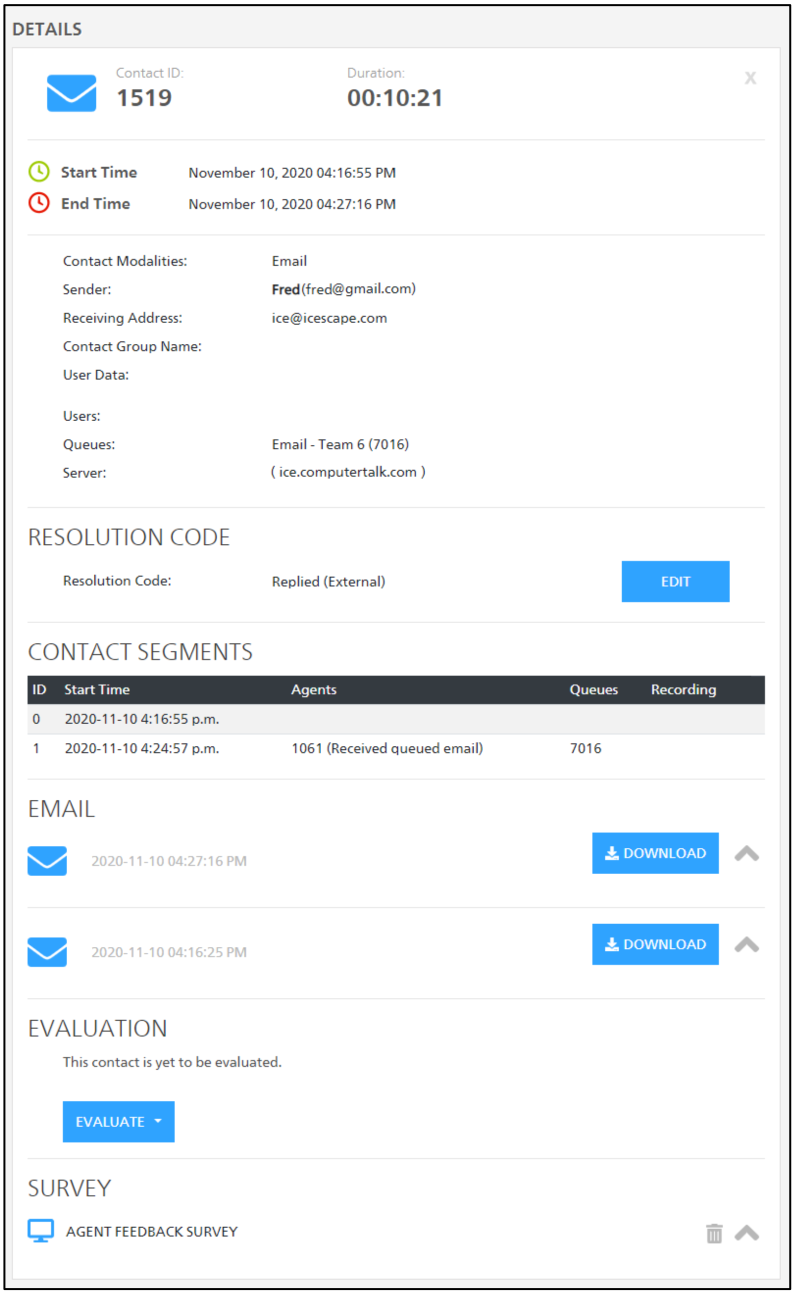
Voice Interactions

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.



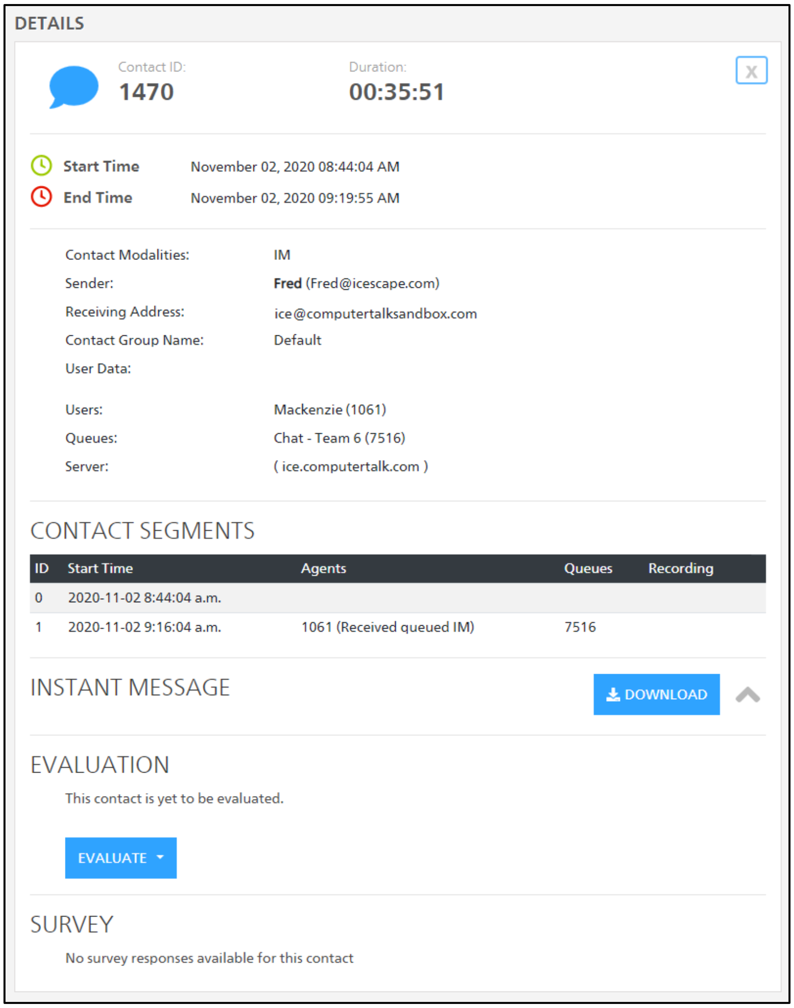
Email Interactions

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.



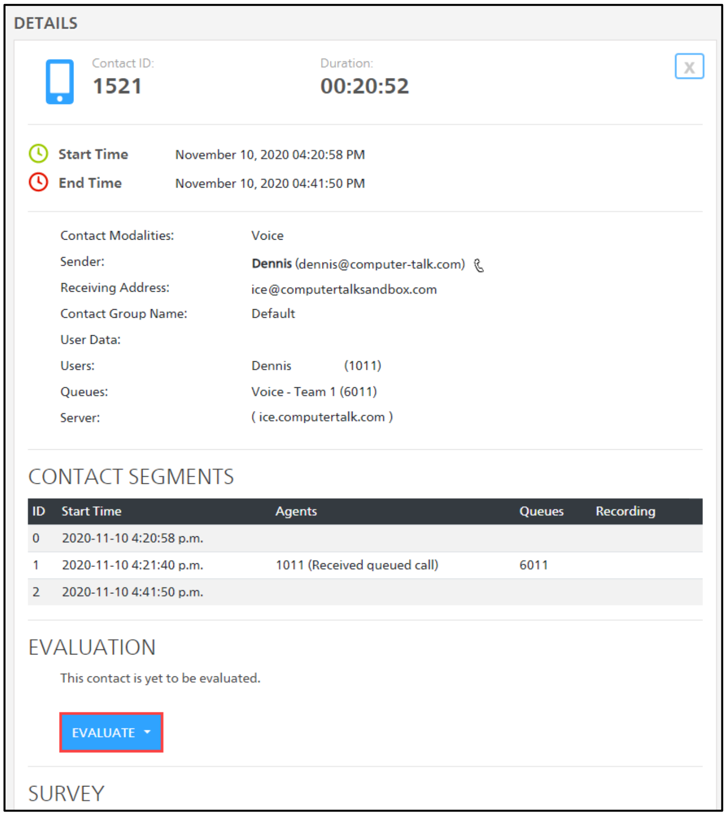
Instant Messaging Interactions

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.

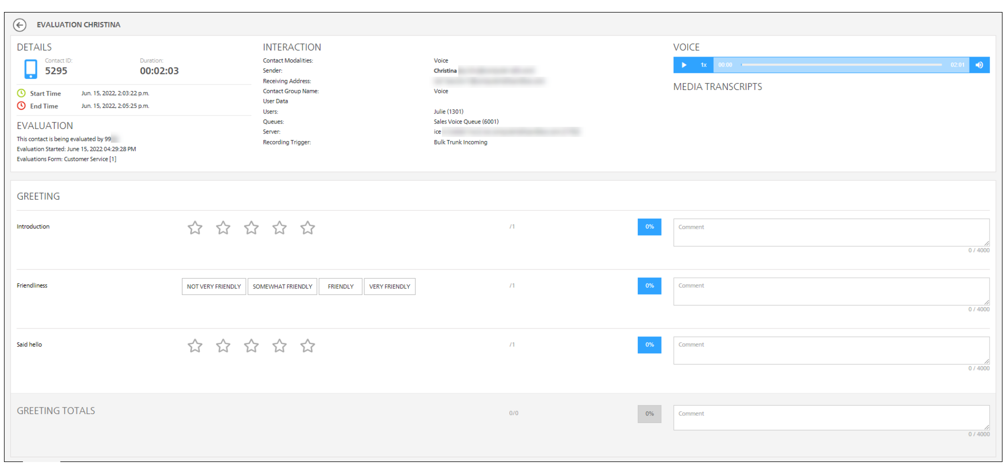


Evaluating an interaction

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



The evaluation form appears in the browser window.



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

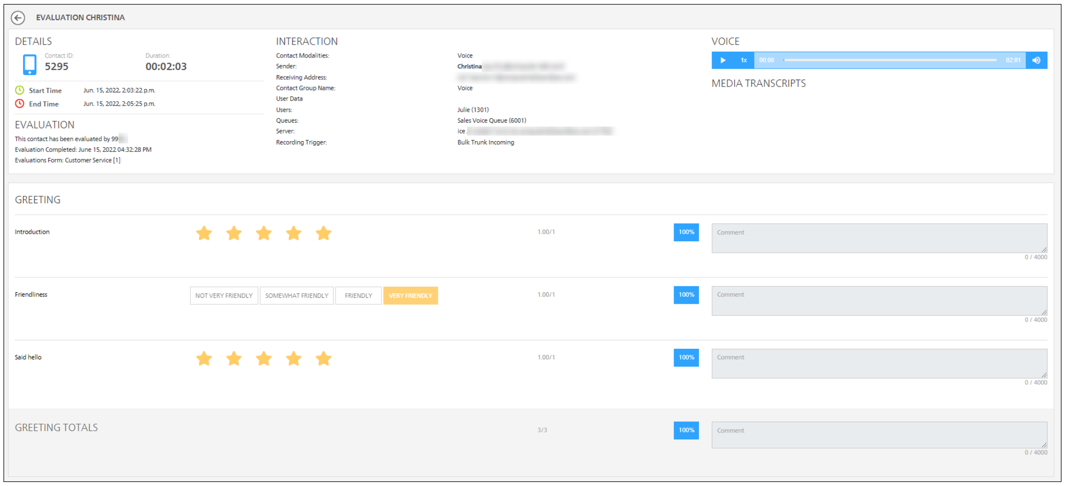
Once you are finished evaluating, click *Submit*. You must complete all fields to submit the evaluation.

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*.



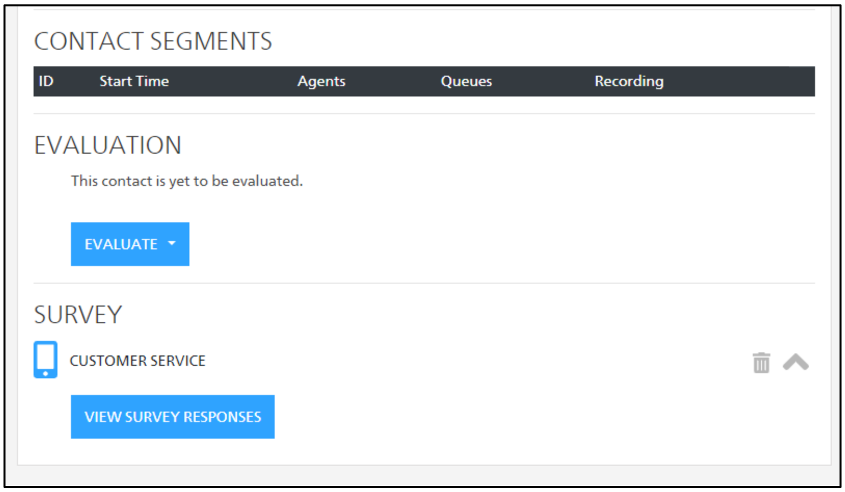
Note: You cannot modify this form.

Survey Responses

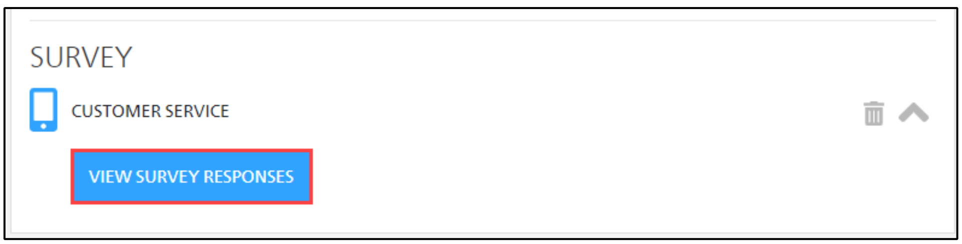
This section displays the name of the survey that the customer participated in. It also provides the option to view and delete the Survey Response.

Note:

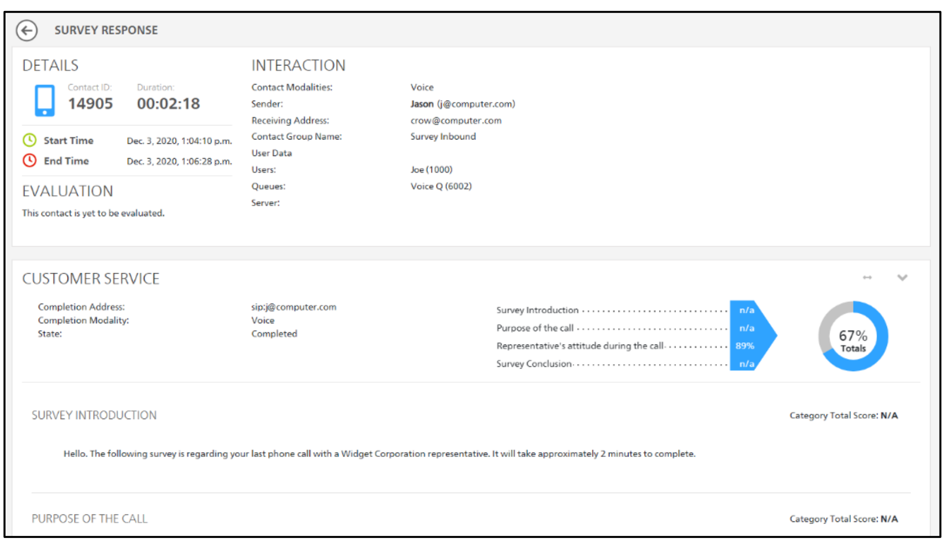
- Survey Responses will only be displayed if the contact participated in an active survey and the response is complete, or if the Survey Run is complete.
- All Survey Responses are also available in iceReporting.



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



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

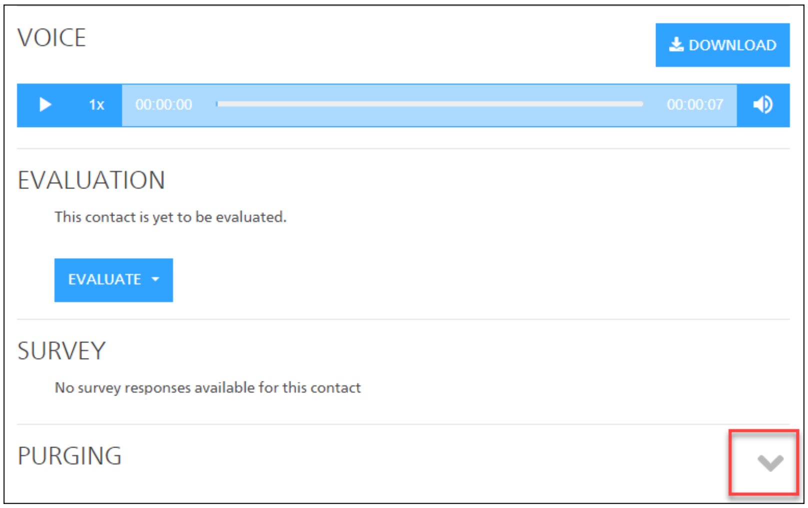


Purging Recordings

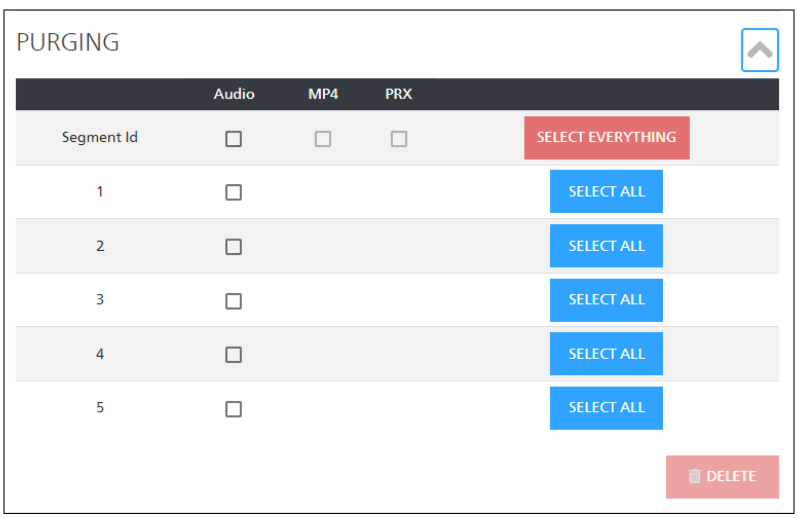
This section is only available for administrators. This allows administrators to delete call and screen recordings.

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

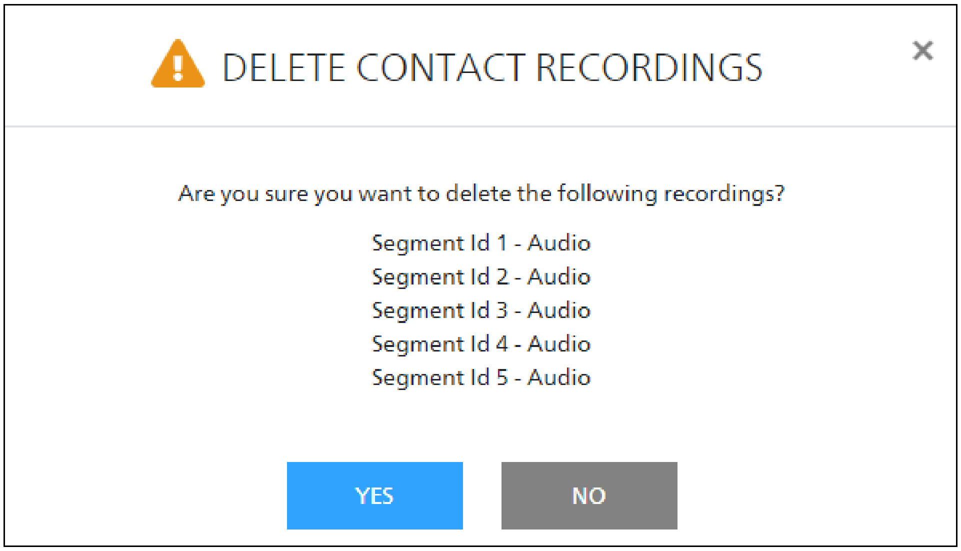
To purge a recording, click the grey arrow to open the section.



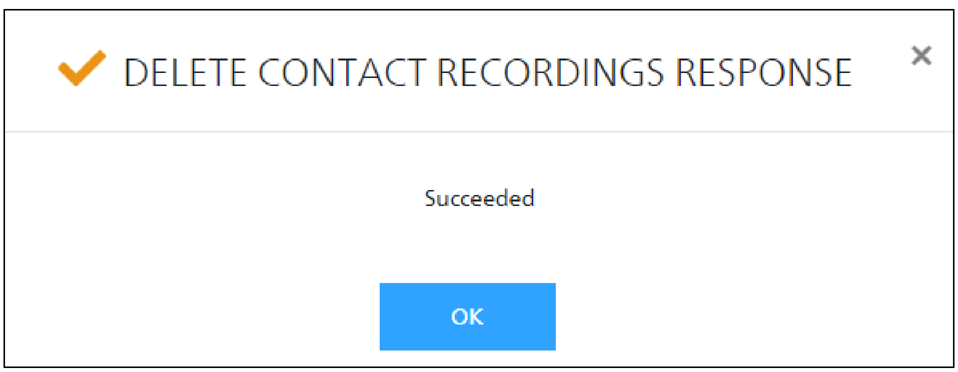
Click the checkbox next to the contact segment(s) you would like to remove or click *Select Everything* to select all segments. Click *Delete* to delete the segments.



The 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

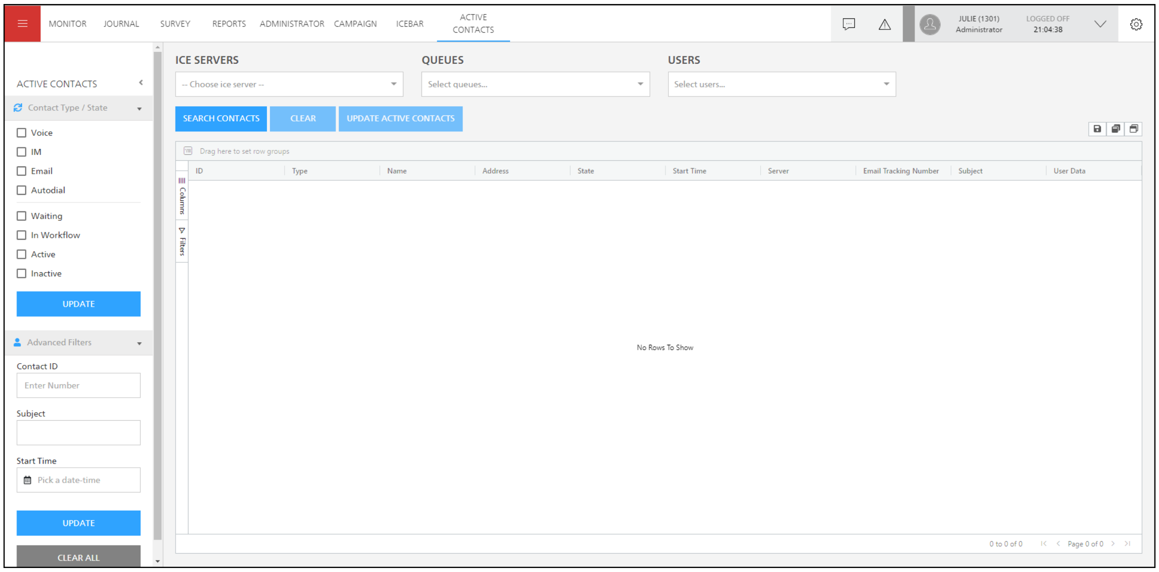
Active Contacts provides the ability to search for interactions by queue, user, contact type, time range and other criteria. Contact details are shown when a particular record is selected.

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.

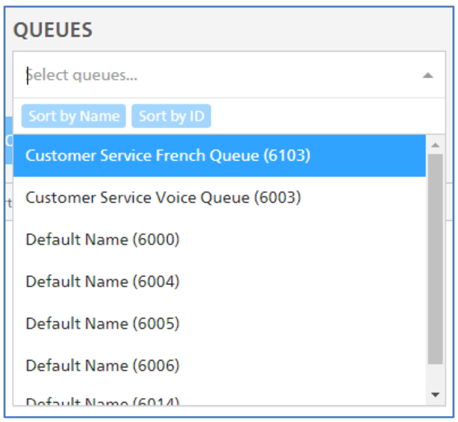


Searching for an interaction

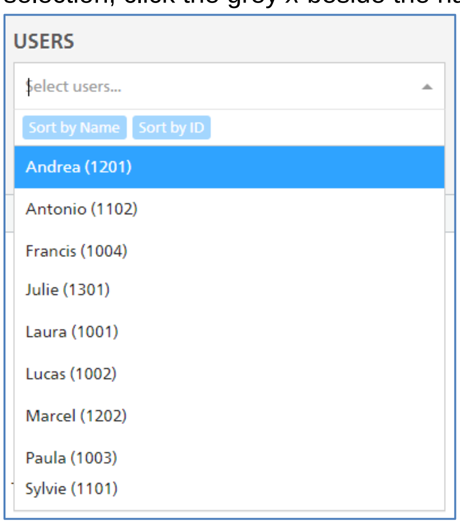
<u>To search for an interaction, complete the following steps:</u>

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.

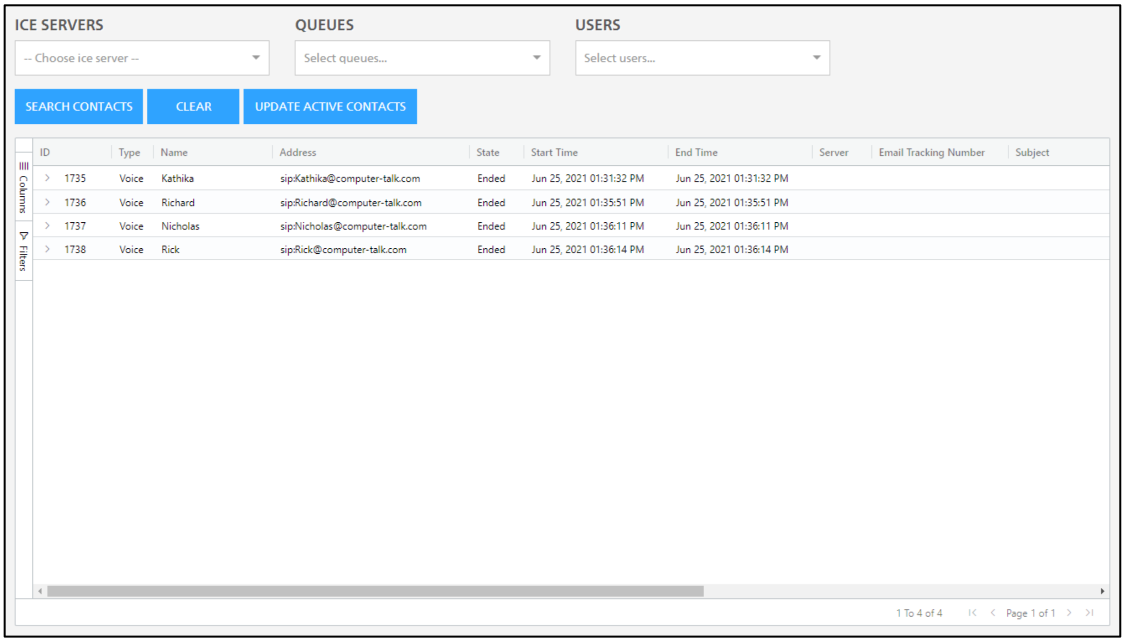
2. If you are looking for the results for a queue or multiple queues, find and select the appropriate queues from the ‘Queues’ drop-down. You can search one queue or multiple queues. To delete a selection, click the grey x beside the name.



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.



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

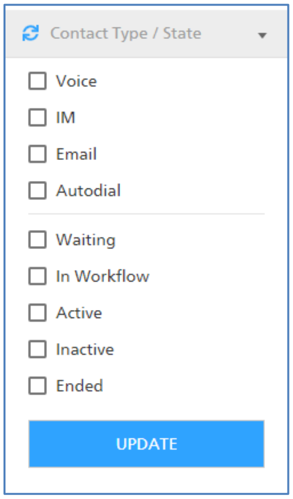
The search results contain pertinent information about the call, email, or IM. The table below describes the fields in the results frame.

Column	Description
ID	The identification of the contact.
Type	Type of interaction. Possible values are IM, Voice, and Email.
Name	The name of the person who contacted the contact center.
Address	The SIP address, email address or phone number of the person who contacted the contact center.
State	State of an interaction. Possible values are Waiting, workflow, Active, Inactive, and Ended. 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

Column	Description
	Note: Only Global Administrators can see contacts with an Ended State.
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	This field contains information on the contact. Depending on the interaction type, different information is displayed. 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. For email interactions, user data can be empty, or it can contain notes from the previous agent. 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.

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

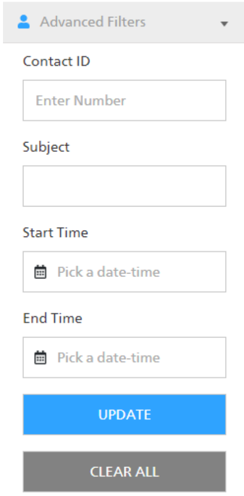
- To filter the results by the channel it came in or the state of the interaction, select the relevant check boxes in the 'Contact Type / State' menu and click *Update*.



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

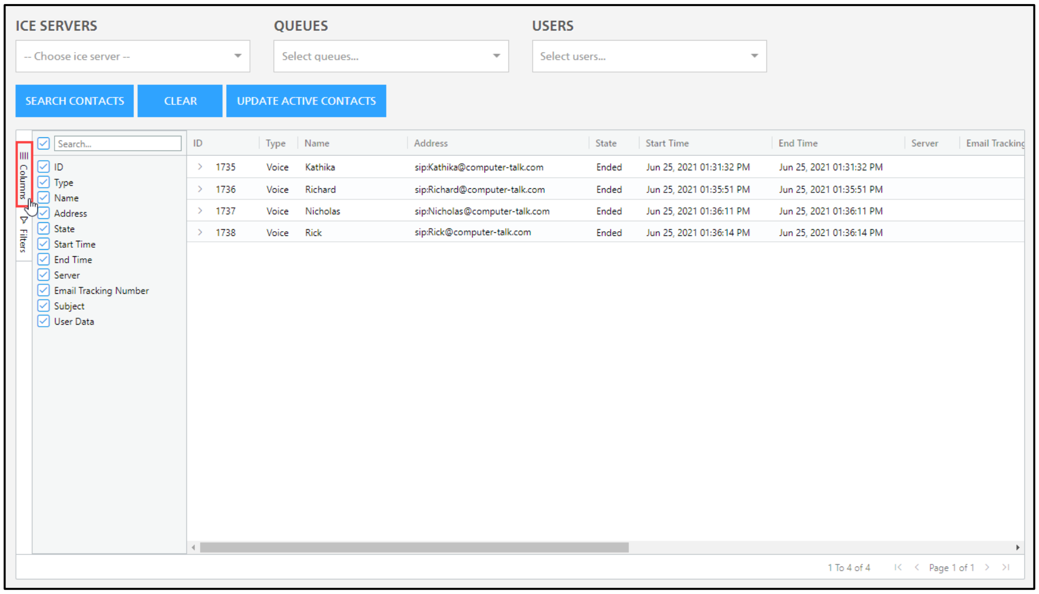
Advanced Filters

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



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.



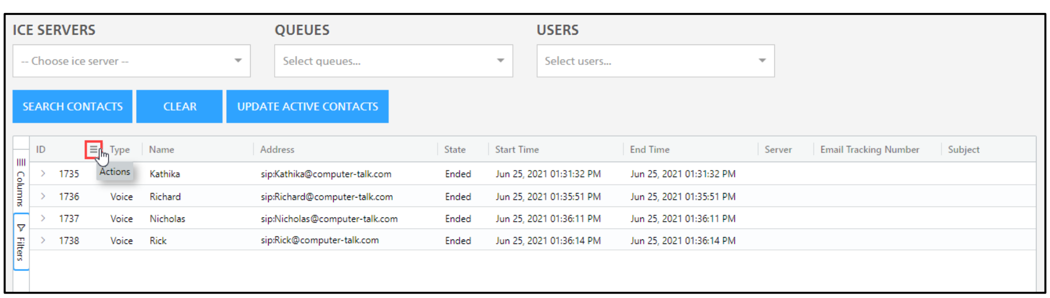
The gallery will refresh with the selected columns. By default, all columns are displayed on the table.

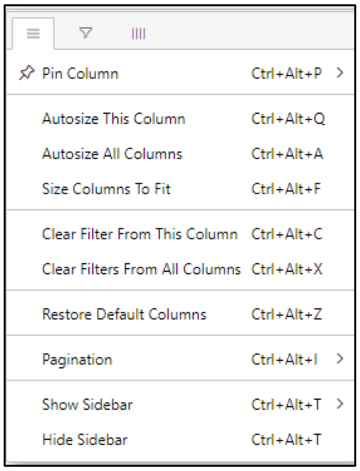
Note: Use the search field to find a column name in the list.

Column Headers

Column Header Actions

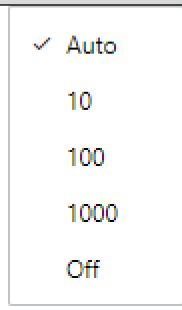
Click the *Actions* button on the right side of the column name as shown below to open the menu of options.





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

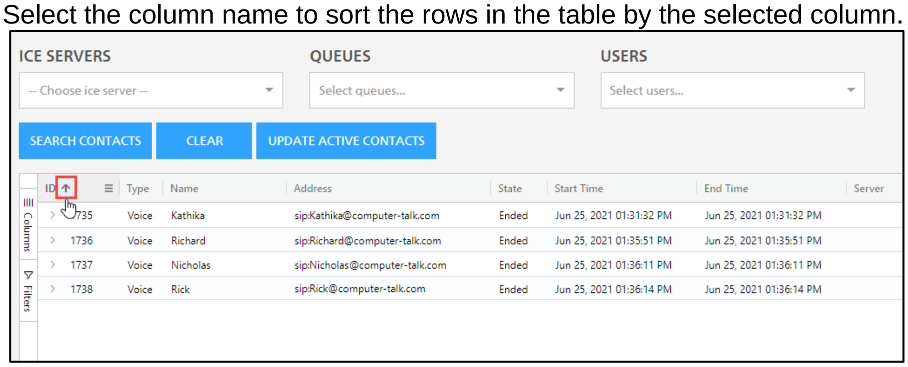
Column Heading Menu Options	
Menu Option	**Function**
Pin Column	Select this option to lock the column on to one side of the table. Options include: ▪ Pin Left ▪ Pin Right ▪ No Pin
Autosize This Column	Resize the selected column to only the necessary width.
Autosize All Columns	Resize all columns to only the necessary width.
Size Columns To Fit	Resize all columns to only the minimum width.
Clear Filter From This Column	Remove all filters added to the selected column.
Clear Filters From All Columns	Remove all filters from all columns in the table.
Restore Default Columns	Revert column settings to the previous version.
Pagination	Sets the number of rows displayed in the table.

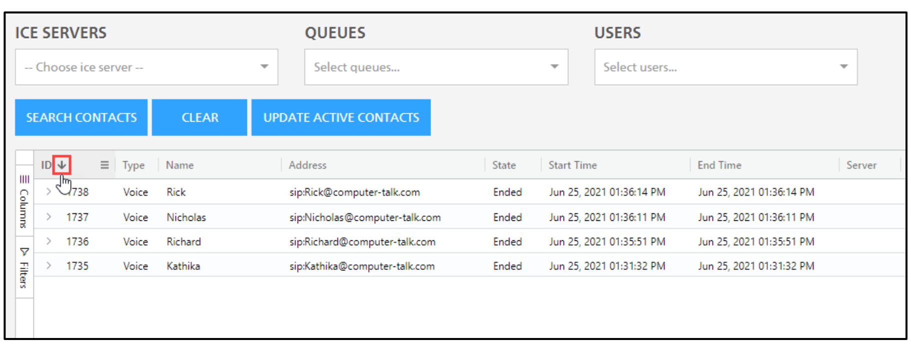
<table>
<tr><th colspan="2">Column Heading Menu Options</th></tr>
<tr><th>Menu Option</th><th>Function</th></tr>
<tr><td></td><td>

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.</td></tr>
<tr><td>Show Sidebar</td><td>Display sidebar options including Filter and Column settings.</td></tr>
<tr><td>Hide Sidebar</td><td>Hide sidebar options including Filter and Column settings.</td></tr>
</table>

Column Header Sorting

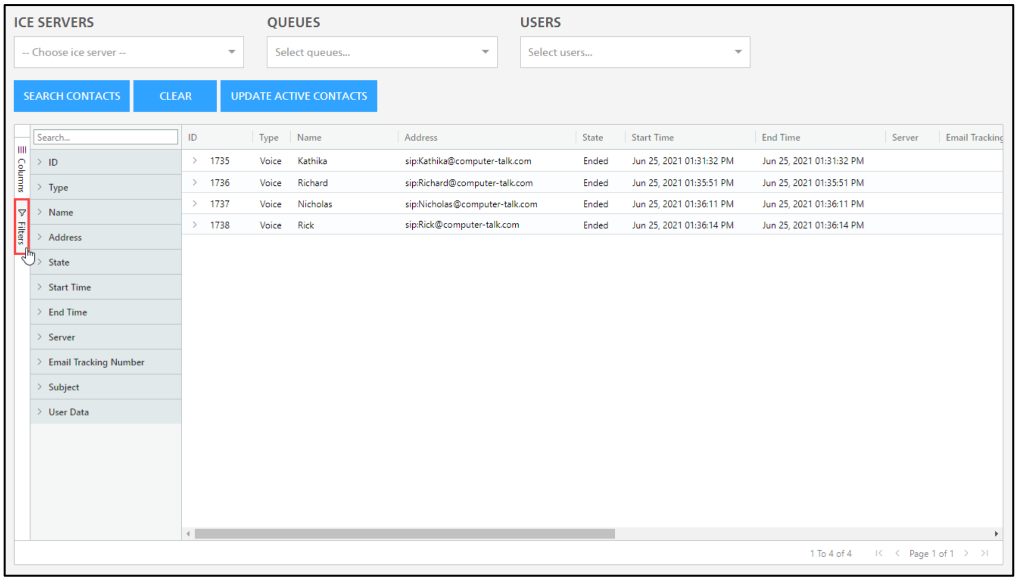
Select the column name to sort the rows in the table by the selected column.

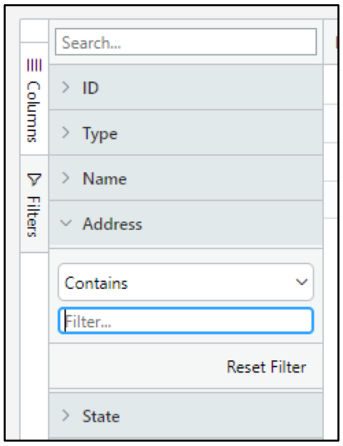




Filter Options

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

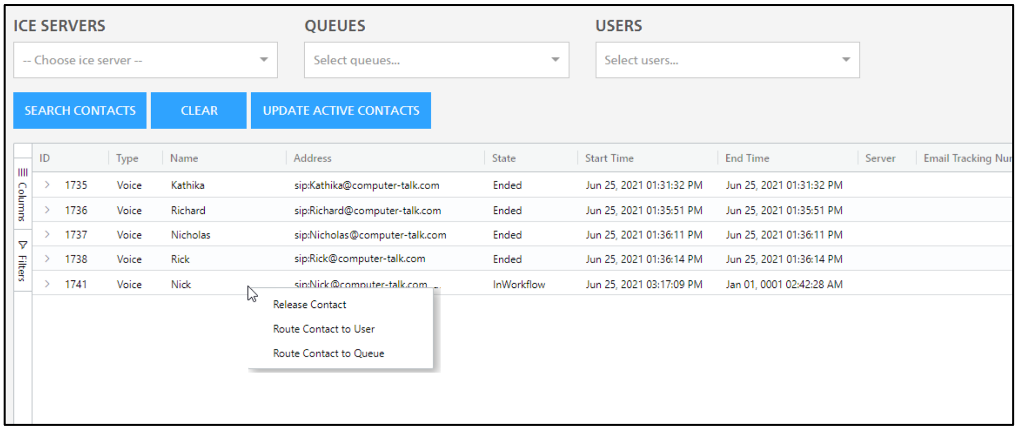




The gallery will refresh according to the filter conditions selected.
Note: Use the search field to find a column name in the list.

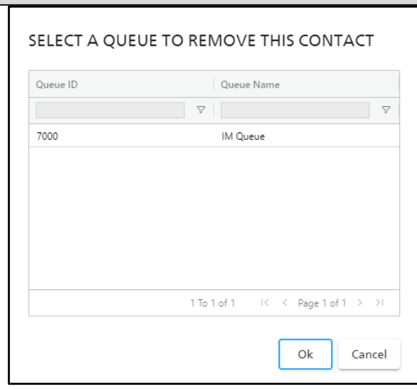
Right-click menu options

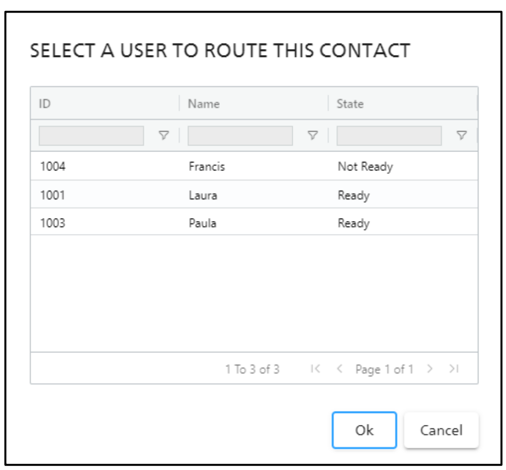
Right-click on a row in the table to perform additional tasks, such as route contacts to users from queue.

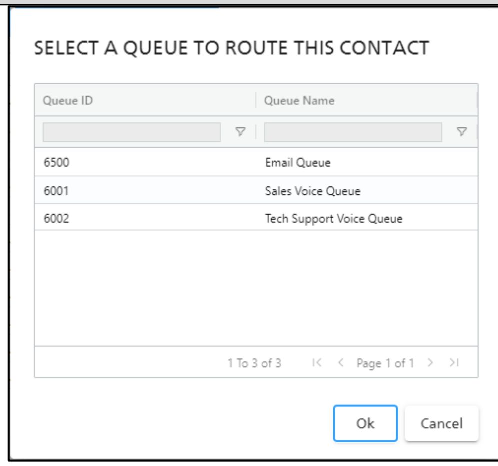
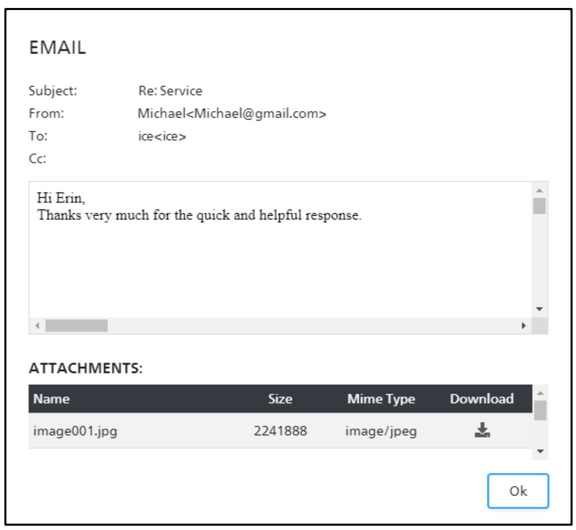


The table below provides information on right click menu options in the Active Contacts gallery.

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

<table>
<tr><th colspan="2">Active Contacts Right-Click Menu</th></tr>
<tr><th>Menu Option</th><th>Function</th></tr>
<tr><td></td><td>

Caution:
This option should only be used if the contact is queued in 2 separate queues.
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.</td></tr>
<tr><td>Route Contact to User</td><td>Route the contact to a specific user.
When this option is selected, the following window appears to select a user from:

</td></tr>
<tr><td>Route Contact to Queue</td><td>Route the contact to a specific queue.
When this option is selected, the following window appears to select a queue from:</td></tr>
</table>

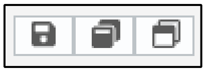
<table>
<tr><th colspan="2">Active Contacts Right-Click Menu</th></tr>
<tr><th>Menu Option</th><th>Function</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>View Email</td><td>Select this option to view the email interaction history.


Note: This option is only available for email contacts.</td></tr>
</table>

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.

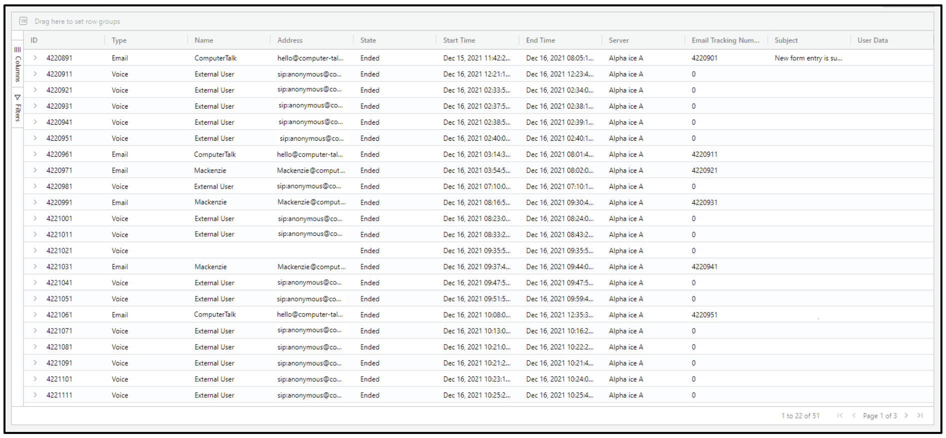
Active Contacts Layout Options	
Toolbar Item	**Function**
	Use this button to save the layout changes.
	Use this button to restore your layout to a previously saved layout.
	Use this button to reset your layout to the default settings.

Row Groups

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

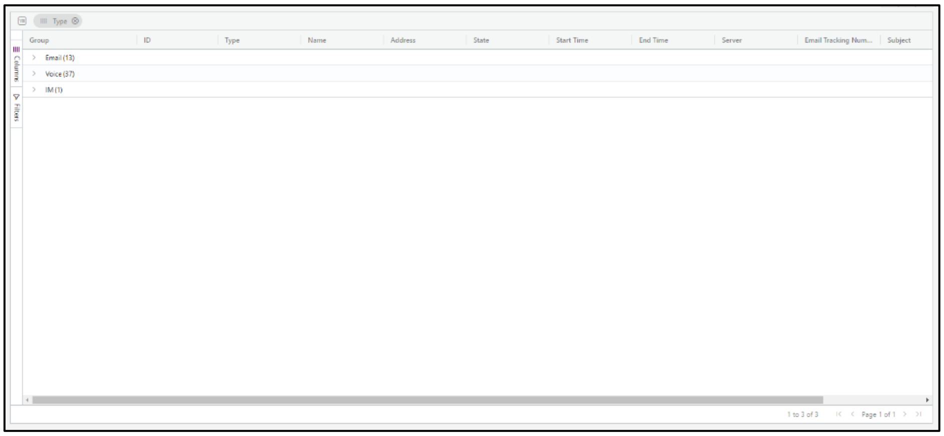
An example of using Row Groups:

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



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

3. The rows are now grouped by Type:



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

Appendix A: Adding to Allowed sites

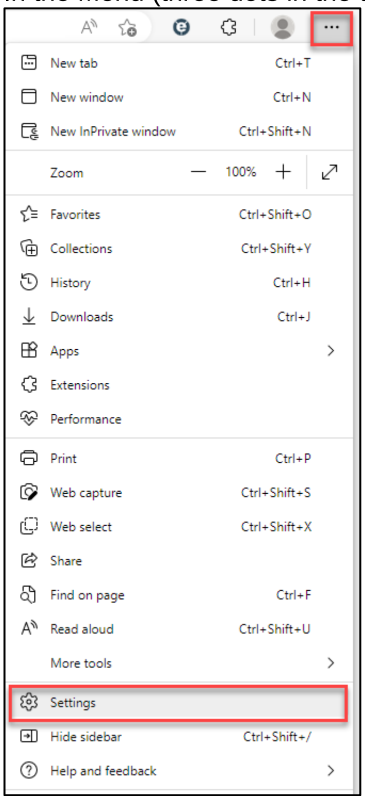
This section explains how to add iceManager to the list of allowed sites on your browser. Steps for adding allowed sites to Microsoft Edge, Google Chrome, and Firefox can be found below.

Microsoft Edge

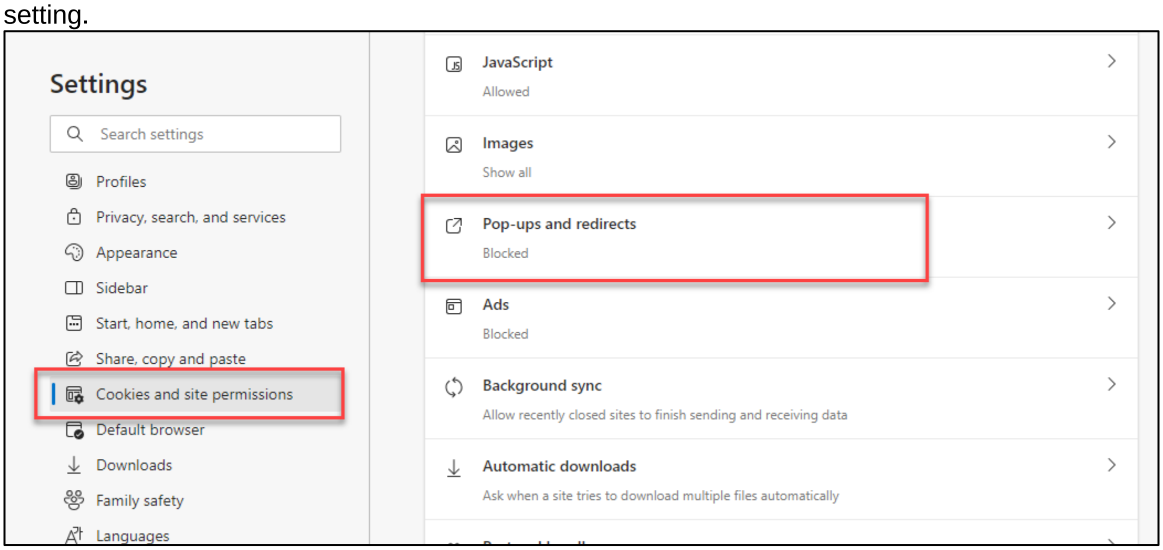
You can allow pop-up windows to open in a Web site by adding the Web site to the **Allowed sites** list.

To do this, follow these steps:

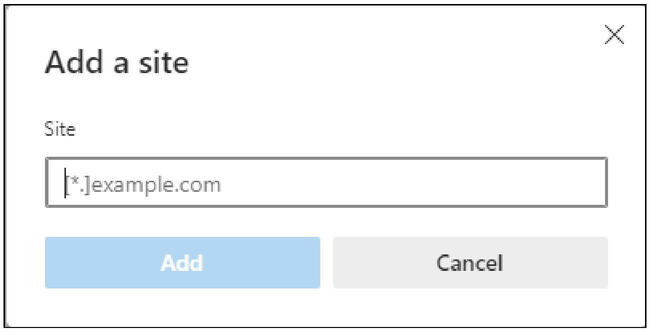
1. Open a Microsoft Edge browser window.
2. In the Menu (three dots in the top right corner), select *Settings*.



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*.



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

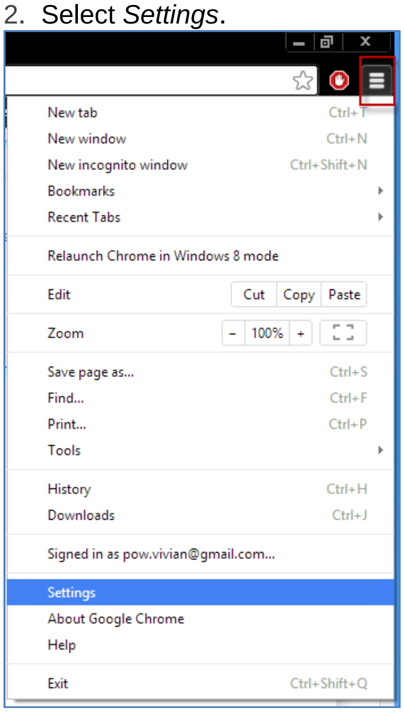
Google Chrome

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

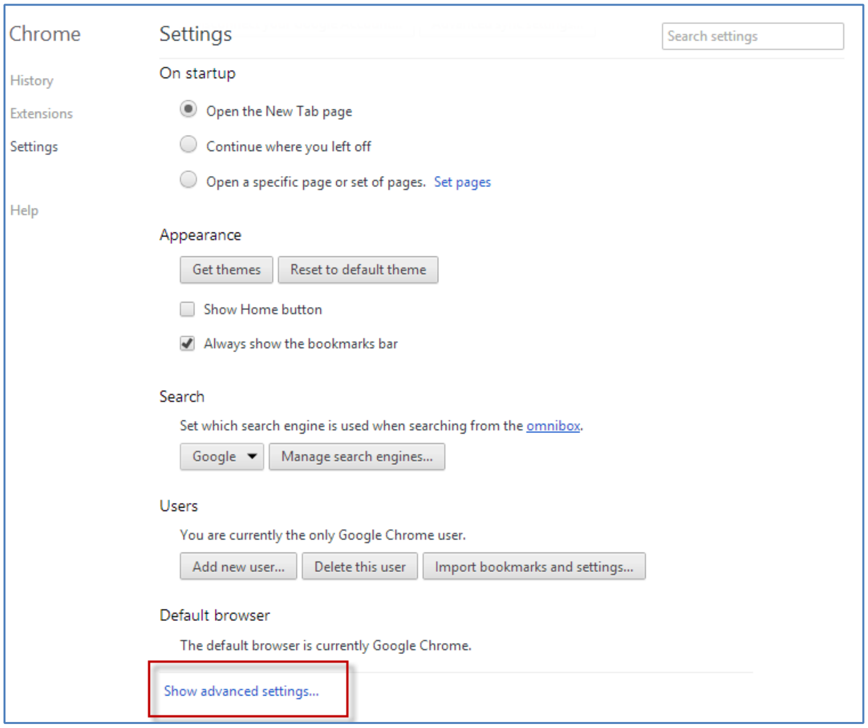
1. If pop-ups have been blocked, you'll see the icon in the address bar. Click the icon to see a list of the blocked pop-ups.
2. Click the link for the pop-up window that you'd like to see.
3. To always see pop-ups for the site, select "Always show pop-ups from [site]." The site will be added to the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

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

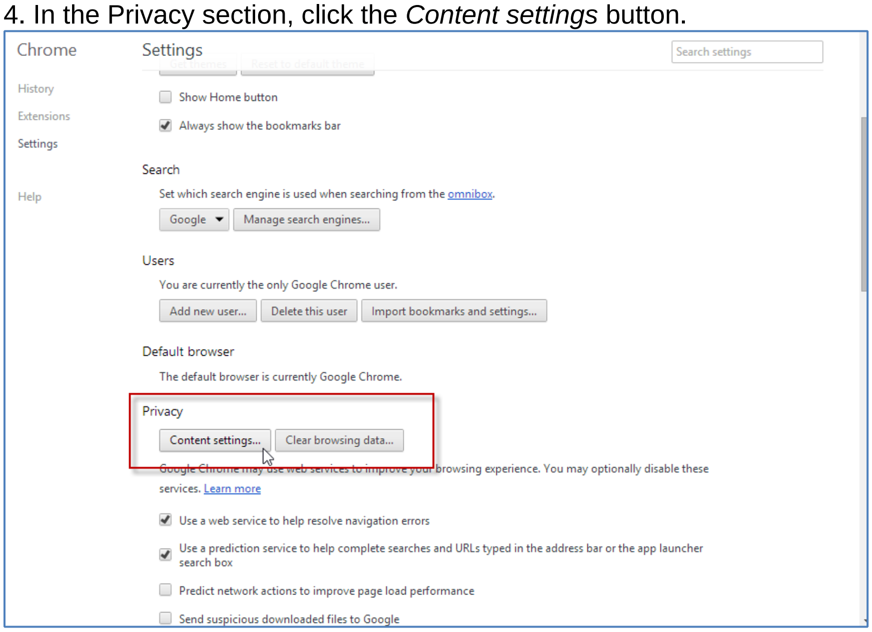
1. Click the Chrome menu on the browser toolbar.
2. Select *Settings*.



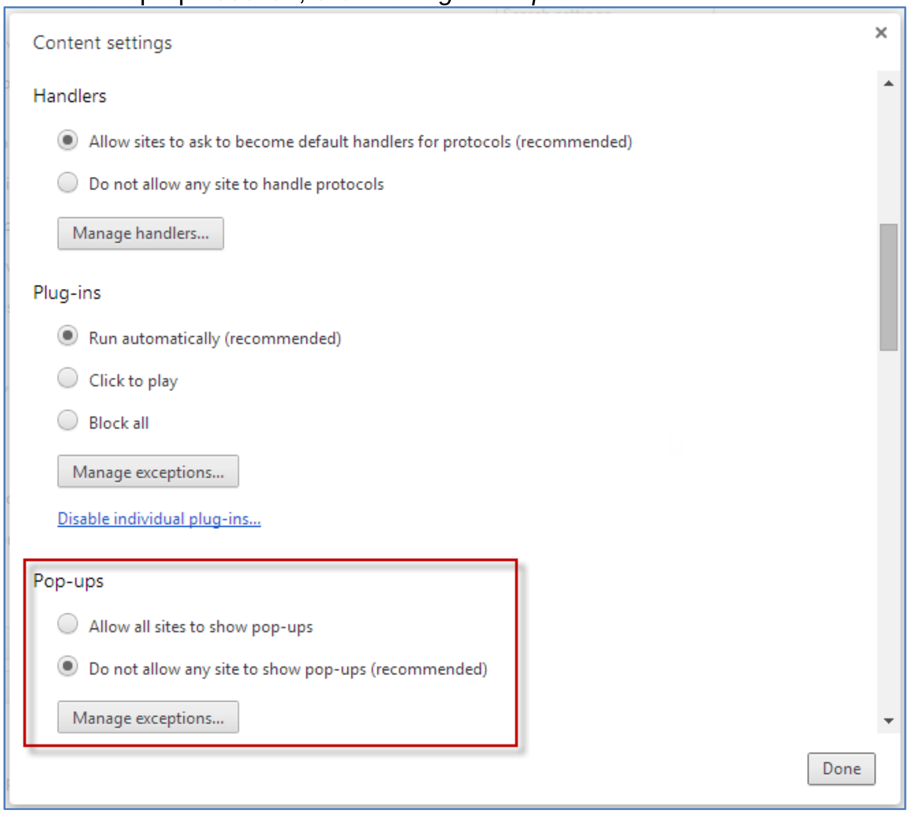
3. Click *Show advanced settings*.



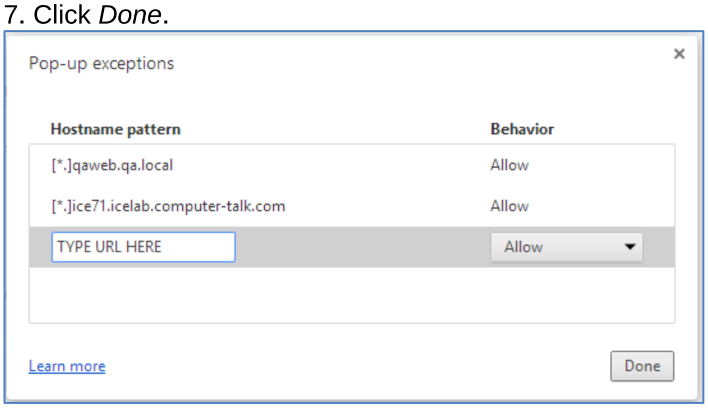
4. In the Privacy section, click the *Content settings* button.



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



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



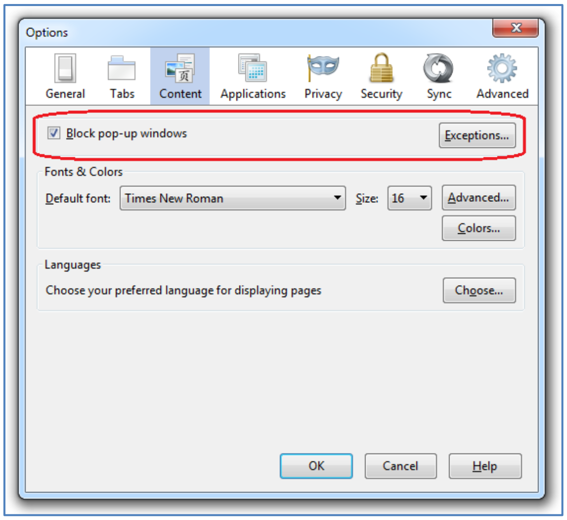
The website should no longer be blocked by the Pop-up Blocker.

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

Firefox

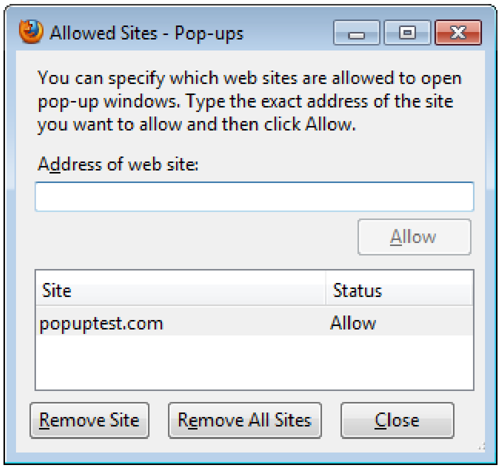
To access the pop-up blocker settings:

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

Recording Triggers	
Recording Trigger	**Description**
Scheduled ANI	Recordings for a particular ANI are scheduled for a specific date and time.
Scheduled Duration	Record anything greater than the configured amount of time. Note: this can only be used when lookback recording has been enabled.
Scheduled Multiple Parameters	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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