



iceManager  
User Manual  
Server Version 14.x

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Part Number: UM\_iM\_14.x\_E\_20240815  
iceManager and iceJournal for ice server version 14.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.

## Responsive Design

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

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

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

- Navigation Menu (Left):** Includes options like HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. Below these are filter categories: Interaction Type (with sub-options: Voice, Email, Instant Message), Contact Info, Evaluation, Recording, Survey, and Miscellaneous. At the bottom of the menu are buttons for UPDATE and CLEAR ALL.
- Top Header:** Contains tabs for HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. On the right, it shows the user profile (JULIE (1301) Administrator), login status (LOGGED OFF 23:36:10), and a settings icon.
- Main Content Area:** Features a search interface with filters for QUEUES, USERS, and DATE RANGE (February 09, 2023 - March 10, 2023). A SEARCH CONTACTS button is present. Below the filters is a search results section with a search input field and Previous/Next navigation buttons. The results table has columns: Contact ID, Type, Date, Duration, Sender (ANI), Recipient (DNIS), User Name, Queue, and User Data. The current results show "No contacts found with given search parameters". Below the table, it indicates "Showing 0 to 0 of 0 entries" and a display setting of "10 records".

The screen below shows the viewing experience on a tablet.

**EVALUATION EXTERNAL USER**

**DETAILS**

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

**INTERACTION**

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

**EVALUATION**

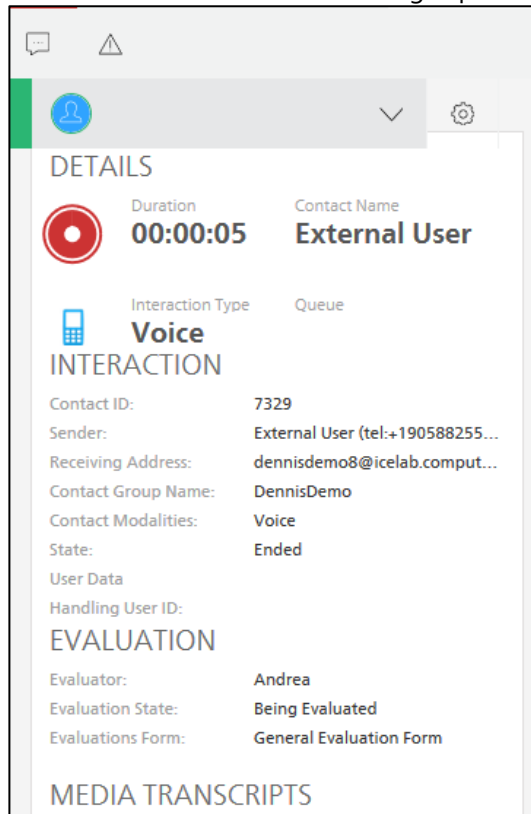
Evaluator: Andrea  
 Evaluation State: Being Evaluated  
 Evaluations Form: General Evaluation Form

**MEDIA TRANSCRIPTS**

**CALL QUALITY**

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

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



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

## **Navigating to the iceManager Site**

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

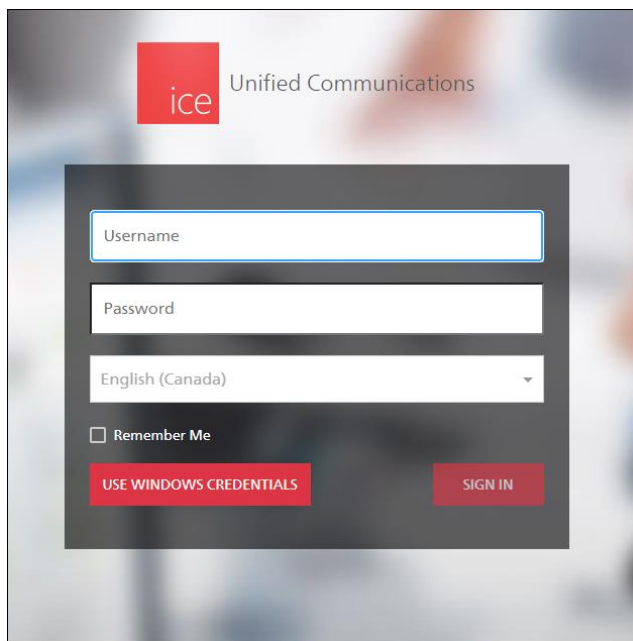
To access the iceManager website, open the web browser and type in the URL for the website. If you do not know the URL, contact your ice administrator.

## Procedure to Sign In

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

Follow these steps to sign into iceManager:

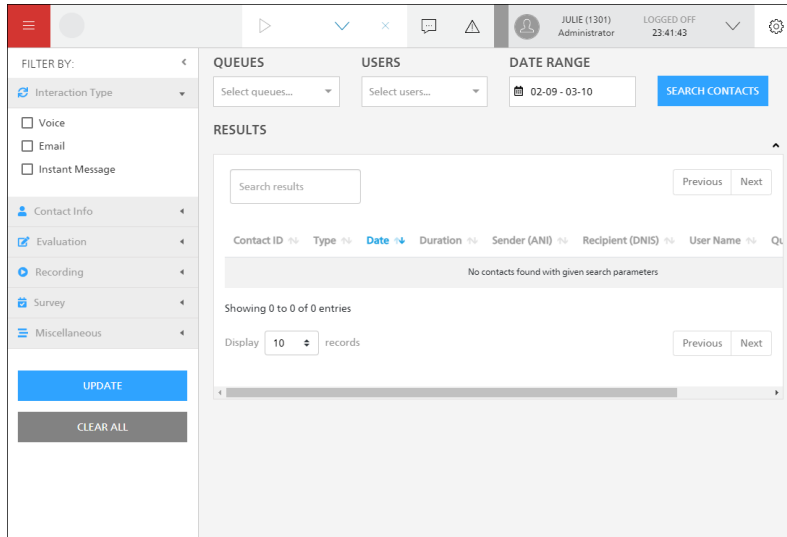
1. Open your Web browser and go to your iceManager site.



2. In the 'Username' field, enter your four-digit user ID.
3. In the 'Password' field, enter your password.
4. Use the language drop-down menu to select either *English* or *French*.
5. Select the 'Remember Me' check box if you want your Username to be pre-populated the next time you go to the Sign In page

**Note:** this option is not recommended for shared computers.

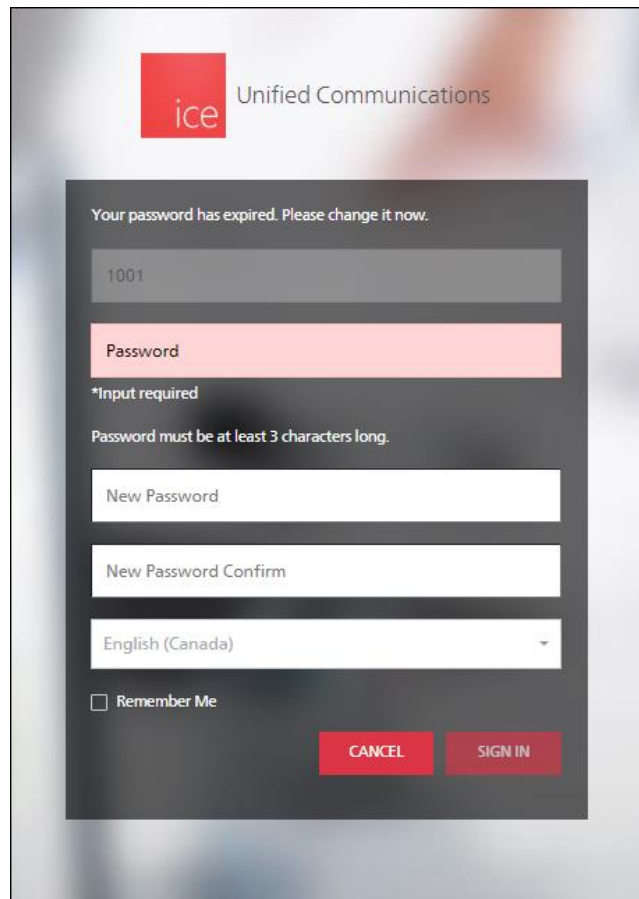
6. Click *Sign In*.
7. Once you have signed in, you will see the Journal page.



## Expired Password

Follow the steps below to change your password:

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



The screenshot shows a web interface for changing a password. At the top left is the 'ice' logo and 'Unified Communications' text. Below this is a message: 'Your password has expired. Please change it now.' The form contains several fields: a grey field with '1001', a pink 'Password' field, a 'New Password' field, a 'New Password Confirm' field, and a dropdown menu set to 'English (Canada)'. There is a 'Remember Me' checkbox and two red buttons labeled 'CANCEL' and 'SIGN IN'.

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



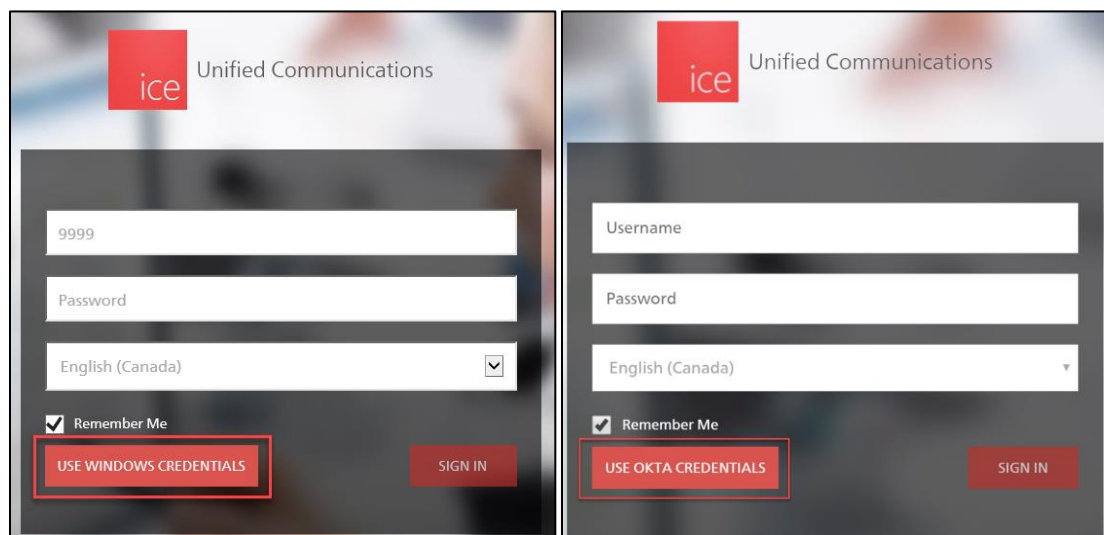
## Single Sign-On

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

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

### Signing on with Single Sign-On

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



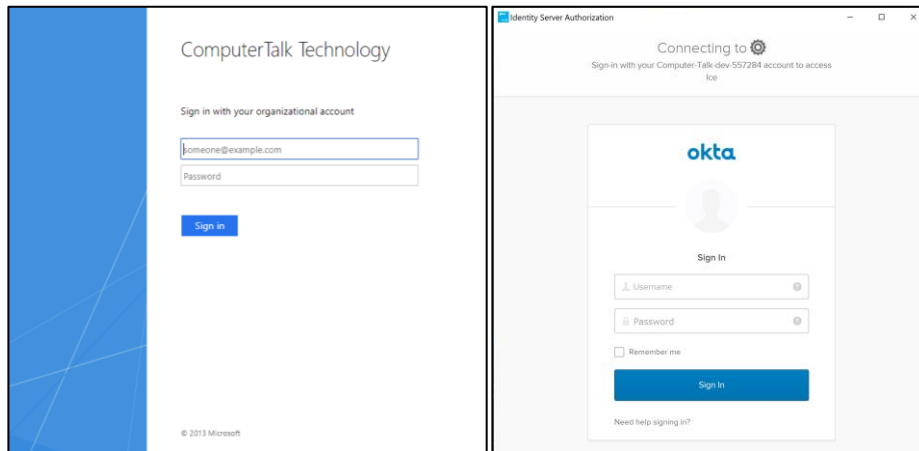
The image shows two side-by-side screenshots of the iceManager login interface. Both screenshots feature the 'ice Unified Communications' logo at the top. The left screenshot shows a login form with fields for '9999', 'Password', and a language dropdown set to 'English (Canada)'. Below these fields is a checked 'Remember Me' checkbox and two buttons: 'USE WINDOWS CREDENTIALS' (highlighted with a red box) and 'SIGN IN'. The right screenshot shows a similar form with fields for 'Username', 'Password', and a language dropdown set to 'English (Canada)'. It also has a checked 'Remember Me' checkbox and two buttons: 'USE OKTA CREDENTIALS' (highlighted with a red box) and 'SIGN IN'.

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

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

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

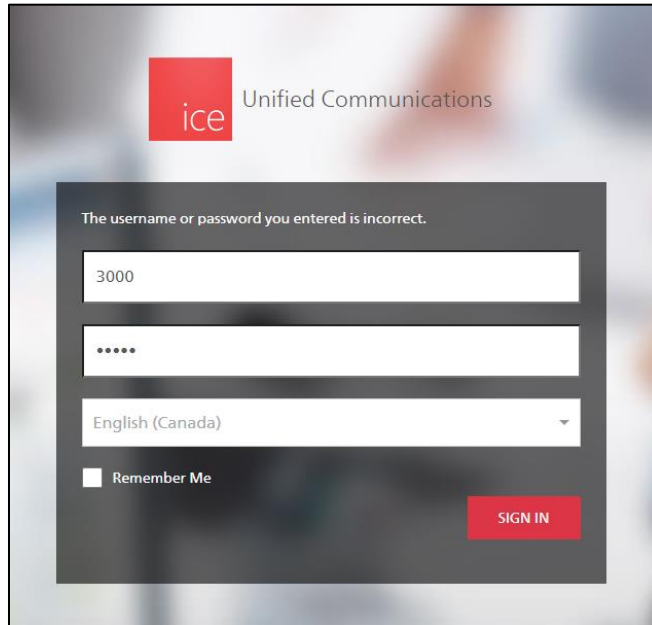
**Note:** This dialog box may look different, depending on the way your administrator has configured the system.



## Common Error and Warning Messages

### Authentication error

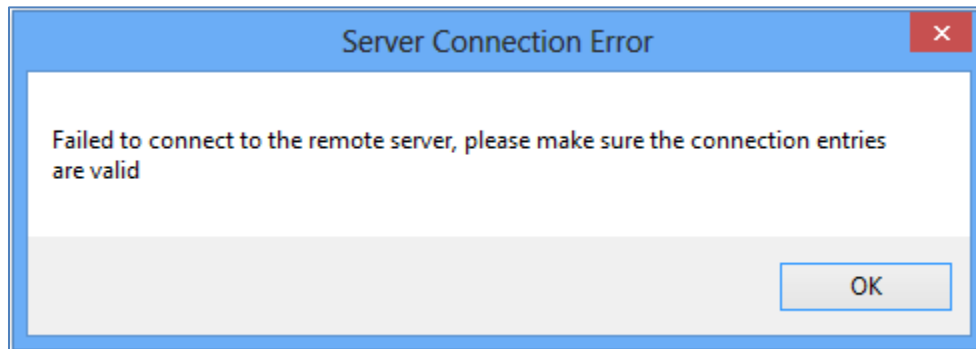
If a user types the wrong User ID or the wrong password, the following message appears.



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

## Server Connection Error

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



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

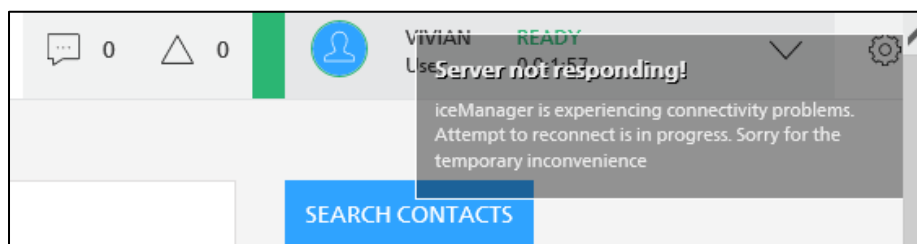
This error message indicates that the server is potentially experiencing a problem with connection. Please contact your ice administrator.

## Loss of connection

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

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

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



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

## iceManager Access Permissions

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

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

	User	Team Lead	Supervisor	Switch Admin	Global Admin
<b>View Recordings, Transcripts and Contact Metadata Fields (everyone can see contact search results)</b>	✓ Can view own recording transcript only	✓ For 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 anyone assigned to his/her switch (similarly for Node and Site Admin)	✓ For anyone
<b>Delete Recordings (can delete audio recordings, but not IMs and emails)</b>				✓	✓
<b>Delete Call Transcripts</b>				✓	✓
<b>Assign LOBs</b>		✓	✓	✓	✓
<b>Change email resolution code</b>	✓ 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	✓ For contacts handled by anyone assigned to his/her switch (similarly for Node and Site Admin)	✓ For all contacts

	User	Team Lead	Supervisor	Switch Admin	Global Admin
			handling agent.		
<b>Settings</b>					
<b>Journal Settings</b>					
<b>Schedules</b>			✓	✓	✓
<b>Recording Server/Screen Recording</b>				✓ Can view datastores	✓
<b>Evaluations</b>		✓	✓	✓	✓
<b>Datastore</b>				✓ Can view datastores	✓
<b>Archiving/Purging Rules</b>				✓ Can view datastores	✓
<b>Campaign Settings</b>			✓	✓	✓
<b>Intranet/Session Settings</b>				✓ Can view and edit some settings.	✓ Can view and edit all settings.
<b>Browser Settings</b>	✓	✓	✓	✓	✓
<b>Language Settings</b>	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓ Can edit settings.
<b>Server Settings</b>				✓	✓
<b>Configuration Group Settings</b>	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓	✓
<b>Line of Business Settings</b>	✓ Can view only.	✓ Can view only.	✓ Can view only.	✓	✓

	User	Team Lead	Supervisor	Switch Admin	Global Admin
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.**



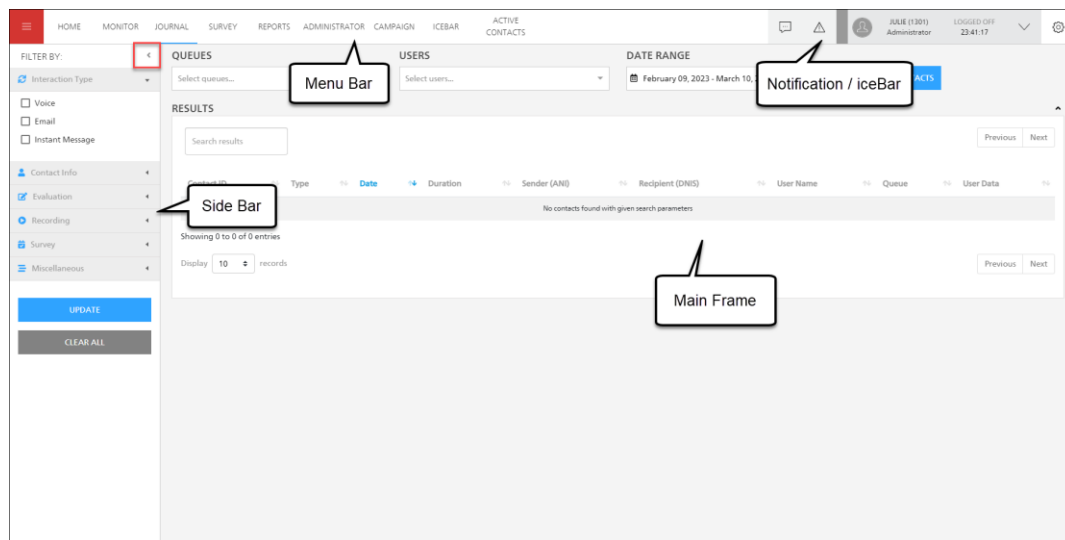


## Chapter 2: Components of iceManager

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.

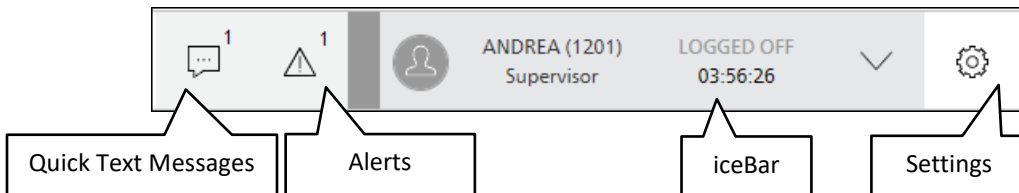
This Chapter provides information about all of these functionalities.



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

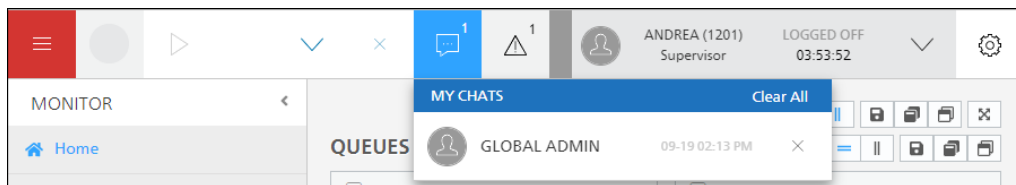
## Notification Bar

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.

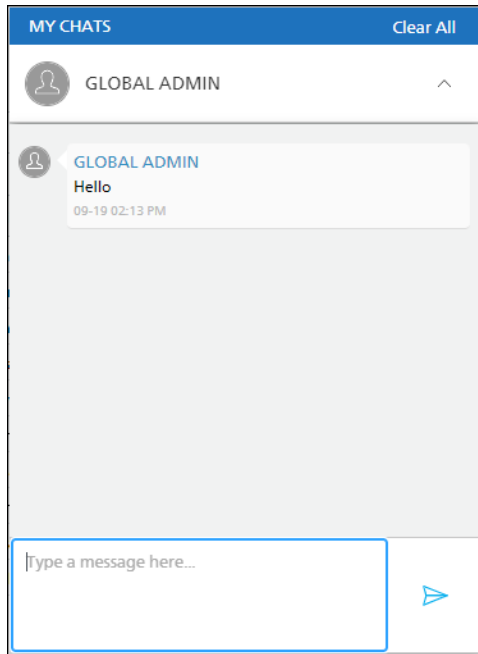


You can respond to the Quick Text message when the dialog box appears by clicking on the conversation.

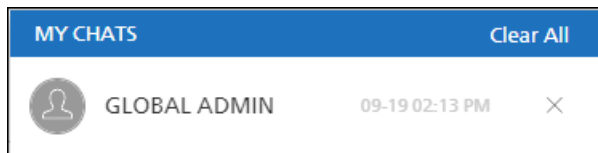
The conversation is kept until that entry in the drop-down list is permanently removed. To permanently remove the conversation from the list, click the X located on the right side of the drop-down dialog box.

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:



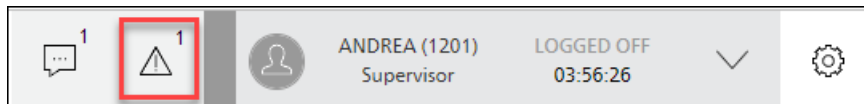
Now you can click on the X to delete the conversation.



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.

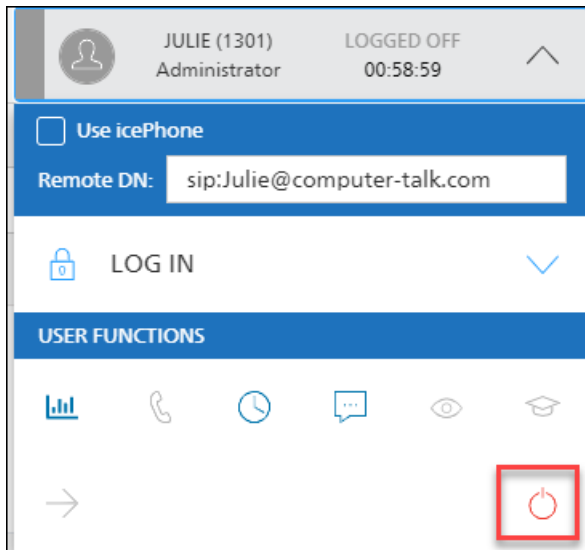


## iceBar for web

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.

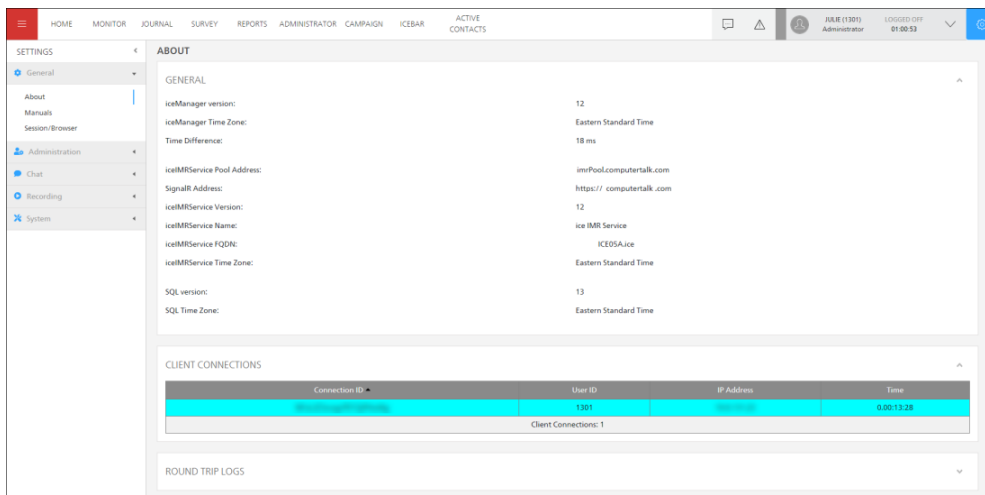
## Logging out

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:



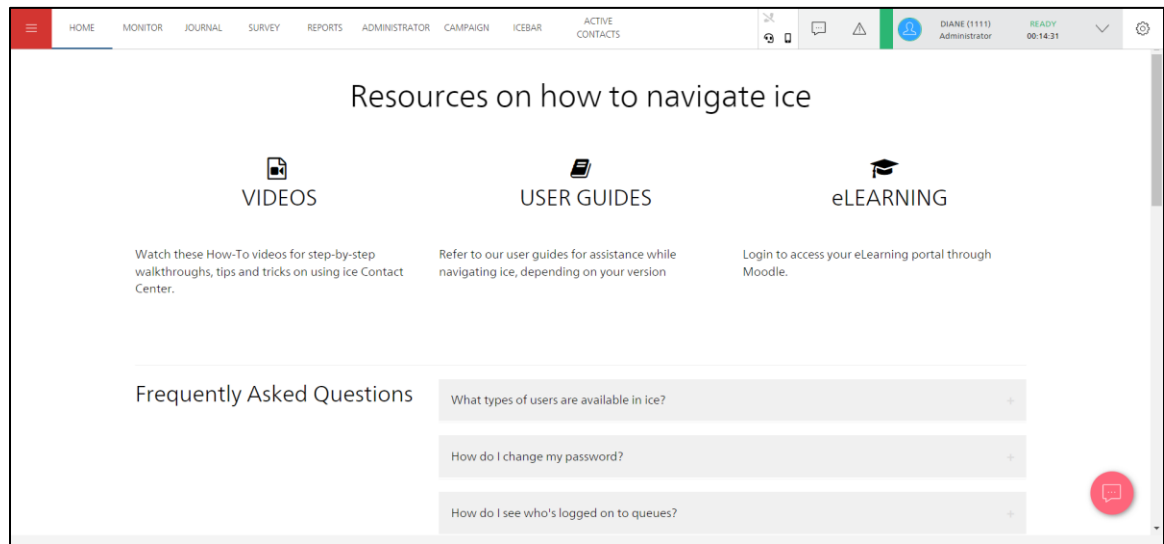
For more information about settings, refer to Chapter 3: Settings.

## Menu Bar

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

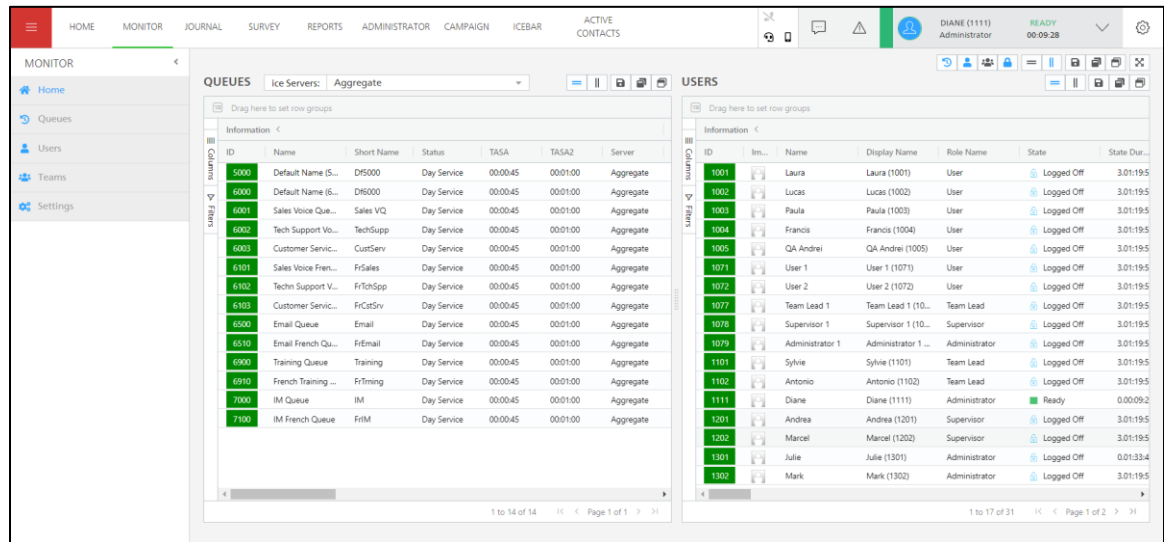
### Home tab

On the Home tab, you can access the help center containing how-to videos, user guides and manuals, eLearning, and more.



### 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.

Using iceJournal, you can:

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

The following screenshot shows the results of an iceJournal search:

The screenshot displays the iceJournal application interface. At the top, a navigation bar includes a red menu icon, a search bar, and a user profile for JULIE (1301) Administrator, who is logged off at 00:00:19. Below the navigation bar, the main content area is divided into several sections:

- SEARCH BY:** A dropdown menu set to "Interaction Type".
- QUEUES:** A dropdown menu set to "Select queues...".
- USERS:** A dropdown menu set to "Select users...".
- DATE RANGE:** A date range selector set to "Jul 01, 2024 - Jul 30, 2024".
- SEARCH CONTACTS:** A blue button to initiate the search.

On the left side, there is a sidebar with the following options:

- Voice
- Email
- Instant Message
- Contact Info
- Contact Metadata
- Evaluation
- Recording
- Survey
- Miscellaneous

Below the sidebar are two buttons: "UPDATE" (blue) and "CLEAR ALL" (grey).

The main results area is titled "RESULTS" and contains a table with the following columns: Contact ID, Type, Date, Duration, Sender (ANI), Recipient (DNIS), User Name, Queue, User Data, and Server. The table is currently empty, displaying "No Rows To Show".

At the bottom right of the results area, there is a pagination indicator: "0 to 0 of 0" and "Page 0 of 0".

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

## Survey Tab

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

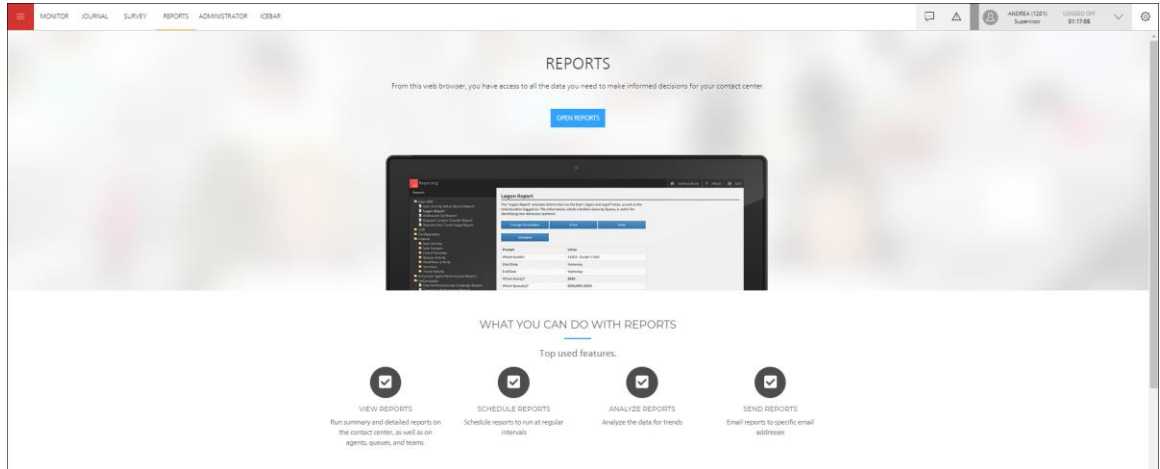
The screenshot displays a web application interface for managing surveys. The top navigation bar includes links for HOME, MONITOR, JOURNAL, SURVEY (highlighted), REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. On the right side of the navigation bar, there is a user profile for JULIE (1301) Administrator, a 'LOGGED OFF' button, and a settings icon. A left sidebar menu is visible with options: Surveys (selected), Survey Runs, Survey Settings, and Audio Files. The main content area is titled 'SURVEYS' and features a toggle switch for 'Show deactivated forms' set to 'OFF'. Below this is a table with the following columns: ID, Name, Presentation Modes, Creation Date, Last Modified Date, Assigned Runs, Action, and Active. The table is currently empty.

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



## Reports Tab

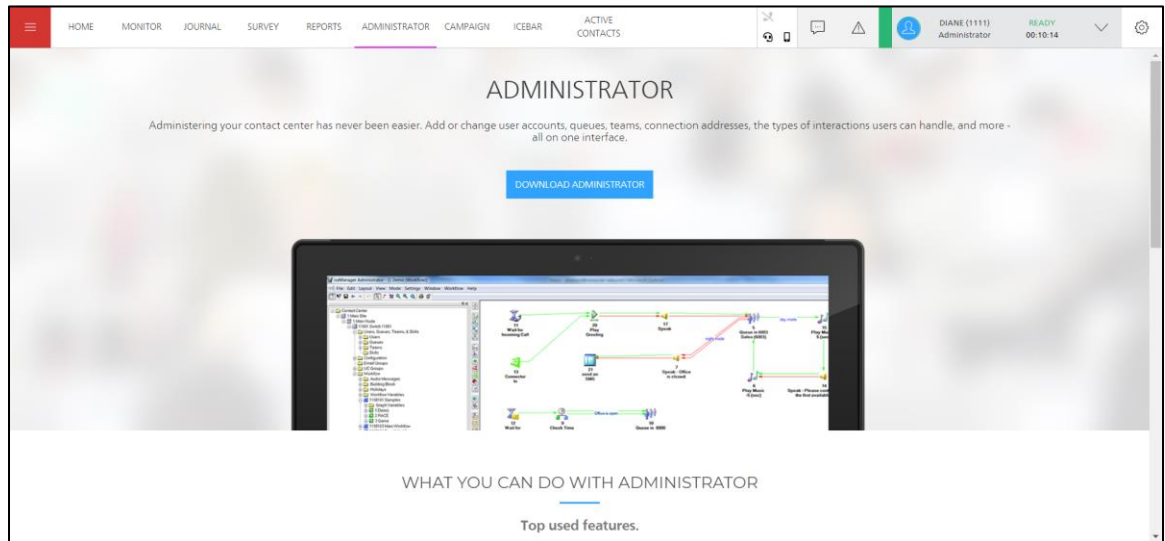
From the Reports tab, you can open iceReporting to run and schedule reports.



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

## Administrator Tab

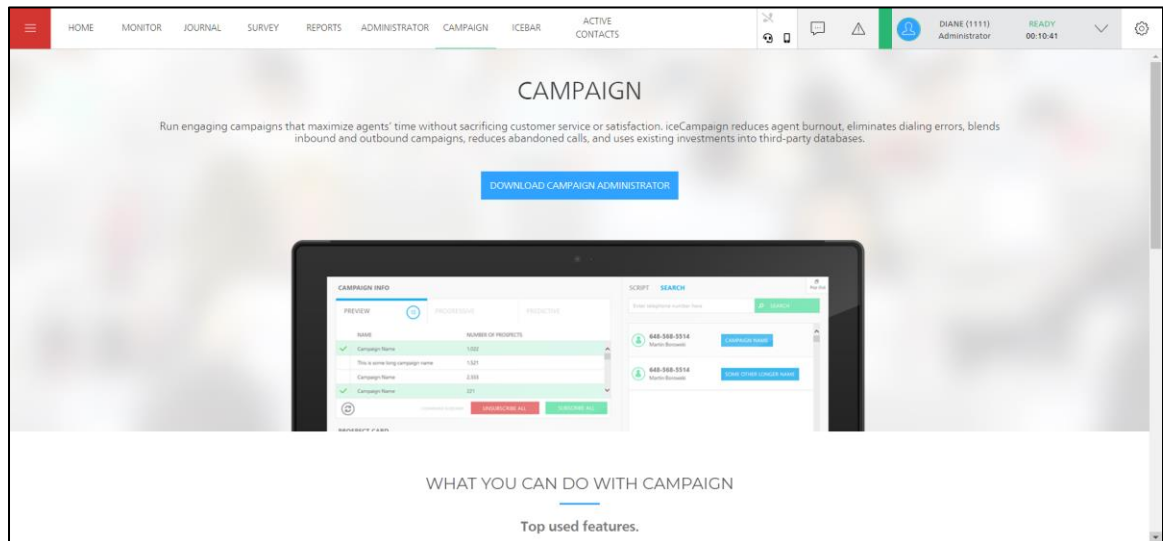
As an on-prem customer, you can download and install iceAdministrator from the Administrator tab. As a cloud customer, you will have access to Citrix through the Administrator tab. For more information on iceAdministrator, refer to the iceAdministrator User Manual. For information on iceWorkflow Designer,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



## Campaign Tab

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

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



The screenshot displays the Campaign tab interface. At the top, a navigation menu includes HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. The main content area is titled "CAMPAIGN" and contains the following text: "Run engaging campaigns that maximize agents' time without sacrificing customer service or satisfaction. iceCampaign reduces agent burnout, eliminates dialing errors, blends inbound and outbound campaigns, reduces abandoned calls, and uses existing investments into third-party databases." Below this text is a blue button labeled "DOWNLOAD CAMPAIGN ADMINISTRATOR".

Below the button is a preview of the Campaign Administrator interface, which is displayed on a tablet. The interface is divided into two main sections: "CAMPAIGN INFO" and "SCRIPT SEARCH".

The "CAMPAIGN INFO" section includes a "PREVIEW" tab and a table with the following data:

NAME	NUMBER OF PRODUCTS
Campaign Name	1,002
This is some long campaign name	1,001
Campaign Name	2,000
Campaign Name	001

The "SCRIPT SEARCH" section includes a search bar with the placeholder text "Enter telephone number here" and a "SEARCH" button. Below the search bar, there are two search results, each with a phone number and a name:

- 648-508-5514, Maria Bonetto
- 648-508-5514, Maria Bonetto

At the bottom of the interface, there is a section titled "WHAT YOU CAN DO WITH CAMPAIGN" with a sub-section for "Top used features."

## iceBar Tab

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

The screenshot displays the iceBar interface within a web browser. The top navigation bar includes links for HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ADMINISTRATOR, CAMPAIGN, ICEBAR, and ACTIVE CONTACTS. The ICEBAR tab is currently selected. In the top right corner, the user's name 'DIANE (1111) Administrator' and status 'READY 00:11:04' are visible.

The main content area features the heading 'ICEBAR' and a descriptive paragraph: 'A toolbar that allows you to do more than answer a call. Using iceBar, users can handle email and instant messages, view queue stats, pick up queued contacts, input reason for call codes, and view contact information.' Below this text is a prominent blue button labeled 'DOWNLOAD ICEBAR'.

Below the main content is a detailed view of the iceBar toolbar. It includes a contact dropdown menu for 'BERNIE' with email addresses 'sip:bernie@computer.talk.com' and 'sip:icebernie2@computer.talkund.com'. The toolbar contains several action buttons: 'Place Call', 'Release', 'Hold', 'Consult', 'Transfer', 'SIP', and 'Queue Stats'. On the right side of the toolbar, there are three data fields: 'LONGEST' (00:00:00), 'QUEUED' (0), and 'CONTACT TIME' (00:03:49). The 'CONTACT TIME' field is currently selected, showing a value of '00:03:49'.

At the bottom of the interface, the text 'WHAT YOU CAN DO WITH ICEBAR' is displayed, followed by a sub-heading 'Top used features.'.

## Active Contacts Tab

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

Using Active Contacts, you can:

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

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

The screenshot displays the 'ACTIVE CONTACTS' tab in a software interface. The top navigation bar includes 'HOME', 'MONITOR', 'JOURNAL', 'SURVEY', 'REPORTS', 'ADMINISTRATOR', 'CAMPAIGN', 'ICEBAR', and 'ACTIVE CONTACTS'. The user is identified as 'DIANE (1111) Administrator' with a 'READY' status at '00:11:37'. The interface is divided into sections for 'ICE SERVERS', 'QUEUES', and 'USERS'. Below these are search filters for 'Contact Type / State' (Voice, IM, Email, Autodial) and 'Advanced Filters' (Waiting, In Workflow, Active, Inactive). The 'Advanced Filters' section includes input fields for 'Contact ID', 'Subject', and 'Start Time', with 'UPDATE' and 'CLEAR ALL' buttons. The main area shows a table with columns: ID, Type, Name, Address, State, Start Time, Server, Email Tracking Nu..., Subject, and User Data. Two rows of data are visible:

ID	Type	Name	Address	State	Start Time	Server	Email Tracking Nu...	Subject	User Data
> 3331	IM	erere	acsb942821-1af7...	In Workflow	Nov 09, 2023 01:32...	iceA	0		
> 3341	IM	Test	acsb3556d8-8e00...	In Workflow	Nov 09, 2023 02:11...	iceA	0		

At the bottom right, it shows '1 to 2 of 2' and 'Page 1 of 1'.

For more information on Active Contacts, refer to Chapter 5: Active Contacts on page 299.



## 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 19.

## General

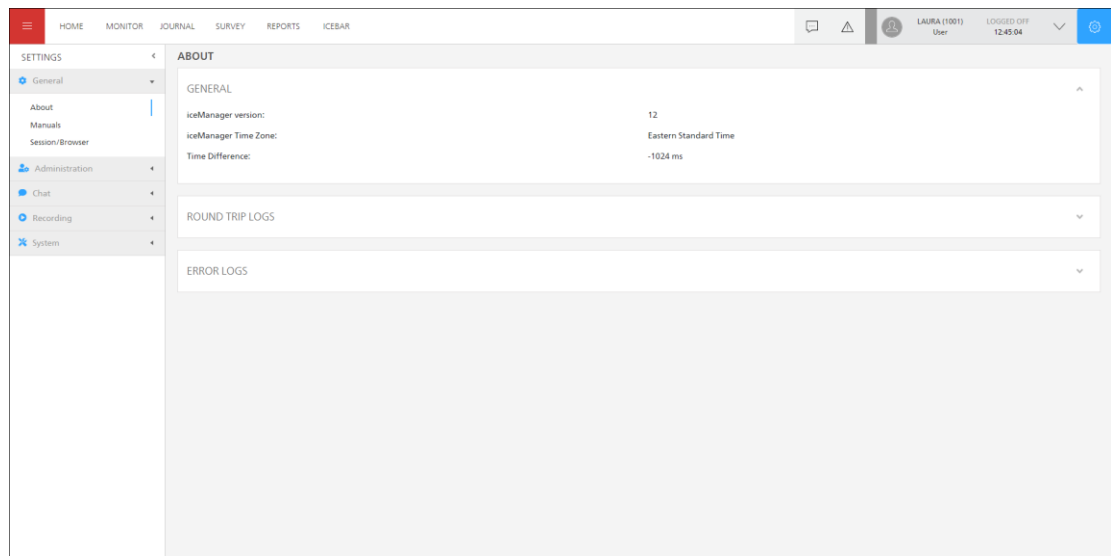
The General section in the sidebar contains information about browser settings, language, users, manuals, and ice. By default, items in the General sidebar option are shown.

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

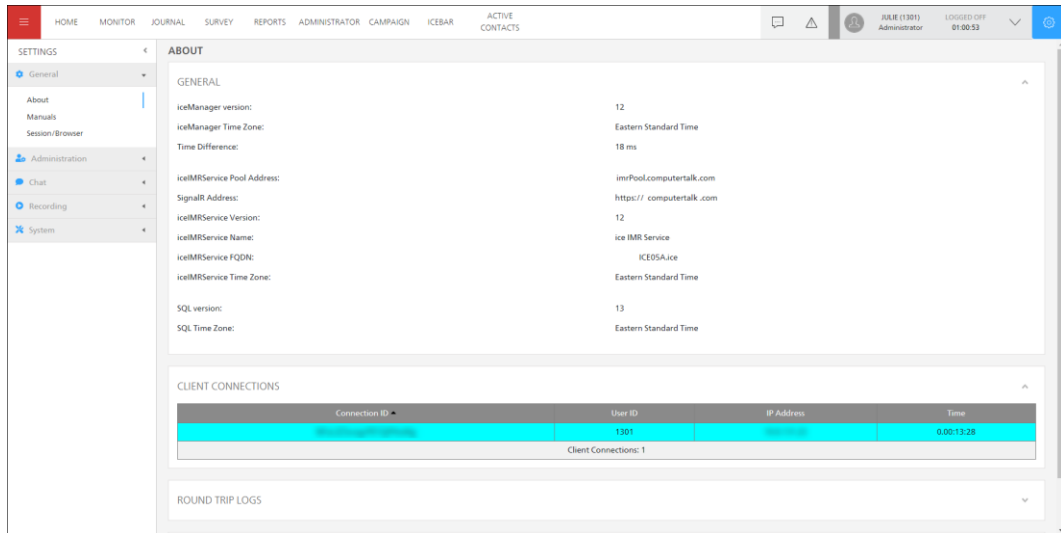
**Note:** you can collapse the individual items in the sidebar into the header by clicking the downward pointing arrow.

## About

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



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



## Manuals

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

## Session/Browser

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

### **Session/Browser: General**

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



**SESSION/BROWSER**

---

**GENERAL**

Client Timeout Interval (Seconds)

Handshake Timeout (Seconds)

Keep Alive Interval (Seconds)

RESET CONNECTION SETTINGS

---

Browser Session Timeout (minutes)

---

Custom Home Page OFF

Enable Quick Text ON

Enable Send Quick Text For Logoff User ON

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

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

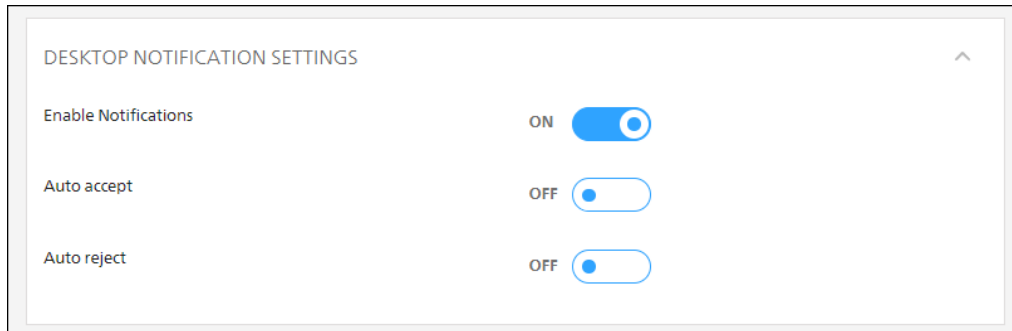
Parameter	Allowable values	Description
<b>Keep-Alive Interval</b>	The default is 15 seconds	Enter the number of seconds for Keep-Alive value. By default, the server sends keep-alive pings every 10 seconds and the client checks for keep-alive pings about every 2 seconds (one-third of the difference between the keep-alive timeout value and the keep-alive timeout warning value). The default keep-alive timeout warning period is 2/3 of the keep-alive timeout. If the keep-alive timeout is 20 seconds, the warning occurs at about 13 seconds.
<b>Browser Session Timeout</b>	The default is 30 minutes	The number of minutes the browser session will stay active while the user is idle before the session is terminated.
<b>Custom Home Page</b>	On/Off	Will enable or disable the custom home page. When this is set to <i>On</i> , you can configure the custom URL link that will display in the Home Page.
<b>Enable Quick Text</b>	On/Off	Will enable or disable Quick Text capabilities in iceMonitor and iceBar for web.
<b>Enable Send Quick Text To Logoff User</b>	On/Off	Will enable or disable Send Quick Text To Logoff User capabilities in iceMonitor and iceBar for web.

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

### **Session/Browser: Desktop Notification Settings**

The screenshot below is displaying the options that are available for all users under the Desktop Notification Section in the Session/Browser tab.

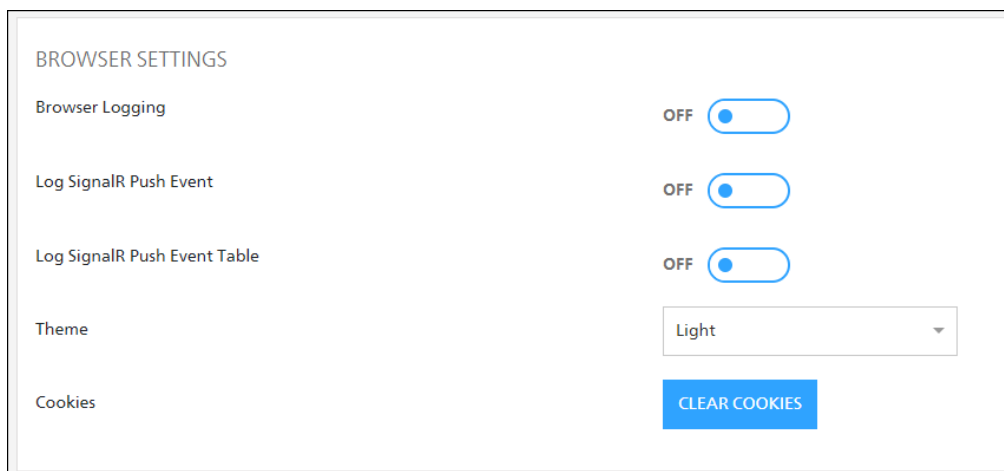
**Note:** For these settings to be visible and modifiable by users, they need to first be enabled by Computer Talk.



Parameter	Allowable values	Description
<b>Enable Notifications</b>	On/Off	Enables desktop notifications for iceBar for web.
<b>Auto accept</b>	On/Off	Auto answers the alerting contact when the desktop notification is clicked.
<b>Auto reject</b>	On/Off	Auto rejects the alerting contact when the notification is closed.
<b>Auto focus browser window</b>	On/Off This setting is only visible if <i>Auto accept</i> is enabled.	Auto focuses the window when auto answering a contact.

## Session/Browser: Browser Settings

The below screenshot displays the default view of the Browser Settings.

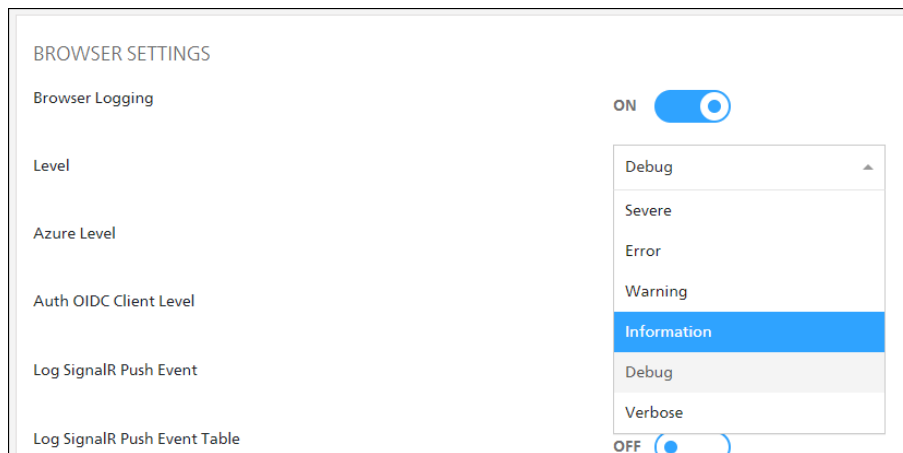


The table below provides information on the fields and buttons found in the Browser Settings.

Parameter	Allowable values	Description
<b>Browser Logging</b>	On/Off	Select <i>On</i> to enable logging to the browser console. By default, Browser Logging is disabled.
<b>Log SignalR Push Event</b>	On/Off	<p>Select <i>On</i> to enable logging of SignalR Push Event to browser.</p> <p>SignalR Push Event logs single events one at a time where:</p> <ul style="list-style-type: none"> <li>• “Count” is the number of messages received.</li> <li>• “Last” is the time it took to receive your last message.</li> <li>• “Max”, “Min” and “Avg” are based on all your received messages so far.</li> </ul> <p>By default, Log SignalR Push Event is disabled.</p>
<b>Log SignalR Push Event Table</b>	On/Off	<p>Select <i>On</i> to enable logging of SignalR Push Event Table to browser.</p> <p>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’.</p> <p>By default, Log SignalR Push Event is disabled.</p>
<b>Log SignalR Push Event Table Count</b>	The default is 100	Configures the value used in Log SignalR Push Event Table to determine the number of messages pushed to summarize.
<b>Theme</b>	Dark/Light/Contrast	Select the theme

Parameter	Allowable values	Description
<b>Cookies</b>	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.

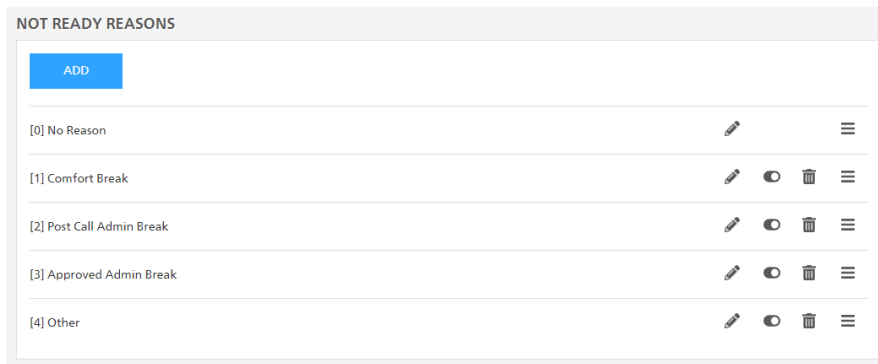


# Administration

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.



The screenshot shows a form for adding a new Not Ready Reason. At the top left is a blue "[5]" label. To the right are icons for close, toggle, delete, and menu. Below is a "Code" field with the value "5". Underneath are three input fields for names: "English (Canada)", "Français (Canada)", and "Español (México)".

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

### To edit a Not Ready Reason:

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



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

#### To delete a Not Ready Reason:

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



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

#### Disable a Not Ready Reason:

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



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

#### Reorder a Not Ready Reason:

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



To import Not Ready Reasons from XML format:

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

The screenshot shows a user interface for importing Not Ready Reasons. At the top left is a blue button labeled "IMPORT". Below it, there is a "Default Language:" dropdown menu currently set to "English (Canada)". To the right is an "Overwrite All" toggle switch, which is currently turned "OFF". Below these controls is a text area with the instruction "Paste the iceBar Not Ready Reason Configuration XML in the textbox to import". The text area contains the following XML code:

```
<NotReadyReasons override="always">
  <NotReadyReason code="5">
    <Name language="en-CA">Lunch</Name>
    <Name language="fr-CA">Déjeuner</Name>
  </NotReadyReason>
</NotReadyReasons>
```

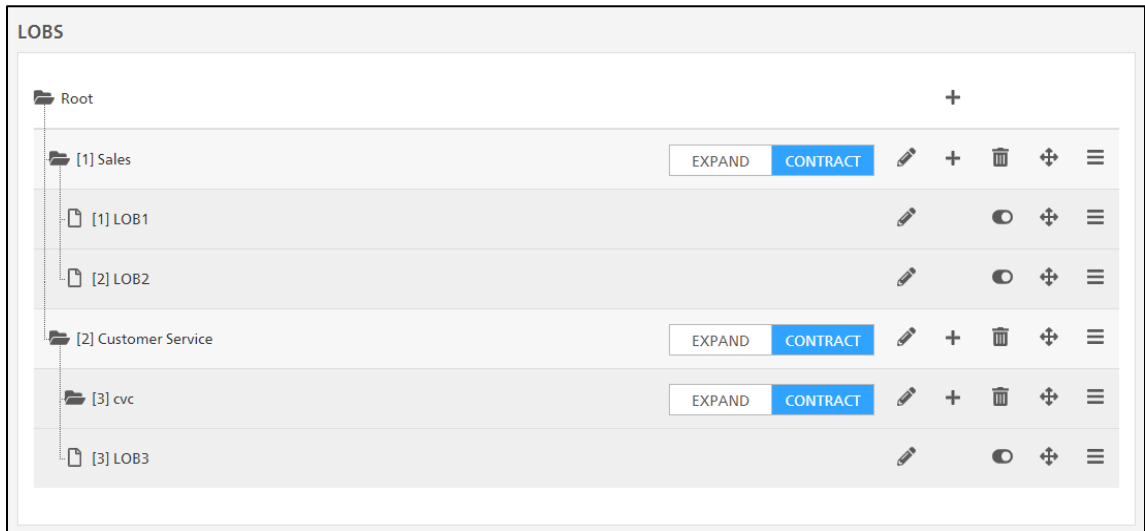
4. Click the Import button to import the Not Ready Reasons.
5. New Not Ready Reason fields open populated with your imported Not Ready Reasons.
6. If you clicked *Save*, the 'Not Ready Reasons Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes'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



## Line of Business Codes

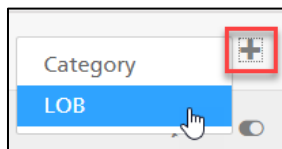
This section allows users to view the Line of Business (LOB) codes that have been configured for the system. Users with administrator privileges or higher are also able to add, edit, disable, or move LOBs.

**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.

**Note:** The LOB input field has a maximum of 2000 characters.

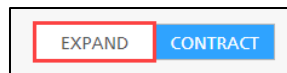


The screenshot shows the input form for a new LOB. It includes a 'LOB ID' dropdown menu with the value '4'. Below this are three text input fields: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. The 'English (Canada)' field contains the text 'English (Canada)'. There are also icons for expand, toggle, refresh, and menu at the top right of the form.

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

Expand or contract an LOB category:

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



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



To edit an LOB:

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



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

To delete an LOB:

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



2. Click *Save* to save the changes. Click *Revert* to cancel the changes.

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

#### Disable an LOB:

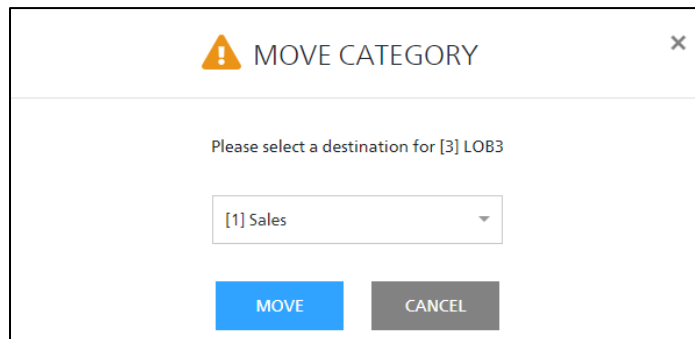
- Click the toggle on the LOB to disable the LOB.



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

#### To move an LOB:

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



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

#### Reorder an LOB or Category:

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



#### To import LOBs from XML format:

1. From the dropdown list, select the default language for the LOBs you are going to import.

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

IMPORT

Default Language: English (Canada) Overwrite All

OFF

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

```
<LOBCodes override="always" forceLOB="1" autoReady="-1" autoSubmit="0" closeSubmit="false">
<Category id="4" expand="true">
  <Name language="en-CA">Business</Name>
  <Name language="es-MX">el business</Name>
  <Name language="fr-CA">La business</Name>
  <LOBCode code="13">
    <Name language="en-CA">gst</Name>
    <Name language="es-MX">gst</Name>
    <Name language="fr-CA">gst</Name>
  </LOBCode>
  <LOBCode code="14">
    <Name language="en-CA">hst</Name>
    <Name language="es-MX">hst</Name>
    <Name language="fr-CA">hst</Name>
  </LOBCode>
</Category>
</LOBCodes>
```

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 *Agent Evaluation Form - Template* is available by default and can be used as a template when building new evaluation forms or modified to fit your quality management program needs.

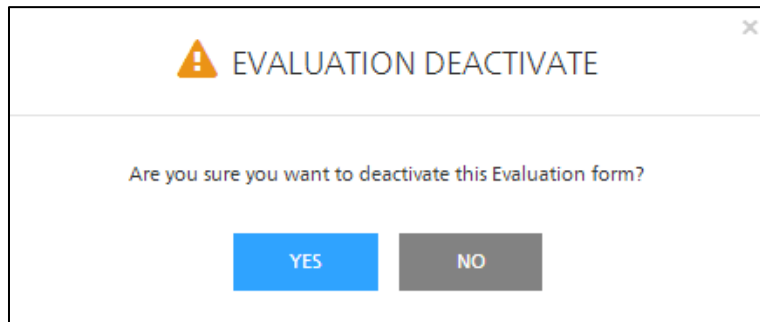
EVALUATIONS							
<a href="#">ADD</a>		Show deactivated forms <input type="checkbox"/> OFF					
Name	ID	Ancestor ID	Times Used	Creation Date	Action	Active	
Agent Evaluation Form - Template	1	0	0	2023-01-01 09:00:00 AM		ON <input checked="" type="checkbox"/>	

The table below explains each column:

Column	Description
<b>Name</b>	Name of the evaluation form. It is recommended that you provide a descriptive name that is below 25 characters. Names over 25 characters may not fit the columns in evaluation reports.
<b>ID</b>	Identification number of the form. Allows you to differentiate between evaluation forms with the same name.
<b>Ancestor ID</b>	Identification number of the parent form, that is, the form where it was copied from.
<b>Times Used</b>	The number of times the form was used for evaluation purposes. Regardless of whether the evaluation is in progress or not, it will be counted in this field. However, if an evaluation is deleted in iceJournal, it will be reflected in this field.
<b>Creation Date</b>	The date and time the evaluation form was created.
<b>Action</b>	Icons that you click to edit, clone, and delete existing evaluation forms.
<b>Active</b>	Toggles that allow you to flip an evaluation on or Shows whether the form is active.

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

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













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

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




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

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

To reactivate a form, toggle the Active switch On.

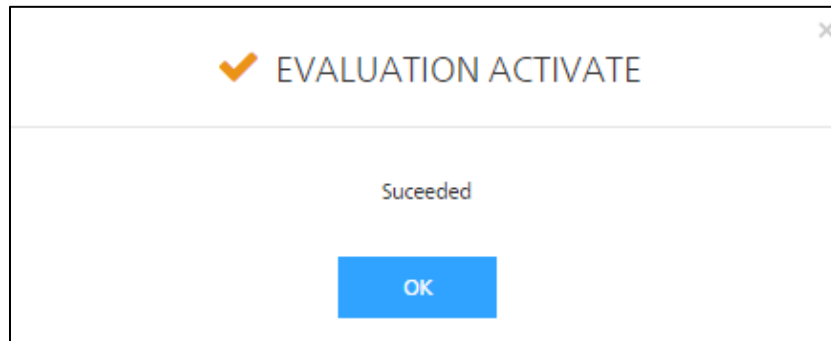
An "Are you sure you want to activate this Evaluation form" message appears.

 EVALUATION ACTIVATE ×

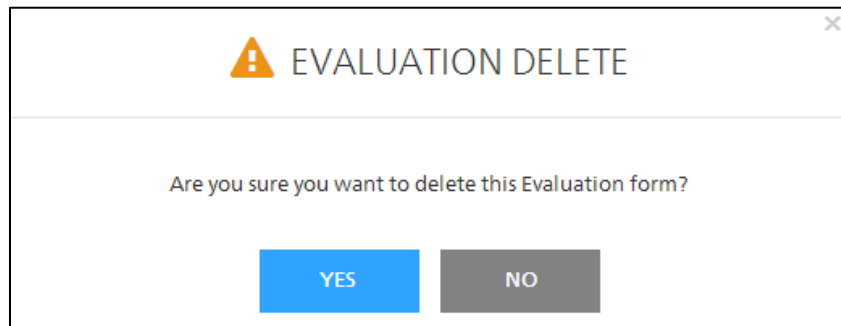
Are you sure you want to activate this Evaluation form?

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

Once you click Yes you will see 'Evaluation activate succeeded' message.



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



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

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

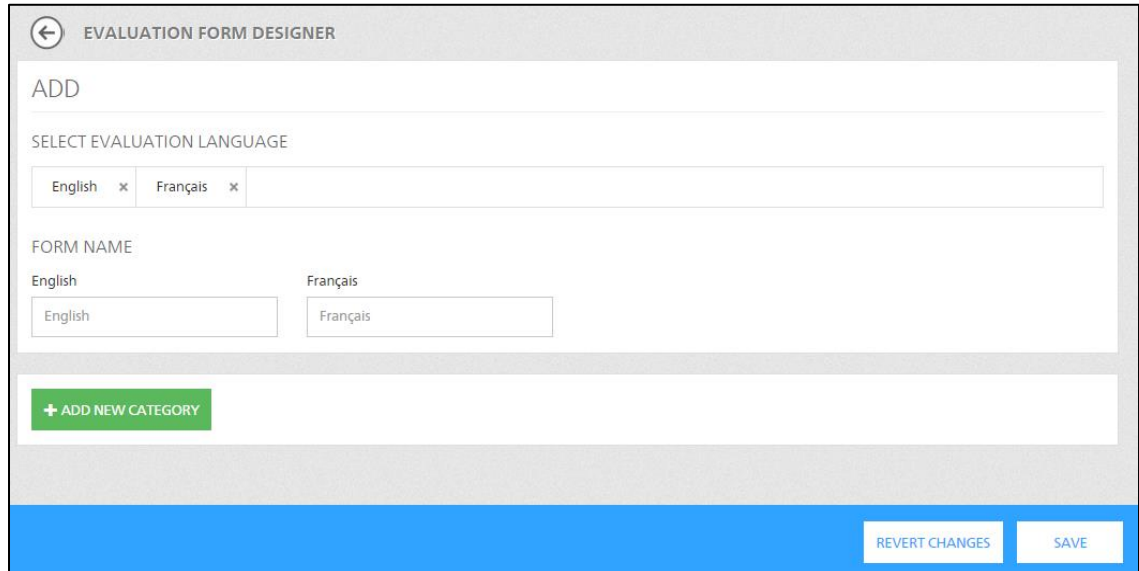


## Creating a New Evaluation Form

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

1. Click *Add*.

The Evaluation form designer appears.



The screenshot shows the 'EVALUATION FORM DESIGNER' interface. At the top left is a back arrow icon. Below it is a large 'ADD' button. Underneath is a 'SELECT EVALUATION LANGUAGE' section with a horizontal list of language tags: 'English' with a grey 'x' and 'Français' with a grey 'x'. Below this is a 'FORM NAME' section with two input fields: one labeled 'English' containing the text 'English', and one labeled 'Français' containing the text 'Français'. At the bottom left of the main form area is a green button with a plus sign and the text '+ ADD NEW CATEGORY'. At the bottom right of the interface, within a blue footer bar, are two buttons: 'REVERT CHANGES' and 'SAVE'.

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

← EVALUATION FORM DESIGNER

ADD

SELECT EVALUATION LANGUAGE

English x Français x

FORM NAME

English Français

English Français

CATEGORY NAME 🗑️ ⌵ ☰

English Français

English Français

**+ ADD NEW CRITERIA**

**+ ADD NEW CATEGORY**

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

The criteria area expands to show additional options.

CATEGORY NAME 🗑️ ⌵ ☰

English (Canada) Français (Canada)

English (Canada) Français (Canada)

CRITERIA 🗑️ ⌵ ☰

Type  Optional  OFF

Minimum Value  Maximum Value  Number of Increments

Name English (Canada) Français (Canada)

English (Canada) Français (Canada)

PREVIEW

★ ☆ ☆ ☆ ☆ 0/1

**+ ADD NEW CRITERIA**

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

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

## Criteria Types

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

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

### Stars

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

CRITERIA

Type: Stars  Optional OFF

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

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

PREVIEW

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

## Slider

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

The screenshot shows the configuration for a Slider criteria. The 'Type' is set to 'Slider' and 'Optional' is turned off. The 'Minimum Value' is 0, 'Maximum Value' is 10, and 'Number of Increments' is 11. The name is 'Caller attitude' in both English and French. The preview shows a slider bar with a value of 8.00/10, a blue progress indicator at 80%, and a 'Comment' button.

## Buttons

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

The screenshot shows the configuration for a Buttons criteria. The 'Type' is set to 'Buttons' and 'Optional' is turned off. The 'Minimum Value' is 0, 'Maximum Value' is 1, and 'Number of Increments' is 5. The name is 'How well was the pr' in English. The preview shows a grid of buttons for 'NOT AT ALL', 'BARELY', 'SOME WHAT', 'ALMOST', and 'COMPLETELY', with a value of 0/1, a blue progress indicator at 0%, and a 'Comment' button.

## Drop Down

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

CRITERIA

Type  Optional

Minimum Value  Maximum Value  Number of Increments

English (Canada)

Name


0

0.50


1.00

PREVIEW

Pass/Fail  0/1

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

The 'Revert Evaluation' message will appear.

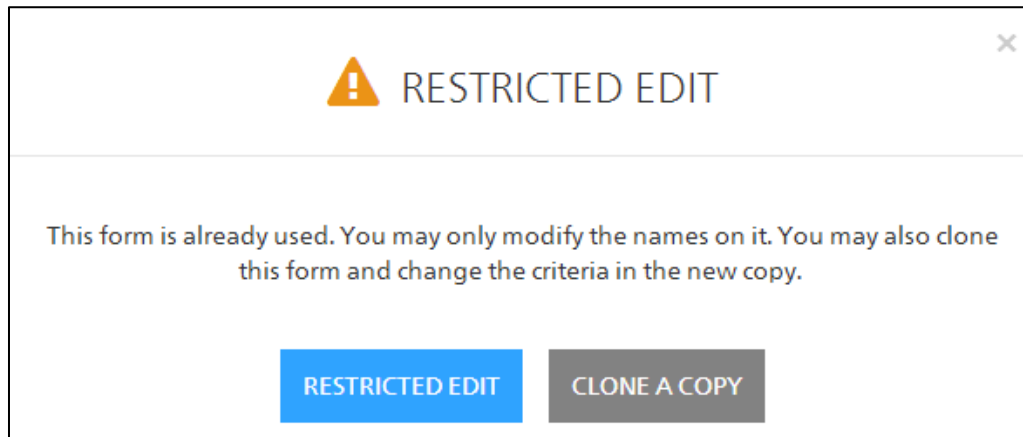
 REVERT EVALUATION? ✕

Are you sure you want to revert your changes?

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

## Modifying an Evaluation Form

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



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

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

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

## Clone a Copy

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

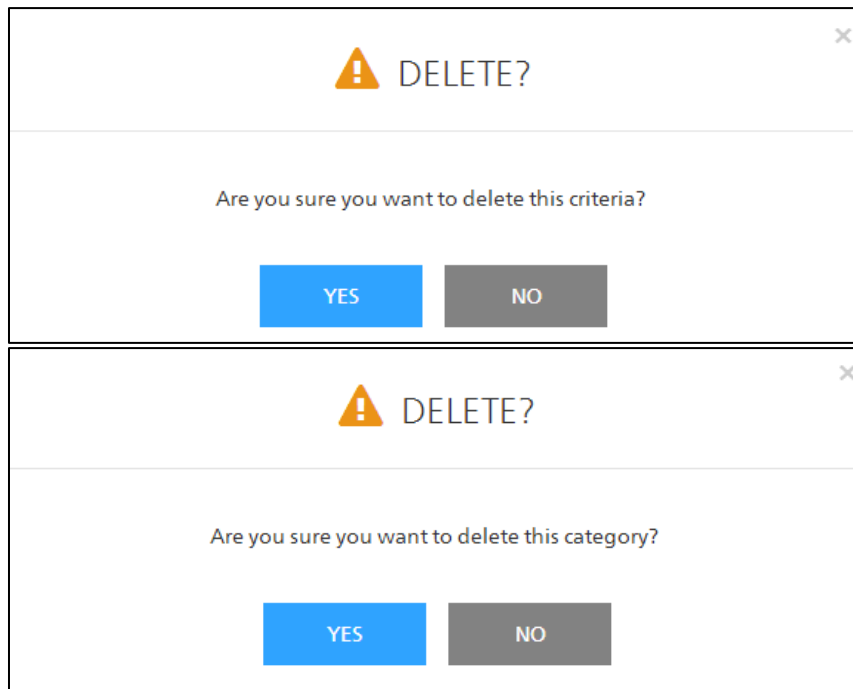
In this mode, you can add evaluation languages and modify all aspects of each criterion. Clone a copy duplicates the structure, using the original as a template for the cloned version.



## Delete Criteria or Category

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

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



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



## Minimize Criteria or Category

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

The expanded view:

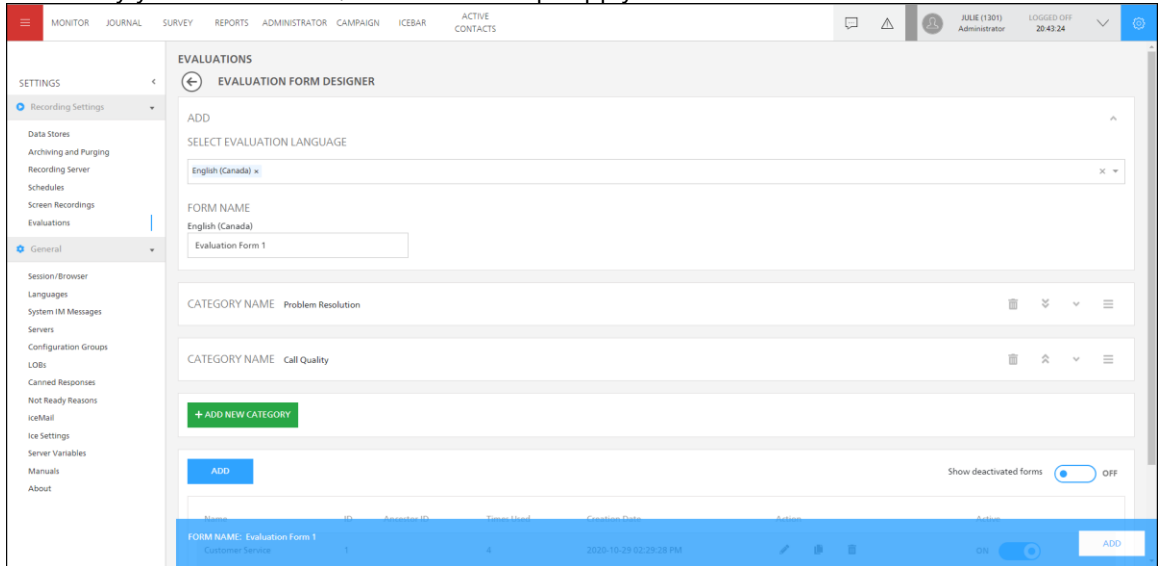
The expanded view shows a detailed configuration for a criterion. At the top, it displays 'CATEGORY NAME' as 'English' and the criterion name 'Problem Resolution'. Below this, the 'CRITERIA' section is expanded, showing various settings: 'Type' is set to 'Buttons', 'Optional' is turned off, 'Minimum Value' is 0, 'Maximum Value' is 10, and 'Number of Increments' is 5. The 'Name' field contains 'How well did the problem'. A vertical scale on the left ranges from 0 to 10.00. On the right side of the expanded view, a red box highlights a downward-pointing arrow icon, which is used to minimize the view.

The minimized view:

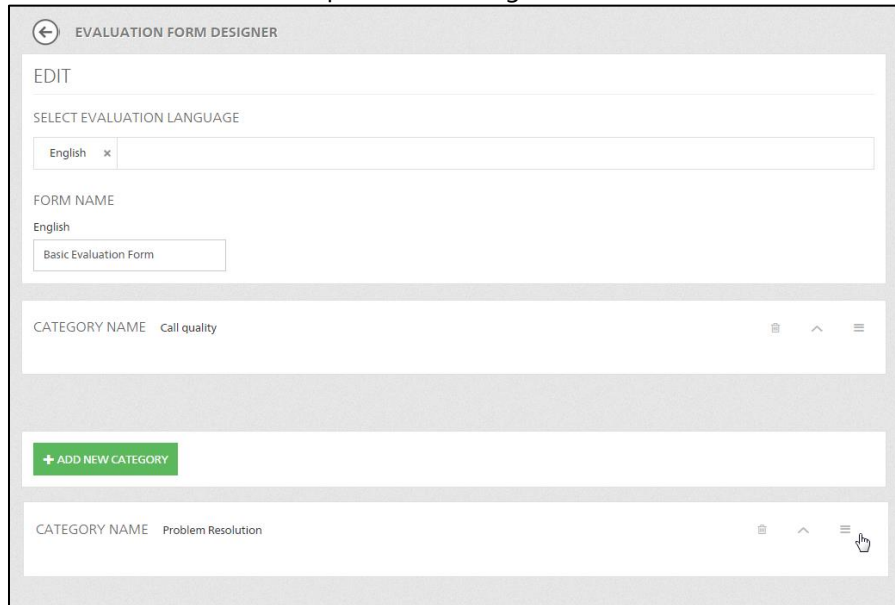
The minimized view shows a compact representation of the criterion. The category 'English' and criterion name 'Problem Resolution' are visible at the top. The criterion is summarized as 'CRITERIA How well did the problem get resolved?'. Below this, a horizontal bar displays the question 'How well did the problem get resolved?' followed by five buttons: 'NOT AT ALL', 'BARELY', 'MARGINALLY', 'SORT OF', and 'MOSTLY'. To the right of these buttons, the current score is shown as '0/10' and a progress indicator as '0%'. At the bottom of the interface, there are two buttons: a red '+ ADD NEW CRITERIA' button and a green '+ ADD NEW CATEGORY' button.

## Move Criteria or Category

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



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



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

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

## Restricted edit

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

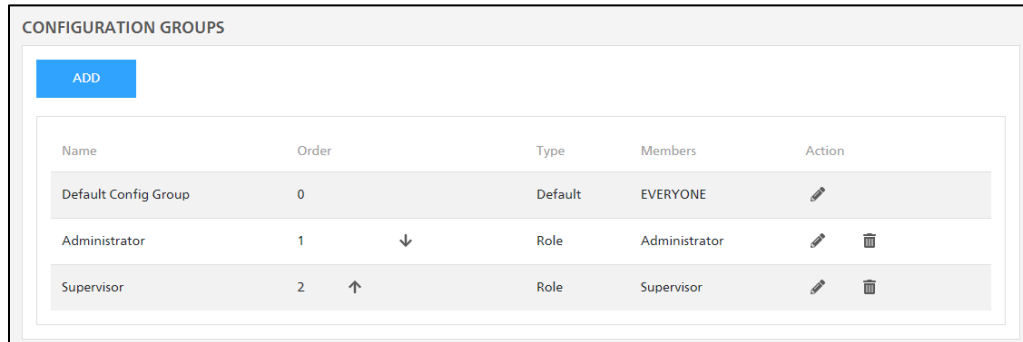
The screenshot shows a user interface for editing a criterion. At the top, the 'CATEGORY NAME' is 'English' and the criterion name is 'Problem Resolution'. Below this, the 'CRITERIA' section is visible. The 'Type' is set to 'Buttons'. The 'Minimum Value' is 0, the 'Maximum Value' is 10 (with a red prohibition sign over it), and the 'Number of Increments' is 5. The 'Name' field contains 'How well did the problor'. Below the name field, there are five buttons corresponding to the values 0, 2.50, 5.00, 7.50, and 10.00, with labels 'Not at all', 'Barely', 'Marginally', 'Sort of', and 'Mostly' respectively.

Value	Label
0	Not at all
2.50	Barely
5.00	Marginally
7.50	Sort of
10.00	Mostly

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

## Configuration Groups

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



Name	Order	Type	Members	Action
Default Config Group	0	Default	EVERYONE	
Administrator	1	Role	Administrator	
Supervisor	2	Role	Supervisor	

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

To add a configuration group:

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

ADD

Name

Type

Members

3. Configure the General properties.

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

Enable Access To Active Contacts

Force Logon All Queues

Show Queue Picker

Default User Connectivity

User Connectivity Changeable From IceBar

4. Configure the Server Assignments.

ASSIGNED SERVER

UNASSIGNED SERVERS Show deactivated servers  OFF

Server

5. Configure the LOB Assignments.

Enable force LOB Code (iceBar Desktop)	Disable
Default LOB Assignment	Include
Default Category Expansion	Expand
Auto Submit (iceBar Desktop)	Disable
Close on Submit (iceBar Desktop)	Disable
Journal Search - Filter LOB Codes <span style="color: blue;">?</span>	Enable

LOB Assignments

Root	
[1] Category 1	EXPAND CONTRACT
[19] Results	INCLUDE EXCLUDE
[3] A3	INCLUDE EXCLUDE
[4] A4	INCLUDE EXCLUDE

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

Default Canned Response Assignment	Inherit
Default Folder Expansion	Inherit

Canned Response Assignments

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

7. Configure the Not Ready Reasons.

Default Not Ready Reason Assignment

Not Ready Reason Assignments

[0] No Reason	<input type="button" value="INCLUDE"/>	<input type="button" value="EXCLUDE"/>	<input checked="" type="button" value="INHERIT"/>
[1] Comfort Break	<input type="button" value="INCLUDE"/>	<input type="button" value="EXCLUDE"/>	<input checked="" type="button" value="INHERIT"/>
[2] Post Call Admin Break	<input type="button" value="INCLUDE"/>	<input type="button" value="EXCLUDE"/>	<input checked="" type="button" value="INHERIT"/>
[3] Approved Admin Break	<input type="button" value="INCLUDE"/>	<input type="button" value="EXCLUDE"/>	<input checked="" type="button" value="INHERIT"/>
[4] Other	<input type="button" value="INCLUDE"/>	<input type="button" value="EXCLUDE"/>	<input checked="" type="button" value="INHERIT"/>

8. Configure the iceBar for Desktop.

IceBar UI Language

Target IceBar Installer Version

Target IceBar Version

Target IceBar Updater Version

iceBar Configuration XML

9. Configure the iceBar for Web.

Enable iceBar for web

Enable Set User Data

Maximum PAQ Number

iceBar Buttons

10. Configure the Survey Permissions, if applicable.



Permissions	
Surveys	Inherit
Survey Runs	Inherit
Survey Response	Inherit

11. Configure the icePhone settings, if applicable.

Close Window on Release	Disable
Allow Contact Attachments from Agent	Enable

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

Configuration Group Properties	
Parameter	Details
<b>Name</b>	Enter a unique name to identify this configuration group.
<b>Type</b>	Select a grouping type – <i>Users, Teams, or Role</i>
<b>Members</b>	Members are specified based on the type selected. Users: members are selected from a list of ice users Teams: members are selected from a list of ice teams Roles: members are selected based on their ice user type
<b>General</b>	
<b>Enable Access to Active Contacts</b>	Options include <i>Enable, Disable, and Inherit</i> 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. <b>Note:</b> Only users with administrator privileges or higher can have access to the Active Contacts tab.

Configuration Group Properties	
Parameter	Details
<b>Force Logon All Queues</b>	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will decide whether this configuration group will be forced to logon to all assigned queues. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Show Queue Picker</b>	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will decide whether this configuration group has access to the queue picker. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Default User Connectivity</b>	Options include <i>iceAdministrator defined</i> , <i>icePhone</i> and <i>Inherit</i> which will decide the default connectivity for users in this configuration group. If this setting is set to <i>iceAdministrator defined</i> , it will set the remote DN field in the global iceBAR XML to blank, prompting the server to use the <i>iceAdministrator</i> configuration when the agent logs into ice. If set to <i>icePhone</i> , it will set the remote DN field to "8:acs:" which informs the server that the agent will use <i>icePhone</i> . The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>User Connectivity Changeable from iceBar</b>	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will control whether an agent's remote DN on their iceBar and iceBar is editable or not. If this setting is enabled, the remote DN field in the iceBar is editable. If it is disabled, the remote DN field in the iceBar is disabled, as well as the "Use icePhone" checkbox. In the server profile page, the "Roaming DN", "Use iceMA assigned remote DN" and "Use icePhone" fields will also be disabled. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another

Configuration Group Properties	
Parameter	Details
	configuration group, the system will use the Default Config Group settings.
<b>Server</b>	
<b>Assigned Server</b>	Shows all the ice servers that the configuration group has been assigned to. To remove a server from this list select the <i>remove</i> button (-) under the Unassign column. The server will then move to the list of unassigned servers. By default all servers are listed under the Unassigned field.
<b>Unassigned servers</b>	Shows all the ice servers that the configuration group has not been assigned to. To assign a server from this list, select the <i>add</i> button (+) under the Assign column. The server will then move to the list of assigned servers. By default, all servers are listed under this field.
<b>LOB</b>	
<b>Enable force LOB Code (iceBar Desktop)</b>	Options include <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group will be required to assign an LOB code to each contact after it has been handled. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.  <b>Note:</b> If you are using Forced LOBs, ensure that you have wrap up after queued calls enabled in the user's class of service. For more information, refer to the <i>iceAdministrator User Manual</i> .
<b>Number of LOB Codes Required (iceBar Desktop)</b>	This option is available when <b>Enable force LOB Code</b> is set to <i>Enable</i> . Enter the number of LOB Codes this configuration group will be required to assign to each contact after it has been handled.
<b>Default LOB Assignment</b>	Options are <i>Include</i> , <i>Exclude</i> , and <i>Inherit</i> which will decide whether this configuration group has access to the default

Configuration Group Properties	
Parameter	Details
	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 <i>Expand</i> , <i>Contract</i> , and <i>Inherit</i> which will decide whether this configuration group's LOBs will be viewed in expanded or contracted form by default. The 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 <b>Enable force LOB Code</b> is set to <i>Enable</i> . Options are <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> which will decide whether this configuration group will automatically enter into the ready state after submitting the LOB assignments. The 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 <b>Enable force LOB Code</b> is set to <i>Enable</i> . Enter the number of seconds before this configuration group will be set to the Ready state after submitting the LOB assignments.
Auto Submit	Options are <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group will need to select the Submit button in the iceBar LOB window to submit their LOB selection. The 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 <b>Auto Submit</b> is set to <i>Enable</i> . Enter the number of seconds this configuration group will have between assigning LOBs and automatic submission.
Close on Submit	Options are <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group will need to manually close the iceBar LOB window after submitting their LOBs. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Journal Search – Filter LOB Codes	Options are <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> . When enabled, the LOB search selector in Journal will only show user assigned LOBs. When disabled, it will show all LOBs including deactivated, and LOBs not assigned to users.
LOB Assignments	Shows all available categories and LOBs. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each LOB. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. By default, this field is set to <i>Inherit</i> .
<b>Canned Response</b>	
Default Canned Response Assignment	Options are <i>Include</i> , <i>Exclude</i> , and <i>Inherit</i> which will decide whether this configuration group has access to the default Canned Response assignment. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another

Configuration Group Properties	
Parameter	Details
	configuration group, the system will use the Default Config Group settings.
<b>Default Folder Expansion</b>	Options are <i>Expand</i> , <i>Contract</i> , and <i>Inherit</i> which will decide whether this configuration group's Canned Responses will be viewed in expanded or contracted form by default. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Canned Response Assignments</b>	Shows all available folders and Canned Responses. Users have the options <i>Expand</i> , <i>Contract</i> , or <i>Inherit</i> for each folder. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each Canned Response. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. By default, this field is set to <i>Inherit</i> .
Not Ready Reason	
<b>Default Not Ready Reason Assignment</b>	Options are <i>Include</i> , <i>Exclude</i> , and <i>Inherit</i> which will decide whether this configuration group has access to the default Not Ready Reason assignment. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Not Ready Reason Assignments</b>	Shows all available Not Ready Reasons. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each Not Ready Reason. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. By default, this field is set to <i>Inherit</i> .
iceBar for desktop	

Configuration Group Properties	
Parameter	Details
iceBar UI Language	Configures the language that iceBar will open in. The dropdown shows the following options: Use OS Language, Prompt, English, French and Spanish. Users also have the <i>Inherit</i> option to use the Default Config Group settings.
Target iceBar Installer Version	iceBar Installer is the executable file that is used to install iceBar on a user's workstation. This dropdown shows all available iceBar Installer versions. Users also have options <i>Inherit</i> and <i>Release\Latest</i> . <i>Release\Latest</i> will use the latest version within the Release channel folder.  <b>Note:</b> Only Global Administrator has access to this configuration option.
Target iceBar Version	The version of iceBar that will be installed on the user's workstation. This dropdown shows all available iceBar versions. Users also have options <i>Inherit</i> and <i>Release\Latest</i> . <i>Release\Latest</i> will use the latest version within the Release channel folder.  <b>Note:</b> Only Global Administrator has access to this configuration option.
Target iceBar 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 <i>Inherit</i> and <i>Release\Latest</i> . <i>Release\Latest</i> will use the latest version within the Release channel folder.  <b>Note:</b> Only Global Administrator has access to this configuration option.
iceBar Configuration XML	Contains the iceBar configuration settings in xml format.  <b>Note:</b> The override="always" attribute in the Queues element in the iceBar configuration will be added if <i>Force Logon All Queues</i> is enabled.

Configuration Group Properties	
Parameter	Details
Enable web iceBar	Options include <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group has access to iceBar for web. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Enable Set User Data	Options include <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> which will decide whether this configuration group has access to modifying the User Data field. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Maximum PAQ Number	Options include <i>Custom</i> and <i>Inherit</i> which will decide the number of rows this configuration group has in their PAQ. The <i>Custom</i> option displays a field to enter the number of PAQ rows for this configuration group. The <i>Inherit</i> option forces the system to look at a parent configuration group 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 <i>Custom</i> and <i>Inherit</i> which will decide the buttons displayed on the iceBar for Web for this configuration group. The <i>Custom</i> 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 <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
<b>Survey</b>	
Surveys	Options include <i>None</i> , <i>View (View)</i> , <i>Edit (View / Edit)</i> , <i>Full Control (View / Edit / Delete)</i> , and <i>Inherit</i> which will decide



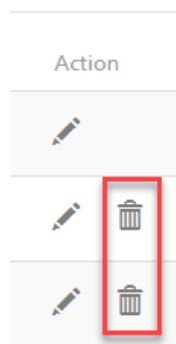
Configuration Group Properties	
Parameter	Details
	the permissions that this configuration group has on the Survey page. The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.
Survey Runs	Options include <i>None</i> , <i>View (View)</i> , <i>Edit (View / Edit)</i> , <i>Full Control (View / Edit / Delete)</i> , and <i>Inherit</i> 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 <i>None</i> , <i>View (View)</i> , <i>Delete (View / Delete)</i> , and <i>Inherit</i> 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.
<b>icePhone</b>	
Close Window on Release	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> . By default, chat windows will stay open when the contact is completed. When this setting is enabled, chat windows will close when the agent selects the release button.
Allow Contact Attachments from Agent	Options include <i>Enable</i> , <i>Disable</i> and <i>Inherit</i> . If enabled, agents belonging to this configuration group will be allowed to upload contact attachments. <b>Note:</b> For the file upload button to be available for the agent, this setting must be enabled <b>and</b> the <i>Allowed File</i>

Configuration Group Properties	
Parameter	Details
	<i>Extensions for Agent setting in Core Settings &gt; Contact Attachments must have at least one file type specified.</i>

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

To delete a configuration group:

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



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

To edit a configuration group:

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

Name	<input type="text"/>									
Type	Users <input type="button" value="v"/>									
Members	<input type="text"/> <input type="button" value="SELECT"/>									
<table border="1"> <tr> <td>General</td> <td>Server</td> <td>LOB</td> <td>Canned Response</td> <td>Not Ready Reason</td> <td>iceBar for desktop</td> <td>iceBar for web</td> <td>Survey</td> <td>icePhone</td> </tr> </table>		General	Server	LOB	Canned Response	Not Ready Reason	iceBar for desktop	iceBar for web	Survey	icePhone
General	Server	LOB	Canned Response	Not Ready Reason	iceBar for desktop	iceBar for web	Survey	icePhone		
Enable Access To Active Contacts	Inherit <input type="button" value="v"/>									
Force Logon All Queues	Inherit <input type="button" value="v"/>									
Show Queue Picker	Inherit <input type="button" value="v"/>									
Default User Connectivity	Inherit <input type="button" value="v"/>									
User Connectivity Changeable From iceBar	Inherit <input type="button" value="v"/>									

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

### Configure iceBar for Web

#### **Understanding Contact Buttons**











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











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

#### **Understanding User Buttons**

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

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

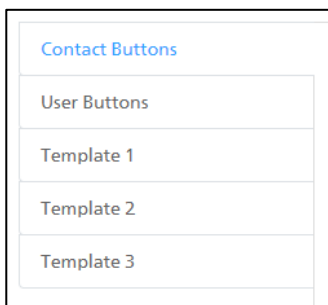
Buttons panel summary		
Button	Available when	Use Button to...
 Answer	Alerting with a contact.	Answer a call alerting at your workstation if off-hook.
 Release	On a contact.	End the contact you are on.
 Place Call	Logged on and not handling another call.	Place a call to another user, or to an external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

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


Buttons panel summary		
Button	Available when	Use Button to...
→ Request New Contact	Multi-contact handling COS and Request to Select Next Contact COS are enabled.	Request the next contact.

### Adding Buttons to the Toolbar

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

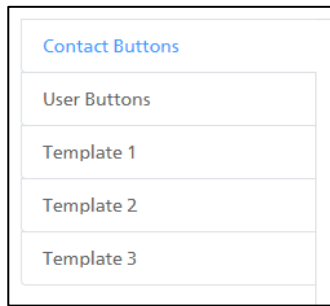


**Note:** Templates 1, 2, and 3 can be used to create and save alternative layouts. Templates can be copied and imported into the Contact Buttons or User Buttons pages. Refer below to learn how to copy and import templates.


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

### Removing Buttons from the Toolbar

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



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

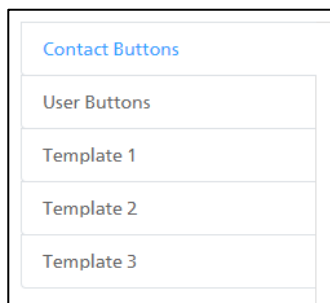
3. The column on the left shows the other buttons available for the user to add to the toolbar. The column on the right shows the buttons currently displayed on the toolbar.
4. In the column on the right, highlight the button that you wish to remove from the Buttons panel.
5. Click  to move the selected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

### Customize Buttons

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

#### To add a new button:

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



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

The dialog box is titled "ADD BUTTON". It contains the following fields and controls:

- Tooltip:** A text input field.
- Icon:** A grey rectangular field with an ellipsis button to its right.
- Command:** A drop-down menu.
- Queue ID:** A grey rectangular field.
- Dialed Digits:** A grey rectangular field.
- User Data:** A grey rectangular field.
- Buttons:** "Ok" and "Cancel" buttons at the bottom right.

3. Add the information about the new button.

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

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

5. Click Save to save your changes.

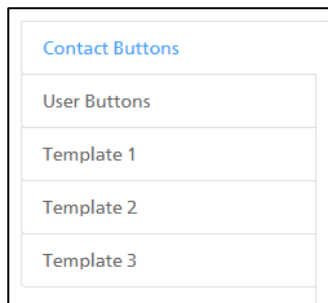
Add Button Options	
Parameter	Description
<b>Tooltip</b>	Insert the text that will be displayed in the tooltip section.
<b>Icon</b>	Add icon. Click the ellipsis button to open the 'select icon' window. Click on the desired icon you wish to use Click <i>OK</i> to apply your changes or <i>Cancel</i> to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



Add Button Options	
Parameter	Description
<b>Queue ID</b>	Enter a Queue ID to be associated with this button, if applicable.
<b>Dialed Digits</b>	Enter Dialed Digits to be associated with this button, if applicable.
<b>User Data</b>	Enter User Data to be associated with this button, if applicable.

To edit a button:

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



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:

**EDIT BUTTON**

Tooltip:

Icon:  
 ...

Command:

Queue ID:

Dialed Digits:

User Data:

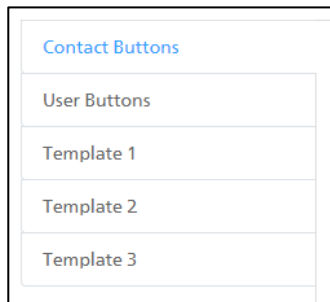
5. Make the desired changes outlined in the table below.
6. Click OK to apply your changes or click Cancel to discard your changes.
7. Click Save to save your changes.

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

Edit Button Options	
Parameter	Description
<b>Dialed Digits</b>	Enter Dialed Digits to be associated with this button, if applicable. <b>Note:</b> This option is only available for new icons.
<b>User Data</b>	Enter User Data to be associated with this button, if applicable. <b>Note:</b> This option is only available for new icons.

To delete a button:

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

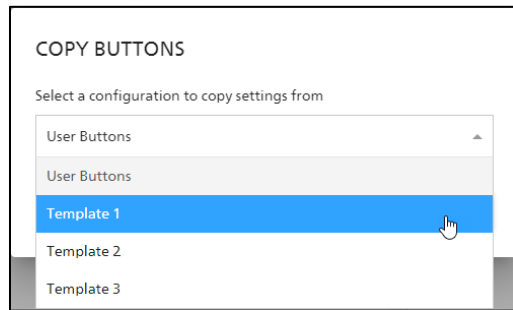


2. Locate the button you wish to delete on any of the columns that appear.
3. Click the Delete button to delete the button.
4. Click Save to save the changes.

Copy the Settings from a Template

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

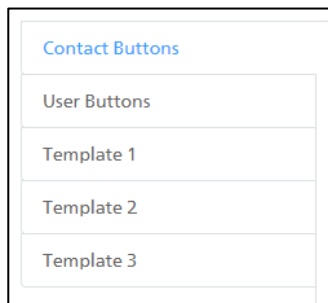
1. Navigate to the Contact Buttons or User Buttons page that you wish to configure.
2. Click the Copy button.
3. In the window that appears, select a page you wish to copy from by highlighting it in the drop-down list.



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

To reset the buttons:

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



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

## icePhone Connection and Backup Settings

### Voice Settings

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

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

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

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

## IM Settings

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

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

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

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

### In iceManager

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

The screenshot shows the 'EDIT CONFIGURATION GROUP' interface. At the top, there is a back arrow and the title 'EDIT CONFIGURATION GROUP'. Below that, it says 'DEFAULT CONFIGURATION GROUP' with a page indicator '1 of 2'. There are several tabs: 'General', 'Server', 'LOB', 'Canned Response', 'Not Ready Reason', 'iceBar for desktop', 'iceBar for web', 'Survey', and 'icePhone'. The 'General' tab is active. Below the tabs, there are several settings with dropdown menus:

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

### In iceAdministrator

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

The screenshot shows the 'Class of Service' configuration window in iceAdministrator. The 'ACS Settings' section is highlighted with a red box, indicating that both 'Enable ACS Voice' and 'Enable ACS IM' are checked. Other settings include 'Allow Multi Contact Handling' (unchecked), 'Auto Answer Calls' (checked), and 'Logon to NOT READY' (checked).

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.

The screenshot shows the 'Connections' configuration window in iceAdministrator. The 'Connection Address/Remote DN' field is set to '12345678790'. The 'Use MS Teams Direct Routing' and 'Block PSTN Remote DN' checkboxes are checked and highlighted with a red box. Other settings include 'Email Address' (laura@computer-talk.com) and 'IM Address' (sip:laura@computer-talk.com).

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'.

EDIT CONFIGURATION GROUP

DEFAULT CONFIGURATION GROUP ↑ ↓ 1 of 2

General Server LOB Canned Response Not Ready Reason iceBar for desktop iceBar for web Survey icePhone

Enable Access To Active Contacts: Enable

Force Logon All Queues: Disable

Show Queue Picker: Enable

Default User Connectivity: iceAdministrator defined

User Connectivity Changeable From iceBar: iceAdministrator defined, icePhone

If the agent is using icePhone to handle IMs, enable both the *Can Handle IM Contacts from ice* and the *Use ACS* checkbox.

Properties Connections Class of Service Call Forwarding Queue Assignments Skills

Connection Address/Remote DN: 12345678790

Password Callback

Use MS Teams Direct Routing

Block PSTN Remote DN

Email Address

Use Connection Address  Can Handle Email Contacts from ice

Use This Address: laura@computer-talk.com

IM Address

Use Connection Address  Can Handle IM Contacts from ice  Use ACS

Use This Address: 8.acs

Auto Logon

Queue: All Assigned Queues

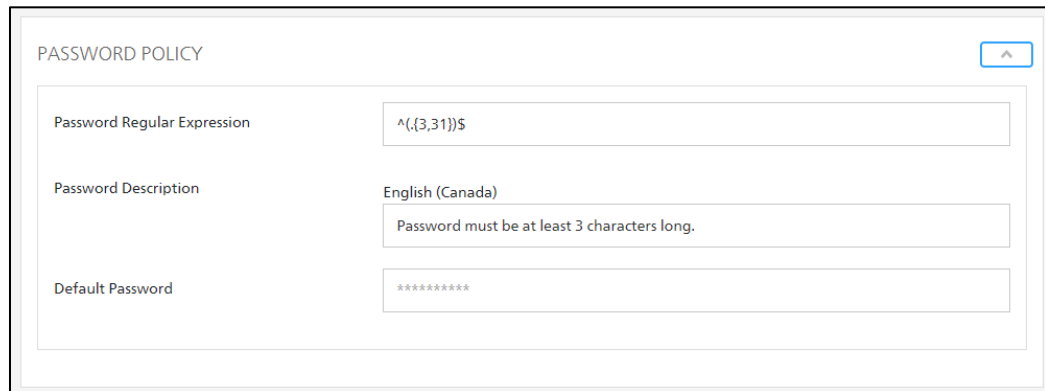
Image URL:



## Password Management

### Password Policy:

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



The screenshot shows a window titled "PASSWORD POLICY" with a close button in the top right corner. It contains three input fields:

- Password Regular Expression:** The input field contains the text `^({3,31})$`.
- Password Description:** The input field contains the text "English (Canada)" above "Password must be at least 3 characters long."
- Default Password:** The input field contains the text "\*\*\*\*\*".

Parameter	Permissible Values	Description
<b>Password Regular Expression</b>	Regex	Enter the password requirements and limitations using regular expression.
<b>Password Description</b>	Text	Enter a description for the password. This field can be used to remind users of their password requirements, such as minimum password length.
<b>Default Password</b>	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.

PASSWORD RESET ^

User

New Password

New Password (Confirm)

Force Password Change on Next Logon OFF

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

1. Select the user from the drop down list.

User

New Password

New Password (Confirm)

Sort by Name | Sort by ID

Andrea (1201)

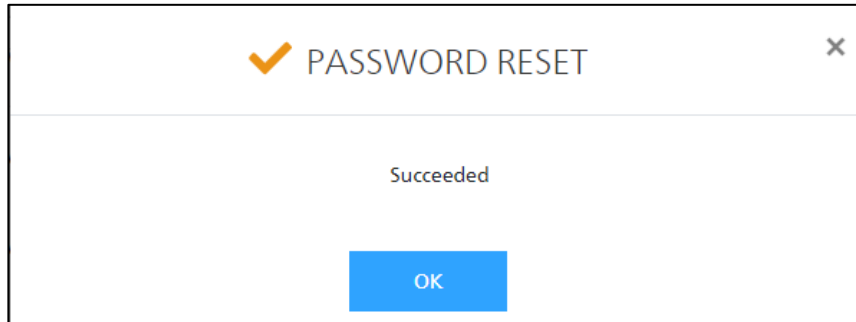
Marcel (1202)

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

New Password

New Password (Confirm)

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.



## Audit Trails

This section provides administrators with the ability to view changes that have been made in the system. Administrators and global administrators are able to view details of the changes, when the changes were made, and the user who made the changes.

The screenshot shows a web application interface for 'Audit Trails'. At the top, there is a navigation bar with tabs: HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ICEBAR, and ACTIVE CONTACTS. On the right of the navigation bar, there is a user profile for 'AJLIE (1301) Administrator' and a 'LOGGED OFF 02:09:24' indicator. A left-hand navigation menu is open, showing categories like 'General', 'Administration', 'Not Ready Reasons', 'LOBs', 'Evaluations', 'Configuration Groups', 'Password Management', 'Audit Trails', 'Audio Messages', 'Contact Metadata Field', 'Contact Metadata Job', 'Chat', 'Recording', and 'System'. The main content area is titled 'AUDIT ID' and contains search filters for 'Enter Number', 'CHANGED BY' (Select users...), 'DATE RANGE' (Jul 01, 2024 - Jul 30, 2024), and 'EVENT TYPE' (Select event types...). Below the filters are 'OBJECT (0/48)' and 'SEARCH' buttons. The 'RESULTS' section features a table with columns: 'Au...', 'User ID', 'DateTime', 'Object', 'Location Path', 'Old Value', 'New Value', 'Event Type', and 'Session ID'. The table is currently empty, displaying 'No Rows To Show'. At the bottom right of the table area, there is a pagination indicator '0 to 0 of 0' and 'Page 0 of 0'.

## Audit Trails Search Results Grid

### Columns Options

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

The screenshot displays the Audit Trails Search Results Grid interface. At the top, there are four search filters: AUDIT ID (text input), CHANGED BY (dropdown), DATE RANGE (calendar icon and date range), and EVENT TYPE (dropdown). Below these are two buttons: OBJECT (0/48) and SEARCH. The main area is titled RESULTS and contains a table with a search bar and a column selection menu. The column selection menu is highlighted with a red box and contains the following items: Search..., Audit ID, User ID, DateTime, Object, Location Path, Old Value, New Value, Event Type, and Session ID. The table currently shows "No Rows To Show".

Audit ID	Changed By	Date Range	Event Type
Enter Number	Select users...	Jul 01, 2024 - Jul 30, 2024	Select event types...

OBJECT (0/48)    SEARCH

RESULTS

Drag here to set row groups

Search...    Audi... ↓    User ID    DateTime    Object    Location Path

Columns

- Audit ID
- User ID
- DateTime
- Object
- Location Path
- Old Value
- New Value
- Event Type
- Session ID

Filters

Groups

Drag here to set row groups

No Rows To Show

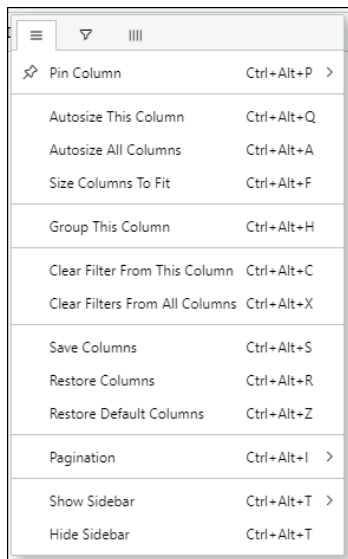
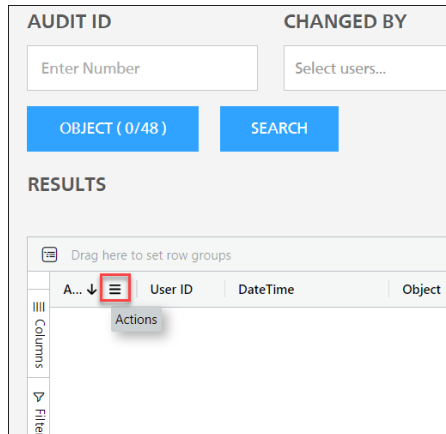
0 to 0 of 0    |< < Page 0 of 0 > >|

The grid will refresh with the selected columns. By default, all columns are displayed.

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

### Column Headers

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 Action Menu Options	
Menu Option	Function
<b>Pin Column</b>	Select this option to lock the column on to one side of the table. Options include: <ul style="list-style-type: none"> <li>▪ Pin Left</li> <li>▪ Pin Right</li> <li>▪ No Pin</li> </ul>

Column Heading Action Menu Options	
Menu Option	Function
<b>Autosize This Column</b>	Resize the selected column to only the necessary width.
<b>Autosize All Columns</b>	Resize all columns to only the necessary width.
<b>Size Columns To Fit</b>	Resize all columns to only the minimum width.
<b>Group This Column</b>	Set a row group using this column.
<b>Clear Filter From This Column</b>	Remove all filters added to the selected column.
<b>Clear Filters From All Columns</b>	Remove all filters from all columns in the table.
<b>Restore Default Columns</b>	Revert column settings to the previous version.
<b>Pagination</b>	<p>Sets the number of rows displayed in the table.</p> <div data-bbox="558 1108 734 1404" style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <ul style="list-style-type: none"> <li>✓ Auto</li> <li>10</li> <li>100</li> <li>1000</li> <li>Off</li> </ul> </div> <p>Auto will fit as many rows as possible without using a scrollbar. Off to turn off pagination and display all rows on the same page.</p>
<b>Show Sidebar</b>	Display sidebar options including Filter and Column settings.
<b>Hide Sidebar</b>	Hide sidebar options including Filter and Column settings.

### **Column Header Sorting**

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

**RESULTS**

Drag here to set row groups

Audi...	User...	DateTime	Object	Location Path	Old Value	New Value	Event Type	Session ID
5319	9999	2024-06-19 01:...	Users	(ice Admin) ID: 9997 ▶ Outbound W...	0	-1	Property Chan...	
5318	9999	2024-06-19 01:...	Users	(ice Admin) ID: 9997 ▶ System Messa...		en-CA	Property Chan...	
5317	9999	2024-06-19 01:...	Teams	ID: 2 ▶ 1101	0	1	Assignment Ch...	
5316	9999	2024-06-19 01:...	Teams	ID: 2 ▶ 1005	0	1	Assignment Ch...	
5315	9999	2024-06-19 01:...	Teams	ID: 2 ▶ 1001	0	1	Assignment Ch...	
5314	9999	2024-06-19 01:...	Teams	ID: 1 ▶ 3164	0	1	Assignment Ch...	
5313	9999	2024-06-19 01:...	Users	(Switch Admin) ID: 9901 ▶ Password ...		Never	Property Chan...	
5312	9999	2024-06-19 01:...	Users	(Switch Admin) ID: 9901 ▶ Password ...		0	Property Chan...	
5311	9999	2024-06-19 01:...	Users	(Switch Admin) ID: 9901 ▶ Password ...		0	Property Chan...	
5310	9999	2024-06-19 01:...	Users	(Switch Admin) ID: 9901 ▶ Placed Cal...		Infinite	Property Chan...	
5309	9999	2024-06-19 01:...	Users	(Switch Admin) ID: 9901 ▶ Outbound...		0	Property Chan...	
5308	9999	2024-06-19 01:...	Users	(Switch Admin) ID: 9901 ▶ Outbound...		-1	Property Chan...	
5307	9999	2024-06-19 01:...	Users	(Switch Admin) ID: 9901 ▶ Image URL			Property Chan...	

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**RESULTS**

Drag here to set row groups

Audi...	User...	DateTime	Object	Location Path	Old Value	New Value	Event Type	Session ID
5440	1301	2024-06-19 02:...	Session Start	iceManager			Accessed	["UserAgent":"Mozilla/...
5439	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	["AuthMethod": ""]
5438	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	["AuthMethod": ""]
5437	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Confi...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	["UserAgent":"Mozilla/...
5436	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod": "azure...
5435	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Confi...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	["UserAgent":"Mozilla/...
5434	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod": "azure...
5433	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Confi...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	["UserAgent":"Mozilla/...
5432	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod": "azure...
5431	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod": "azure...
5430	1301	2024-06-19 02:...	Session Start	iceManager			Accessed	["UserAgent":"Mozilla/...
5429	9999	2024-06-19 02:...	Users	(Julie) ID: 1301 ▶ Caller Name	Julie		Property Chan...	
5428	1111	2024-06-19 02:...	Session Start	iceMA			Accessed	["AuthMethod": ""]

1 to 13 of 1,000 Page 1 of 77

## Filter Options

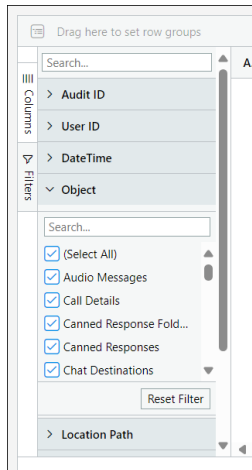
Click the Filters heading on the left of the table and use the data points available to filter your list of audits.

**RESULTS**

Drag here to set row groups

A...	User...	DateTime	Object	Location Path	Old Value	New Value	Event Type
No Rows To Show							

0 to 0 of 0 Page 0 of 0



The grid will refresh according to the filter conditions selected.




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

### **Layout Options**

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



The table below provides information for each layout option.

<b>Audit Trails Layout Options</b>	
<b>Toolbar Item</b>	<b>Function</b>
	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 audits.



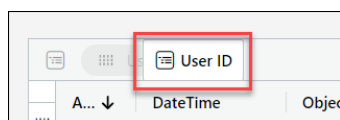
**RESULTS**

Drag here to set row groups

	A... ↓	User...	DateTime	Object	Location Path	Old Value	New Value	Event Type	Session ID
	5440	1301	2024-06-19 02:...	Session Start	iceManager			Accessed	("UserAgent":"Mozilla/...
	5439	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	("AuthMethod": "")
	5438	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	("AuthMethod": "")
	5437	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ► Conf...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	("UserAgent":"Mozilla/...
	5436	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	("AuthMethod":"azure...
	5435	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ► Conf...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	("UserAgent":"Mozilla/...
	5434	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	("AuthMethod":"azure...
	5433	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ► Conf...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	("UserAgent":"Mozilla/...
	5432	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	("AuthMethod":"azure...
	5431	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	("AuthMethod":"azure...
	5430	1301	2024-06-19 02:...	Session Start	iceManager			Accessed	("UserAgent":"Mozilla/...
	5429	9999	2024-06-19 02:...	Users	(Julie) ID: 1301 ► Caller Name	Julie		Property Chan...	
	5428	1111	2024-06-19 02:...	Session Start	iceMA			Accessed	("AuthMethod": "")

1 to 13 of 1,000 < > Page 1 of 77 > > |

- Click and drag the User column to the top of the grid.



- The rows are now grouped by User:

	Group	A... ↓	DateTime	Object	Location Path	Old Value	New Value	Event Type	Session ID
	> 1301 (7)								
	> 3164 (16)								
	> 9999 (974)								
	> 1111 (3)								

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

### **Export Options**

The following options will allow you to export your search results to an Excel or CSV file.



The exported file will reflect the data in the grid at the time of export and will include the columns and contacts that are visible in the search results grid.

Follow the steps below to export your audit search results

1. Using the filter options, search for the audits to be included in the export.

A.	User	DateTime	Object	Location Path	Old Value	New Value	Event Type	Session ID
5440	1301	2024-06-19 02:...	Session Start	iceManager			Accessed	["UserAgent":"Mozilla/...
5439	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	["AuthMethod":"","]
5438	1301	2024-06-19 02:...	Session Start	iceMA			Accessed	["AuthMethod":"","]
5437	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Conf...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	["UserAgent":"Mozilla/...
5436	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod":"","azure...
5435	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Conf...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	["UserAgent":"Mozilla/...
5434	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod":"","azure...
5433	1301	2024-06-19 02:...	Config Groups	(Default Config Group) ID: 1 ▶ Conf...	<?xml version="1.0" e...	<?xml version="1.0" e...	Property Chan...	["UserAgent":"Mozilla/...
5432	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod":"","azure...
5431	3164	2024-06-19 02:...	Session Start	iceBAR			Accessed	["AuthMethod":"","azure...
5430	1301	2024-06-19 02:...	Session Accessed	iceManager			Accessed	["UserAgent":"Mozilla/...
5429	9999	2024-06-19 02:...	Users	(Julie) ID: 1301 ▶ Caller Name	Julie		Property Chan...	
5428	1111	2024-06-19 02:...	Session Start	iceMA			Accessed	["AuthMethod":"","]

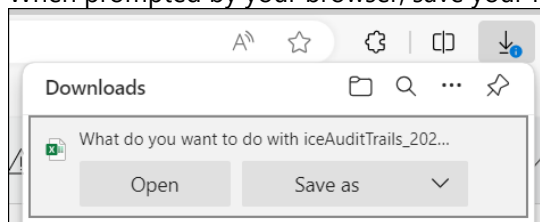
2. To export the data to an excel file, select the *Export to Excel File* button.



To export the data to a CSV file, select the *Export to CSV File* button.



3. When prompted by your browser, save your file to your local machine.



## Searching for an Audit Trail

To search for an audit trail, complete the following steps:

1. The filters along the top of the window allow you to filter your audit results by audit ID, user, date and event type. The audit ID allows you to search for a specific audit item based on the unique ID assigned. If you know the ID, enter it in this field and click search to narrow the search results.

**AUDIT ID**

- The User filter allows you to search for audit items changed by a specific user or users. Find and select the appropriate users from the 'Changed by' drop-down. You can search for one user or multiple users. To delete a selection, click the grey x beside the name.

**CHANGED BY**

x Christina (3164)
x

Sort by Name
Sort by ID

- Andrea (1201)
- Andrea Administrator (2000)
- Antonio (1102)
- Diane (1111)
- Francis (1004)
- Global Admin (9999)
- Global Admin 2 (9999)

- The date range filter allows you to further narrow down your search results to items changed during a certain interval.

📅 May 21, 2024, 12:00 a.m.

📅 Jun 19, 2024, 11:59 p.m.

< May 2024 >

Mo	Tu	We	Th	Fr	Sa	Su
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

< Jun 2024 >

Mo	Tu	We	Th	Fr	Sa	Su
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

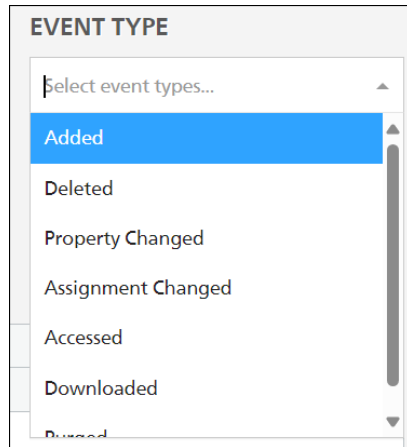
⬆️ 12 : 00 AM

⬆️ 11 : 59 PM

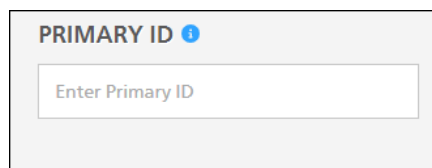
SUBMIT  
CANCEL

Select from one of the preset intervals on the right, or select a custom range using the two calendars in the window. The calendar on the left can be used to select the starting date and time while the calendar on the right can be used to select the ending date and time of the interval.

- The event type filter allows you to filter the audit results based on the object event type.

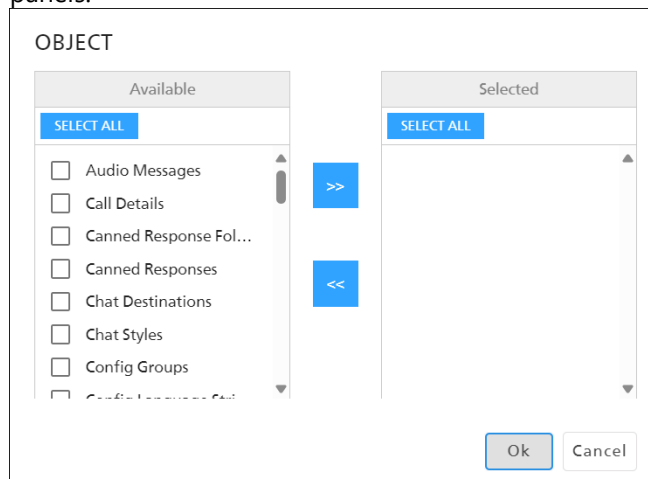


5. The Primary ID filter is the first ID or subdirectory within a path. For example, in the location path *ID:6001 / No Answer Time*, the Primary ID is 6001.



**Note:** This filter is only available for certain object types.

6. The Object filter allows you to filter your search results based on the type of object that is being audited.  
To select an object, select the item from the *Available* panel on the left by enabling the checkbox. Use the arrows in the middle to move the items between the two panels.



7. Click *Search Contacts*. The results section refreshes with audit items that match the filter criteria.

The search results provide detailed information about the audit. The table below describes the fields in the results grid.

Column	Description
<b>Audit ID</b>	Each audit is assigned a unique ID for identification purposes.
<b>User ID</b>	The user ID of the user who made the change.
<b>DateTime</b>	The date and time that the change was made.
<b>Object</b>	<p>The object that was changed. Objects include:</p> <ul style="list-style-type: none"> <li>• Audio messages</li> <li>• Call details</li> <li>• Canned response Folders</li> <li>• Canned responses</li> <li>• Chat destinations</li> <li>• Chat styles</li> <li>• Config groups</li> <li>• Config language strings</li> <li>• Datastore archive rules</li> <li>• Datastores</li> <li>• Email addresses</li> <li>• Email groups</li> <li>• Evaluation forms</li> <li>• Evaluations</li> <li>• Holiday</li> <li>• Languages</li> <li>• LOB categories</li> <li>• LOB codes</li> <li>• Mail accounts</li> <li>• Mail settings</li> <li>• Manager settings</li> <li>• Queues</li> <li>• Recording options</li> <li>• Recording schedules</li> <li>• Recordings</li> <li>• Report schedules</li> <li>• Routing rules</li> <li>• Screen recording server config</li> <li>• Server variable</li> <li>• Servers</li> <li>• Session start</li> <li>• Skills</li> <li>• Survey audio file</li> <li>• Survey response</li> <li>• Survey runs</li> <li>• Surveys</li> <li>• Switches</li> <li>• Teams</li> <li>• Transcripts</li> <li>• UC Addresses</li> <li>• UC Groups</li> <li>• Users</li> </ul>

	<ul style="list-style-type: none"> <li>• Not ready reasons</li> </ul>
<b>Location Path</b>	The location path of the object that was changed.
<b>Old Value</b>	The object's previous value prior to the change.
<b>New Value</b>	The new value assigned to the object after the change.
<b>Event Type</b>	<p>The event type associated with the object. Options include:</p> <ul style="list-style-type: none"> <li>• Added</li> <li>• Deleted</li> <li>• Property Changed</li> <li>• Assignment Changed</li> <li>• Accessed</li> <li>• Downloaded</li> <li>• Purged</li> </ul>
<b>Session ID</b>	The iceManager session ID where the change was made, if applicable.

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

AUDIT ID

CHANGED BY

DATE RANGE

EVENT TYPE

PRIMARY ID  ⓘ

Enter Number

Select users...  ▼

📅 05/27/24 - 06/25/24

Select event types...  ▼

Enter Primary ID

OBJECT FILTER ( 1/45 )

SEARCH

**RESULTS**

📄 📄 📄 📄 📄

🔍 Drag here to set row groups

	A. ↓	Use...	DateTime	Object	Location Path
Columns					
Filters					
	5501	1301	2024-06-20 0...	LOB Codes	(Return) ID: 4 ▶ Name ▶ en-CA
	5500	1301	2024-06-20 0...	LOB Codes	(Return) ID: 4 ▶ Category Id
	5499	1301	2024-06-20 0...	LOB Codes	(Return) ID: 4 ▶ Is Active
	5498	1301	2024-06-20 0...	LOB Codes	(Return) ID: 4 ▶ Order
	5497	1301	2024-06-20 0...	LOB Codes	(Return) ID: 4
	5496	1301	2024-06-20 0...	LOB Codes	(New product request) ID: 3 ▶ N
	5495	1301	2024-06-20 0...	LOB Codes	(New product request) ID: 3 ▶ C
	5494	1301	2024-06-20 0...	LOB Codes	(New product request) ID: 3 ▶ Is
	5493	1301	2024-06-20 0...	LOB Codes	(New product request) ID: 3 ▶ O
	5492	1301	2024-06-20 0...	LOB Codes	(New product request) ID: 3
	5491	1301	2024-06-20 0...	LOB Codes	(Account inquiry) ID: 2 ▶ Name .
	5490	1301	2024-06-20 0...	LOB Codes	(Account inquiry) ID: 2 ▶ Catego
	5489	1301	2024-06-20 0...	LOB Codes	(Account inquiry) ID: 2 ▶ Is Activ
	5488	1301	2024-06-20 0...	LOB Codes	(Account inquiry) ID: 2 ▶ Order
	5487	1301	2024-06-20 0...	LOB Codes	(Account inquiry) ID: 2
	5486	1301	2024-06-20 0...	LOB Codes	(Information request) ID: 1 ▶ Na

1 to 16 of 20 |< < Page 1 of 2 > >|

**AUDIT TRAIL DETAIL**

↑ ↓ ×

👤

Audit ID:

5496

User ID:

1301

COPY LINK

---

DateTime

June 20, 2024 09:34:06 a.m.

Object

LOB Codes

Location Path

(New product request) ID: 3 ▶ Name ▶ en-CA

---

Event Type

Property Changed

New Value

New product request

Old Value

---

Session ID

{"UserAgent": "Mozilla/5.0

## Interpreting the Details Frame

The Details frame contains information about the audit trail. For more information on how to interpret the details provided, consider the following example:

**AUDIT ID**  **CHANGED BY**  **DATE RANGE**  **EVENT TYPE**

**OBJECT FILTER** (0/45)

**RESULTS**

Audit ID ↓	User ID	DateTime	Object	Loc
5345	3164	2024-06-19 01:44:43 PM	Server Variable Category	(Ca
5342	9999	2024-06-19 01:33:36 PM	Users	(Ch
5341	9999	2024-06-19 01:33:36 PM	Users	(Di
5340	9999	2024-06-19 01:33:36 PM	Users	(Di
5339	3164	2024-06-19 01:29:19 PM	Users	(Di
5338	3164	2024-06-19 01:29:11 PM	Users	(Ch
5320	9999	2024-06-19 01:20:33 PM	Users	(La
5319	9999	2024-06-19 01:20:11 PM	Users	(ice
5318	9999	2024-06-19 01:20:11 PM	Users	(ice
5313	9999	2024-06-19 01:20:11 PM	Users	(Sw
5312	9999	2024-06-19 01:20:11 PM	Users	(Sw
5311	9999	2024-06-19 01:20:11 PM	Users	(Sw
5310	9999	2024-06-19 01:20:11 PM	Users	(Sw
5309	9999	2024-06-19 01:20:11 PM	Users	(Sw
5308	9999	2024-06-19 01:20:11 PM	Users	(Sw
5307	9999	2024-06-19 01:20:11 PM	Users	(Sw
5306	9999	2024-06-19 01:20:11 PM	Users	(Sw
5305	9999	2024-06-19 01:20:11 PM	Users	(Sw
5304	9999	2024-06-19 01:20:11 PM	Users	(Sw
5303	9999	2024-06-19 01:20:11 PM	Users	(Sw
5302	9999	2024-06-19 01:20:11 PM	Users	(Sw

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**AUDIT TRAIL DETAIL**

Audit ID: **5342** User ID: **9999**

**DateTime**: June 19, 2024 01:33:36 p.m.

**Object**: Users

**Location Path**: (Christina) ID: 3164 > Password

**Event Type**: Property Changed

**New Value**: N/A

**Old Value**: N/A

**Session ID**: N/A

From this example, you can see the following information:

Column	Detail
<b>Audit ID</b>	5342
<b>User ID</b>	9999
<b>DateTime</b>	June 19, 2024 01:33:36 p.m.
<b>Object</b>	Users
<b>Location Path</b>	(Christina) ID: 3164 > Password
<b>Old Value</b>	N/A
<b>New Value</b>	N/A




<b>Event Type</b>	Property Changed
<b>Session ID</b>	N/A

From these details, you can see that the audited item was changed by user 9999 on June 19, 2024 at 1:33 pm.

This was a property change to a user. In this example, the change was made to user 3164, and from the location path, you can see that the change was made to the user's password. The old and new value fields are not populated to retain password security.

Consider this next example:

### AUDIT TRAIL DETAIL

 Audit ID: **5519**      User ID: **1301**      [COPY LINK](#)

---

**DateTime**      June 20, 2024 10:28:50 a.m.

**Object**      Call Details

**Location Path**      ID: 431

---

**Event Type**      Accessed

**New Value**

**Old Value**

---

**Session ID**      {"UserAgent":"Mozilla/5.0 (Windows NT 10.0; Win64; ...

You can see that the audited item was accessed by user 1301 on June 20, 2024 at 10:28 a.m.

The event type shows that the object call details, was accessed by the user.

The location path tells you the contact ID of the call that was viewed by user 1301.

Lastly, consider this third example:

**AUDIT TRAIL DETAIL**
✕

Audit ID: **5520**

User ID: **1301**

COPY LINK

<b>DateTime</b>	June 20, 2024 10:43:39 a.m.
<b>Object</b>	Queues
<b>Location Path</b>	ID: 6900 ▶ 1001
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="display: flex; align-items: center;"> <span>Audit ID: <b>5342</b></span> </div> <div style="display: flex; align-items: center;"> <span>User ID: <b>9999</b></span> </div> <div style="text-align: right;"> <span style="background-color: #007bff; color: white; padding: 5px 10px; border-radius: 3px;">COPY LINK</span> </div> </div>	
<b>Event Type</b>	Assignment Changed
<b>New Value</b>	0
<b>Old Value</b>	1
<b>Session ID</b>	

You can see that the audited item was changed by user 1301 on June 20, 2024 at 10:43 a.m.

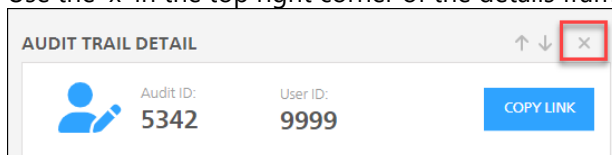
The event type shows that this item was an assignment change and the object field shows that it was related to queues, so you can see this item was a queue assignment change.

The location path indicates that the assignment change was for queue 6900, the training queue and user 1001.

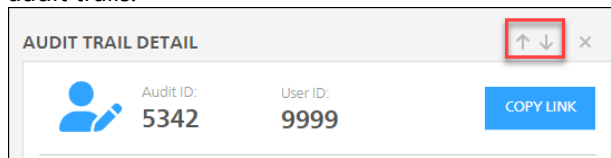
Lastly, from the new and old value, we can see that the old value was set to 1 (true), meaning the queue was originally assigned to the user. It has been updated to a value of 0 (false), indicating queue 6900 has been unassigned from user 1001.

**Note:**

- The *Copy Link* button can be used to share the audit trail detail with another administrator.
- Use the 'x' in the top right corner of the details frame to close the frame.



- Use the *next* and *previous* arrows in the details frame to navigate between the audit trails.



## Audio Messages

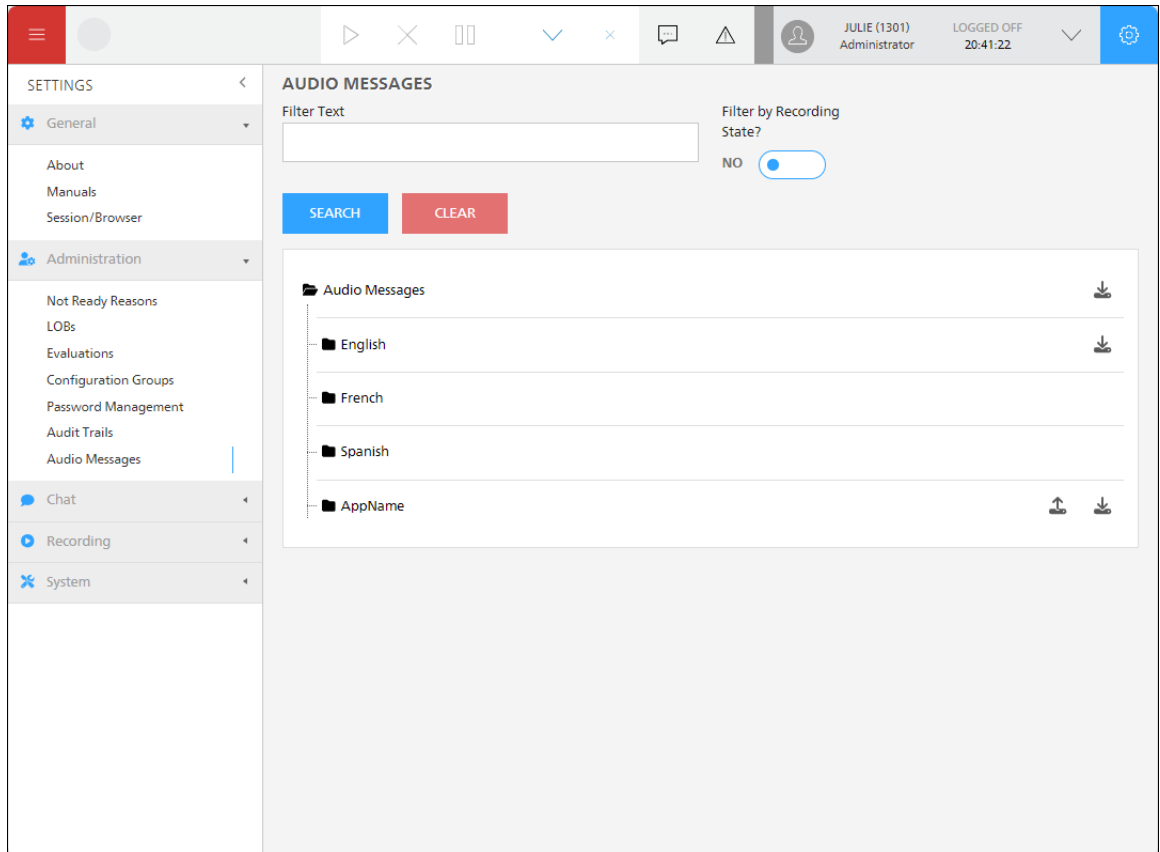
The audio message section allows team leaders, supervisors and administrators to listen to, manage and update the audio prompts used in the IVR.

This page consists of a search field, followed by the audio message folders.

In ice, audio message records are separate from audio files. Audio message records are the message paths used within workflow and are defined and created in iceAdministrator within the audio messages folder.

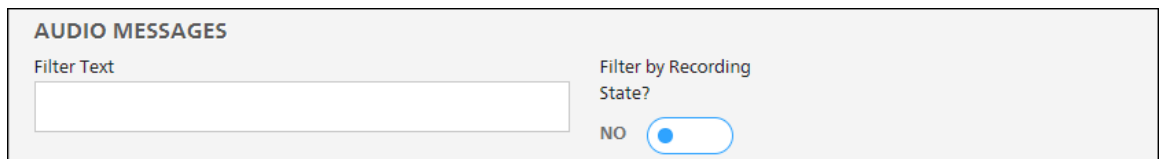
The audio file is the prompt file that plays in the system and can be created within this audio messages section. The audio messages tool allows users to record, generate TTS or upload the audio file that corresponds with the audio message record.

**Note:** This tool does not allow you to add or delete audio message records. Adding and deleting audio message records must still be managed through the iceAdministrator tool.



## Audio Message Search

The audio message search field allows users to search for messages based on text and recording state.



The *Filter Text* field allows users to search for audio messages containing specific keywords. The *Filter by Recording State* toggle allows users to filter prompts by recording state.

Follow the steps below to use the audio message search:

1. In the Filter Text field, enter your keyword or phrase.

**AUDIO MESSAGES**

Filter Text

**SEARCH** **CLEAR**

2. If you would like to filter the prompts by recording state, enable the *Filter by Recording State* toggle and select your desired state.

Filter by Recording State? **YES**

Only include prompts with Recording State:

Recorded

Any

Unrecorded

**Recorded**

3. Click the Search button.

**AUDIO MESSAGES**

Filter Text: greeting Recording Status: Recorded

Filter Text

Filter by Recording State? **YES**

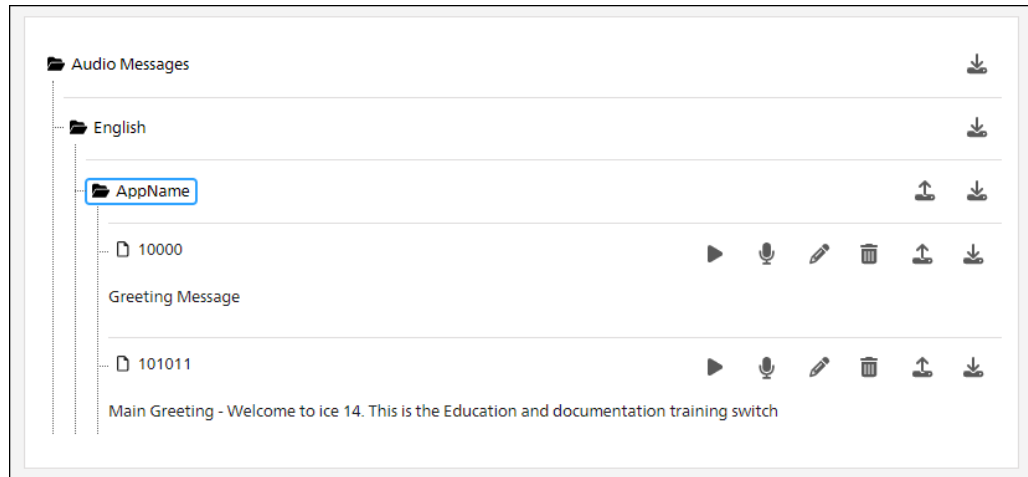
Only include prompts with Recording State: Recorded

**SEARCH** **CLEAR**

Audio Messages

English

4. Expand the folders to see the filtered audio messages.



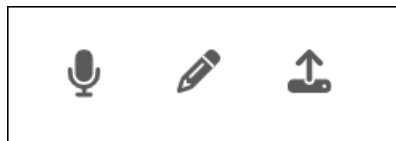
## Recording an audio file

Follow the steps below to record an audio file:

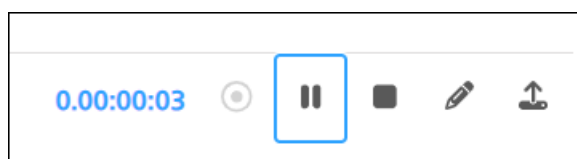
1. Locate the audio message you wish to record.



2. If there is no current audio file associated with the audio message, you will see three buttons in the top right corner of the message. These buttons that allow you to record the file, edit the file, or upload a file.

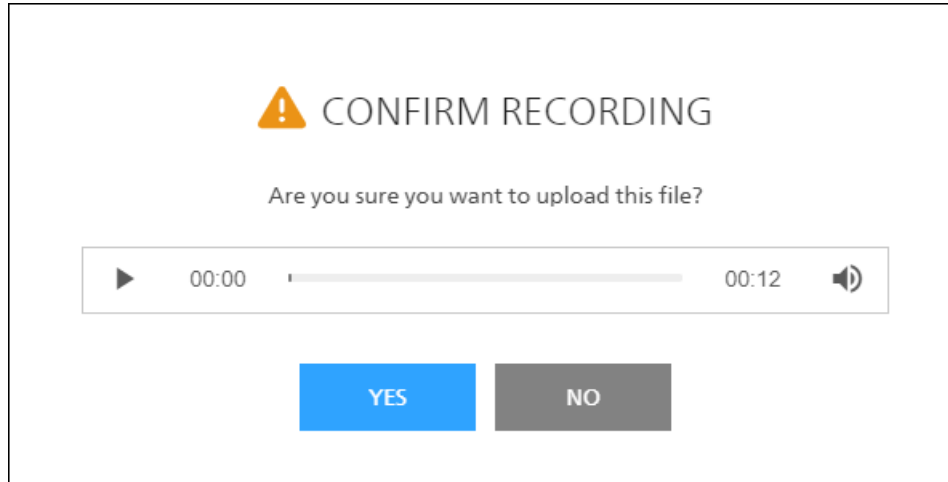


3. To record the file, click on the record button. The recording will begin directly in the browser. The inline controls allow you to pause, resume or stop the recording when you are finished.



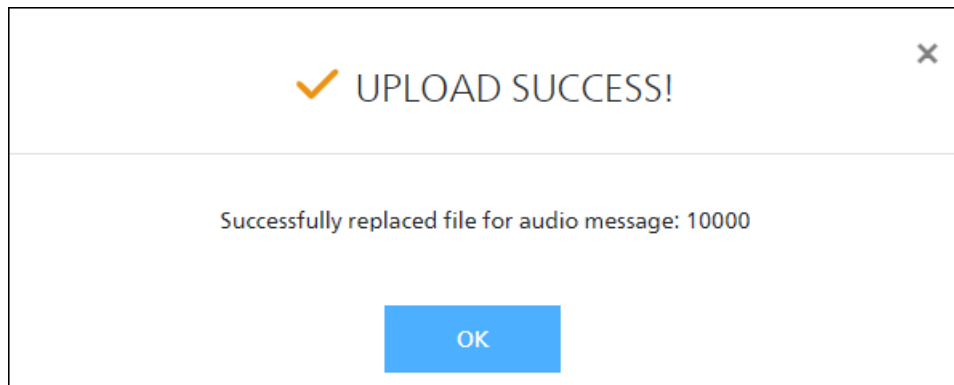
4. When you have clicked the stop button, the following confirmation window will display.

You can listen to the recording using the player in in the window.



To confirm the recording, select *Yes*. If you would like to cancel the recording, select *No*.

5. If you have selected *Yes*, the following window will display. Click *OK* to close the window.



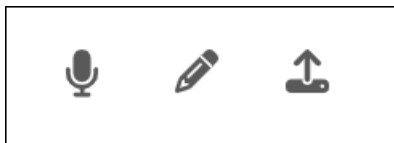
## Editing an audio file

Follow the steps below to edit an audio file:

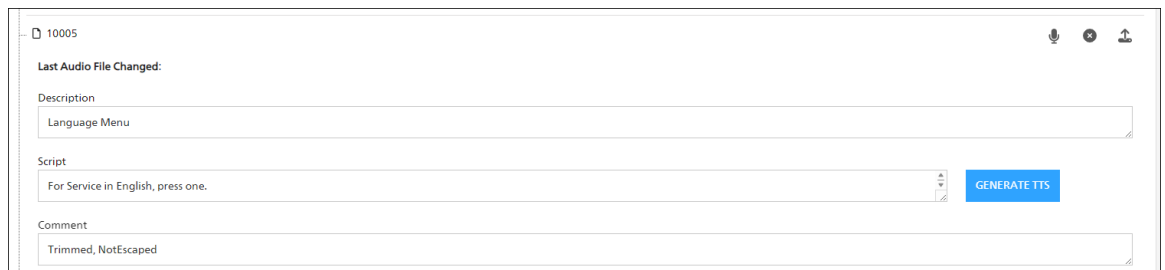
1. Locate the audio message you wish to modify.



2. In the top right corner of the message select the edit button.



3. In edit mode, you can modify the description of the audio file, generate text to speech (TTS), and modify the comment field.




4. To generate a TTS message, enter your file script in the *Script* field. When complete, click the *Generate TTS* button to generate the TTS audio file.

**Note:** This field also supports SSML.

5. The following window will display. Select the TTS language, gender and voice from the options provided.



 GENERATE TTS

Language

Gender


Voice

Trim Silence

Click *Generate* to generate the file.

6. The following message will appear.

You can listen to the recording using the player in in the window.

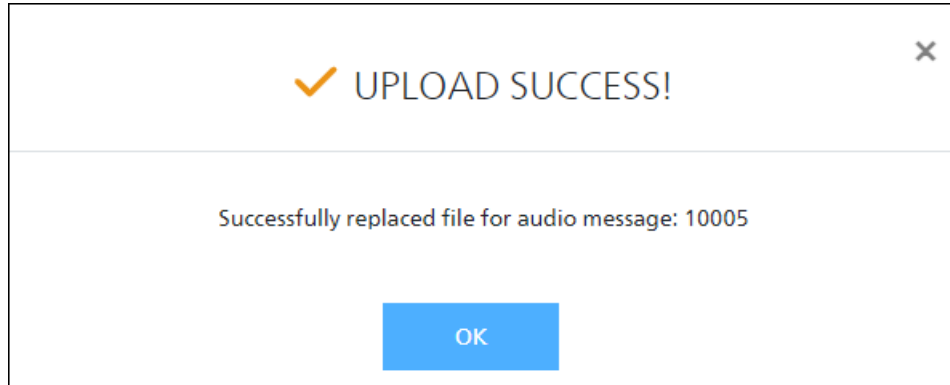
 CONFIRM RECORDING

Are you sure you want to upload this file?

To confirm the recording, select *Yes*. If you would like to cancel the recording, select

No.

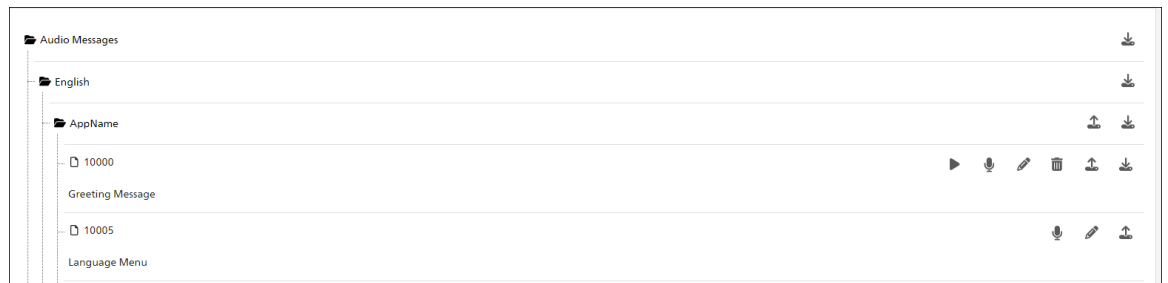
7. If you have selected Yes, the following window will display. Click OK to close the window.



## Uploading an audio file

Follow the steps below to upload an audio file:

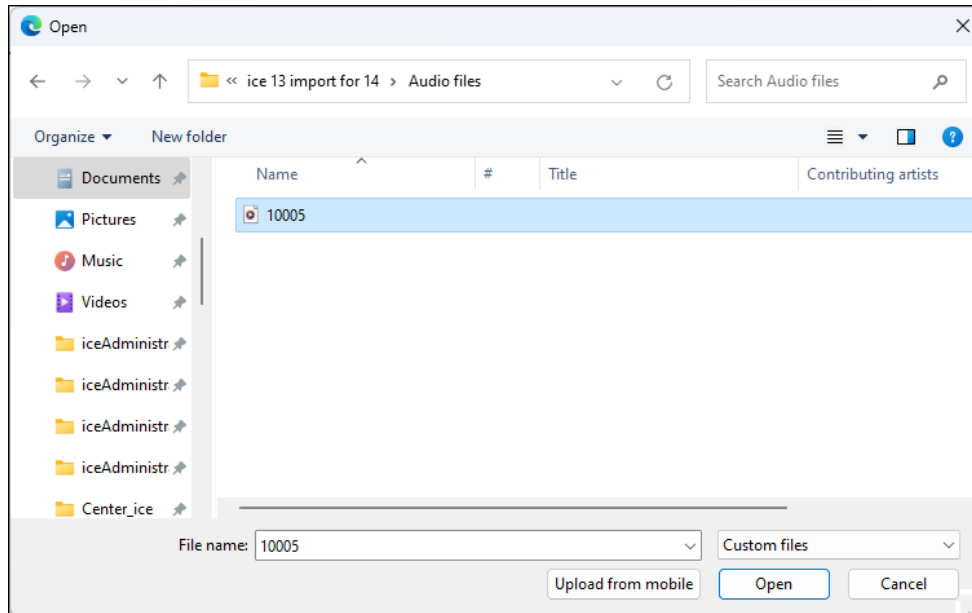
1. Locate the audio message you wish to upload.



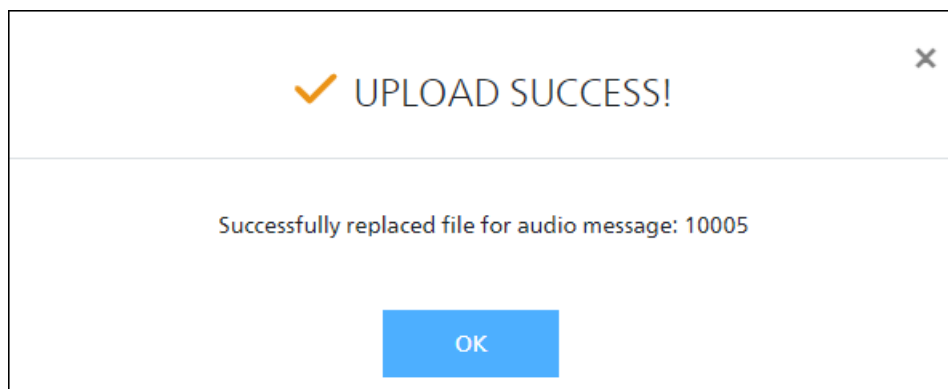
2. In the top right corner of the message select the upload button.



3. This will open a file explorer on your local machine. Select the file you wish to upload and click *Open*.



8. The following window will display. Click OK to close the window.



## Listening to an audio file

Follow the steps below to listen to an existing audio file:

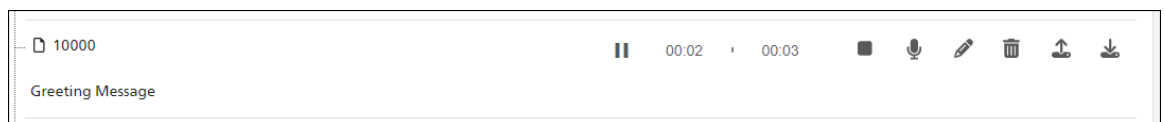
1. Locate the audio message you wish to listen to.



2. In the top right corner of the message select the play button.



3. The video player will appear in line with the audio message. Use the controls to pause, resume and stop the file playback.

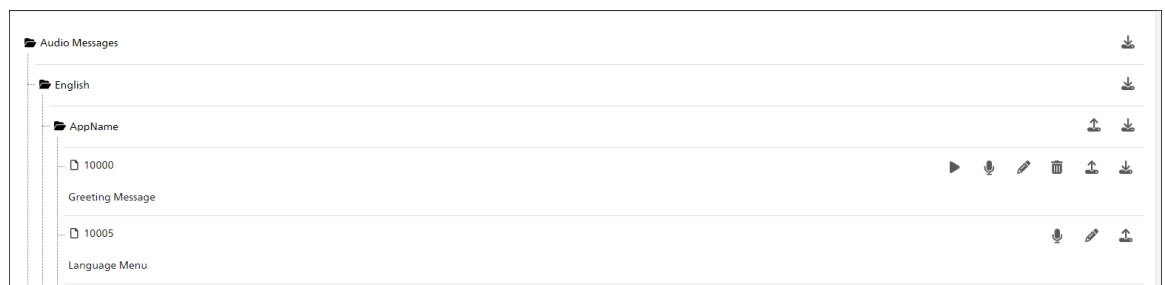


## Deleting an audio file

**Note:** Audio message records can only be created or deleted from the iceAdministrator tool.

Follow the steps below to delete an existing audio file:

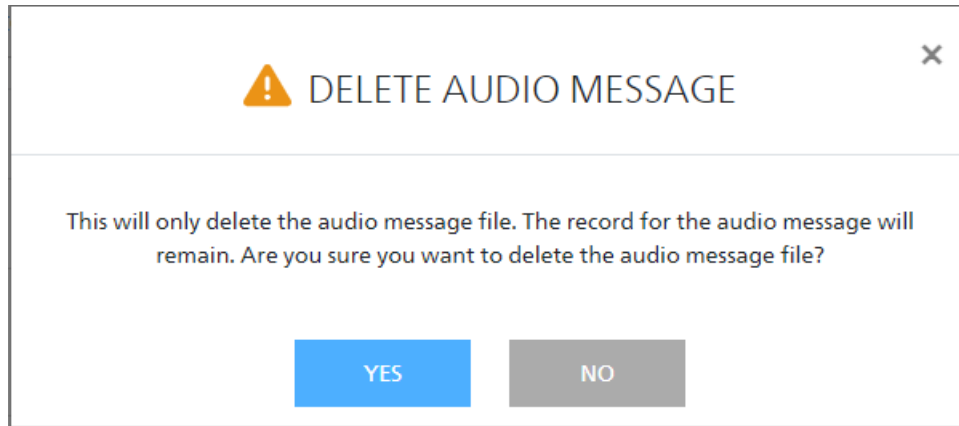
1. Locate the audio file you wish to delete.



2. In the top right corner of the message select the delete button.

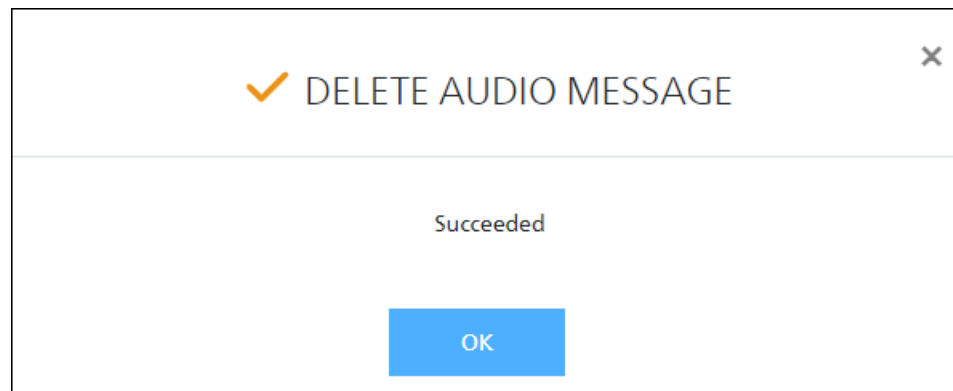


3. The following confirmation message will display. Remember, deleting the audio file will not delete the audio message.



Select *Yes* to delete the audio file or *No* to cancel.

4. Upon successful deletion, the following message will display.



## Downloading an audio file

Follow the steps below to download an existing audio file:

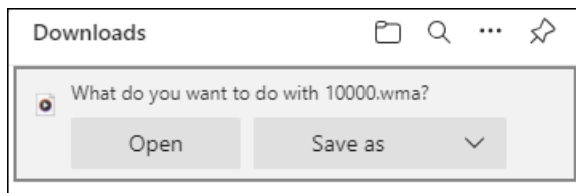
1. Locate the audio message you wish to download.



2. In the top right corner of the message select the download button.



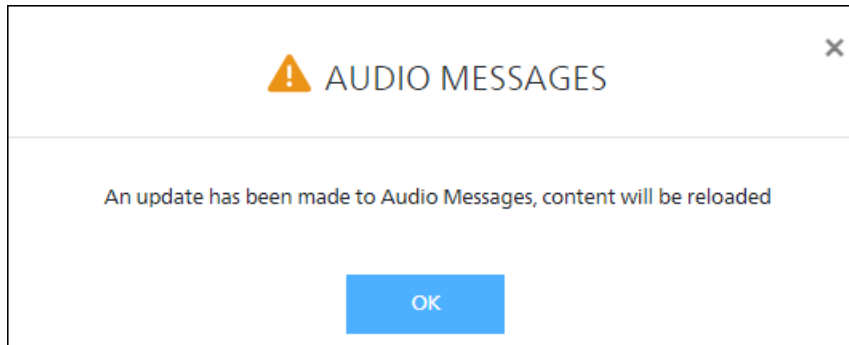
3. Save the file to your preferred location on your local machine.



**Note:** You can also download all audio files within a folder using the download button in line with the folder name.



The following message will appear each time a change is saved to notify all users modifying audio messages.



After closing the message, the content on the page will reload and any open folders will need to be reopened.

## Contact Metadata

Contact Metadata allows you to run post-contact jobs to perform actions that may take place when a call is completed. These jobs enable various metadata to be created and associated with the contact. They may be user-defined or pre-built in the system.

### Contact Metadata Field





This section can only be modified by Administrators.

Contact metadata fields provide more customization options to allow users to add specific fields of data. Metadata jobs can then be run to populate these fields with additional information.

Four metadata fields are included out of the box for Contact Summarization.

- iceContactSummary
- iceContactSummaryCompletionUsage
- iceContactSummaryMaxTokens
- iceContactSummaryPromptUsage

These fields cannot be deleted.

CONTACT METADATA FIELD		
<a href="#">ADD</a>		
Setting Name	Display Name	Action
iceContactSummary	Summary	
iceContactSummaryCompletionUsage	Contact Summary Completion Usage	
iceContactSummaryMaxTokens	Maxium Tokens limit for the summarization Job	
iceContactSummaryPromptUsage	Contact Summary Prompt Usage	

To add, delete, or modify contact metadata fields, click *Contact Metadata Field*. A list of existing fields will display.

### Add a field

To add a field, follow these steps:

1. Click the *Add* button. The following display opens:



←
CONTACT METADATA FIELD

ADD
↑

Setting Name ⓘ

Display Name ⓘ

English (Canada)

Français (Canada)

Display As ⓘ

Searchable in Journal ⓘ ON

Is Filterable ⓘ ON

Description ⓘ

Default Value ⓘ

Field Stored Per Segment ⓘ OFF

Allow Workflow Read ⓘ ON

Allow Workflow Write ⓘ OFF

2. Modify the parameters as required to create a field.

The table below explains the parameters.

Parameter	Allowable values	Description
Setting Name	Text	Enter the field setting name.
Display Name	Text	The name displayed for the metadata field. There will be one field for each enabled language in iceManager.
Display As	String Url Integer Decimal Csv List Json List	Select the object type used to display the field content.
Searchable in Journal	On/Off	If enabled, the field will be displayed in journal in the Contact Metadata table.

Parameter	Allowable values	Description
Is Filterable	On/Off	If enabled, the field will be displayed in the Contact Metadata filter in journal. This will allow users to filter contacts based on this metadata field and its value.
Description	Text	A description of the field's purpose.
Default Value	Text	The default value provided when no value is specified. This is an optional value.
Field Stored Per Segment	On/Off	If enabled, the field will be stored per segment rather than the entire contact.
Allow Workflow Read	On/Off	If enabled, allows workflow to read the metadata field.
Allow Workflow Write	On/Off	If enabled, allows workflow to write to the metadata field.

- Once all the parameters have been filled, click *Add*. The new field is added to the list. If you do not wish to add the field, click *Return to previous page*.  
The new field appears on the bottom of the list.

To edit a field:

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

**CONTACT METADATA FIELD**

EDIT

Setting Name *i* iceContactSummary

Display Name *i*

English (Canada) Summary

Français (Canada) Summary

Display As *i* String

Searchable in Journal *i* ON

Is Filterable *i* ON

Description *i* Summary of a contact transcription

Default Value *i* Default Value

Field Stored Per Segment *i* OFF

Allow Workflow Read *i* OFF

Allow Workflow Write *i* OFF

To delete the field:

1. Click the garbage can icon located in the Action column.  
When you delete a field, an "Are you sure you want to delete this Contact Metadata Field" message appears.
2. Select Yes to proceed with the deletion. Click No to cancel the deletion.

**DELETE CONTACT METADATA FIELD**

Are you sure you want to delete this Contact Metadata Field?

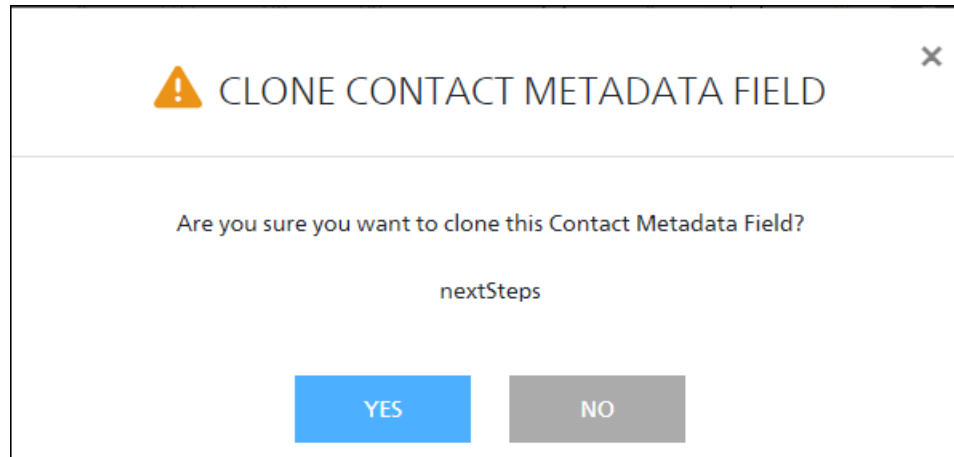
TestField

YES NO

Once you click Yes the field is removed from the list.

To clone the field:

1. Click the clone icon located in the Action column.  
When you clone a field, an "Are you sure you want to clone this Contact Metadata Field" message appears.
2. Select *Yes* to proceed with the cloning. Click *No* to cancel the cloning.



Once you click *Yes* the new field is added to the list.

## Contact Metadata Job

This section can only be modified by Administrators.

Contact metadata jobs are created to run when contacts are completed, in order to populate contact metadata fields with additional information. Currently, ice supports Azure OpenAI jobs and Virtual Workflow jobs.

The iceVoiceContactSummary14 job is included out of the box for Contact Summarization, visible in iceJournal. This job cannot be deleted.

CONTACT METADATA JOB		
<input type="button" value="ADD"/>		
Name	ID	Action
iceVoiceContactSummary14	1	

To add, delete, or modify contact metadata jobs, click *Contact Metadata Job*. A list of existing jobs will display.

### Add a Job

To add a job, follow these steps:

1. Click the *Add* button. The following display opens:

**CONTACT METADATA JOB**

ADD

Name

Description

State ⓘ Enabled

Trigger ⓘ Transcript Complete

Modality ⓘ All Contact Types

Job Type ⓘ Azure OpenAI

**AZURE OPENAI SETTINGS**

Azure OpenAI Endpoint ⓘ

Azure OpenAI Key ⓘ

Max Input Tokens Allowed ⓘ 15000

Deployment Name ⓘ

System Prompt ⓘ  
You are an assistant for contact center agents on a help desk. You create short, three sentence summaries of prior conversation transcripts. You help agents quickly identify ongoing issues and prior call resolutions. Summarize this transcript.

**CONTACT METADATA JOB FIELD**

Select Contact Metadata Fields

2. Modify the parameters as required to create a job.

The table below explains the parameters.

Parameter	Allowable values	Description
<b>Name</b>	Text	Enter the job setting name.
<b>Description</b>	Text	A description of the contact metadata job.
<b>State</b>	Enabled Disabled Preview	Enabled: This state is required to configure jobs to run on a schedule. Disabled: The job does not run. Preview: The job runs ad hoc by clicking the <i>Preview</i> button in iceJournal.
<b>Trigger</b>	Transcript Complete Contact Complete Job Complete	The trigger which is required for the job to run. Contact metadata jobs can be linked together through the <i>Job Complete</i> option. Virtual workflow jobs require the trigger to be set to <i>Contact Complete</i> . GenAI jobs using call transcription to generate content require the trigger to be set to <i>Transcript Complete</i> .
<b>Modality</b>	All Contact Types Unknown Voice IM Autodial Email	The contact modality. Currently, GenAI jobs are only supported for voice contacts. Virtual workflow jobs support all modalities.
<b>Job Type</b>	Azure OpenAI Virtual Workflow	The job type.
<b>Azure OpenAI Settings</b>		
<b>Azure OpenAI Endpoint</b>	Text	The API endpoint for Azure Open AI.
<b>AzureOpenAI Key</b>	Text	The API Key for Azure Open AI.
<b>Max Input Tokens Allowed</b>	Text	The maximum tokens allowed for usage. The default value is 15000

Parameter	Allowable values	Description
<b>Deployment Name</b>	Text	The Azure Open AI deployment name. This indicates which Azure OpenAI model to use.
<b>System Prompt</b>	Text	The GenAI prompt used to generate the data.
<b>Contact Metadata Job Field</b>	Text	The list of metadata job fields and the JSON path used to map data fields to values associated with certain keys in the JSON.
<b>Virtual Workflow Settings</b>		
<b>Contact Type</b>	Voice IM Email	The type of contact that the job will run for.
<b>UC Group</b>	A dropdown list of your available UC Groups	The UC Group associated with the job.
<b>User Data</b>	Text	Additional user data that can be passed to virtual workflow. At the moment, ice only supports Contact Transcript, the handling agent name, and the list of agents who handled the contact.

- Once all the parameters have been filled, click *Add*. The new job is added to the list. If you do not wish to add the job, click *Return to previous page*.

The new job appears on the bottom of the list.

To edit a job:

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

← CONTACT METADATA JOB

EDIT ↑ ↓ ^

Name	iceVoiceContactSummary14
Description	Built in job for contact transcript summarization
State ⓘ	Preview
Trigger ⓘ	Transcript Complete
Modality ⓘ	Voice
Job Type ⓘ	Azure OpenAI

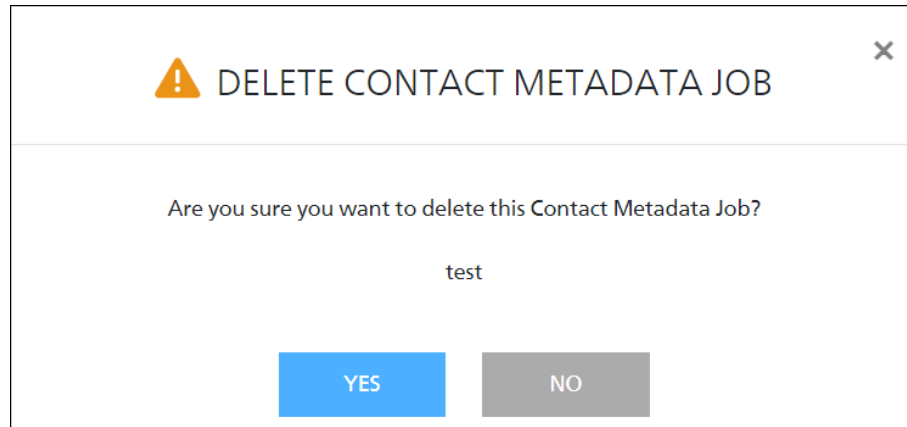
AZURE OPENAI SETTINGS

Azure OpenAI Endpoint ⓘ	[REDACTED]
Azure OpenAI Key ⓘ	*****
Max Input Tokens Allowed ⓘ	15000
Deployment Name ⓘ	[REDACTED]
System Prompt ⓘ	You are an assistant for contact center agents. You create short, three sentence summaries of prior conversation transcripts. You help agents quickly identify ongoing issues and prior call resolutions. Summarize this transcript.

To delete the job:

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





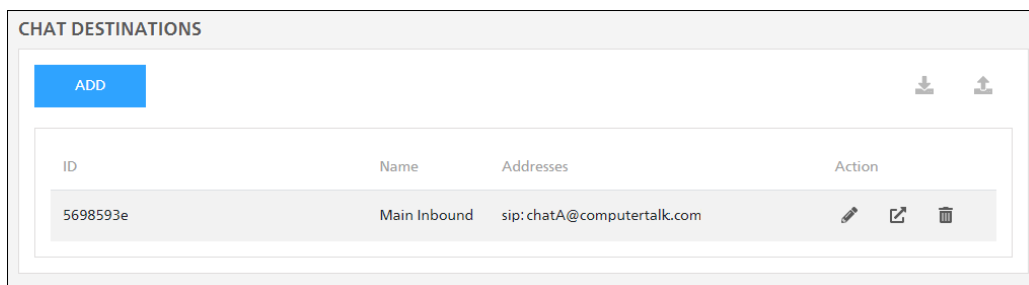
Once you click Yes the job is removed from the list.

# 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. The Copy Chat Link button allows administrators to share the link to other users to test the iceChat URL.

To add a chat destination:

1. Select the *Add* button in the top left corner.

## 2. Configure the Name, Addresses, and Lookup Type.

EDIT ↑ ↓ of 1 ^

ID

Name

Addresses

Lookup Type

## 3. Configure the Style, Chat Rehydration Mode, Require SSO, and Allow Contact Attachments from Web User.

Style

Chat Rehydration Mode

Require SSO

Allow Contact Attachments from Web User

## 4. If you are embedding iceChat into an iFrame on a third party website, configure the iFrame settings.

IFRAME CONFIGURATION ^

Embed iceChat into iFrame

Allowed Directives

Chat Button Icon

Chat Button Styles 

```
.iceChatIFrameButton {
background-color: #ee264b;
border-color: transparent;
border-radius: 50px;
bottom: 30px;
box-shadow: rgb(157 157 157) 0px 6px 8px 0px;
cursor: pointer;
display: block;
fill: #FFFFFF;
font-size: 16px;
height: 68px;
position: fixed;
right: 30px;
}
```

Height

Width

Referrer Policy: strict-origin-when-cross-origin

Source URL: [Redacted]

iFrame Styles:

```
.iceChatIFrame {
  border: none;
  border-radius: 0.75rem;
  bottom: 1.7rem;
  box-shadow: rgba(150, 150, 150, 0.2) 0px 10px 30px 0px, rgba(150, 150, 150, 0.2) 0px 0px 1px;
  display: flex;
  flex-direction: column;
  justify-content: space-between;
  overflow: hidden;
  position: fixed;
  right: 1.7rem;
  z-index: 2147483646;
}
```

EMBED CODE (JS)

Basic Integration

```
<script>
var iceChatSettings = {
  "lang": "en-CA"
};
</script>
<script src="https://[Redacted].computertalksandbox.com/iceChat/assets/js/iceChatIFrame.js"></script>
<script src="https://[Redacted].computertalksandbox.com/[Redacted]"
  onload="IceChat.init(iceChatSettings);" async></script>
```

RESET TO DEFAULTS

IFRAME LOCALIZATION

Chat Button Aria-Label

English (Canada): Live chat with one of our representatives.

Français (Canada): Live chat with one of our representatives.

Chat Button Tooltip

English (Canada): Start chat

Français (Canada): Start chat

Title

People navigating with assistive technology such as a screen reader can use the title attribute on an iframe to label its content. The title's value should concisely describe the embedded content.

English (Canada): iceChat Web Interface

Français (Canada): iceChat Web Interface

RESET TO DEFAULTS

5. Enable the chat landing page using adaptive cards if applicable.

CHAT LANDING PAGE USING ADAPTIVE CARDS

Use Adaptive Cards Login: OFF

### CHAT LANDING PAGE USING ADAPTIVE CARDS

Use Adaptive Cards Login ON

Adaptive Card JSON Data Refer to the [Adaptive Card designer](#) tools to generate the JSON.

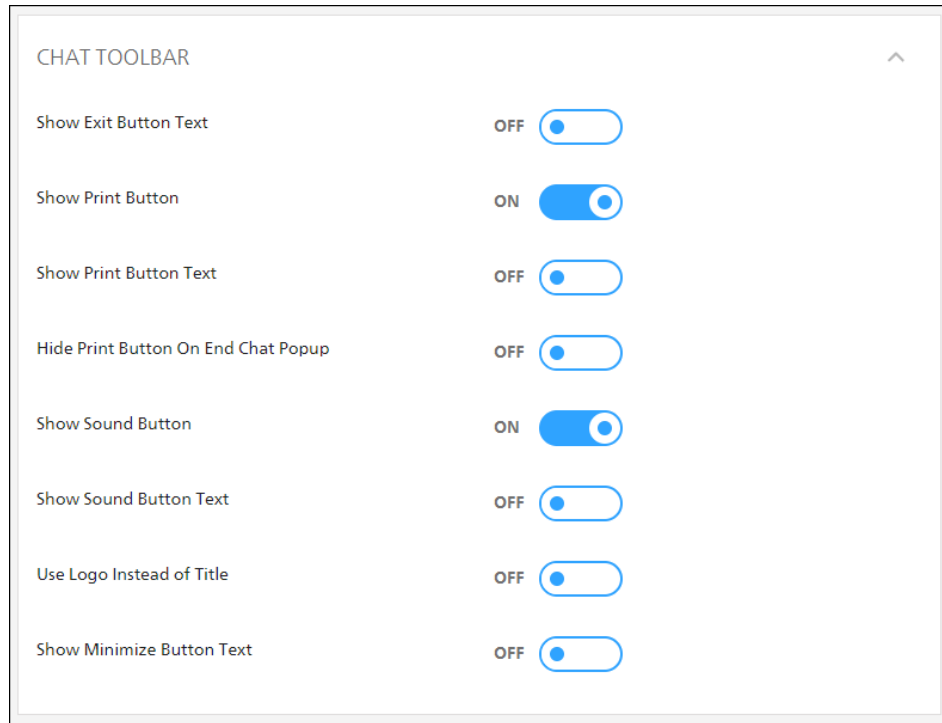
```
{
  "$schema": "http://adaptivecards.io/schemas/adaptive-card.json",
  "type": "AdaptiveCard",
  "version": "1.6",
  "sdata": {
    "lang": "en-CA",
    "langKeys": {
      "signIn": {
        "en-CA": "Sign In",
        "en-US": "Sign In",
        "fr-CA": "Connexion",
        "es-MX": "Registro"
      }
    }
  },
}
```

Adaptive Card CSS Styling Refer to the documentation at [Adaptive Cards Native styling](#) for more information.

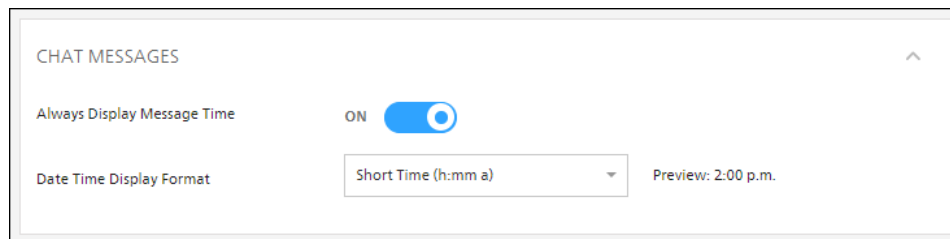
```
/* sign in button */
#signInLabel {
  color: #323232 !important;
  font-weight: 400 !important;
  font-size: 28px !important;
  line-height: 42px !important;
}
/* remove outline from adaptive card container */
.ac-container.ac-adaptiveCard:focus-visible {
  outline: none;
}
/* actions rendered like buttons */
.ac-pushButton {
```

[RESET TO DEFAULTS](#)

6. Configure the Chat Toolbar settings.



7. Configure the Chat Messages setting.



8. Configure the Localization settings for the appropriate languages.

LOCALIZATION ^

**Window Title**

English (Canada)	ComputerTalk iceChat
Français (Canada)	iceChat de ComputerTalk

**Toolbar Title**

English (Canada)	ComputerTalk iceChat
Français (Canada)	iceChat de ComputerTalk

**Logo**

English (Canada)	assets/Images/default-ui/iceim-uii_12.png
Français (Canada)	assets/Images/default-ui/iceim-uii_12.png

**Logo Alt Text**

English (Canada)	
Français (Canada)	

**Chat Generic Error Message**

English (Canada)	There is an issue with the iceChat service. Please close the chat window and try again.
Français (Canada)	Nous éprouvons de la difficulté avec notre service de clavardage. Veuillez fermer votre fenêtre et réessayer.

**Chat Busy Message**

English (Canada)	We are receiving higher than usual requests and cannot handle your chat at this time. Please try again later.
Français (Canada)	Nous recevons un nombre de requêtes plus élevé qu'à l'habitude et ne pouvons pas traiter votre demande en ce moment. Veuillez réessayer plus

**Chat Terminated Message**

English (Canada)	It appears your chat has ended. If you need to contact us again, please start a new chat.
Français (Canada)	Votre clavardage semble avoir pris fin. Si vous avez toujours besoin de nous contacter, veuillez fermer votre fenêtre et réessayer.

**Chat Rehydration Prompt Message**

English (Canada)	It appears you have a chat in progress. Would you like to continue your chat or start a new one?
Français (Canada)	Il apparaît que vous êtes en cours de clavardage. Aimerez-vous continuer votre clavardage ou en démarrer un nouveau?

**Screen Reader Message Replay for User**  
*{0} - Message Sender, {1} - Message*

English (Canada)	You said {1}
Français (Canada)	Vous avez dit {1}

**Screen Reader Message Replay for Agent**  
*{0} - Message Sender, {1} - Message*

English (Canada)	{0} said {1}
Français (Canada)	{0} a dit {1}

**Screen Reader Message Replay for Workflow**  
*{0} - Message Sender, {1} - Message*

English (Canada)	{0} said {1}
Français (Canada)	{0} a dit {1}

**Screen Reader Message Replay for System**  
*{0} - Message Sender, {1} - Message*

English (Canada)	{0} said {1}
Français (Canada)	{0} a dit {1}

**RESET TO DEFAULTS**

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 Rehydration Mode	<p>Allows administrators to configure how iceChat handles chat rehydration.</p> <p>Options include:</p> <ul style="list-style-type: none"> <li>• Rehydrate: will restore an active chat session.</li> <li>• Prompt: will restore an active chat session, but if the chat URL parameters are different from the previous chat, it will ask for user confirmation to either continue the previous chat or start a new one.</li> <li>• Start New: will restore an active chat session, but initiates a new one without user confirmation if the chat URL parameters are different from the previous chat (in local storage). The previous chat will be terminated if it is still active, before starting a new chat.</li> </ul> <p>Consider the following scenarios:</p> <ol style="list-style-type: none"> <li>1. Ending the chat in the UI: This correctly ends the contact in ice. There is no option to re-hydrate the chat. Clicking on a <b>start chat</b> button to populate the chat data will create a new contact.</li> <li>2. Agent ends the chat: This correctly ends the contact in ice. There is no option to re-hydrate the chat. Clicking on a <b>start chat</b> button to populate the chat data will create a new contact.</li> </ol>



## Chat Destination Properties

Parameter	Details
	<ol style="list-style-type: none"><li data-bbox="623 386 1344 1041">3. Closing the browser: The contact is still alive in ice and the contact can be re-hydrated (restored). If the rehydration mode is set to <b>Rehydrate</b> and the active chat is still in progress, clicking on a <b>start chat</b> button will rehydrate the previous chat. If the rehydration mode is set to <b>Prompt</b> and new parameters are passed to iceChat, the customer will be asked if they want to start a new chat or continue with the previous one. If the rehydration mode is set to <b>Prompt</b> and the parameters have not changed, the previous chat will be rehydrated. <b>Note:</b> The agent keep alive message will end the chat eventually if the customer does not rehydrate the chat and the agent does not end it. Both rehydration modes <b>Prompt</b> and <b>Start New</b> will end the existing chat prior to creating a new one.</li><li data-bbox="623 1079 1344 1264">4. Refreshing the browser on an active chat: Refreshing the chat browser page without changing any of the chat parameters (for example, destination ID, language, etc) will always rehydrate the active chat.</li><li data-bbox="623 1302 1344 1726">5. Opening a new tab and clicking on the <b>start chat</b> button: If the rehydration mode is set to <b>Rehydrate</b> and there is an existing chat from that browser, the previous chat will be rehydrated. If the rehydration mode is set to <b>Prompt</b> and new parameters are passed to iceChat, the customer will receive a prompt asking if they would like to start a new chat. If the parameters are the same, it will restore the active chat session. If there is no existing chat, a new chat is created.</li><li data-bbox="623 1764 1344 1864">6. Opening a new browser and clicking on the start chat button: If it is a different browser, a new chat is created.</li></ol>

Chat Destination Properties	
Parameter	Details
	<p>If it is the same browser, for example two Edge windows open, and there is an existing chat session: If the rehydration mode is set to <b>Rehydrate</b> and the active chat is still in progress, the previous chat will be rehydrated.</p> <p>If the rehydration mode is set to <b>Prompt</b> and new parameters are passed to iceChat, the customer will be asked if they want to start a new chat or continue with the previous one.</p> <p>If the rehydration mode is set to <b>Prompt</b> and the same parameters are passed to iceChat, the previous chat will be rehydrated.</p>
<b>Require SSO</b>	<p>Options include On/Off. Enable this setting to require single sign-on authentication and configure the AAD Client ID and AAD Tenant ID.</p> <p><b>Note:</b> SSO is not available with iFrame integration.</p>
<b>Allow Contact Attachments from Web User</b>	<p>If enabled, contacts will be allowed to upload contact attachments.</p> <p><b>Note:</b> For the file upload button to be available for the contact, this setting must be enabled <b>and</b> the <i>Allowed File Extensions for Contact</i> setting in <i>Core Settings &gt; Contact Attachments</i> must have at least one file type specified.</p>
iFrame Configuration	
<b>Embed iceChat into iFrame</b>	<p>If enabled, iceChat may be embedded into an iFrame.</p> <p>Note: iFrame should be used with the <i>Rehydrate</i> Chat Rehydration Mode.</p>
<b>Allowed Directives</b>	<p>The list of allowed directives.</p>
<b>Chat Button icon</b>	<p>The chat button icon.</p> <p>This field can accommodate a html image tag with a source or svg, but cannot accommodate a URL.</p>

Chat Destination Properties	
Parameter	Details
Chat Button Styles	The chat button styles in CSS.
Height	The height of the iFrame.
Width	The width of the iFrame.
Referrer Policy	The referrer policy controls how much referrer information should be included with requests.
Source URL	Specifies the URL of the page you want to display.
iFrame Styles	The iFrame styles in CSS.
Embed Code (JS)	Code to embed iceChat in iFrame
iFrame Localization	
Chat Button Aria-Label	The text for the chat button aria-label.
Chat Button Tooltip	The tooltip text for the chat button.
Title	Users navigating with assistive technology such as a screen reader can use the title attribute on an iframe to label its content. The title's value should concisely describe the embedded content.
Chat Landing Page Using Adaptive Cards	
Use Adaptive Cards Login	If enabled, the chat landing page can be configured using adaptive cards.
Adaptive Card JSON Data	When creating a new chat destination, a default Adaptive Card template JSON data will be added. The JSON data can be modified to configure your chat landing page.
Adaptive Card CSS Styling	When creating a new chat destination, a default Adaptive Card template CSS styling will be added. The CSS styling can be modified to configure your chat landing page.

Chat Destination Properties	
Parameter	Details
<b>Chat Toolbar</b>	
Show Exit Button Text	Options include On/Off. Enable this setting to show the exit button text on the chat toolbar.
Show Print Button	Options include On/Off. Enable this setting to show the print button on the chat toolbar.
Show Print Button Text	Options include On/Off. Enable this setting to show the print button text on the chat toolbar.
Hide Print Button on End Chat Popup	Options include On/Off. Enable this setting to hide the print button on the popup when a chat ends.
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.
Show Minimize Button Text	Options include On/Off. Enable this setting to show the text on the minimize button.
<b>Chat Messages</b>	
Always Display Message Time	Options include On/Off. Enable this setting to always display the message time.
Date Time Display Format	Options include: <ul style="list-style-type: none"> <li>• Short Time (h:mm a)</li> <li>• Medium Time (h:mm:ss a)</li> </ul>

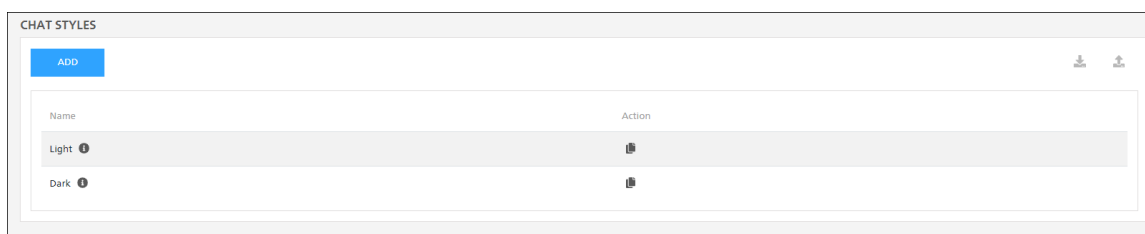
Chat Destination Properties	
Parameter	Details
	<ul style="list-style-type: none"> <li>• Long Time (h:mm:ss a z)</li> <li>• Short Date (yyyy-MM-dd)</li> <li>• Medium Date (MMM dd, yyyy)</li> <li>• Long Date (MMMM dd, yyyy)</li> <li>• Short Date Time (yyyy-MM-dd, h:mm a)</li> <li>• Medium Date Time (MMM dd, yyyy, h:mm:ss a)</li> <li>• Long Date Time (MMMM dd, yyyy, h:mm:ss a z)</li> </ul> <p>where a denotes a.m. or p.m. and z denotes the time zone.</p>
<b>Localization</b>	
<b>Window Title</b>	The title text to be displayed in the window.
<b>Toolbar Title</b>	The title text to be displayed in the toolbar.
<b>Logo</b>	The file path for your logo.
<b>Logo Alt Text</b>	The alternate text displayed in place of your logo if the image fails to load.
<b>Chat Generic Error Message</b>	The text to be displayed in the chat generic error message.
<b>Chat Busy Message</b>	The text to be displayed in the chat busy message.
<b>Chat Terminated Message</b>	The text to be displayed in the chat terminated message.
<b>Chat Rehydration Prompt Message</b>	The text to be displayed when a user is prompted to continue the chat or begin a new chat.
<b>Screen Reader Message</b>	The screen reader text to be replayed for a user message.

Chat Destination Properties	
Parameter	Details
Replay for User	
Screen Reader Message Replay for Agent	The screen reader text to be replayed for an agent message.
Screen Reader Message Replay for Workflow	The screen reader text to be replayed for a workflow message.
Screen Reader Message Replay for System	The screen reader text to be replayed for a system message.

## 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.

MESSAGES

Minimum Width (%) ⓘ	<input type="text" value="20"/>
Maximum Width (%) ⓘ	<input type="text" value="80"/>
Space Between Bubbles of Messages Sent Within a Minute (px) ⓘ	<input type="text" value="2"/>
Space Between Bubbles of Messages Sent (px) ⓘ	<input type="text" value="7"/>
Agent Message Bubble Border Style ⓘ	<input type="text" value="round"/>
Agent Message Bubble Border Radius (px) ⓘ	<input type="text" value="10"/>
Agent Message Bubble Border Thickness (px) ⓘ	<input type="text" value="1"/>
User Message Bubble Border Style ⓘ	<input type="text" value="round"/>
User Message Bubble Border Radius (px) ⓘ	<input type="text" value="10"/>
User Message Bubble Border Thickness (px) ⓘ	<input type="text" value="1"/>
System Message Bubble Border Style ⓘ	<input type="text" value="round"/>
System Message Bubble Border Radius (px) ⓘ	<input type="text" value="10"/>
System Message Bubble Border Thickness (px) ⓘ	<input type="text" value="1"/>
Workflow Message Bubble Border Style ⓘ	<input type="text" value="round"/>
Workflow Message Bubble Border Radius (px) ⓘ	<input type="text" value="10"/>
Workflow Message Bubble Border Thickness (px) ⓘ	<input type="text" value="1"/>

4. Configure the colours section.

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

5. Configure the fonts section by selecting the font and font size.



**FONTS** ^

Agent Message Date Time <span style="float: right;">?</span>	10	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
Agent Message <span style="float: right;">?</span>	14	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
Agent Message Name <span style="float: right;">?</span>	14	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
User Message Date <span style="float: right;">?</span>	10	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
User Message <span style="float: right;">?</span>	14	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
System Message Date Time <span style="float: right;">?</span>	10	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
System Message <span style="float: right;">?</span>	14	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
Workflow Message Date Time <span style="float: right;">?</span>	10	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
Workflow Message Font <span style="float: right;">?</span>	14	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
Toolbar Button <span style="float: right;">?</span>	14	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Light</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>
Toolbar Label <span style="float: right;">?</span>	12	px	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>✕ FrutigerNeueLTPro-Bold</span> <span>✕ Courier New</span> <span>✕ Sans-Serif</span> <span>✕ ▾</span> </div>

**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
<b>Name</b>	Enter a unique name to identify this chat style.
<b>Messages</b>	
<b>Minimum Width (%)</b>	<p>The minimum width of the message bubbles when viewed in the chatbox.</p> <p>Default minimum is 20%.</p> <p>Value must be within the range of 20% - 80%.</p>

Chat Style Properties	
Parameter	Details
Maximum Width (%)	<p>The maximum width of the message bubbles when viewed in the chatbox.</p> <p>Default maximum is 80%.</p> <p>Value must be within the range of 20% - 80%.</p>
Space Between Bubbles of Messages Sent Within a Minute (px)	Space between the message bubbles for messages sent within a minute of each other.
Space Between Bubbles of Messages Sent (px)	Space between the message bubbles for messages sent in a time span outside of a minute from the last message sent.
Agent Message Bubble Border Style	The border style of the incoming message bubble. The options are round or square. Defaults to round.
Agent Message Bubble Border Radius (px)	<p>The border radius of the incoming message bubble border.</p> <p>Defaults to 10 px.</p>
Agent Message Bubble Border Thickness (px)	<p>The border thickness of the incoming message bubble border.</p> <p>Defaults to 1 px.</p>
User Message Bubble Border Style	The border style of the outgoing message bubble. The options are round or square. Defaults to round.
User Message Bubble Border Radius (px)	<p>The border radius of the outgoing message bubble border.</p> <p>Defaults to 10 px.</p>
User Message Bubble Border Thickness (px)	<p>The border thickness of the outgoing message bubble border.</p> <p>Defaults to 1 px.</p>

<b>Chat Style Properties</b>	
<b>Parameter</b>	<b>Details</b>
<b>System Message Bubble Border Style</b>	The border style of the system message bubble. The options are round or square. Defaults to round.
<b>System Message Bubble Border Radius (px)</b>	The border radius of the system message bubble border. Defaults to 10 px.
<b>System Message Bubble Border Thickness (px)</b>	The border thickness of the system message bubble border. Defaults to 1 px.
<b>Workflow Message Bubble Border Style</b>	The border style of the workflow message bubble. The options are round or square. Defaults to round.
<b>Workflow Message Bubble Border Radius (px)</b>	The border radius of the workflow message bubble border. Defaults to 10 px.
<b>Workflow Message Bubble Border Thickness (px)</b>	The border thickness of the workflow message bubble border. Defaults to 1 px.
<b>Colours</b>	
<b>Chat Input Background</b>	The background colour used for the chat input container. Defaults to #ffffff.
<b>Chat Input Colour</b>	The colour used for the input field text. Defaults to #323232.
<b>Chat Input Focus Indicator Colour</b>	The colour of the focus outline for the chat input fields. Defaults to #000000.
<b>Chat Input Toolbar Background</b>	The background colour used for the rich text editor toolbar. Defaults to #ffffff.

Chat Style Properties	
Parameter	Details
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 Input Toolbar Button Focus Indicator Colour	The colour of the focus outline of the chat input toolbar buttons. Defaults to #000000.
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.
Chat Thread Focus Indicator Colour	The colour of the focus indicator outline of the chat thread body. Defaults to #000000.

Chat Style Properties	
Parameter	Details
Chat Messages Focus Indicator Colour	The colour of the focus outline border of chat messages. Defaults to #000000.
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 Links Text	The colour of the link in the chat message sent by the Agent. Defaults to #005999.
Agent Message Links Hover Text	The hover/focus colour of the link in the chat message sent by the Agent. Defaults to #002D4D.
Agent Message Link Focus Indicator Colour	The focus indicator outline colour of the agent message bubble link. Defaults to #000000.
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 Links Text	The color of the link in the chat message sent by the User. Defaults to #005999.
User Message Links Hover Text	The hover/focus color of the link in the chat message sent by the User. Defaults to #002D4D.
User Message Link Focus Indicator Colour	The focus indicator outline colour of the user message bubble link. Defaults to #000000.
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.
System Message Links Text	The color of the link in the chat message sent by the System. Defaults to #a51b12.
System Message Links Hover Text	The hover/focus color of the link in the chat message sent by the System. Defaults to #9f140b.
System Message Link Focus Indicator Colour	The focus indicator outline colour of the system message bubble link. Defaults to #000000.
Workflow Message Bubble Background	The background colour of the workflow message bubble. Defaults to #f8fbff.

Chat Style Properties	
Parameter	Details
<b>Workflow Message Bubble Border</b>	The border colour of the workflow message bubble. Defaults to #c9c9c9.
<b>Workflow Message Date Time</b>	The colour of the workflow message date and time. Defaults to #2e2e2e.
<b>Workflow Message</b>	The colour used for the workflow message text. Defaults to #323232.
<b>Workflow Message Links Text</b>	The color of the link in the chat message sent by the Workflow. Defaults to #005999.
<b>Workflow Message Links Hover Text</b>	The hover/focus color of the link in the chat message sent by the Workflow. Defaults to #002D4D.
<b>Workflow Message Link Focus Indicator Colour</b>	The focus indicator outline colour of the workflow message bubble link. Defaults to #000000.
<b>Send Message Button Icon</b>	The colour of the send message button icon. Defaults to #005999.
<b>Send Message Button Hover Icon</b>	The hover / focus colour of the send message button icon. Defaults to #ffffff.
<b>Send Message Button Hover Background</b>	The hover / focus background colour of the send message button. Defaults to #005999.
<b>Send Button Focus Indicator Colour</b>	The colour of the focus outline of the chat send button. Defaults to #000000.
<b>Toolbar Background</b>	The toolbar background colour. Defaults to #005999.
<b>Toolbar Button Text Colour</b>	The toolbar text colour. Defaults to #ffffff.

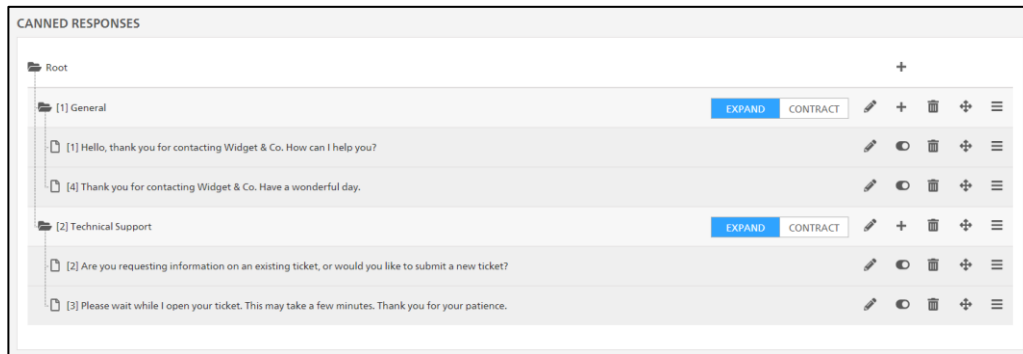
Chat Style Properties	
Parameter	Details
Toolbar Button Hover Text	The hover / focus toolbar text colour. Defaults to #005999.
Toolbar Button Icon	The toolbar button icon colour. Defaults to #ffffff.
Toolbar Button Hover Icon	The hover / focus toolbar button icon colour. Defaults to #005999.
Toolbar Button Background	The toolbar button background colour. Defaults to #005999.
Toolbar Button Hover Background	The hover / focus toolbar button background colour. Defaults to #ffffff.
Toolbar Focus Indicator Colour	The colour of the focus outline for the header of the chat. Defaults to #000000.
Toolbar Label	The toolbar label colour. Defaults to #ffffff.
Tooltip Text Colour	The colour of the font for tooltips. Defaults to #000000.
Tooltip Background Colour	The colour of the background for the tooltips. Defaults to #000000.
Tooltip Border Colour	The colour of the border for the tooltips. Defaults to #000000.
End Chat Popup Button Focus Indicator Colour	When clicking the end chat button, a pop up is displayed. This allows you to change the focus indicator colour.
<b>Fonts</b>	
Agent Message Date Time	The font used for the incoming message date and time.
Agent Message	The font used for the incoming message text.



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

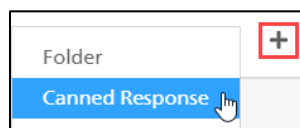
## Canned Responses

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

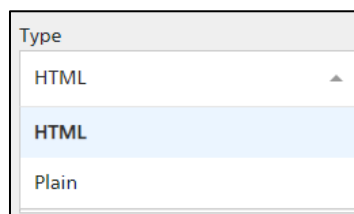


### To add a Canned Response:

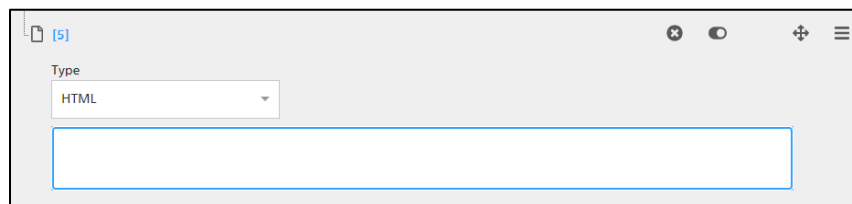
1. Choose a folder under which you want to add a Canned Response.
2. Click the *add* (+) button in the same row as the chosen folder. Select Canned Response from the list. A new entry will be added to the folder.



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



4. Enter the Canned Response into the field.

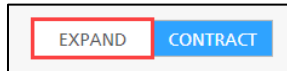


5. Click *Save* to save the changes. Click *Revert* to cancel the changes.
6. If you clicked *Save*, the 'Canned Responses Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will appear. Click *Yes* to revert the changes or click *No*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

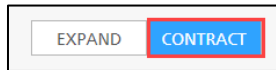
**Note:** Canned responses and folder names are restricted to a maximum of 2000 characters.

Expand or contract a Canned Response folder:

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



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



To edit a Canned Response:

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



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

To delete a Canned Response:

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



2. Click *Save* to save the changes. Click *Revert* to cancel the changes.
3. If you clicked *Save*, the 'Canned Responses Succeeded' message will appear. Click *OK* to complete the change. If you clicked *Revert*, the 'Revert Changes' message will

appear. Click *Yes* to revert the changes or click *No* to keep your changes on the editing page.

#### Disable a Canned Response:

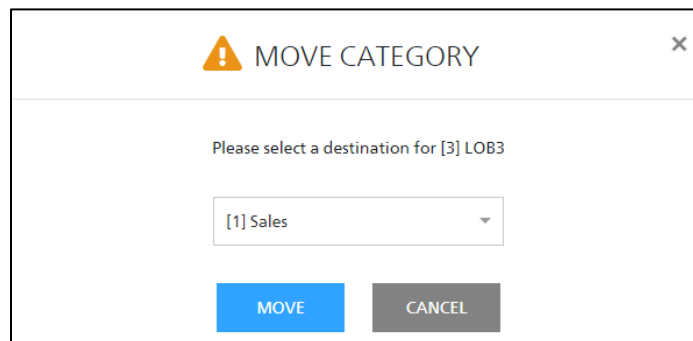
- Click the toggle on the Canned Response to disable the Canned Response.



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

#### To move a Canned Response:

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



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

#### Reorder a Canned Response or folder:

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



#### To import Canned Responses from XML format:

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

IMPORT Overwrite All  
OFF

Paste the IceBar Canned Response Configuration XML in the textbox to import

```
<CannedIMResponses>  
<CannedResponseFolder name="Common" expand="true">  
<CannedResponse>Thank you for your question.</CannedResponse>  
</CannedResponseFolder>  
</CannedIMResponses>
```

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

[4] Common EXPAND CONTRACT

Common

[7] Thank you for your question.

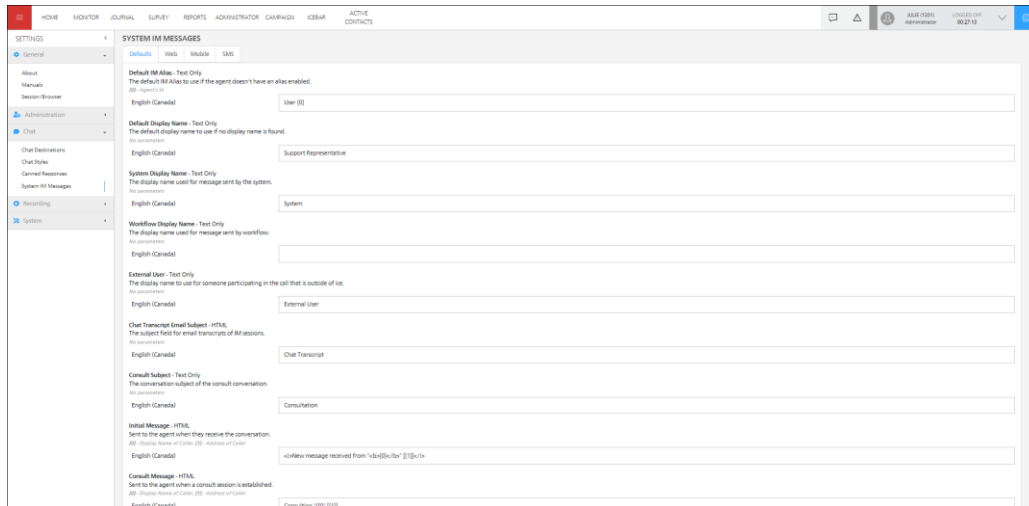
Type  
HTML

Thank you for your question.

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

Parameter	Format	Description
<b>Consult Subject</b>	Text Only	The conversation subject of the consult conversation.
<b>Initial Message</b>	HTML	Sent to the agent when they receive the conversation.
<b>Consult Message</b>	HTML	Sent to the agent when a consult session is established.
<b>Only Party Left</b>	HTML	Sent when there is only one person left in the conversation.
<b>Connected Keep Alive Message</b>	HTML	Sent after the configured idle time when connected to an agent.
<b>Connected Keep Alive Message Final</b>	HTML	Sent after the configured idle time max retries has been reached.
<b>Workflow Keep Alive Message</b>	HTML	Sent after the configured idle when connected to workflow.
<b>PAQ Keep Alive Message</b>	HTML	Sent after the configured idle time when waiting in someone's PAQ.
<b>PAQ Message</b>	HTML	Sent when the client tries to send a message while they are in someone's PAQ.
<b>Agent Did Not Accept Message</b>	HTML	Sent when an agent does not accept the conversation request being sent to them.
<b>Waiting For Agent Message</b>	HTML	Sent when waiting for an agent to join the conversation.

Parameter	Format	Description
<b>Joined Conversation</b>	HTML	Sent when someone joins the conversation.
<b>Left Conversation</b>	HTML	Sent when someone leaves the conversation.
<b>Outbound Message</b>	HTML	Sent to the agent when they attempt to establish an outbound IM session.
<b>Sent Canned Response Message</b>	HTML	Sent to the agent when they send canned responses.
<b>Chat Replay Message</b>	HTML	The caller's chat replay sent to the IM session.
<b>Web / Mobile / SMS</b>		
<b>Connected Keep Alive Message</b>	HTML	Sent after the configured idle time when connected to an agent.
<b>Connected Keep Alive Message Final</b>	HTML	Sent after the configured idle time max retries has been reached.
<b>Workflow Keep Alive Message</b>	HTML	Sent after the configured idle time when connected to workflow.
<b>PAQ Keep Alive Message</b>	HTML	Sent after the configured idle time when waiting in someone's PAQ.
<b>PAQ Message</b>	HTML	Sent when the client tries to send a message while they are in someone's PAQ.
<b>Agent Did Not Accept Message</b>	HTML	Sent when an agent does not accept the conversation request being sent to them.



Parameter	Format	Description
<b>Waiting for Agent Message</b>	HTML	Sent when waiting for an agent to join the conversation.
<b>Joined Conversation</b>	HTML	Sent when someone joins the conversation.
<b>Left Conversation</b>	HTML	Sent when someone leaves the conversation.
<b>Terminated Message (Agent)</b>	HTML	Sent when the IM session is terminated by the user.
<b>Server Error Message (Agent)</b>	HTML	Sent when there is a server error.
<b>Connection Timeout Message (Agent)</b>	HTML	Sent when the IM session has timed out based on the configured setting for connection loss.

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

# Recording settings

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





## Schedules

This section can only be modified by Administrators and Supervisors.

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

SCHEDULES ▼

[ADD](#)

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

### Add a schedule

To add a schedule, following these steps:

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

←
ADD SCHEDULE

ADD
↑

Users

Select users... ▾

Queues

Select queues... ▾

Destination Address

Destination Address ▾

Originator Address

Any

Duration (Seconds)

Any

Date/Time

Any

Audio Recording
ON

Screen Recording
OFF

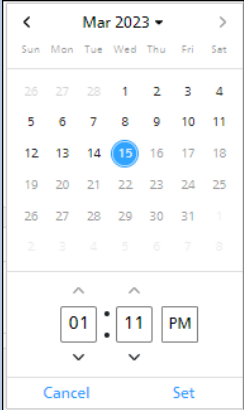
Recording Transcription
OFF

Contact Metadata Job
OFF

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

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

Parameter	Allowable values	Description
<b>Users</b>	List of users from the drop-down	Select a user from a list of users configured in the switch. <i>Any User</i> can be selected if recording schedule is not for a specific user.
<b>Queues</b>	List of queues from the drop-down	Select a queue from a list of queues configured in the switch. <i>Any Queue</i> can be selected if recording schedule is not for a specific queue.

Parameter	Allowable values	Description
<b>Destination Address</b>	List of addresses from the drop-down	Enter a destination address such as a SIP endpoint. <i>Any Destination</i> can be selected if recording schedule is not for a specific destination.
<b>Originator Address</b>	Free text	Enter originator address such as ANI or select <i>Any</i> if not for a specific originator address.
<b>Duration</b>	1 to N seconds	Enter the minimum duration of a call before recording starts. Lookback recording must be enabled when the duration is configured.
<b>Date/Time</b>	Any/Specific	Select <i>Specific</i> to enter a start and end date and time for recordings or select <i>Any</i> if not selecting a specific date and time.
<b>Start Date/Time</b>	The date selected from calendar and time from the drop-down	<p>Select starting date and time of date range if the Date/Time field is set to <i>Specific</i>.</p> <ol style="list-style-type: none"> <li>To select a start date, click on the field next to Start Date/Time. A calendar appears:  </li> <li>Select the date. Use the forward and backward arrows where necessary.</li> <li>Select the time. Use the arrows where necessary.</li> <li>Click <i>Set</i> to confirm your selection.</li> </ol>

Parameter	Allowable values	Description
<b>End Date/Time</b>	The date selected from calendar and time	Select ending date and time of date range if the Date/Time field is set to <i>Specific</i> . Follow the steps listed in Start Date/Time to select the End Date and Time.
<b>Audio Recording</b>	Off/On	Select <i>On</i> to record audio.
<b>Screen Recording</b>	Off/On	Select <i>On</i> to record the agent's screen.
<b>Recording Transcription</b>	Off/On	Select <i>On</i> to enable recording transcription and select your transcription provider.
<b>Contact Metadata Job</b>	Off/On	Select <i>On</i> to enable the contact metadata job and specify the job ID. <b>Note:</b> The contact metadata job state must be set to Enabled for this setting to work.

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

The new schedule appears on the bottom of the list.

SCHEDULES ▼

ADD

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

## Edit a Schedule

To edit a schedule:

- Click the pencil icon located in the Action column.

2. Make the appropriate changes and click **Save**.

EDIT SCHEDULE

EDIT

Users: Select users...

Queues: Customer Service Voice Que...x

Destination Address: Inbound x

Originator Address: Any

Duration (Seconds): Any

Date/Time: Any

Audio Recording: ON

Screen Recording: OFF

Recording Transcription: OFF

Contact Metadata Job: ON

Contact Metadata Job ID: iceVoiceContactSummary14

## 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.

DELETE SCHEDULE

Are you sure you want to delete this schedule?

YES NO

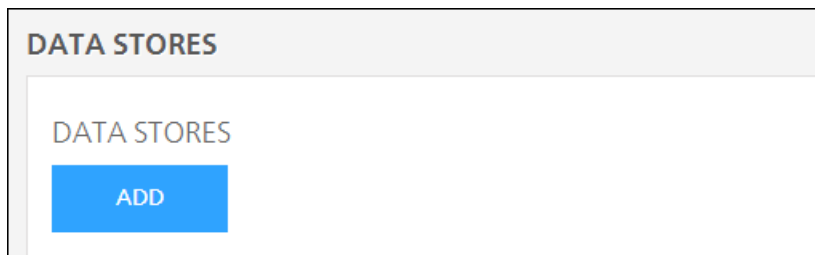
Once you click Yes the schedule is removed from the list.

## 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, or SFTP. Once it has been defined, it cannot be switched.



The table below describes the parameters that can be configured.

Parameter	Permissible Values	Description
<b>Datastore</b>		
Name	Free text	Enter datastore name.
<b>FTP</b>		
Server	Free text	Enter FTP server URL.
Port	Typically 21	Enter FTP port. The default is 21.
Is Passive	Checked / Unchecked	Select the checkbox to indicate if FTP is passive. With passive FTP, the connection is initiated between the FTP server's

		<p>command port (port 21) and the data connection to the server.</p> <p>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.</p>
<b>Is Secure</b>	Checked / Unchecked	TLS encryption for security.
<b>Username</b>	Free text	Enter the username for FTP connection.
<b>Password</b>	Free text	Enter the password for FTP connection.
<b>Remote Path</b>	Free text	The folder path.
<b>Timeout</b>	1 to N seconds	Enter the connect timeout value.
<b>Network</b>		
<b>UNC Path</b>	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.
<b>Timeout (Seconds)</b>	1 to N seconds	Enter the connect timeout value.
<b>Azure</b>		
<b>Account Name</b>	Free text	Enter the Azure account name.
<b>Account Key</b>	Free text	Enter the Azure Account Key.
<b>Container Name</b>	Free text	Enter the Azure Container Name.
<b>Key ID</b>	Free text	Enter the Azure Key ID.
<b>Key Vault Client ID</b>	Free text	Enter the Azure Key Vault Client ID.
<b>Key Vault Client Secret</b>	Free text	Enter the Azure Key Vault Client Secret.
<b>SFTP</b>		
<b>Server</b>	Free text	Enter SFTP server URL.
<b>Port</b>	Typically 22	Enter SFTP port. The default is 22.



<b>Server Fingerprint</b>	Free text	Enter the SFTP server fingerprint for authentication.
<b>Username</b>	Free text	Enter the username for SFTP connection.
<b>Password</b>	Free text	Enter the password for SFTP connection.
<b>Remote Path</b>	Free text	The folder path.
<b>Timeout</b>	1 to N seconds Default is 3600	Enter the connect timeout value.

## Recording Server

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

### RECORDING SERVER

---

**GENERAL**

Max Recording Length (sec)

---

**IM RECORDING**

Enabled ON

---

**AUDIO RECORDING**

Enabled ON

Lookback Recording OFF

Exclude Internal Calls OFF

Bulk Trunk-side Incoming ON

Bulk Trunk-side Outgoing OFF

---

All User Calls ON

---

**SCREEN RECORDING**

Enabled OFF

---

**LEGACY RECORDING**

Fail conversions in queue after (min)

Fail conversions in progress after (min)

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

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

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

Parameter	Permissible Values	Description
		Note: This option applies to both audio and screen recording.
<b>Supervisor Initiated</b>	On/Off	Select <i>On</i> to enable supervisor-initiated recordings. A supervisor can initiate recording through silent monitoring if this setting is turned on. A new recording starts each time the user receives a call. Note: This option applies to both audio and screen recording.
<b>Schedule</b>	On/Off	Select <i>On</i> to enable scheduled recordings. Note: This option applies to both audio and screen recording.
<b>Random (open to the selection below if On)</b>	On/Off	Select <i>On</i> to enable random recordings. For this option, the system will record the number of calls entered in the Max 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.
<b>Max Unscored Recordings Per User</b>	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.

Parameter	Permissible Values	Description
<b>Screen Recording</b>		
<b>Enabled</b>	On/Off	Select <i>On</i> to enable screen recording. Note: When Screen Recording is enabled Audio Recording will automatically be enabled.
<b>Wrapup Enabled</b>	On/Off	Select <i>On</i> to allow screen recording to continue when the agent is in wrapup state.
<b>Max Screen Recording in Wrapup (sec)</b>	1 to N seconds	Enter maximum length of screen recording in wrapup state in seconds. Defaults to 3600. When agents have infinite Auto Wrap time configured for the handling queue, this will control the length of time for screen recording in wrapup.
<b>Legacy Recordings</b>		
<b>Fail conversions in the queue after (min)</b>	1 to 2147483646	The number of minutes before the conversion of legacy recordings in the queue will fail.
<b>Fail conversions in progress after (min)</b>	1 to 2147483646	The number of minutes before the conversion of legacy recordings in progress will fail.

## Screen Recordings

This section can only be modified by Administrators.

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

### SCREEN RECORDINGS

---

#### PROXY SERVER

Server Name	<input type="text" value="proxy.domain.local"/>
Use Default Port	ON <input checked="" type="checkbox"/>
User Name	<input type="text"/>
Password	<input type="text"/>
Root Directory	<input type="text" value="C:\Program Files (x86)\Proxy Netw"/>
Alias Root Directory	<input type="text" value="\\machine.domain.local\ProxyScre"/>

---

#### PAUSE

Caption	<input type="text" value="Recording Paused/Enregistrement"/>
Foreground	<input type="text" value="White"/>
Background	<input type="text" value="Black"/>

## TRANSCODING

OFF

### Proxy Recording To WMV

Original Video Codec

Encoder Mode

Peak Bit Rate

Screen Capture Quality

Time Per Frame

Key Frame Distance

Modify Frame Size

### WMV To MP4

Transcoded Container Format

Transcoded Video Codec

Transcoded Audio Codec

VENDOR

Vendor Name

Product Name

Product Info

Cur Version

Min Version

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

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



Parameter	Permissible Values	Description
<b>Pause</b>		
<b>Caption</b>	Text	Enter the text of the message displayed while recording is paused.
<b>Foreground</b>	Black, Blue, Green Cyan, Red, Magenta Yellow, White, Grey, Bright blue, Bright green, Bright cyan, Bright red, Bright magenta, Bright yellow, Bright white	The color the text in the caption appears.
<b>Background</b>	Black, Blue, Green Cyan, Red, Magenta Yellow, White, Grey, Bright blue, Bright green, Bright cyan, Bright red, Bright magenta, Bright yellow, Bright white	The color of the screen when screen recording is paused.
<b>Transcoding</b>	On/Off	Select On to have screen recordings created in MP4 format or select Off to view the screen recording on the web.
<b>Proxy Recording to WMV</b>		
<b>Original Video Codec</b>	Windows Media Video 9 Screen, Windows Media Video 9	Select the video codec of the WMV file encoded from a proxy screen recording. Default codec is Windows Media Video 9 Screen.
<b>Encoder Mode</b>	Encoded at a constant bit rate, Encoded at a variable bit rate	Select Encoded at a constant bit rate to specify the video will be encoded at a constant bit rate or select <i>Encoded at a variable bit rate</i> to specify that the video will be encoded at a variable bit rate. The default mode is <i>Encoded at a variable bit rate</i> .

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

Parameter	Permissible Values	Description
<b>Transcoded Audio Codec</b>	ACC, MP3	The audio codec used in the container. For the mp4 container format, it can be either as ACC or mp3.
<b>Vendor</b>		
<b>Vendor Name</b>	Static – unchangeable	Name of the service provider used to create screen recording capability.
<b>Product Name</b>	Static – unchangeable	Name of product used for screen recording.
<b>Product Info</b>	Static – unchangeable	Description of product used for screen recording.
<b>Cur Version</b>	Text	Current version of the product used.
<b>Min Version</b>	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.

**ARCHIVING AND PURGING**

ARCHIVING RULES ▼

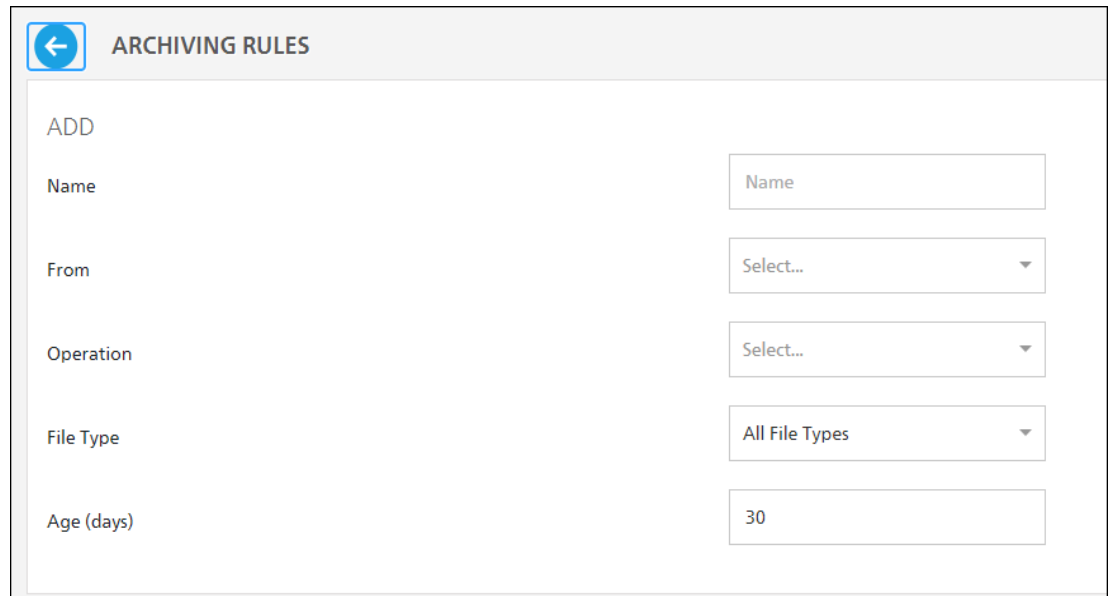
ADD

Name	From	Operation	To	Age	Action

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.


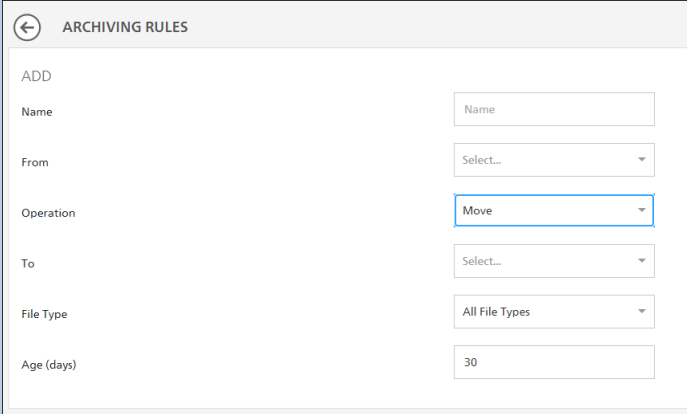


The screenshot shows a form titled "ARCHIVING RULES" with a back arrow icon. The form contains the following fields:

- Name:** A text input field with the placeholder "Name".
- From:** A dropdown menu with the placeholder "Select..".
- Operation:** A dropdown menu with the placeholder "Select..".
- File Type:** A dropdown menu with the placeholder "All File Types".
- Age (days):** A text input field with the value "30".

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
<b>Name</b>	Free text	Enter a descriptive name for the archive rule.
<b>From</b>	List of datastores from the drop-down	Select the datastore from which data will be drawn.
<b>Operation</b>	<ul style="list-style-type: none"><li>▪ Copy</li><li>▪ Move</li><li>▪ Delete</li></ul>	Select one of the archiving operations. A copy is done before a move, which is done before a delete.

Parameter	Permissible Values	Description
		 <p>A delete operation will also delete the recording file if it is not in any other datastore.</p> <p>When <i>Move</i> is selected, additional options appear:</p> 
<b>To</b>	List of datastores from the drop-down	Select the datastore to which data will be copied or moved. The 'To' field is only shown if the selected Operation is a <i>Copy</i> or <i>Move</i> .
<b>File Type</b>	List of file types from the drop-down	Select the file type that will be archived. Options include Audio, Screen Recording (MP4), Screen Recording (Proxy), Prompt, Voice Mail, Workflow Recording and Survey Audio Response.
<b>Age</b>	1 to N days	Enter the number of days of recordings in the datastore before archiving kicks in. For example, if 30 is entered, the archiving rule will run on the 30th day.

## Purging:

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

PURGING	
Enabled	ON <input checked="" type="checkbox"/>
<hr/>	
<b>IM Recording</b>	
Delete IM recordings older than (days)	<input type="text" value="365"/>
<hr/>	
<b>Audio Recording</b>	
Only purge audio recordings with no file	ON <input checked="" type="checkbox"/>
Delete audio recordings older than (days)	<input type="text" value="90"/>
<hr/>	
<b>Screen Recording</b>	
Only purge screen recordings with no file	ON <input checked="" type="checkbox"/>
Delete screen recordings older than (days)	<input type="text" value="15"/>
When duplicate recordings exist, delete the recordings of type	<input type="text" value="None"/>
Delete duplicate recordings after (days)	<input type="text" value="15"/>
<hr/>	
<b>Legacy Recording</b>	
Delete legacy recordings after they have been converted?	ON <input checked="" type="checkbox"/>
Delete converted legacy recordings after (days)	<input type="text" value="30"/>
<hr/>	
<b>Evaluation</b>	
Delete evaluations older than (days)	<input type="text" value="90"/>

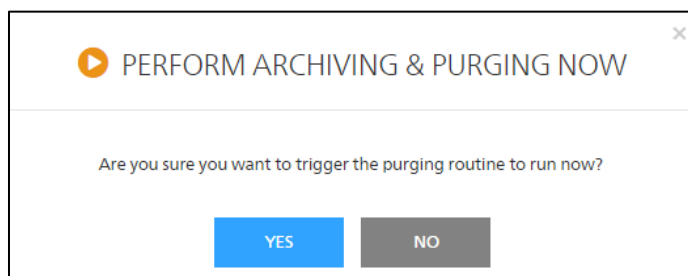
The following table provides more information on the options:

Parameter	Permissible Values	Description
<b>Enabled</b>	On/Off	Select <i>On</i> to enable purging.
<b>IM Recording</b>		
<b>Delete IM recordings older than (days)</b>	1 to N days Default is 365	Enter the number of days after which purging for IM recordings would kick in.
<b>Audio Recording</b>		
<b>Only purge audio recordings with no file</b>	On/Off	Select <i>On</i> to purge audio recordings that have corresponding records in the database but without the actual recording file.
<b>Delete audio recordings older than (days)</b>	1 to N days Default is 90	Enter the number of days after which purging for audio recordings would kick in.
<b>Screen Recording</b>		
<b>Only purge screen recordings with no file</b>	On/Off	Select <i>On</i> to purge screen recordings that have corresponding records in the database but without the actual recording file.
<b>Delete screen recordings older than (days)</b>	1 to N days Default is 15	Enter the number of days after which purging for screen recordings would kick in.
<b>When duplicate recordings exist, delete the recordings of type</b>	None PRXREC MP4	Select the file type of the duplicate screen recordings you want deleted.

Parameter	Permissible Values	Description
Delete duplicate recordings after (days)	1 to N days Default is 15	Enter the number of days after which purging for screen recordings would kick in.
<b>Legacy Recording</b>		
Delete legacy recordings after they have been converted?	On/Off	Select <i>On</i> to purge legacy recordings after they have been converted.
Delete converted legacy recordings after (days)	1 to N days Default is 30	Enter the number of days after which purging for converted legacy recordings would kick in.
<b>Evaluation</b>		
Delete evaluations older than (days)	1 to N days Default is 90	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?"







## Transcription Providers

This section can only be modified by Administrators. The iceTranscriber service has been created to perform uploads of recordings to transcription providers for transcription and speech analytic purposes.

### TRANSCRIPTION PROVIDERS

TRANSCRIPTION PROVIDERS

[ADD](#)

Name	Provider	Hours Used (Current Month)	Action	Enabled
Tethr	Tethr	0	 	ON <input checked="" type="checkbox"/>

To add a Transcription Provider, complete the following steps:

1. Click *Add*. The Add Transcription providers fields appear.

### ← TRANSCRIPTION PROVIDERS

ADD

Name

Max Transcription Recording Hours

Select Transcription Provider:

Tethr

TETHR SETTINGS

API Url

API User

API Password

Language

2. Fill in the fields. For more information on the fields view the table below.
3. Click *Add* to add the transcription provider or 'cancel' to discard.

Parameter	Permissible Values	Description
<b>Name</b>	Free text	Enter a descriptive name for the transcription provider.
<b>Max Transcription on Recording Hours</b>	1 to N	Select the maximum number of hours of recordings to be transcribed.
<b>Select Transcription Provider</b>	Tethr Azure	Select the transcription provider.
<b>Tether Settings</b>		
<b>API Url</b>	Free text	The URL for the Tethr service (per-customer instance)
<b>API User</b>	Free text	Username for Tethr upload (Tethr provided)

Parameter	Permissible Values	Description
<b>API Password</b>	Free text	Password for Tethr upload (Tethr provided)
<b>Language</b>	Free text	The language used for transcription services.
<b>Azure Settings</b>		
<b>Storage Connection String</b>	Free text	The connection string used to identify the storage account.
<b>Transcription Key</b>	Free text	The transcription key for the Azure transcription.
<b>Region</b>	Free text	The location or region of the resource used when making calls to the API.
<b>Language</b>	Free text	The language used for transcription services.
<b>Model Id</b>	Free text	The model ID.

## System

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

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

## Server Variables

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


## Categories

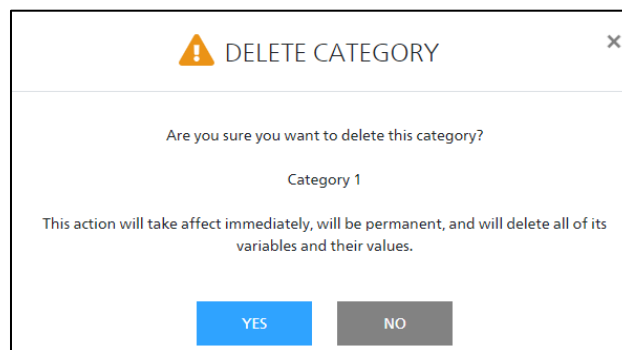
Categories allow you to group variables together.

### Add a new server variable category

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

### Delete a server variable category

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




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

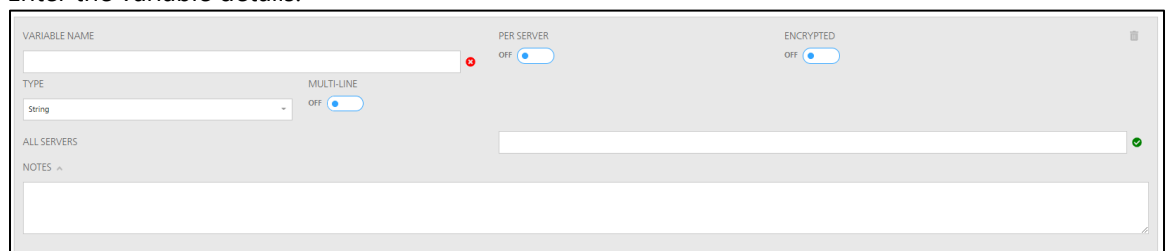
Parameter	Description
Category	Enter a name for the category.
Notes	Enter information regarding the category.
<b>User Permissions</b>	
Type	This is how members have been grouped. Options include Users, Teams, and Roles.
Members	Once a type has been selected, members can be specified. Users: members are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

## Variables

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

### Add a new server variable

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




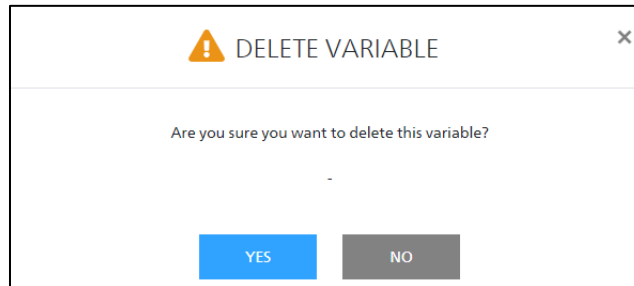
The screenshot shows a configuration form for a server variable. It includes the following fields and controls:

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

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

#### Delete a server variable

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



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

Parameter	Description
Variable Name	Enter a name for the server variable.
Per Server	Use this toggle to set configurations for all servers or each server individually.
Encrypted	Use this toggle to encrypt the value of the variable when stored in the database.
Type	Select a variable type from the dropdown list. Options include: <ul style="list-style-type: none"><li>• String</li><li>• String (RegEx Validated)<ul style="list-style-type: none"><li>- Opens another field to enter the regular expression.</li></ul></li><li>• Integer</li><li>• Boolean<ul style="list-style-type: none"><li>- Displays a toggle to be used for setting the value of the variable.</li></ul></li><li>• URL</li></ul>

Parameter	Description
<b>Multi-line</b>	Enable this setting value to support Multi-line variables. This value is set to Off by default.
<b>All Servers</b>	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 you to set a value to be applied for each server individually.
<b>Notes</b>	Enter information regarding the category.

## SysAdmin

The SysAdmin (System Administration) folder of server variables allows administrators to configure certain variables from the System Administration tool.

Category	Action
SysAdmin-AppName	
IceSurvey	 

Use the following table to understand the variables in the SysAdmin folder:

Variable	Permissible Values	Description
<b>SysAvailable</b>	Options include: True(1)= Application is Available False(0) = Application is Not Available	This setting determines if the application is available. If set to false(0), the application will be unavailable and contacts will not reach ice.
<b>Cur1BroadcastMsgNumber</b>	Options include: True(1) = Enabled False(0) = Not Enabled	The message must already be recorded to use this variable. When this variable is enabled, broadcast message 1 will play. When disabled,

Variable	Permissible Values	Description
		broadcast message 1 will not play.
<b>Cur2BroadcastMsgNumber</b>	Options include: True(1) = Enabled False(0) = Not Enabled	The message must already be recorded to use this variable. When this variable is enabled, broadcast message 2 will play. When disabled, broadcast message 2 will not play.
<b>Cur3BroadcastMsgNumber</b>	Options include: True(1) = Enabled False(0) = Not Enabled	The message must already be recorded to use this variable. When this variable is enabled, broadcast message 3 will play. When disabled, broadcast message 3 will not play.
<b>Cur4BroadcastMsgNumber</b>	Options include: True(1) = Enabled False(0) = Not Enabled	The message must already be recorded to use this variable. When this variable is enabled, broadcast message 4 will play. When disabled, broadcast message 4 will not play.
<b>Cur5BroadcastMsgNumber</b>	Options include: True(1) = Enabled False(0) = Not Enabled	The message must already be recorded to use this variable. When this variable is enabled, broadcast message 5 will play. When disabled, broadcast message 5 will not play.
<b>Cur6BroadcastMsgNumber</b>	Options include: True(1) = Enabled	The message must already be recorded to use this variable. When this variable is enabled,



Variable	Permissible Values	Description
	False(0) = Not Enabled	broadcast message 6 will play. When disabled, broadcast message 6 will not play.
<b>Cur1BroadcastKeyThruFlag</b>	Options include: True(1) = Caller can key through the message False(0) = Caller cannot key through the message	When this variable is enabled, the caller can key through message 1. When disabled, the call cannot key through broadcast message 1.
<b>Cur2BroadcastKeyThruFlag</b>	Options include: True(1) = Caller can key through the message False(0) = Caller cannot key through the message	When this variable is enabled, the caller can key through message 2. When disabled, the call cannot key through broadcast message 2.
<b>Cur3BroadcastKeyThruFlag</b>	Options include: True(1) = Caller can key through the message False(0) = Caller cannot key through the message	When this variable is enabled, the caller can key through message 3. When disabled, the call cannot key through broadcast message 3.
<b>Cur4BroadcastKeyThruFlag</b>	Options include: True(1) = Caller can key through the message False(0) = Caller cannot key through the message	When this variable is enabled, the caller can key through message 4. When disabled, the call cannot key through broadcast message 4.
<b>Cur5BroadcastKeyThruFlag</b>	Options include: True(1) = Caller can key through the message	When this variable is enabled, the caller can key through message 5. When disabled, the call

Variable	Permissible Values	Description
	False(0) = Caller cannot key through the message	cannot key through broadcast message 5.
<b>Cur6BroadcastKeyThruFlag</b>	Options include: True(1) = Caller can key through the message False(0) = Caller cannot key through the message	When this variable is enabled, the caller can key through message 6. When disabled, the call cannot key through broadcast message 6.

## Core Settings

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

### Core

This section allows Global Administrators to modify the Global, Event Manager, IMR, Contact Attachment, Audit Trail, iceManager and Audio Messages settings.

#### Global

The screenshot shows a settings page for 'Global'. On the left is a navigation menu with items: Event Manager, IMR, Contact Attachments, Audit Trail, iceManager, and Audio Messages. The main area is titled 'SharePath' and contains a text input field. Below the field is a description: 'The path to the switch's base share location. e.g. \\SERVER\Tenants\<TENANT>\'. NOTE: It will include the trailing slash.'

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

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

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

IMR

Stale Heartbeat Duration (s)	<input type="text" value="30"/>
Listener Connection Timeout (ms)	<input type="text" value="1000"/>
Max Active Sends - User	<input type="text" value="5000"/>
Max Active Sends - Monitor	<input type="text" value="20000"/>
Max Active Sends - Admin	<input type="text" value="100"/>
IMR Debug Mask	<input type="text" value="x None x Info x Serious x Fatal"/>
Server - iceA	Override <input checked="" type="checkbox"/>
Server - iceB	Override <input checked="" type="checkbox"/>
Server - iceC	Override <input checked="" type="checkbox"/>
TAPI Trace Level	<input type="text" value="All Messages"/>
Server - iceA	Override <input checked="" type="checkbox"/>
Server - iceB	Override <input checked="" type="checkbox"/>
Server - iceC	Override <input checked="" type="checkbox"/>

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

Parameter	Permissible Values	Description
<b>Listener Connection Timeout</b>	Text The default value is 1000 ms.	This setting applies when no data is received during TLS handshake initiation and authentication request, serving to mitigate potential DoS attacks.
<b>Max Active Sends – User</b>	Text The default value is 5000.	Maximum size of the outgoing message queue for TAPI messages going to iceBar.
<b>Max Active Sends – Monitor</b>	Text The default value is 20000.	Maximum size of the outgoing message queue for TAPI messages going to iceMonitor.
<b>Max Active Sends - Admin</b>	Text The default value is 100.	Maximum size of the outgoing message queue for TAPI messages going to iceAdministrator.
<b>IMR Debug Mask</b>	Options include: <ul style="list-style-type: none"> <li>• None</li> <li>• Info</li> <li>• Serious</li> <li>• Fatal</li> </ul>	Options to determine which log messages to send.
<b>TAPI Trace Level</b>	Options include: <ul style="list-style-type: none"> <li>• Disabled</li> <li>• Errors only</li> <li>• All Messages</li> </ul>	The trace level for TAPI logging. Options are available to override the general settings on an individual server basis. Toggle the switch to override the general settings for the specified server and select the trace level from the dropdown list.

[Contact Attachments](#)

Purge Interval (Days)	<input type="text" value="365"/>
Expiry Interval (Hours)	<i>Default Value 24 hours. Should not exceed 24 hours.</i> <input type="text" value="24"/>
Max Attachment Size (MB)	<i>Default Value 25MB. Should not exceed 100MB.</i> <input type="text" value="25"/>
Max Files Per Session	<i>Default Value 10. Should not exceed 20.</i> <input type="text" value="10"/>
Allowed File Extensions for Agent <span>?</span>	<p><i>Allowed File Extensions are: 'wav', 'wma', 'mp3', 'mp4', 'xlsx', 'docx', 'pdf', 'txt', 'jpg', 'jpeg', 'png'</i></p> <input type="text" value=".wav"/> <input type="text" value=".wma"/> <input type="text" value=".mp3"/> <input type="text" value=".mp4"/> <input type="text" value=".xlsx"/> <input type="text" value=".docx"/> <input type="text" value=".pdf"/>
Allowed File Extensions for Contact <span>?</span>	<input type="text" value=".wav"/> <input type="text" value=".wma"/> <input type="text" value=".mp3"/> <input type="text" value=".mp4"/> <input type="text" value=".xlsx"/> <input type="text" value=".docx"/> <input type="text" value=".pdf"/>

Parameter	Permissible Values	Description
<b>Purge Interval (Days)</b>	Integer. The default value is 365 days.	The number of days that attachments remain accessible in journal.
<b>Expiry Interval (Hours)</b>	Integer. The default value is 24 hours.	The amount of time in hours that attachment links remain valid.
<b>Max Attachment Size (MB)</b>	Integer. The default value is 25 MB and should not exceed 100 MB.	This is the maximum attachment size in MB per attachment.

Parameter	Permissible Values	Description
<b>Max Files Per Session</b>	Integer. The default value is 10 and should not exceed 20 files.	The maximum number of files that can be uploaded per participant in a chat session.
<b>Allowed File Extensions for Agent</b>	Text.	Provide a whitelist of file extensions that can be uploaded by the Agent in an ACS Chat. Enter each file extension on a new line and in the following format: period, followed by the specific file type abbreviation. For example, for a text file enter: .txt Be sure to include the period before typing the file extension abbreviation.
<b>Allowed File Extensions for Contact</b>	Text.	Provide a whitelist of file extensions that can be uploaded by the Contact in an ACS Chat. Enter each file extension on a new line and in the following format: period, followed by the specific file type abbreviation.  For example, for a text file enter: .txt. Be sure to include the period before typing the file extension abbreviation.

#### Audit Trail

Purge Interval (Days)	<input type="text" value="365"/>
Enable Audit Trails	ON <input checked="" type="checkbox"/>

Parameter	Permissible Values	Description
<b>Purge Interval (Days)</b>	Integer. The default value is 365 days.	The number of days that audit trails remain accessible.
<b>Enable Audit Trails</b>	On/Off	Enable this setting to audit changes in Audit Trails.

iceManager

JOURNAL ^

Show Canned Responses In IM Transcript OFF

Parameter	Permissible Values	Description
<b>Show Canned Responses in IM Transcript</b>	On/Off	Disable this setting to hide the "Sent Canned Response" system message in Journal IM transcripts.

Audio Messages

Azure Region

Azure Speech Key

Parameter	Permissible Values	Description
<b>Azure Region</b>	Text.	Your Azure Speech resource region.
<b>Azure Speech Key</b>	Text.	Your Azure Speech resource Key.



## Workflow

This section allows Global Administrators to modify the workflow settings.

Max Building Block Stack Depth <a href="#">↻</a>	<input type="text" value="50"/>
Routing Cycle Detection Count <a href="#">↻</a>	<input type="text" value="10"/>
Queue Info Expiry Interval (s) <a href="#">↻</a>	<input type="text" value="1800"/>
Send Email Protocol Timeout (ms) <a href="#">↻</a>	<input type="text" value="15000"/>
Send Email Message Data Timeout (ms) <a href="#">↻</a>	<input type="text" value="12000"/>
Close Autodials on Startup <a href="#">↻</a>	ON <input checked="" type="checkbox"/>
Suppress Emergency Agent Not Found Message <a href="#">↻</a>	OFF <input type="checkbox"/>
Workflow Action Cycle Detection Count <a href="#">↻</a>	<input type="text" value="500"/>
Auto-Logon Defer Time (s) <a href="#">↻</a>	<input type="text" value="120"/>
Change History Poll Interval (ms) <a href="#">↻</a>	<input type="text" value="900000"/>
Inter-Server Heartbeat Interval (s) <a href="#">↻</a>	<input type="text" value="15"/>
Max Parallel Alert	<input type="text" value="11"/>
Maximum Number of Workflow Replies	<input type="text" value="100"/>

Enable Smart Routing	ON <input checked="" type="checkbox"/>
Use IceBar DN for Email	OFF <input type="checkbox"/>
Use IceBar DN for IM	ON <input checked="" type="checkbox"/>
Startup Trace Level	<input type="text" value="Trace Level 2"/>
Server - iceA	Override <input type="checkbox"/>
Startup Trace Mask	<input type="text" value="x All"/>
Server - iceA	Override <input type="checkbox"/>

Parameter	Permissible Values	Description
<b>Max Building Block Stack Depth</b>	Text The default is 50.	Number of levels of allowed nested building block calls.
<b>Routing Cycle Detection Count</b>	Text The default is 10.	Maximum number of routing cycles in workflow before iceServer throws an error.
<b>Queue Info Expiry Interval (s)</b>	Text The default is 1800.	Interval which indicates how often queue info is refreshed by ice.
<b>Send Email Protocol Timeout (ms)</b>	Text The default is 15000.	Protocol timeout.
<b>Send Email Message Data Timeout (ms)</b>	Text The default is 12000.	Timeout interval for ice to send email message data.
<b>Close Autodials on Startup</b>	On/Off	Enable this setting to close autodials on start-up.
<b>Suppress Emergency Agent Not Found Message</b>	On/Off	Enable this setting to suppress the emergency agent not found message.
<b>Workflow Action Cycle Detection Count</b>	Text The default is 500.	Maximum number of routing cycles in workflow before iceServer throws an error.
<b>Auto-Logon Defer Time (s)</b>	Text The default is 120.	Interval in seconds indicating how long to defer auto logon for a given user.
<b>Change History Poll Interval (ms)</b>	Text The default is 900000.	Interval in milliseconds indicating how often the change history table will be polled.

Parameter	Permissible Values	Description
<b>Inter-Server Heartbeat Interval (s)</b>	Text The default is 15.	Interval in milliseconds indicating how often server instances exchange heartbeats.
<b>Max Parallel Alert</b>	Text The default is 11.	Maximum number of alerts to send at once.
<b>Maximum Number of Workflow Replies</b>	Text The default is 100.	The maximum number of replies that workflow can send.
<b>Enable Smart Routing</b>	On/Off	Enable this setting to enable smart routing.
<b>Use iceBar DN for Email</b>	On/Off	Enable this setting to allow ice to use the agent's iceBar DN to receive email contacts.
<b>Use iceBar DN for IM</b>	On/Off	Enable this setting to allow ice to use the agent's iceBar DN to receive IM contacts.
<b>Startup Trace Level</b>	<ul style="list-style-type: none"> <li>• Trace Level 0</li> <li>• Trace Level 1</li> <li>• Trace Level 2</li> <li>• Trace Level 3</li> </ul>	Trace setting for startup
<b>Startup Trace Mask</b>	<ul style="list-style-type: none"> <li>• DBO</li> <li>• System</li> <li>• Switch</li> <li>• Engine</li> <li>• ACD Manager</li> <li>• Queue Routing</li> <li>• All</li> </ul>	Options indicating which workflow components will output trace logs.

## Virtual Workflow Sessions

Description:

ADD ^

Server

Session Name

UC Group ID

Contact Type

Number of Sessions

Restart Delay

Run Once  ON

Session Data

---

Server	Session Name	UC Group ID	Contact Type	Number Of Sessions	Restart Delay	Run Once	Session Data	Action
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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.
UC Group ID	Dropdown list of configured UC Groups	The selected UC Group ID.
Contact Type	<ul style="list-style-type: none"> <li>• Voice</li> <li>• Email</li> <li>• IM</li> </ul>	The type of contact that the virtual workflow session is dealing with.
Number of Sessions	Text	The number of workflow sessions.
Restart Delay	Text	The number of seconds to delay between subsequent invocations of the session, if <i>Run Once</i> is off.

Parameter	Permissible Values	Description
Run Once	On/Off	Turn this setting on to run the session only once.
Session Data	Text	The data passed into the virtual workflow session on start-up.

## UC

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

### Global

The screenshot shows a configuration page with a sidebar on the left containing the following items: Global (selected), Voice, IM, UCMA, ACS, and Recording. The main content area shows the 'Append SwitchID Param to SIP' setting, which is currently turned OFF, indicated by a blue toggle switch.

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

### Voice

Agent Fallback Behaviour	None
Agent Receive DTMF	OFF <input type="checkbox"/>
Asserted Phone Uri Regex	<code>^\+7\d{10,}\$</code>
Call Waiting Interval (s)	20
Default Refer Mode	ON <input checked="" type="checkbox"/>
Hold Reminder Interval (s)	10
Password DTMF Timeout (s)	5
AV Reject Code	486
Telephone Command	OFF <input type="checkbox"/>
Treat SIP URI As Phone Number	OFF <input type="checkbox"/>

Parameter	Permissible Values	Description
<b>Agent Fallback Behaviour</b>	<ul style="list-style-type: none"> <li>None</li> <li>PSTN</li> <li>SIP</li> </ul>	This setting specifies the fallback behaviour as: <ul style="list-style-type: none"> <li>None: No fallback defined.</li> <li>PSTN: Fallback will retry the user's Remote DN without the Direct Routing as a PSTN call.</li> <li>SIP: Fallback to the user's IM SIP Address URI via Skype for Business Federation.</li> </ul>
<b>Agent Receive DTMF</b>	On/Off	Turn this setting on to allow agents to receive DTMF.

Parameter	Permissible Values	Description
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
Password DTMF Timeout (s)	Text Default is 5.	Timeout interval for a user to input their password when a password callback is initiated from ice.
AV Reject Code	Text Default is 486	The return code the server sends to the client when rejecting an AV contact.
Telephone Command	On/Off	Turn this setting on to allow telephone commands.
Treat SIP URI as Phone Number	On/Off	Turn this setting on to allow ice to treat SIP URIs as phone numbers.

## IM

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

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

### UCMA

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

Parameter	Permissible Values	Description
Conference Deactivation	Text	Number of seconds that the TIM will delay before deactivating conferences.



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

ACS

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

Parameter	Permissible Values	Description
<b>Primary ACS Connection String</b>	Text	The primary ACS endpoint.
<b>Secondary ACS Connection String</b>	Text	The secondary ACS endpoint.
<b>Active ACS Connection String</b>	<ul style="list-style-type: none"> <li>Primary ACS Connection String</li> </ul>	The active ACS connection string.

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

## Recording

Enable Recording ON

Recording Manager URI

Server - iceA

Server - iceB

Parameter	Permissible Values	Description
<b>Enable Recording</b>	On/Off	Enable this setting to enable recording.
<b>Recording Manager URI</b>	Text	URI for the recorders.

## iceMail

Message Protocol Timeout (ms)	<input type="text" value="10000"/>
Message Data Timeout (ms)	<input type="text" value="120000"/>
Keep Additional Emails (Internal)	ON <input checked="" type="checkbox"/>
Keep Additional Emails (External)	ON <input checked="" type="checkbox"/>

Parameter	Permissible Values	Description
<b>Message Protocol Timeout (ms)</b>	Text	Protocol timeout.
<b>Message Data Timeout (ms)</b>	Text	Message timeout.
<b>Keep Additional Emails (Internal)</b>	On/Off	If this setting is enabled, any non-iceMail email addresses on internal inbound emails will be tracked and used to populate workflow variables as documented and used as the default set of addresses to send messages to the external side. If set to false, the existing ice 12 behaviour of dropping these addresses will be used.
<b>Keep Additional</b>	On/Off	If this setting is enabled, any non-iceMail email addresses on external inbound emails will be tracked and

Parameter	Permissible Values	Description
<b>Emails (External)</b>		used to populate workflow variables as documented and used as the default set of addresses to send messages to the external side. If set to false, the existing ice 12 behaviour of dropping these addresses will be used.

## icelDentity

Core	Workflow	Virtual Workflow Sessions	UC	iceMail	icelDentity	Microsoft Graph	Services	Api Keys
Identity URL	<input type="text"/>							
Legacy Identity URL	<input type="text"/>							
Use Legacy Identity URL <a href="#">?</a>	OFF <input type="checkbox"/>							
Login URL <a href="#">?</a>	<input type="text"/>							
icelMRSservice Redirect URI <a href="#">?</a>	<input type="text"/>							
Accepted Referrers <a href="#">?</a>	<input type="text"/>							
Refresh Token Expire Time (s) <a href="#">?</a> <a href="#">?</a>	<input type="text" value="600"/>							
Access Token Expire Time (s) <a href="#">?</a> <a href="#">?</a>	<input type="text" value="300"/>							
Cookie Expire Time (s) <a href="#">?</a>	<input type="text" value="10"/>							
Auto Link On First Login <a href="#">?</a>	OFF <input type="checkbox"/>							
WS-Fed: Azure AD Metadata URI <a href="#">?</a>	<input type="text"/>							
WS-Fed: Azure AD App ID URI <a href="#">?</a>	<input type="text"/>							
OIDC: Azure AD Authority <a href="#">?</a>	<input type="text"/>							
OIDC: Azure AD Client ID <a href="#">?</a>	<input type="text"/>							
OIDC: Azure AD Secret <a href="#">?</a>	<input type="password" value="*****"/>							
ADFS Address <a href="#">?</a>	<input type="text"/>							
OKTA Entity ID <a href="#">?</a>	<input type="text"/>							
OKTA Metadata Location <a href="#">?</a>	<input type="text"/>							
External Identity Provider	None <input type="text"/>							
External Identity Provider Caption	Français (Canada) <input type="text" value="Utiliser l'authentifiant de Windows"/>							
	English (Canada) <input type="text" value="Use Windows Credentials"/>							

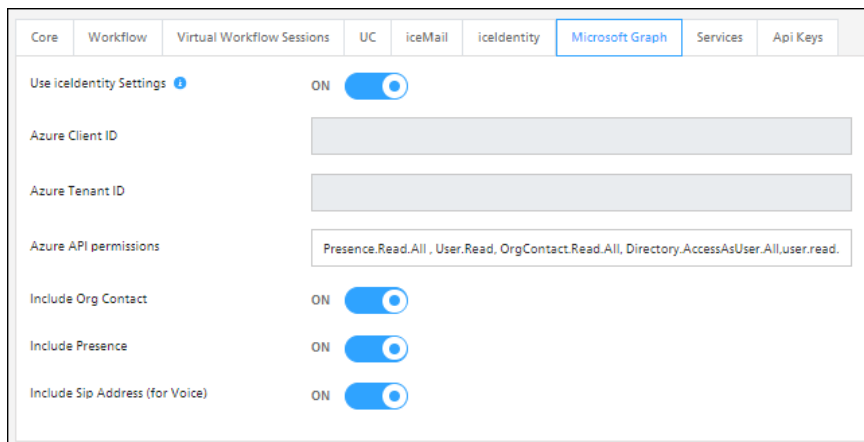
Parameter	Permissible Values	Description
Identity URL	Text	URL for Identity.

Parameter	Permissible Values	Description
<b>Legacy Identity URL</b>	Text	URL for Legacy Identity.
<b>Use Legacy Identity URL</b>	Off/On	If enabled, Legacy Identity URL will be used instead of Identity URL.
<b>Login URL</b>	Text	URL for login.
<b>iceIMRService Redirect URI</b>	Text	URI for iceIMRService redirects.
<b>Accepted Referrers</b>	Text	The accepted referrers.
<b>Refresh Token Expire Time (s)</b>	Text	Interval which indicates how old the refresh token can be before it expires.
<b>Access Token Expire Time (s)</b>	Text	Interval which indicates how old the access token can be before it expires.
<b>Cookie Expire Time (s)</b>	Text	Interval which indicates how old a cookie can be before it expires.
<b>Auto Link on First Login</b>	On/Off	When enabled, if a SSO user logs in and their token does not match an assigned AD GUID, icelidentity will check if the user's email matches an agent. On the first match, icelidentity will assign the user's AD GUID to the user and proceed with the login.
<b>WS-Fed: Azure AD Metadata URI</b>	Text	The URI for the Azure AD Metadata.
<b>WS-Fed: Azure AD App ID URI</b>	Text	The URI for the Azure AD App ID.
<b>OIDC: Azure AD Authority</b>	Text	The address for the Azure AD Authority OIDC.
<b>OIDC: Azure AD Client ID</b>	Text	Application ID of the registration in Azure AD.

Parameter	Permissible Values	Description
<b>OIDC: Azure AD Secret</b>	Text	The Azure secret value.
<b>ADFS Address</b>	Text	The ADFS address.
<b>OKTA Entity ID</b>	Text	The OKTA entity ID.
<b>OKTA Metadata Location</b>	Text	The location of the OKTA metadata.
<b>External Identity Provider</b>	Options include: <ul style="list-style-type: none"> <li>• None</li> <li>• AzureAD</li> <li>• AzureADOIDC</li> <li>• ADFS</li> <li>• OKTASAML</li> </ul>	The external identity provider used for single sign-on.
<b>External Identity Provider Caption</b>	Text	The text displayed on the single sign-on button on the logon page.

## Microsoft Graph Settings

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



Setting	Value
Use icelDentity Settings	ON
Azure Client ID	
Azure Tenant ID	
Azure API permissions	Presence.Read.All, User.Read, OrgContact.Read.All, Directory.AccessAsUser.All,user.read.
Include Org Contact	ON
Include Presence	ON
Include Sip Address (for Voice)	ON

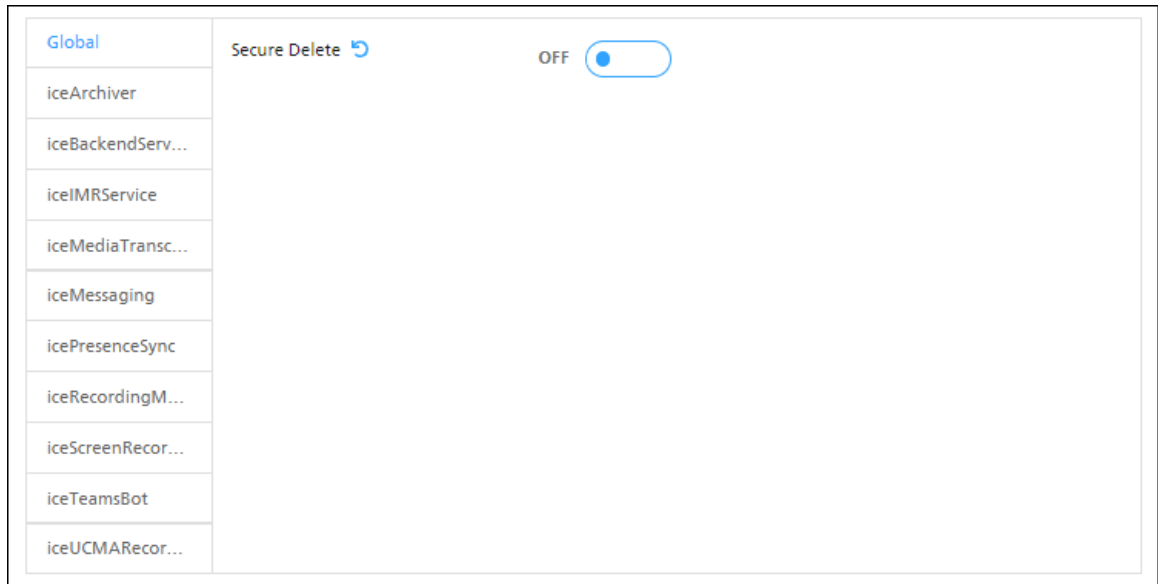


Parameter	Description
<b>Use icelDentity Settings</b>	If enabled, the Azure Client ID and Azure Tenant ID fields will be disabled and the settings configured in the icelDentity tab will be used instead. <b>Note:</b> Ensure that Azure AD OIDC SSO is set up prior to enabling this setting.
<b>Azure Client ID</b>	Application ID of the registration in Azure AD.
<b>Azure Tenant ID</b>	Azure AD Tenant ID.
<b>Azure API permissions</b>	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.
<b>Include Org Contact</b>	If enabled, organizational contacts (e.g. contacts created as mail contacts in a GAL) will be included in the search results.
<b>Include Presence</b>	If enabled, Teams presence will show on contact search results for organizational contacts.
<b>Include Sip Address (for Voice)</b>	If enabled, the Sip address for voice will be displayed.

## Services





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

Global





Parameter	Description
<b>Secure Delete</b>	Overwrites a deleted file's on-disk data using techniques that are shown to make disk data unrecoverable. Makes use of the application SDelete, which implements the Department of Defense clearing and sanitizing standard DOD 5220.22-M to securely delete existing files.

iceArchiver

Global	Archiver Max Retry  	<input type="text" value="3"/>
iceArchiver		
iceBackendServ...	IMR Retry Timeout (ms)  	<input type="text" value="60000"/>
iceIMRService		
iceMediaTransc...		
iceMessaging		
icePresenceSync		
iceRecordingM...		
iceScreenRecor...		
iceTeamsBot		
iceUCMARacor...		

Parameter	Description
<b>Archiver Max Retry</b>	The maximum number of retries for the archiver to process recordings.
<b>IMR Retry Timeout (ms)</b>	The time in milliseconds that the service will wait before attempting to reconnect to the iceIMR service after a failure.

iceBackendService

Global	Enable External WebApi Port  ON <input checked="" type="checkbox"/>
iceArchiver	
iceBackendServ...	WebApi Accepted Referrers  <input type="text"/>
iceIMRService	
iceMediaTransc...	
iceMessaging	
icePresenceSync	
iceRecordingM...	
iceScreenRecor...	
iceTeamsBot	
iceUCMARecor...	

Parameter	Description
<b>Enable External WebApi Port</b>	If this setting is enabled, external WebApi Ports will be enabled.
<b>WebApi Accepted Referrers</b>	The list of WebApi Accepted Referrers.

iceIMRService

Global	IMR HOST	
iceArchiver	ice Reconnect Delay ⓘ ↻	90
iceBackendService	Max Active Send ⓘ ↻	10000
iceIMRService	Accepted Referrers ⓘ ↻	
iceMediaTranscoder	Reconnect Time Check (s) ⓘ ↻	70
iceMessaging	Stream Verification Timeout (s) ⓘ ↻	30
icePresenceSync	Stream Verification ⓘ ↻	ON <input checked="" type="checkbox"/>
iceRecordingManager	Reconnect Failover Attempts ↻	2
iceScreenRecorder	Enable Manual Failover In iceMonitor ↻	ON <input checked="" type="checkbox"/>
iceTeamsBot	Stats Update Interval (ms) ↻	5000
iceUCMAREcorder	Download Expiry Time (m) ↻	1440

EMAIL ALERT	
From Address ↻	<input type="text"/>
Alert Subject ↻	<input type="text"/>
SMTP Server ↻	<input type="text"/>
SMTP Server Port ↻	<input type="text"/>
SMTP Enable SSL ↻	ON <input checked="" type="checkbox"/>
SMTP Username ↻	<input type="text"/>
SMTP Password ↻	<input type="password"/>

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

Parameter	Permissible Values	Description
		and ice client connections. If this buffer reaches the maximum buffer size, messages will be dropped.
<b>Accepted Referrers</b>	Text	The list of origin domains to allow in CORS requests delimited by comma. If left blank, it will allow all domains. This list is also used to verify referrer for recordings.
<b>Reconnect Time Check (s)</b>	Text	The amount of time to wait in seconds before restarting the service after a fault if there have been no pings.
<b>Stream Verification Timeout (s)</b>	Text	The time in seconds to wait for the browser to verify the recording.
<b>Stream Verification</b>	ON/OFF	If enabled, the connection will be verified before playing the recording.
<b>Reconnect Failover Attempts</b>	Text	The number of reconnect failover attempts allowed.
<b>Enable Manual Failover in iceMonitor</b>	ON/OFF	If enabled, manual failover in iceMonitor will be allowed.
<b>Stats Update Interval (ms)</b>	Text	The time in milliseconds between statistic updates.
<b>Download Expiry Time (m)</b>	Text	The time in minutes before a download expires.
<b>Email Alert</b>		
<b>From Address</b>	Text	The address that the email alert will be sent from.
<b>Alert Subject</b>	Text	The subject of the alert.

Parameter	Permissible Values	Description
SMTP Server	Text	The SMTP server address.
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.

#### iceMediaTranscoder

Global	WMV To MP4 Conversion Timeout (ms) ↻	7200000
iceArchiver		
iceBackendServ...	DB Cache Time (ms) ↻	60000
iceIMRService		
iceMediaTransc...	Polling DB Interval (ms) ↻	60000
iceMessaging	Transfer Retry Interval (ms) ↻	10000
icePresenceSync		
iceRecordingM...	Transcoding Max Number of Retries ↻	3
iceScreenRecor...		
iceTeamsBot		
iceUCMARecor...		

Parameter	Description
WMV to MP4 Conversion Timeout (ms)	The maximum wait time in milliseconds for the conversion process from WMV to MP4.
Polling DB Interval (ms)	After checking the database for any new recording merge jobs to transcode and not finding any new jobs

Parameter	Description
	to process, iceMediaTranscoder will wait for the specified interval before polling the database for any new merge jobs.
<b>Transcoding Max Number of Retries</b>	The maximum number of retry attempts for the transcoding process.

### iceMessaging

Global		
iceArchiver	Allowed Addresses <a href="#">?</a> <a href="#">↺</a>	<input type="text"/>
iceBackendS...		
iceIMRService	Allowed Hash Add on <a href="#">?</a> <a href="#">↺</a>	ice
iceMediaTra...	Log Messages <a href="#">↺</a>	ON <input checked="" type="checkbox"/>
<b>iceMessaging</b>		
icePresenceS...	Cors Origins <a href="#">?</a> <a href="#">↺</a>	<input type="text"/>
iceRecordin...		
iceScreenRe...	IMR Retry Timeout (ms) <a href="#">?</a> <a href="#">↺</a>	10000
iceTeamsBot	AAD Tenant ID <a href="#">?</a> <a href="#">↺</a>	XXXXXXXX-XXXX-XXXX-XXXX-XXXX
iceUCMARE...	AAD Workflow Verification Password <a href="#">↺</a>	.....
	SignalR Connection Timeout (s) <a href="#">?</a> <a href="#">↺</a>	110
	SignalR Disconnect Timeout (s) <a href="#">?</a> <a href="#">↺</a>	30
	SignalR KeepAlive Timeout (s) <a href="#">?</a> <a href="#">↺</a>	10

Parameter	Description
<b>Allowed Addresses</b>	The allowed addresses, delimited by a comma.



















Parameter	Description
Allowed Hash Add on	If specified, it will allow a destinationHash to be specified to allow flexible allowed addresses.
Log Messages	If this setting is enabled, messages will be logged.
Cors Origins	The list of origin domains to allow in CORS requests delimited by comma. If left blank, it will allow all domains. <b>Note:</b> This will log a security error.
IMR Retry Timeout (ms)	The time in milliseconds that the service will wait before attempting to reconnect to the iceIMR service after a failure.
AAD Tenant ID	The Azure Active Directory Tenant ID from the Azure Application setup for iceMessaging SSO. This is a GUID.
AAD Workflow Verification Password	The Azure Active Directory workflow verification password.
SignalR Connection Timeout (s)	The maximum number of seconds that long polling connections will wait for a response before triggering a timeout command to make the client reconnect.
SignalR Disconnect Timeout (s)	The maximum number of seconds after a transport connection is lost before raising the Disconnected event to terminate the SignalR connection.
SignalR KeepAlive Timeout (s)	For transports other than long polling, send a keepalive packet every X seconds. This value must be no more than 1/3 of the DisconnectTimeout value.

[icePresenceSync](#)

Global	ice Reconnect Interval (s) ↻	<input type="text" value="30"/>
iceArchiver		
iceBackendServ...	Skype Domain ↻	<input type="text"/>
iceIMRService	Monitored Agents ↻	<input type="text" value="1000-9999"/>
iceMediaTransc...		
iceMessaging		
icePresenceSync		
iceRecordingM...		
iceScreenRecor...		
iceTeamsBot		
iceUCMAREcor...		

Parameter	Description
<b>Ice Reconnect Interval (s)</b>	The number of seconds to wait between reconnection attempts if connection to ice is lost.
<b>Skype Domain</b>	The Skype domain of the users to be monitored.
<b>Monitored Agents</b>	A list of ice Users to be monitored. Specify both single IDs, and ranges. Default value includes all users (1000-9999).




[iceRecordingManager](#)

Global	IMR Faulted Default Privacy  	OFF <input type="checkbox"/>
iceArchiver		
iceBackendServ...	Discard Rec On Fault  	OFF <input type="checkbox"/>
iceIMRService	DB Cache Time (ms)  	<input type="text" value="60000"/>
iceMediaTransc...		
iceMessaging	IMR Retry Timeout (ms)  	<input type="text" value="10000"/>
icePresenceSync	Transfer Retry Interval (ms)  	<input type="text" value="10000"/>
iceRecordingM...		
iceScreenRecor...	Transfer Num Retries  	<input type="text" value="3"/>
iceTeamsBot	Recorder Reg Timeout (ms)  	<input type="text" value="100000"/>
iceUCMARecor...		
	Only Record Agents  	OFF <input type="checkbox"/>

Parameter	Description
<b>IMR Faulted Default Privacy</b>	If enabled, while disconnected from IMRService, privacy mode is enabled for active recordings.
<b>Discard Rec on Fault</b>	If enabled, it will discard recording for an active contact: <ul style="list-style-type: none"> <li>on failure to allocate or communicate to a recorder,</li> <li>when the associated recorder unregisters or fails to register to ice Recording Manager,</li> <li>when ice Recording Manager shuts down,</li> <li>when the recording session terminates unexpectedly</li> <li>or the recording is not stopped after the recording session terminates.</li> </ul>
<b>DB Cache Time (ms)</b>	The timeout in milliseconds that the service will wait before refreshing the cache if nothing has triggered a change.
<b>IMR Retry Timeout (ms)</b>	The time in milliseconds that the service will wait before attempting to reconnect to the iceIMR service after a failure.

Parameter	Description
Transfer Retry Interval (ms)	The interval in between transfer attempts in milliseconds.
Transfer Num Retries	The number of times it will retry a transfer before asking for new transfer parameters.
Recorder Reg Timeout (ms)	The timeout interval in milliseconds between registration verification attempts. <b>Note:</b> This value must be at least three times greater than the UCMARecorder RegistrationIdleTimeout.
Only Record Agents	If enabled, this turns on Privacy Mode when an agent is not on a call.

#### iceScreenRecorder

Global	Discard Rec On Fault (ms) 	OFF <input type="checkbox"/>
iceArchiver		
iceBackendServ...	Registration Idle Timeout (ms) 	<input type="text" value="30000"/>
iceIMRService	Registration Failed RetryTimeout (ms) 	<input type="text" value="10000"/>
iceMediaTransc...		
iceMessaging		
icePresenceSync		
iceRecordingM...		
iceScreenRecor...		
iceTeamsBot		
iceUCMARecor...		

Parameter	Description
Discard Rec on Fault (ms)	If enabled, it will discard the recording on fault.

Parameter	Description
<b>Registration Idle Timeout (ms)</b>	The amount of time the heart-beat timer will wait to verify if the connection to iceRecording is still valid after establishing a successful connection.
<b>Registration Failed RetryTimeout (ms)</b>	The amount of time the recorder will wait to try to make a new connection to iceRecordingManager if it was unable to make or verify a successful connection.

iceTeamsBot

Global	Accepted Referrers	<input type="text"/>
iceArchiver	Bot ID	<input type="text"/>
iceBackendService	Bot Secret	<input type="password" value="*****"/>
iceIMRService	IMR Retry Timeout (ms)	<input type="text" value="60000"/>
iceMediaTranscoder	Ice State Expiry (ms)	<input type="text" value="60000"/>
iceMessaging	Monitored Agent Range	<input type="text" value="1000-9999"/>
icePresenceSync	Enable Inline Email Reply	ON <input checked="" type="checkbox"/>
iceRecordingManager	Auto Ready After Email Reply	ON <input checked="" type="checkbox"/>
iceScreenRecorder	Nack Timeout (s)	<input type="text" value="30"/>
iceTeamsBot	Enable OWA	ON <input checked="" type="checkbox"/>
iceUCMARecorder	Max Inline Email Length	<input type="text" value="1000"/>
	Email Poll Time (ms)	<input type="text" value="15000"/>
	Email Poll Attempts	<input type="text" value="9"/>
	Previous Contacts Depth	<input type="text" value="5"/>
	Use Application Graph Permissions	OFF <input type="checkbox"/>
	OAuth Connection Name	<input type="text" value="iceBarForTeamsGraphAuth"/>
	Required OAuth Scopes	<input type="text" value="User.Read User.ReadBasic.All Mail.Read Mail.ReadWrite Mail.Send Team.ReadBasic.All C"/>
	Max Message Length	<input type="text" value="20000"/>
	Tenant ID	<input type="text"/>

Parameter	Description
Accepted Referrers	The list of accepted referrers.
Bot ID	The bot ID found in the Azure AD application.
Bot Secret	The secret provided when provisioning the bot.
IMR Retry Timeout (ms)	Retry interval for broken IMR connections.

Parameter	Description
<b>Monitored Agent Range</b>	The range of agents that are configured for this bot. To include all agents, enter 1000-9999.
<b>Enable Inline Email Reply</b>	If enabled, the agent will be able to reply to emails inline. Requires additional bot permissions.
<b>Auto Ready After Email Reply</b>	If inline email is enabled, this setting can be enabled to set the agent to the ready state after a reply is sent.
<b>Nack Timeout (s)</b>	The time in seconds that a NACK message should remain on a status card before being cleared.
<b>Enable OWA</b>	If enabled, OWA integration for emails will be enabled.
<b>Max Inline Email Length</b>	The maximum number of characters that will display for an email on a contact card (default 1000). Setting this to 0 disables email body display in cards.
<b>Email Poll Time (ms)</b>	Time in milliseconds between attempts to retrieve an email from the agent's inbox and display the OWA/Reply controls.
<b>Email Poll Attempts</b>	The maximum number of attempts to retrieve an email from the agent's inbox.
<b>Previous Contacts Depth</b>	The number of previous contacts that will be displayed on the contact card.
<b>Use Application Graph Permissions</b>	If Azure app is using application permissions, enable this setting.
<b>OAuth Connection Name</b>	If using User permissions, enter the name of the OAuth connection setting that was configured for the Bot.
<b>Required OAuth Scopes</b>	User.Read User.ReadBasic.All Mail.Read Mail.ReadWrite Mail.Send Team.ReadBasic.All Channel.ReadBasic.All ChannelMessage.Send Presence.Read.All

Parameter	Description
<b>Max Message Length</b>	The maximum number of characters allowed in a message.
<b>Tenant ID</b>	The Azure Active Directory tenant ID.

### iceUCMARecorder

Global	Discard Rec On Fault (ms)	OFF <input type="checkbox"/>
iceArchiver		
iceBackendServ...	Registration Idle Timeout (ms)	30000
iceIMRService	Registration Failed RetryTimeout (ms)	10000
iceMediaTransc...		
iceMessaging	Trimmer Over Under Threshold (ms)	10000
icePresenceSync	Faulted Size Monitor (MB)	200
iceRecordingM...		
iceScreenRecor...	Trim Privacy At End Of Call	OFF <input type="checkbox"/>
iceTeamsBot		
iceUCMARecor...		

Parameter	Description
<b>Discard Rec On Fault (ms)</b>	If enabled, when a recording faults, the recording will be discarded.
<b>Registration Idle Timeout (ms)</b>	The amount of time the heart-beat timer will wait to verify if the connection to iceRecording is still valid after establishing a successful connection.
<b>Registration Failed RetryTimeout (ms)</b>	The amount of time the recorder will wait to try to make a new connection to iceRecordingManager if it was unsuccessful in making or verifying a successful connection.



Parameter	Description
<b>Trimmer Over Under Threshold (ms)</b>	After trimming the recording, the recorder checks if the original wma audio file is longer or shorter than it should be based on the start and stop recording trimmer events for the contact. If this time exceeds the threshold, the recorder will log an error.
<b>Faulted Size Monitor (mb)</b>	The recorder keeps track of the size of the recorder's faulted folder. If the total size of files in this folder exceeds this value in mb, the recorder will log an error.
<b>Trim Privacy At End of Call</b>	If the call ends with recording privacy mode turned on, this final portion of the audio call with only privacy beeps will not be included in the final encoded mp3 file.

### iceApiKeys

Core	Workflow	Virtual Workflow Sessions	UC	iceMail	icelidentity	Microsoft Graph	Services	Api Keys
Event Grid				<input type="text"/>				
ImrService Cti				<input type="text"/>				
Virtual Workflow				<input type="text"/>				

Parameter	Description
<b>Event Grid</b>	Event Grid Api Key.
<b>ImrService Cti</b>	IMR Service CTI Api Key.
<b>Virtual Workflow</b>	Virtual Workflow Api Key.

### iceMail

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

## iceMail Accounts

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

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

Parameter	Details
<b>Type</b>	Type of iceMail account. User can select from one of the following options listed below: <ul style="list-style-type: none"> <li>• Internal</li> <li>• External</li> </ul>
<b>Protocol</b>	Email transfer protocol the account will be using. User can select from one of the following options listed below: <ul style="list-style-type: none"> <li>• IMAP4</li> <li>• IMAP4-SSL</li> <li>• IMAP4-OAUTH2</li> <li>• POP3</li> <li>• SMTP</li> <li>• SMTP-SSL</li> <li>• SMTP-IP-Auth</li> <li>• SMTP-User-Auth</li> <li>• SMTP-OAUTH2</li> </ul>

Parameter	Details																		
<b>Use Default Port (open to selections below if Off)</b>	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: <table border="0"> <tr> <td>IMAP4</td> <td>143</td> </tr> <tr> <td>IMAP4-SSL</td> <td>993</td> </tr> <tr> <td>IMAP4-OAUTH2</td> <td>993</td> </tr> <tr> <td>POP3</td> <td>110</td> </tr> <tr> <td>SMTP</td> <td>25</td> </tr> <tr> <td>SMTP-SSL</td> <td>587</td> </tr> <tr> <td>SMTP-IP-Auth</td> <td>25</td> </tr> <tr> <td>SMTP-User-Auth</td> <td>587</td> </tr> <tr> <td>SMTP-OAUTH2</td> <td>587</td> </tr> </table>	IMAP4	143	IMAP4-SSL	993	IMAP4-OAUTH2	993	POP3	110	SMTP	25	SMTP-SSL	587	SMTP-IP-Auth	25	SMTP-User-Auth	587	SMTP-OAUTH2	587
IMAP4	143																		
IMAP4-SSL	993																		
IMAP4-OAUTH2	993																		
POP3	110																		
SMTP	25																		
SMTP-SSL	587																		
SMTP-IP-Auth	25																		
SMTP-User-Auth	587																		
SMTP-OAUTH2	587																		
<b>Port</b>	Port used to connect to the email server.																		
<b>Display Name</b>	The name displayed with the email address.																		
<b>Server Name</b>	Name of the email server.																		
<b>User Name</b>	User name used for account authentication.																		
<b>Password</b>	Password used for account authentication.																		
<b>Email Address</b>	The email address associated with the iceMail account. This email address will be used send and receive emails.																		
<b>Active</b>	Indicates whether the iceMail account is active or not.																		
<b>Action</b>	Allows a user to edit the iceMail account settings or delete the iceMail account.																		

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

←
ICEMAIL

HELP ^

---

ADD v

Type Select Type ▼

Protocol Select Protocol ▼

Use default port ON

Display Name

Server Name

User Name

Password

Email Address

License Overflow Email

Activate ON

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

---

SERVER ASSIGNMENTS v

ASSIGNED SERVER

UNASSIGNED SERVERS Show deactivated servers  OFF

Server	Assign
Default ( icelabice9a.icelab.local:2060 )	+

To add an iceMail account:

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

To delete an iceMail account:

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

To edit an iceMail account:

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

## Settings

SETTINGS ^

Poll for new email every

Limit download per account flush ON

Limit download per account flush to (emails)

Pause inbound queue while processing outbound messages OFF

Prevent sending multiple compose reply messages ON

---

**Loop Prevention**

Allow a maximum of (emails)

from the same address every

---

**Agent Replies**

Restrict replies to be from handling agent only OFF

---

Activate detailed trace ON

Max memory usage for message caching (MB)

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

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

## Servers

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

ID	Name	Short Name	DNS Name	Port	Mode	Internal DNS Name	Interflow Address	Starting Contact ID	Contact ID Increment	State	Connection Time	Action	Active
1	iceA	iceA	iceA.computer-talk.com	2060	TCP	iceA.computer-talk.com	I	318	10	Connected	12.10:53:16		ON <input checked="" type="checkbox"/>
2	iceB	iceB	iceB.computer-talk.com	2060	TCP	iceB.computer-talk.com		1000	10	Closed	-N/A-		OFF <input type="checkbox"/>

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



Parameter	Details
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.

← SERVERS

ADD

Name

Short Name

DNS Name

Port

Mode  TCP  TLS

Internal DNS Name

Interflow Address

Starting Contact ID

Contact ID Increment

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

ADD

To add a new server:

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

3. Click *Add* in the blue banner at the bottom of the page.

To edit an existing server:

← SERVERS

EDIT ↑ ↓ 2 of 3

Name

Short Name

DNS Name

Port

Mode  TCP  TLS

Internal DNS Name

Interflow Address

Starting Contact ID

Contact ID Increment

Note: Changing Contact ID Increment will apply to all servers

REVERT SAVE

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

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

## Languages

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

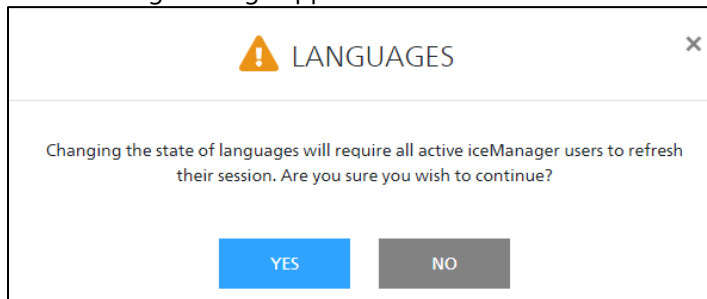
LANGUAGES			
Name	Order		Enabled
English (Canada)	0	↓	<input checked="" type="checkbox"/>
English (US)	1	↑ ↓	<input type="checkbox"/>
Français (Canada)	2	↑ ↓	<input type="checkbox"/>
Español (México)	3	↑	<input type="checkbox"/>

To turn on a language option:

1. Select the toggle under the Enabled column.



2. The following message appears:



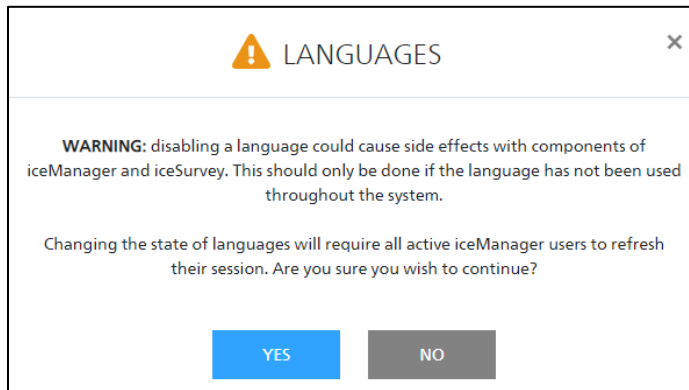
3. Select Yes to enable the language, or No to cancel.

To turn off a language option:

1. Select the toggle under the Enabled column.



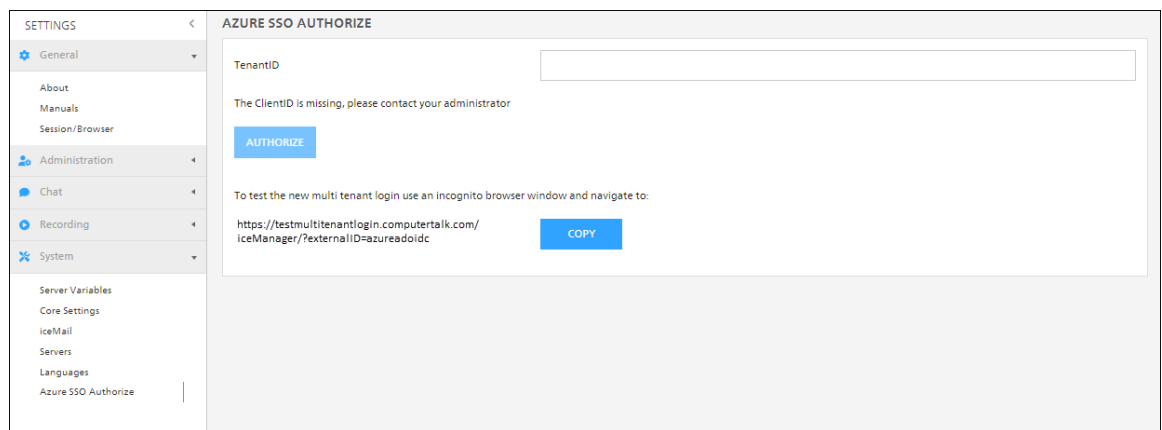
2. The following message appears:



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

## Azure SSO Authorize

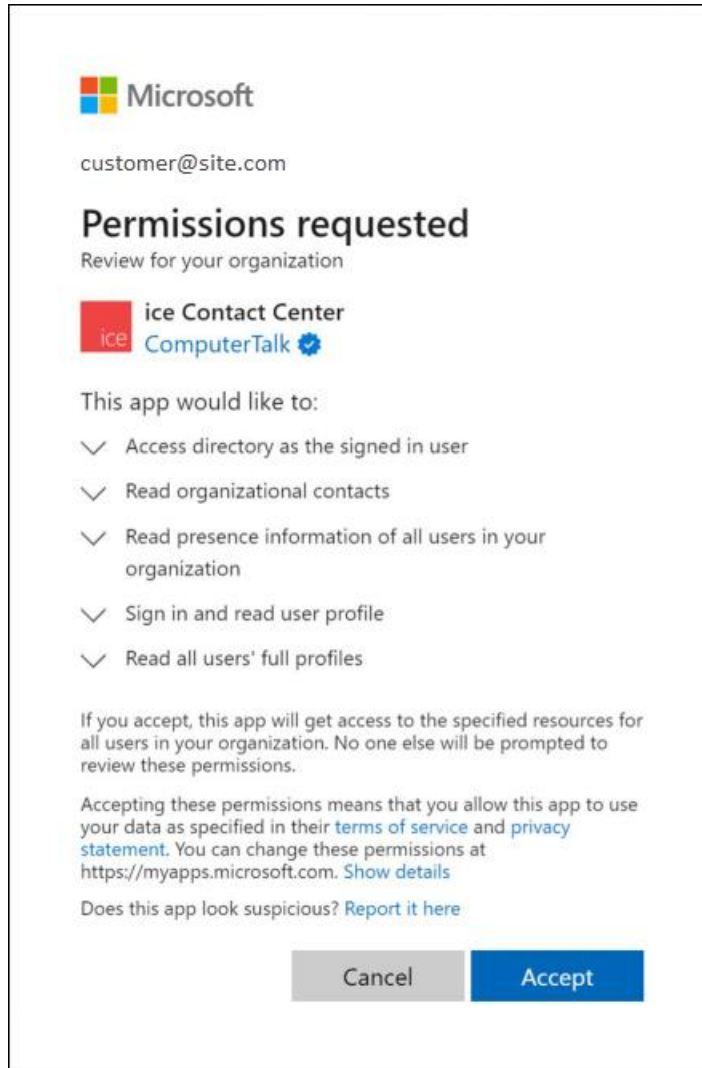
This section is only accessible by administrators. It allows an administrator with Azure administrator access, to set up multitenant single-sign on and graph search once the appropriate settings have been configured by Computer Talk.



Once Computer Talk has configured the related settings, the Azure administrator will need to complete the following steps:

1. Log into iceManager as an administrator and navigate to the Azure SSO Authorize page.
2. Enter the TenantID and click "Authorize". This will open a separate login window where you will need to enter your SSO credentials to log in.

3. After logging in, you will see the following popup that will request permissions for the application.



4. Review the requested permissions and click "Accept". You will be directed back to the iceManager page.
5. Test the login using the provided test link in an incognito browser to confirm access.



## Chapter 4: iceJournal

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

Using iceJournal, you can:

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

# iceJournal

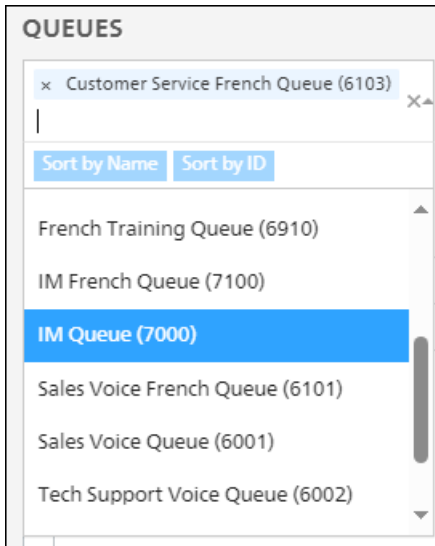
When you first click the *Journal* tab, the following screen appears. Search options and results are on the right side of the screen and filters are along the left side of the screen.

The screenshot displays the iceJournal interface. At the top, there is a navigation bar with a red menu icon, a search bar, and user information: JULIE (1301) Administrator, LOGGED OFF 00:00:19, and a settings gear icon. Below the navigation bar, the main interface is divided into three sections: SEARCH BY, QUEUES, and USERS. The SEARCH BY section includes a dropdown for Interaction Type (set to Voice) and checkboxes for Voice, Email, and Instant Message. The QUEUES and USERS sections each have a 'Select...' dropdown menu. The DATE RANGE section shows a date range of Jul 01, 2024 - Jul 30, 2024 and a blue SEARCH CONTACTS button. Below these sections is the RESULTS section, which contains a table with the following columns: Contact ID, Type, Date (sorted descending), Duration, Sender (ANI), Recipient (DNIS), User Name, Queue, User Data, and Server. The table is currently empty, displaying 'No Rows To Show'. At the bottom right of the table, there is a pagination indicator: 0 to 0 of 0 | Page 0 of 0.

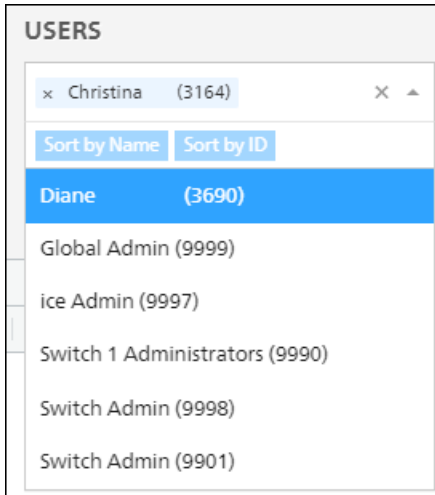
## Searching for an interaction

To search for an interaction, complete the following steps:

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



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





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

Double click on one of the preset date filters along on the right, or select a custom range. To select a custom range, use the two calendars on the left. The calendar on the left can be used to select the 'From' start date and time while the calendar on the right can be used to select the 'To' date and time.

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

QUEUES	USERS	DATE RANGE	
<input type="text" value="E-mail Queue (6004)"/>	<input type="text" value="Select users..."/>	<input type="text" value="Jan 08, 2024 - Feb 06, 2024"/>	<input type="button" value="SEARCH CONTACTS"/>

RESULTS								
Contact ID	Type	Date ↓	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data
6301	Email	2024-01-30 01:0...	00:05:10	Diane	ice13@ice13.com	Default User...	E-mail Queu...	
5601	Email	2024-01-10 11:1...	00:00:38	Andrew	ice13@ice13.com	alin (1018)	E-mail Queu...	

1 to 2 of 2    < < Page 1 of 1 > >

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

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

Column	Description
<b>Assigned LOBs</b>	The Line of Business code(s) that the handling agent assigned to the contact.
<b>Resolution Codes</b>	The Resolution code(s) that were assigned to the contact.

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 258 explains the advanced filters that are available. Only the advanced filters that have been modified from the default option will be used to filter results.

## Advanced Filters

Parameter	Description
<b>Contact Info</b>	
<b>Contact ID</b>	Enter the Contact ID of interest.
<b>User Data</b>	<p>This field contains information on the contact. Depending on the interaction type, different information is displayed.</p> <p>For voice interactions, the caller ID and the caller's responses to menu prompt may be displayed. It can also contain notes from the previous agent.</p> <p>For email interactions, user data can be empty, or it can contain notes from the previous agent.</p> <p>For instant messages, user data contains the website URL from which they entered into a chat session. It can also contain the contact's responses to menu prompts.</p>
<b>Sender (ANI)</b>	The SIP address, email address or phone number of the person who called the contact center.
<b>Receiver (DNIS)</b>	The SIP address, email address or phone number the sender had dialed, emailed, or IM'd.
<b>Subject</b>	The subject of the email.

Contact Info

**Contact ID**

**User Data**

**Sender (ANI)**

**Receiver (DNIS)**

**Subject**

**User Event**

**LOB** ⓘ


## User Event

Select the User Event associated with the contact. Options include:

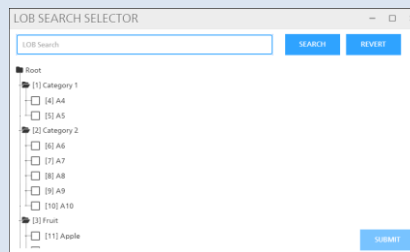
- Conferenced
- Conferencing
- Consulted
- Consulting
- In meeting
- Placed external contact
- Placed internal contact
- Received direct contact
- Received queued contact
- Received self parked contact
- Received transferred direct contact
- Received transferred queued contact

## LOB

Enter a comma delimited list of LOB codes (ie 3, 65, 346) in the text box, or click on the LOB selector button to the right of the text box to select the codes.



A screenshot of a text input field with the label "LOB" and a blue information icon. To the right of the text box is a red-bordered button with a white dropdown arrow icon.



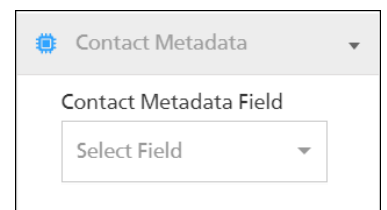
A screenshot of a dialog box titled "LOB SEARCH SELECTOR". It features a search input field with "LOB Search:" and "SEARCH" and "REVERT" buttons. Below is a tree view showing a hierarchy of LOB codes:

- Root
  - Category 1
    - 14 A4
    - 15 A5
  - Category 2
    - 16 A6
    - 17 A7
    - 18 A8
    - 19 A9
    - 19A A10
  - Fruit
    - 11 Apple


A "SUBMIT" button is located at the bottom right of the dialog.

**Note:** The Journal Search – Filter LOB Codes setting in Configuration Groups determines if Journal will only show user assigned LOBs, or all LOBs including

	deactivated LOBs and LOBs not assigned to users.
<b>Contact Metadata</b>	
<b>Contact Metadata Field</b>	<p>Select from the drop-down list containing the available contact metadata fields. This filter will return contacts that have data populated in the specified field.</p> <p><b>Note:</b> The visibility of each contact metadata fields is configured in the contact metadata field settings. For more information, refer to Contact Metadata Field.</p>
<b>Contact Metadata Value</b>	<p>This field is only available if a Contact Metadata Field has been selected. Further filter your search results to search for a specific value in the contact metadata field.</p> <p>This is an optional field.</p>
<b>Evaluation</b>	
<b>Evaluation Status</b>	<p>Select from the drop-down list containing the current evaluation status of the recording. Options that you can select are listed below:</p> <ul style="list-style-type: none"> <li>• Not Evaluated</li> <li>• Being Evaluated</li> <li>• Evaluated</li> <li>• Unknown</li> </ul>




<b>Evaluator ID</b>	Type the ID of an evaluator to filter results by the interactions that he/she evaluated.
<b>Recording</b>	
<b>Recording Modalities</b>	Select the recording modality associated with the contact you are searching. Options that you can select are listed below: <ul style="list-style-type: none"> <li>• Any</li> <li>• Voice</li> <li>• Screen Recording</li> </ul>
<b>Recording Trigger</b>	Options that you can select are listed in Appendix B: Recording Triggers on page 321.
<b>Recording Initiator ID</b>	To find results of recordings that were initiated by a person, enter the ID of the person in this field.
<b>Transcript Text</b>	<p>Transcription search supports exact phrase search and individual word search. To search for an exact phrase such as <i>ticket number</i>, enter the phrase in double quotes: "ticket number".</p> <p>To search for two distinct words such as <i>ticket</i> and <i>number</i>, separate the two words by a space without any quotes: ticket number.</p> <p>Search also supports a combination of the two. To search for an exact phrase such as <i>ticket number</i> and a distinct word</p>

 Evaluation ▼

Evaluation Status

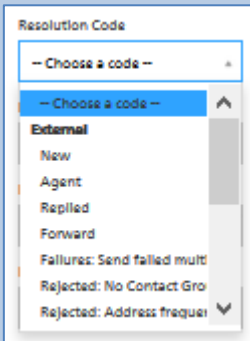
Evaluator ID

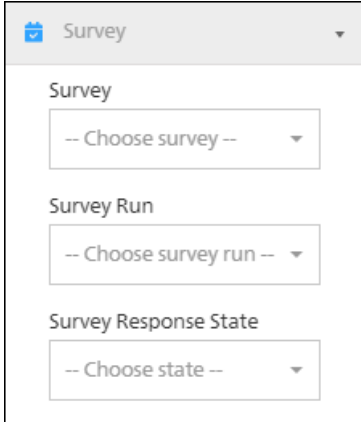
 Recording ▼

Recording Modalities:

Recording Trigger

Recording Initiator ID

	such as <i>ice</i> , enter the following: "ticket number" ice.
<b>Survey</b>	
<b>Survey</b>	Select the Survey name for the survey used by the contact. Options include all surveys created within the system.
<b>Survey Run</b>	Select the Survey Run name for the survey used by the contact. Options include all the survey runs created within the system.
<b>Survey Response State</b>	Select the Survey Response state for responses associated with the contact. For more information on Survey Response States, refer to the <i>iceReporting User Manual</i> .
<b>Miscellaneous</b>	
<b>Resolution Code</b>	Select from the drop-down list containing resolution codes configured for your contact center.  
<b>ice Servers</b>	Select the ice server used when the contact entered the system.



Survey

Survey

-- Choose survey --

Survey Run

-- Choose survey run --

Survey Response State

-- Choose state --



## Attachments

Select *has attachments* to display contacts with attachments.

Miscellaneous

Resolution Code  
-- Choose a code --

ice Servers  
-- Choose ice server --

Attachments  
-- Choose a attachment --

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

**RESULTS**

Drag here to set row groups

Contact ID	Type	Date ↓	Duration	Sender (ANI)	Re
6301	Email	2024-01-30 01:0...	00:05:10	Diane	1
5601	Email	2024-01-10 11:1...	00:00:38	Andrew	1

**DETAILS**

Contact ID: **6301** Duration: **00:05:10**

**Start Time** January 30, 2024 01:00:11 PM  
**End Time** January 30, 2024 01:05:21 PM

Contact Modalities: Email  
Sender: **Diane**

Receiving Address:  
Contact Group Name: Default Name (1)  
User Data: WATCH OUT FOR: help  
Users: Default User (1000)  
Handled Queues: E-mail Queue (6004)  
Server: IceA  
Contact Links: [Associated Email 6311](#)

**RESOLUTION CODE**

Resolution Code: Replied (External) **EDIT**

**CONTACT SEGMENTS**

ID	Start Time	Agents	Queues	Recording
0	2024-01-30 1:00:11 p.m.			
1	2024-01-30 1:00:46 a.m.	1000 (Received queued email)	6004	

1 to 2 of 2 | Page 1 of 1

## Interpreting the Details Frame

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

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

Field	Description
	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.
<b>Users</b>	The name and ID of the users who handled the interaction are displayed here.
<b>Handled Queues</b>	The name and ID of the queues the interaction occurred in.
<b>Server</b>	The ice server used when the contact entered the system.
<b>Contact Links</b>	Journal links to any contacts associated with the selected contact.
<b>Resolution Code section</b>	This section contains options for selecting resolution codes. This section appears for interactions that involve email. Select the appropriate resolution code from the <i>Choose a code</i> drop-down and click <i>Apply</i> .
<b>LOBs Assigned</b>	<p>This section contains information about the LOB codes assigned to a contact including the LOB ID, the LOB name, the time applied and the user who applied the code.</p> <p>Team Leaders, Supervisors and Administrators can assign additional codes to the contact.</p>
<b>Contact Summary</b>	The Contact Summary job is available out of the box for users with call recordings enabled and transcription services. This job will generate a summary of voice contacts based on the transcription, and display the summaries in the Contact Summary section.
<b>Contact Metadata</b>	This table shows the data generated in the contact metadata fields that have been configured to display in journal.

Field	Description
<b>Contact Metadata Job History</b>	This table shows the state of all contact metadata jobs that have run. Options include Created, Running, Complete or Failed.
<b>Contact Segments section</b>	<p>A Contact segment is made anytime the agent Roster of the call changes.</p> <p>The contact Segments table gives a list of agents that were present on that segment of the call, what queues the call was handled from and the time when the segment was generated.</p>
<b>Contact Attachments</b>	<p>This section contains links to all attachments uploaded in a contact.</p> <p>The contact attachments table provides information on the segment ID in which the attachment was uploaded, the file name of the attachment, the upload time, who uploaded the file and the file size.</p> <p>The download button allows agents to download the attachment and follows the same permissions as segmented call recordings.</p> <p><b>Caution:</b> Only administrators have the ability to delete chat attachments. Any chat attachments that have been deleted can not be recovered.</p>
<b>Recordings</b>	<p>This section contains information about interactions including the recordings. Depending on the interaction type, different information is displayed. If the recording was not enabled and recordings were not made, the Recording column will be empty.</p> <p>For voice interactions, the ID of the agent who handled was handling the contact during this segment of the call is displayed. The reason why the agent has been added to this segment is also displayed. Where available, the recording can</p>

Field	Description
	<p>be heard and also downloaded from this section. The playback speed can be adjusted by clicking on the speed icon next to the play button and toggling through the available options (0.5x, 1x, 1.5x and 2x). If a recording is not available, the message "No file is available for this recording" is displayed. Under the Recording column, 'Jump to' allows you to jump to the selected segment within the recording.</p> <p>For email interactions, the email icon and the subject of the email are displayed. To view and/or download a copy of the email, click the down arrow. In the expanded view, you will see the From address, To address, any Cc'd emails, Sent date and time, Subject line, and message. Under the transcript is the <i>Download</i> button – click to download a copy of the transcript.</p> <p>For instant message interactions, the IM icon is displayed. To view and/or download a copy of the IM transcript, click the down arrow. In the expanded view, you will see the conversation stream. Under the transcript is the <i>Download</i> button – click to download a copy of the transcript.</p> <p><u>File formats for downloaded files</u></p> <p>Voice calls can be downloaded in MP3 format. Email can be downloaded in .eml format, which can be opened in a number of common mail viewers. Instant messages can be downloaded as a text file.</p>
<b>Transcript</b>	<p>If transcription services are enabled, the call transcript will be displayed in this section.</p> <p>The transcripts are generate for each contact segment and will show the transcription of the conversation during each segment.</p>

Field	Description
	<p>In addition to the text, each transcript segment will display the status of the transcription, and the datetime stamp of the last state change.</p> <p>Administrators can delete transcripts by contact segment.</p>
<b>Screen Recording</b>	<p>This section contains information about screen recordings.</p> <p>For screen recordings, the segment ID of the contact is displayed. Where available, the recording can be viewed and also downloaded from this section.</p> <p>There are two options for viewing a screen recording:</p> <ul style="list-style-type: none"> <li>• View Prxrec: on-demand transcoding, which will only convert the screen recording to a viewable format on request. It is more efficient from a resource usage perspective.</li> <li>• View MP4: available if the screen recording has already been transcoded. This allows the user to view the recording in a MP4 format.</li> </ul> <p><b>Note:</b> Screen recording can be enabled during wrap-up. If enabled, the maximum time for screen recording in wrap-up is configurable and defaults to 1 hour. For more information, refer to <i>Recording Settings</i>.</p>
<b>Evaluation section</b>	<p>This section contains options for evaluations. If the interaction has not been evaluated, you can select the appropriate form from the <i>Evaluate</i> drop-down. If the interaction has already been evaluated, you can view the evaluation results or delete the existing evaluation.</p>
<b>Survey</b>	<p>This section contains information regarding the survey that this contact participated in. The information includes:</p> <ul style="list-style-type: none"> <li>• Survey Name</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• Survey Run Name</li> <li>• Completion Address</li> <li>• Completion Modality</li> <li>• State</li> </ul>
<b>Purging</b>	<p>This section allows administrators to purge voice and screen recordings. To view the purging options, click the grey arrow in the right corner of the section. You can delete specific segments of a recording using the segment ID checkbox or choose to delete the entire recording.</p> <p><b>Caution:</b> Recordings that have been purged cannot be recovered. Please ensure that you do not purge any recordings you may need in the future.</p>

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

## LOBs Assigned

The LOBs Assigned section provides information on all LOB codes assigned to the contact. Users with team lead access and above can assign additional codes to the contact as needed once the contact has been completed.

To assign an additional LOB code:

1. Expand the LOB Assigned section.



2. Select the (+) sign in the top right corner of the section to assign a new code.

LOBS ASSIGNED			
ID	Name	Time Applied	Applied By
2	Account inquiry	2024-06-20 10:28:43 a.m.	1301
3	New product request	2024-06-20 10:28:43 a.m.	1301

3. The Assign LOB window will open to show a list of all available LOB codes. If a code has already been assigned to the contact, it will be greyed out.

ASSIGN LOB

LOB Search SEARCH REVERT

- Root
  - [1] Customer Service
    - [1] Information request
    - [x] [2] Account inquiry
    - [x] [3] New product request
    - [ ] [4] Return

SUBMIT

4. Select the code you would like to assign to the contact by enabling the checkbox next to the code. Click submit.



ASSIGN LOB

LOB Search SEARCH REVERT

- Root
  - [1] Customer Service
    - [1] Information request
    - [2] Account inquiry
    - [3] New product request
    - [4] Return

SUBMIT

5. The new code has been added.

LOBS ASSIGNED +

ID	Name	Time Applied	Applied By
1	Information request	2024-06-20 1:24:21 p.m.	1301
2	Account inquiry	2024-06-20 10:28:43 a.m.	1301
3	New product request	2024-06-20 10:28:43 a.m.	1301

**Note:** You cannot unassign LOB codes.

If no LOB Codes have been assigned for the contact, you will see the following display.

NO LOBS ASSIGNED +

## Contact Metadata

### Contact Summarization

Contact Summarization uses Generative AI to generate contact summaries based on the call transcript. It provides an AI-generated summary of the interaction and can be viewed in journal, saving agents from manually writing out summaries. While the data is generated through a metadata job, the field is displayed in its own section above the other contact metadata information.

#### CONTACT SUMMARY

The customer, Joe, called about a package that was marked as delivered but was missing. The agent checked with the customer's neighbors and discovered that the package was found in the neighbor's backyard. The agent apologized for the inconvenience and promised to escalate the issue to the delivery team and add specific delivery instructions to the customer's account to prevent future occurrences.

Contact Summaries can be scheduled in the same way as recordings and transcripts. For more information, refer to Schedules. The contact summarization metadata job can also be run 'on demand' by administrators like all contact metadata jobs, provided that the metadata job state is set to Preview. For more information on contact metadata job states, refer to Contact Metadata Job

### Contact Metadata

The table below the Contact Summary field is the Contact Metadata table. This table displays the data populated by contact metadata jobs after they have been executed, within their associated fields.

## CONTACT METADATA ☰

Name	Value
Contact Summary Completion Usage	70
Contact Summary Prompt Usage	944
Next Steps	Summary of next steps: Global Admin will report the delivery issue to the delivery team and escalate the recurring problem to be addressed. They will also add specific delivery instructions to Joe's account to ensure packages are left in a secure location. They will ensure that the issue is resolved and make sure it doesn't happen again.

The blue table icon in the top right corner allows you to open the table in a new window.

### CONTACT METADATA - □ ×

ID	Value
Contact Summary Completion Usage	70
Contact Summary Prompt Usage	944
Next Steps	Summary of next steps: Global Admin will report the delivery issue to the delivery team and escalate the recurring problem to be addressed. They will also add specific delivery instructions to Joe's account to ensure packages are left in a secure location. They will ensure that the issue is resolved and make sure it doesn't happen again.

## Contact Metadata Job History

The Contact Metadata Job History table displays the list of contact metadata jobs that have run. The state will indicate whether the job has been created, running, completed or failed.

CONTACT METADATA JOB HISTORY		
ID	Name	State
1	iceVoiceContactSummary14	Complete
2	PoemGeneration	Complete
6	getNextSteps	Complete

 Preview

The preview button in the top right corner of the section allows you to run a contact metadata job 'on demand'.

**Note:** The preview button is only available for administrators and will only be available if the contact metadata job state is set to *Preview*.

Click the preview button. A list of created contact metadata jobs will appear.

PREVIEW JOB - □ ×

Preview Job

iceVoiceContactSummary14

**iceVoiceContactSummary14**

PoemGeneration

VirtualWorkflow

getNextSteps

Select the job you would like to run and click Submit.

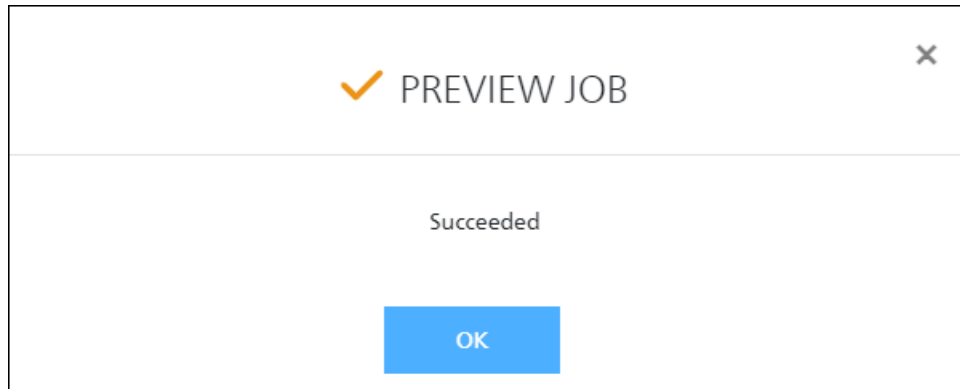
PREVIEW JOB - □ ×

Preview Job

iceVoiceContactSummary14

**SUBMIT**

You will see the following window upon submit if the preview job was successful.



If the job has already been run, the existing data in the contact metadata field will be overwritten.

**Note:** Depending on the configured job, the job can take a few minutes to complete.

## Contact Segments

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

There are 3 possible scenarios in this section:

1. There are no transcripts.

A screenshot of a table titled 'CONTACT SEGMENTS'. The table has four columns: ID, Start Time, Agents, and Queues, and a fifth column labeled 'Recording'. There is one row of data with ID 0 and Start Time 2020-11-10 4:19:41 p.m. The 'Recording' column is empty.

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

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

CONTACT SEGMENTS

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

3. Transcripts are available for viewing and download.

CONTACT SEGMENTS

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

VOICE [DOWNLOAD](#)

▶ 1x 00:00  09:50 🔊

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

## Voice Interactions

Below is a screenshot of Details section for a Voice Interaction. For more information on the information in each field, refer to Interpreting the Details Frame on page 264.

### DETAILS

Contact ID: **6461** Duration: **00:01:09**

---

**Start Time** February 02, 2024 09:32:33 AM  
**End Time** February 02, 2024 09:33:42 AM

---

Contact Modalities: Voice  
Sender: Y  
Receiving Address: ice13@ice13.com  
Contact Group Name: Inbound  
User Data:  
Users: Agent 1 (1028)  
Handled Queues:  
Server: iceA  
Recording Trigger: Bulk User

---

### CONTACT SEGMENTS

ID	Start Time	Agents	Queues	Recording
0	2024-02-02 9:32:33 a.m.			
1	2024-02-02 9:33:18 a.m.	1028 (Received direct call)		<a href="#">Jump to 00:00:00</a>

---

### VOICE

1x 00:00:00 00:00:22

---

### SCREEN RECORDING

Segment Id: 1 [DOWNLOAD](#)

---

### EVALUATION

This contact is yet to be evaluated.

[EVALUATE](#)

## Email Interactions

Below is a screenshot of Details section for an email interaction. For more information on the information in each field, refer to Interpreting the Details Frame on page 264.

### DETAILS

Contact ID: **1519** Duration: **00:10:21** X

---

**Start Time** November 10, 2020 04:16:55 PM  
**End Time** November 10, 2020 04:27:16 PM

---

Contact Modalities: Email  
Sender: **Fred(fred@gmail.com)**  
Receiving Address: ice@icescape.com  
Contact Group Name:  
User Data:  
Users:  
Queues: Email - Team 6 (7016)  
Server: ( ice.computertalk.com )

---

### RESOLUTION CODE

Resolution Code: Replied (External) EDIT


---

### CONTACT SEGMENTS


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

---

### EMAIL

 2020-11-10 04:27:16 PM DOWNLOAD ^

---

 2020-11-10 04:16:25 PM DOWNLOAD ^

---


### EVALUATION

This contact is yet to be evaluated.

EVALUATE ▾

---

### SURVEY

 AGENT FEEDBACK SURVEY 🗑️ ^



## Instant Messaging Interactions

Below is a screenshot of Details section for an instant message interaction. For more information on the information in each field, refer to Interpreting the Details Frame on page 264.

### DETAILS

Contact ID: **1470** Duration: **00:35:51**

---

**Start Time** November 02, 2020 08:44:04 AM  
**End Time** November 02, 2020 09:19:55 AM

---

Contact Modalities: IM  
Sender: **Fred** (Fred@icescape.com)  
Receiving Address: ice@computertalksandbox.com  
Contact Group Name: Default  
User Data:  
Users: Mackenzie (1061)  
Queues: Chat - Team 6 (7516)  
Server: ( ice.computertalk.com )

---

### CONTACT SEGMENTS

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

---

### INSTANT MESSAGE

[DOWNLOAD](#)

---

### EVALUATION

This contact is yet to be evaluated.

[EVALUATE](#)

---

### SURVEY

No survey responses available for this contact

## Transcript

Post-call transcription is available for users with call recording enabled, and transcription enabled. Once a transcription provider is configured, the iceTranscriber service will send the call recording to the transcription provider and will return the transcript to be displayed in journal.

**Note:** Depending on the file size, this process can take up to 15 minutes to complete.

Access to transcripts follow the same permissions as recordings. Users may only access their own call transcripts, team leaders may access the transcripts for any users assigned to their team, supervisors may access the transcripts for users assigned to a common queue, and administrators may access all transcripts.

Below is a screenshot of the transcript section for a voice call with one contact segment.

### TRANSCRIPT

Segment 1

Azure-lab13003rg

Status: Transcription Complete Last State Changed: July 12, 2024 07:32:57 AM

**Speaker 1:** Hello.

**Speaker 2:** Hello, I'm looking for Joe regarding a message you left.

**Speaker 1:** I'm Joe. I left that message. I need to talk to somebody about my package. It says it was delivered but it I didn't get it.

**Speaker 2:** Hi, Joe, I'm sorry to hear that. Let's see if we can figure out what happened. Can you give me the tracking number please?

**Speaker 1:** Yeah, sure, it's one Z999AA1 O 123456.

**Speaker 2:** Thank you, Joe. Let me look that up for you. One moment, please. OK. According to our system, the package was delivered yesterday at 3:00 PM. It says it was left at your front door.

**Speaker 1:** Well, it wasn't there when I got home. I checked everywhere around my house. I, I don't want anyone else to see it.

**Speaker 2:** I'm really sorry to hear that, Joe. Did you check with your neighbors to see if it might have been delivered to them by mistake?

**Speaker 1:** Yes, I did. And guess what? My neighbor did find it. It was in his backyard this morning. This is really, really frustrating.

**Speaker 2:** Oh no, that's certainly not how it should be. I'm very sorry for this inconvenience this has caused you. I'm sure to report this issue to our delivery team so we can address it.

**Speaker 1:** I hope this isn't the last time it'll happen. It happened one time before. I need to know what's going to happen to make sure it doesn't happen again.

**Speaker 2:** I completely understand your frustration Joe. I'll escalate this issue and ensure that our delivery team is aware of the reoccurring problem. We can also add specific delivery instructions to your account to help ensure the packages left in a secure location.

**Speaker 1:** I appreciate that because this is really unacceptable.

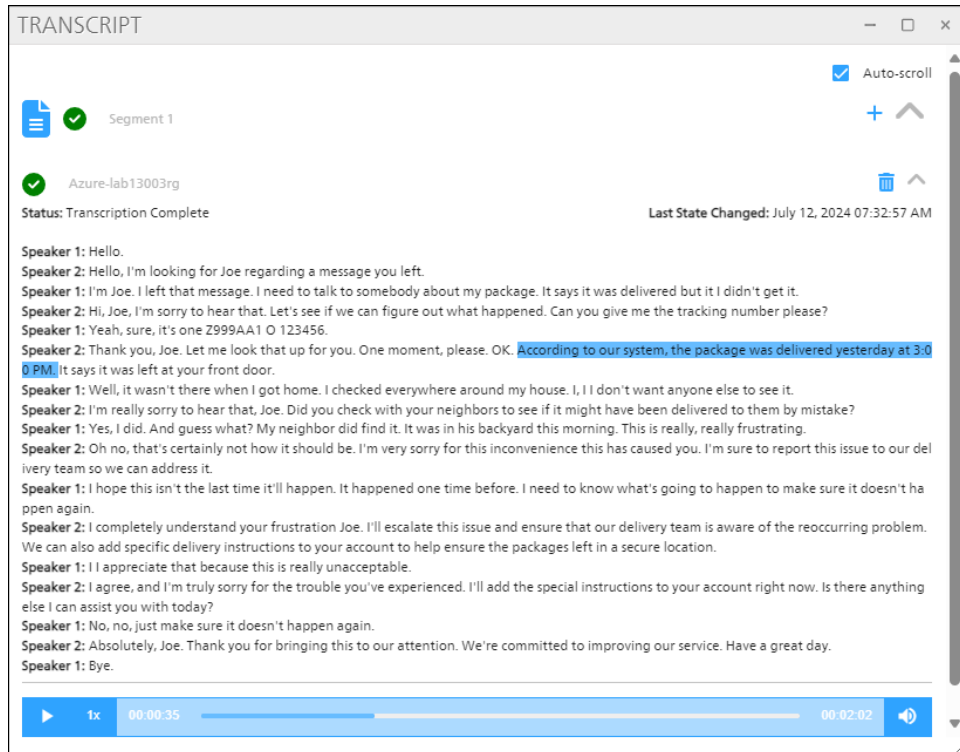
**Speaker 2:** I agree, and I'm truly sorry for the trouble you've experienced. I'll add the special instructions to your account right now. Is there anything else I can assist you with today?

**Speaker 1:** No, no, just make sure it doesn't happen again.

**Speaker 2:** Absolutely, Joe. Thank you for bringing this to our attention. We're committed to improving our service. Have a great day.

**Speaker 1:** Bye.

The buttons in the top right corner allow users to download all transcripts or open transcripts in a new window.

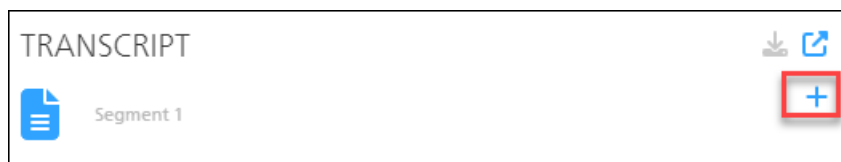


The new window consists of the transcript(s) and the audio file player. As you play the audio file, you will see the corresponding text highlighted to indicate where you are in the transcript.

Administrators have the ability to delete transcript segments.

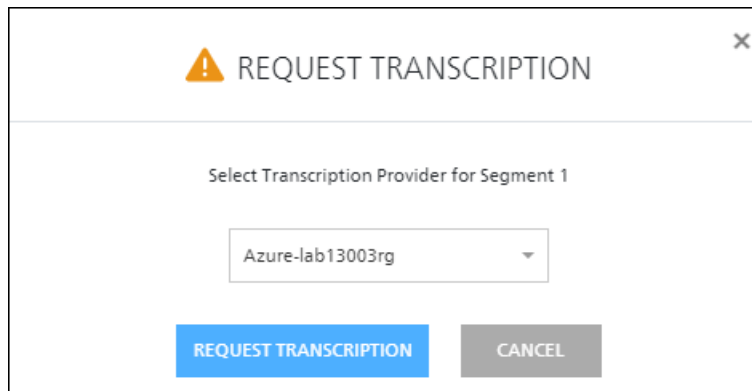
Post-call transcripts can be configured to transcribe all calls or can be scheduled to only transcribe calls that meet certain conditions. For more information, refer to Recording settings.

Transcripts can also be requested on demand for certain segments.



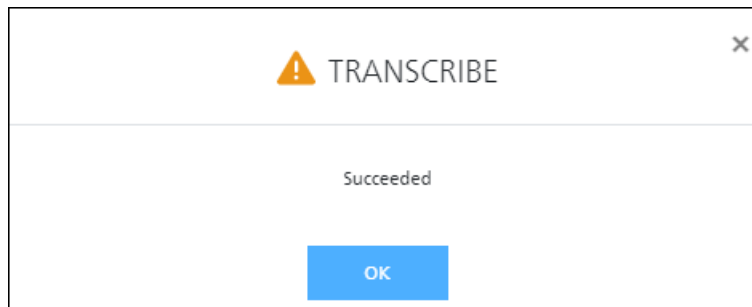
For any segments that have not been transcribed, the plus sign in the top right corner of the field allows users to request transcription.

Select the transcription provider and click *Request Transcription*.



The screenshot shows a dialog box titled "REQUEST TRANSCRIPTION" with a close button (X) in the top right corner. Below the title bar, there is a warning icon (yellow triangle with an exclamation mark) and the text "REQUEST TRANSCRIPTION". The main content area contains the text "Select Transcription Provider for Segment 1" followed by a dropdown menu showing "Azure-lab13003rg". At the bottom, there are two buttons: "REQUEST TRANSCRIPTION" (blue) and "CANCEL" (gray).

The following window will appear.



The screenshot shows a dialog box titled "TRANSCRIBE" with a close button (X) in the top right corner. Below the title bar, there is a warning icon (yellow triangle with an exclamation mark) and the text "TRANSCRIBE". The main content area contains the text "Succeeded". At the bottom, there is a single button: "OK" (blue).

## Evaluating an interaction

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

### DETAILS

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

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

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

### CONTACT SEGMENTS

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

### EVALUATION

This contact is yet to be evaluated.

**EVALUATE**

### SURVEY

The evaluation form appears in the browser window.

### EVALUATION CHRISTINA

#### DETAILS

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

**Start Time** Jun 15, 2022 2:09:22 p.m.  
**End Time** Jun 15, 2022 2:09:25 p.m.

This contact is being evaluated by **WJ**  
Evaluation Started: Jun 15, 2022 04:26:28 PM  
Evaluations Form: Customer Service [1]

#### INTERACTION

Contact Modalities: Voice  
Sender: Christina  
Receiving Address: [REDACTED]  
Contact Group Name: [REDACTED]  
User Data: [REDACTED]  
Users: Julie (1300)  
Queues: Sales Voice Queue (8001)  
Server: [REDACTED]  
Recording Trigger: Bulk Trunk Incoming

#### VOICE

**0%** **00:00**

MEDIA TRANSCRIPTS

#### GREETING

Introduction	☆☆☆☆☆	1/1	<b>0%</b>	Comment
Friendliness	NOT VERY FRIENDLY SOMEWHAT FRIENDLY FRIENDLY VERY FRIENDLY	1/1	<b>0%</b>	Comment
Said hello	☆☆☆☆☆	1/1	<b>0%</b>	Comment
<b>GREETING TOTALS</b>		0/0	<b>0%</b>	Comment

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

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

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

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

## Viewing an evaluation

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

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

- DETAILS:** Shows contact ID 5295, duration 00:02:03, start time (Jun 15, 2022, 2:09:22 p.m.), and end time (Jun 15, 2022, 2:09:25 p.m.).
- EVALUATION:** States 'This contact has been evaluated by 99', 'Evaluation Completed: June 15, 2022 04:32:38 PM', and 'Evaluations Form: Customer Service (1)'. A 'View Evaluation' button is present.
- INTERACTION:** Lists fields like Contact Mobility, Sender, Receiving Address, Contact Group Name, User State, Outlets, Server, and Recording Trigger.
- VOICE:** Includes fields for Voice Overview, Voice, and Media Transcripts.
- GREETING:** A table with columns for 'Introduction', 'Frendlines', and 'Said hello'. Each row has a star rating (5 stars), a '100%' score, and a 'View' button. A 'GREETING TOTALS' row shows a '3/3' score.

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

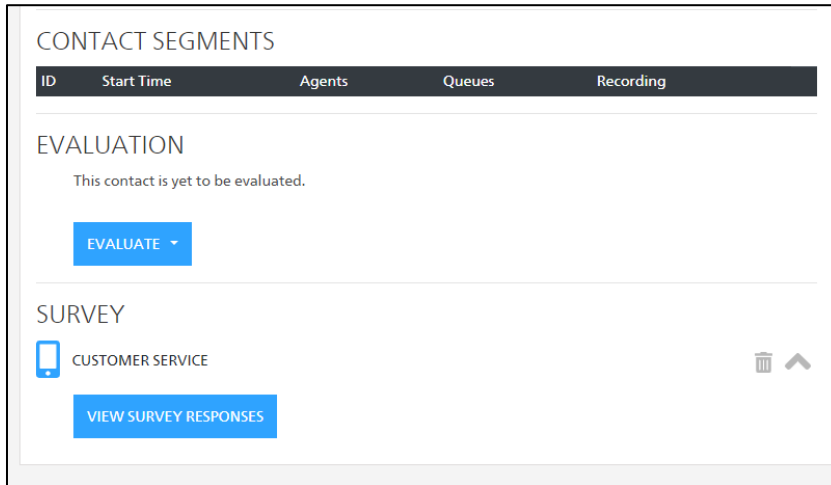
## Survey Responses

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:**

- [12.0] 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.

- [12.1] All survey responses will be displayed in Journal (including partial responses).
- 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.

← SURVEY RESPONSE

**DETAILS**

Contact ID: **14905**    Duration: **00:02:18**

Start Time: Dec. 3, 2020, 1:04:10 p.m.  
End Time: Dec. 3, 2020, 1:06:28 p.m.


**EVALUATION**  
This contact is yet to be evaluated.

**INTERACTION**

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

---

**CUSTOMER SERVICE**

Completion Address: sip:j@computer.com	Survey Introduction: n/a	
Completion Modality: Voice	Purpose of the call: n/a	
State: Completed	Representative's attitude during the call: 89%	
	Survey Conclusion: n/a	

**SURVEY INTRODUCTION** Category Total Score: N/A

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

---

**PURPOSE OF THE CALL** Category Total Score: N/A

## Purging Recordings

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

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

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

**VOICE** DOWNLOAD

▶ 1x 00:00:00  00:00:07 🔊

---

**EVALUATION**

This contact is yet to be evaluated.

EVALUATE ▾

---

**SURVEY**

No survey responses available for this contact

---

**PURGING** ▾

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.




PURGING ⬆

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

DELETE

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

 **DELETE CONTACT RECORDINGS** ✕


---

Are you sure you want to delete the following recordings?

Segment Id 1 - Audio  
 Segment Id 2 - Audio  
 Segment Id 3 - Audio  
 Segment Id 4 - Audio  
 Segment Id 5 - Audio

YES
NO

The recording has successfully been deleted.

 **DELETE CONTACT RECORDINGS RESPONSE** ✕

---

Succeeded

OK

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

# Journal Search Results Grid

## Columns Options

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

The screenshot displays the 'Journal Search Results Grid' interface. At the top, there are three filter sections: 'QUEUES' with a dropdown menu 'Select queues...', 'USERS' with a dropdown menu 'Select users...', and 'DATE RANGE' with a date picker showing 'Jan 08, 2024 - Feb 06, 2024'. A blue 'SEARCH CONTACTS' button is located to the right of the date range. Below these filters is the 'RESULTS' section. On the left side of the results area, there is a 'Columns' panel with a search field and a list of columns with checkboxes: Search..., Contact ID, Type, Date, Duration, Sender (ANI), Recipient (DNIS), User Name, Queue, User Data, Server, Assigned LOBs, and Resolution Codes. All checkboxes are currently checked. Below the columns list is a 'Groups' section with a search field and a 'Drag here to set row groups' area. The main table area is currently empty, displaying 'No Rows To Show'. The table header includes columns for Contact ID, Type, Date, Duration, Sender (ANI), Recipient (DNIS), and User Name. At the bottom right of the interface, there is a pagination indicator showing '0 to 0 of 0' and 'Page 0 of 0'.

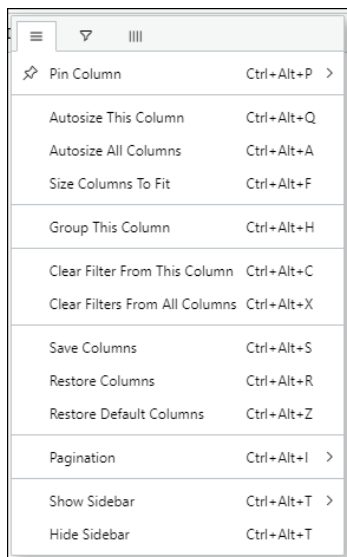
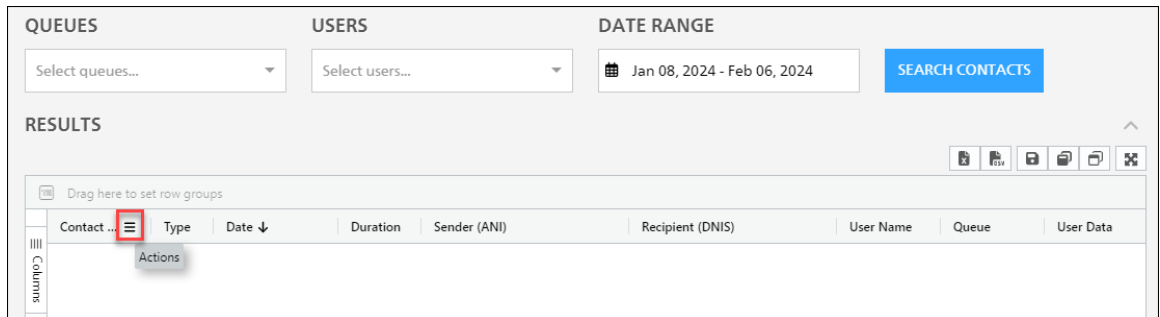
The grid will refresh with the selected columns. By default, all columns are displayed on the table.

**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 Action Menu Options	
Menu Option	Function
<b>Pin Column</b>	Select this option to lock the column on to one side of the table. Options include: <ul style="list-style-type: none"><li>▪ Pin Left</li><li>▪ Pin Right</li><li>▪ No Pin</li></ul>

Column Heading Action Menu Options	
Menu Option	Function
<b>Autosize This Column</b>	Resize the selected column to only the necessary width.
<b>Autosize All Columns</b>	Resize all columns to only the necessary width.
<b>Size Columns To Fit</b>	Resize all columns to only the minimum width.
<b>Group This Column</b>	Set a row group using this column.
<b>Clear Filter From This Column</b>	Remove all filters added to the selected column.
<b>Clear Filters From All Columns</b>	Remove all filters from all columns in the table.
<b>Restore Default Columns</b>	Revert column settings to the previous version.
<b>Pagination</b>	<p>Sets the number of rows displayed in the table.</p> <div data-bbox="558 1150 735 1451" style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <ul style="list-style-type: none"> <li>✓ Auto</li> <li>10</li> <li>100</li> <li>1000</li> <li>Off</li> </ul> </div> <p>Auto will fit as many rows as possible without using a scrollbar. Off to turn off pagination and display all rows on the same page.</p>
<b>Show Sidebar</b>	Display sidebar options including Filter and Column settings.
<b>Hide Sidebar</b>	Hide sidebar options including Filter and Column settings.

## Column Header Sorting

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

**QUEUES**      **USERS**      **DATE RANGE**

Select queues...      Select users...      Jan 08, 2024 - Feb 06, 2024      **SEARCH CONTACTS**

**RESULTS**

Drag here to set row groups

Contact ID	Type	Date ↑	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data
5601	Email	2024-01-10 11:1...	00:00:38	Andrew	ice13@ice13.com	alin (1018)	E-mail Queu...	WATCH OUT...
6151	Email	2024-01-22 01:2...	00:03:11	Bryan	ice13@ice13.com			WATCH OUT...
6301	Email	2024-01-30 01:0...	00:05:10	Diane	ice13@ice13.com	Default User...	E-mail Queu...	WATCH OUT...
6311	Email	2024-01-30 01:0...	00:04:02	Diane	ice13@ice13.com	Default User...		
6321	Email	2024-01-30 01:0...	00:04:43	Diane	ice13@ice13.com	Default User...		

**QUEUES**      **USERS**      **DATE RANGE**

Select queues...      Select users...      Jan 08, 2024 - Feb 06, 2024      **SEARCH CONTACTS**

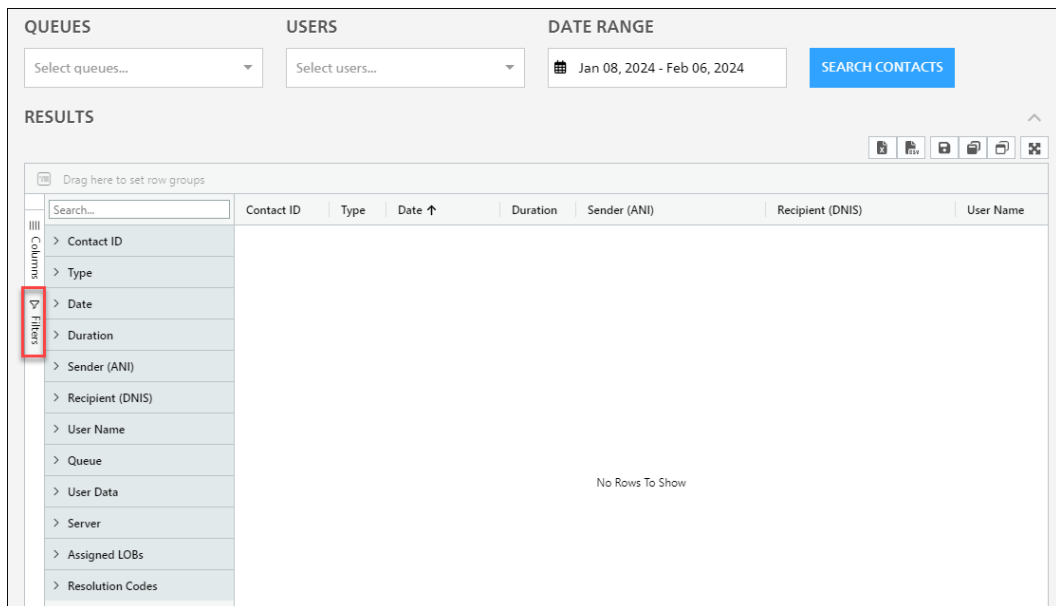
**RESULTS**

Drag here to set row groups

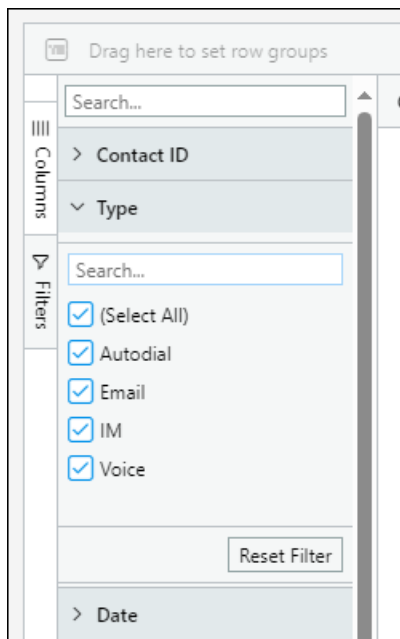
Contact ID	Type	Date ↓	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data
6321	Email	2024-01-30 01:0...	00:04:43	Diane	ice13@ice13.com	Default User...		
6311	Email	2024-01-30 01:0...	00:04:02	Diane	ice13@ice13.com	Default User...		
6301	Email	2024-01-30 01:0...	00:05:10	Diane	ice13@ice13.com	Default User...	E-mail Queu...	WATCH OUT...
6151	Email	2024-01-22 01:2...	00:03:11	Bryan	ice13@ice13.com			WATCH OUT...
5601	Email	2024-01-10 11:1...	00:00:38	Andrew	ice13@ice13.com	alin (1018)	E-mail Queu...	WATCH OUT...

## Filter Options

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



The screenshot displays a contact management interface. At the top, there are three sections: 'QUEUES' with a dropdown 'Select queues...', 'USERS' with a dropdown 'Select users...', and 'DATE RANGE' with a date picker set to 'Jan 08, 2024 - Feb 06, 2024' and a blue 'SEARCH CONTACTS' button. Below this is the 'RESULTS' section, which includes a search bar and a table. The table has columns for 'Contact ID', 'Type', 'Date', 'Duration', 'Sender (ANI)', 'Recipient (DNIS)', and 'User Name'. The table is currently empty, displaying 'No Rows To Show'. On the left side of the table, there is a 'Columns' list and a 'Filters' list. The 'Filters' list is highlighted with a red box and contains the following items: '> Date', '> Duration', '> Sender (ANI)', '> Recipient (DNIS)', '> User Name', '> Queue', '> User Data', '> Server', '> Assigned LOBs', and '> Resolution Codes'.



This close-up view shows the 'Filters' menu. It features a search bar at the top. Below it, the 'Type' filter is expanded, showing a list of contact types with checkboxes: '(Select All)', 'Autodial', 'Email', 'IM', and 'Voice'. All these checkboxes are checked. A 'Reset Filter' button is located at the bottom of the filter list. The 'Date' filter is also visible below the 'Type' filter.

The grid will refresh according to the filter conditions selected.





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

## Layout Options

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

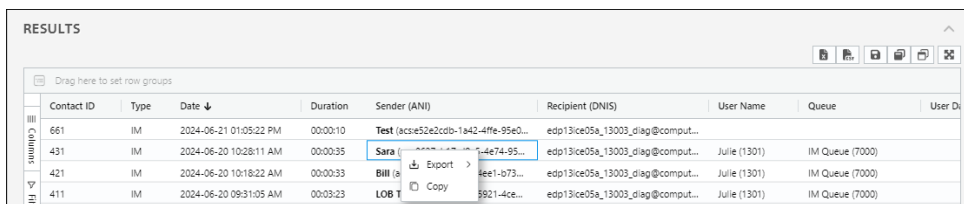


The table below provides information for each layout option.

Journal 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.
	Use the button to enter Full Screen Mode. To exit full screen, use the ESC button on your keyboard.

## Right-click menu options

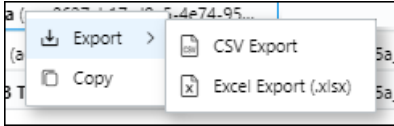
Right-click on a row in the table to perform additional tasks, such as exporting or copying the contact details.



Contact ID	Type	Date	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Di
661	IM	2024-06-21 01:05:22 PM	00:00:10	Test (acsx52e2c0b-1b42-4ffe-95e0...	edp13ice05a_13003_diag@comput...			
431	IM	2024-06-20 10:28:11 AM	00:00:35	Sara (...-4e74-95...	edp13ice05a_13003_diag@comput...	Julie (1301)	IM Queue (7000)	
421	IM	2024-06-20 10:18:22 AM	00:00:33	Bill (...ee1-b73...	edp13ice05a_13003_diag@comput...	Julie (1301)	IM Queue (7000)	
411	IM	2024-06-20 09:31:05 AM	00:03:23	LOB (...921-4ce...	edp13ice05a_13003_diag@comput...	Julie (1301)	IM Queue (7000)	

The table below provides information on right click menu options in the journal search results grid.



Journal Right-Click Menu	
Menu Option	Function
<b>Export</b>	<p>Select this option to export the contacts in the search results grid.</p> <p>When this option is selected, the following options appear:</p>  <p>Click <i>CSV Export</i> to export the results to CSV.</p> <p>Click <i>Excel Export</i> to export the results to Excel.</p>
<b>Copy</b>	Select this option to copy the contents of the selected field to the user's clipboard.

## Row Groups

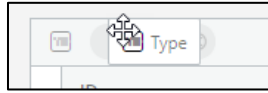
Click and drag columns to the top of the grid to categorize or group the rows in the grid.

An example of using Row Groups:

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

QUEUES		USERS		DATE RANGE						
Select queues...		Select users...		Jan 08, 2024 - Feb 06, 2024		SEARCH CONTACTS				
RESULTS										
Drag here to set row groups										
	Contact ID	Type	Date ↓	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data	
	6321	Email	2024-01-30 01:0...	00:04:43	Diane	ice13@ice13.com	Default User...			
	6311	Email	2024-01-30 01:0...	00:04:02	Diane	ice13@ice13.com	Default User...			
	6301	Email	2024-01-30 01:0...	00:05:10	Diane	ice13@ice13.com	Default User...	E-mail Queu...	WATCH OUT...	
	6151	Email	2024-01-22 01:2...	00:03:11	Bryan	ice13@ice13.com			WATCH OUT...	
	5601	Email	2024-01-10 11:1...	00:00:38	Andrew	ice13@ice13.com	alin (1018)	E-mail Queu...	WATCH OUT...	

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



3. The rows are now grouped by Type:

RESULTS

Group: Type

Group	Contact ID	Date ↓	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data
Email (5)								

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

## Export Options

The following options will allow you to export your search results to an Excel or CSV file.



The exported file will reflect the data in the Journal grid at the time of export and will include the columns and contacts that are visible in the search results grid.

**Note:** Journal search results are limited to 1000 records.

Follow the steps below to export your journal search results

5. Using the filter options, search for the interactions to be included in the export.

QUEUES: Select queues... | USERS: Select users... | DATE RANGE: Jan 08, 2024 - Feb 06, 2024 | SEARCH CONTACTS

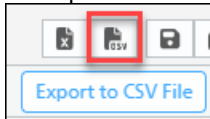
RESULTS

Contact ID	Type	Date ↓	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data
6321	Email	2024-01-30 01:0...	00:04:43	Diane	ice13@ice13.com	Default User...		
6311	Email	2024-01-30 01:0...	00:04:02	Diane	ice13@ice13.com	Default User...		
6301	Email	2024-01-30 01:0...	00:05:10	Diane	ice13@ice13.com	Default User...	E-mail Queu...	WATCH OUT...
6151	Email	2024-01-22 01:2...	00:03:11	Bryan	ice13@ice13.com			WATCH OUT...
5601	Email	2024-01-10 11:1...	00:00:38	Andrew	ice13@ice13.com	alin (1018)	E-mail Queu...	WATCH OUT...

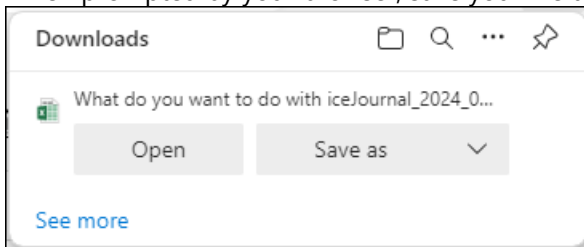
- To export the data to an excel file, select the *Export to Excel File* button.



To export the data to a CSV file, select the *Export to CSV File* button.



- When prompted by your browser, save your file to your local machine.



- In the Excel exported file, a Details Link column has been added to provide a link to the specific contact in journal.

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Details Link	Contact ID	Type	Date	Duration	Sender (ANI)	Recipient (DNIS)	User Name	Queue	User Data	Server	Assigned LOBs	Resolution Codes
2	<a href="https://11113.co">https://11113.co</a>	6321	Email	2024-01-30 01:06:16 00:04:43		Diane	ice13@ice13.com	Default User (1000)			iceA		Agent
3	<a href="https://11113.co">https://11113.co</a>	6311	Email	2024-01-30 01:06:15 00:04:02		Diane	ice13@ice13.com	Default User (1000)			iceA		Agent
4	<a href="https://11113.co">https://11113.co</a>	6301	Email	2024-01-30 01:00:11 00:05:10		Diane	ice13@ice13.com	Default User (1000)	Default User (1000) E-mail Queue	{6C WATCH OUT FOF iceA			Replied
5	<a href="https://11113.co">https://11113.co</a>	6151	Email	2024-01-22 01:24:54 00:03:11		Bryan	ice13@ice13.com			WATCH OUT FOF iceA			Released
6	<a href="https://11113.co">https://11113.co</a>	5601	Email	2024-01-10 11:14:52 00:00:38		Andrew	ice13@ice13.com	alin (1018)	E-mail Queue	{6C WATCH OUT FOF iceA			Agent
7													
8													

**Note:** The CSV file export does not contain this additional column.





## Chapter 5: Active Contacts

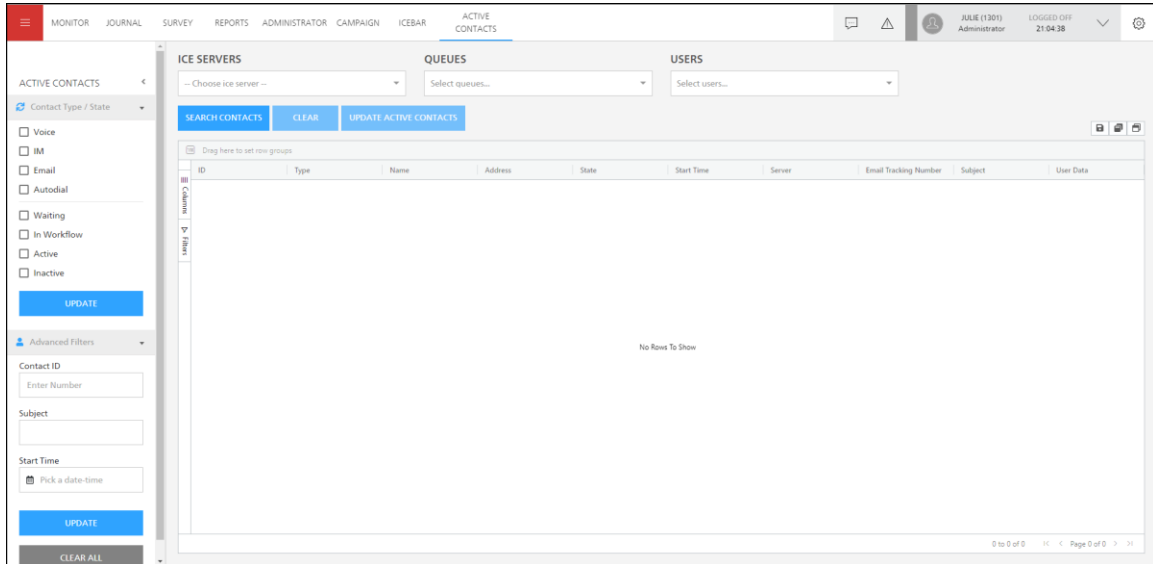
Active Contacts provides the ability to search for interactions by queue, user, contact type, time range and other criteria. Contact details are shown when a particular record is selected.

Using Active Contacts, you can:

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

# Active Contacts

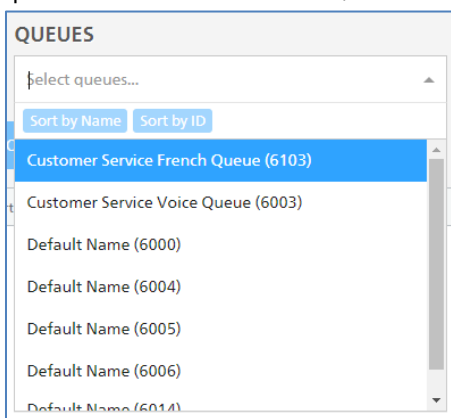
When you first click the *Active Contacts* tab, the following screen appears. Search options and results are on the right side of the screen and filters are along the left side of the screen.



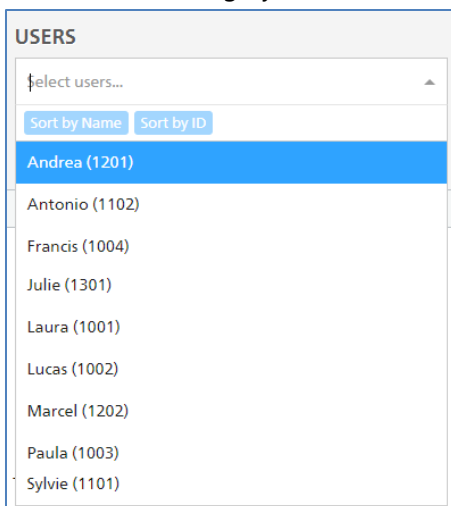
## Searching for an interaction

To search for an interaction, complete the following steps:

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



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



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

ICE SERVERS: -- Choose ice server --

QUEUES: Select queues...

USERS: Select users...

SEARCH CONTACTS CLEAR UPDATE ACTIVE CONTACTS

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

1 To 4 of 4 < > Page 1 of 1 > |

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

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

Column	Description
<b>ID</b>	The identification of the contact.
<b>Type</b>	Type of interaction. Possible values are IM, Voice, and Email.
<b>Name</b>	The name of the person who contacted the contact center.
<b>Address</b>	The SIP address, email address or phone number of the person who contacted the contact center.
<b>State</b>	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



Column	Description
	Inactive: still with the user, not being actively handled Ended: interaction with contact has been completed  <b>Note:</b> 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*.

↻ Contact Type / State ▼

Voice

IM

Email

Autodial

---

Waiting

In Workflow

Active

Inactive

Ended

UPDATE

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

## Advanced Filters

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

⚙️ Advanced Filters ▼

**Contact ID**

**Subject**

**Start Time**

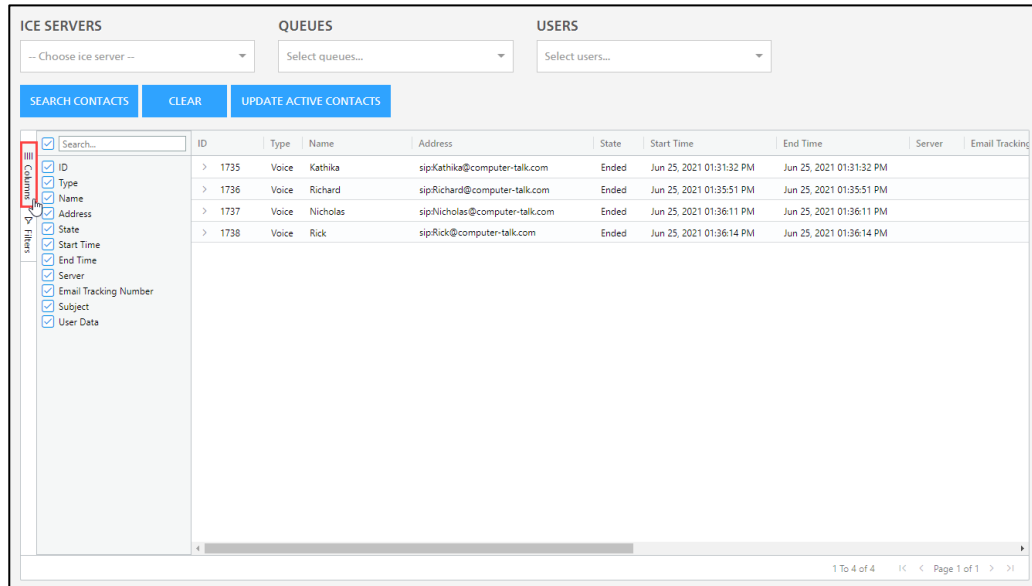
**End Time**

UPDATE

CLEAR ALL

## Columns Options

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



The screenshot shows the contact management interface. At the top, there are three dropdown menus for 'ICE SERVERS', 'QUEUES', and 'USERS'. Below them are three buttons: 'SEARCH CONTACTS', 'CLEAR', and 'UPDATE ACTIVE CONTACTS'. A search bar is located above the table. The table has columns for ID, Type, Name, Address, State, Start Time, End Time, Server, and Email Tracking. On the left side of the table, there is a 'Columns' panel with a search bar and a list of columns with checkboxes. The 'Columns' panel is currently open, showing a list of columns with checkboxes next to them. The table contains four rows of data.

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

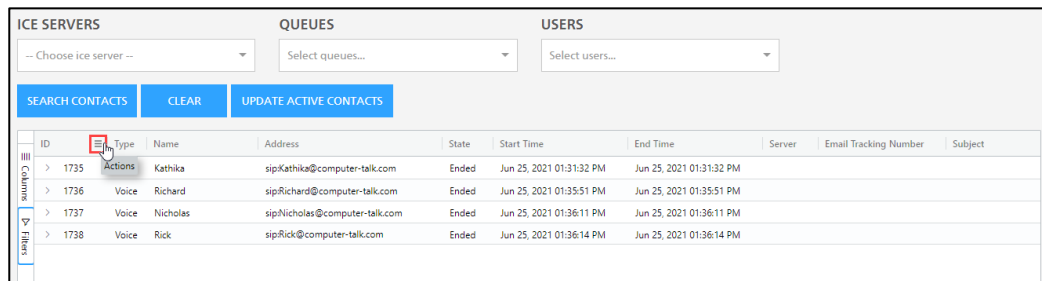
The gallery will refresh with the selected columns. By default, all columns are displayed on the table.

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

## Column Headers

### Column Header Actions

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



The screenshot shows the contact management interface. At the top, there are three dropdown menus for 'ICE SERVERS', 'QUEUES', and 'USERS'. Below them are three buttons: 'SEARCH CONTACTS', 'CLEAR', and 'UPDATE ACTIVE CONTACTS'. A search bar is located above the table. The table has columns for ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Number, and Subject. On the left side of the table, there is a 'Columns' panel with a search bar and a list of columns with checkboxes. The 'Columns' panel is currently open, showing a list of columns with checkboxes next to them. The table contains four rows of data. A red box highlights the 'Actions' button on the right side of the 'Type' column header.

ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Number	Subject
> 1735	Kathika	Richard	Nicholas	Rick	Ended	Ended	Ended	Ended	Ended
> 1736	Voice	Richard	Richard	Nicholas	Ended	Ended	Ended	Ended	Ended
> 1737	Voice	Nicholas	Nicholas	Rick	Ended	Ended	Ended	Ended	Ended
> 1738	Voice	Rick	Rick	Ended	Ended	Ended	Ended	Ended	Ended

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

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

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

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

## Column Header Sorting

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

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

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

## Filter Options

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

The screenshot shows a web interface with three dropdown menus at the top: "ICE SERVERS" (with "-- Choose ice server --"), "QUEUES" (with "Select queues..."), and "USERS" (with "Select users..."). Below these are three buttons: "SEARCH CONTACTS", "CLEAR", and "UPDATE ACTIVE CONTACTS". A search bar is located above the table. The table has columns: ID, Type, Name, Address, State, Start Time, End Time, Server, and Email Tracking. A sidebar on the left contains a "Columns" section with expandable items (ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Number, Subject, User Data) and a "Filters" section with a search bar, a dropdown menu set to "Contains", a "Filter..." input field, a "Reset Filter" button, and another expandable item "State". The table contains four rows of data, all with "Ended" status. A footer at the bottom right indicates "1 To 4 of 4" and "Page 1 of 1".

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

This close-up shows the "Filters" section of the sidebar. It includes a search bar, a dropdown menu set to "Contains", a "Filter..." input field, a "Reset Filter" button, and an expandable item "State".

The gallery will refresh according to the filter conditions selected.

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

## Right-click menu options

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

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

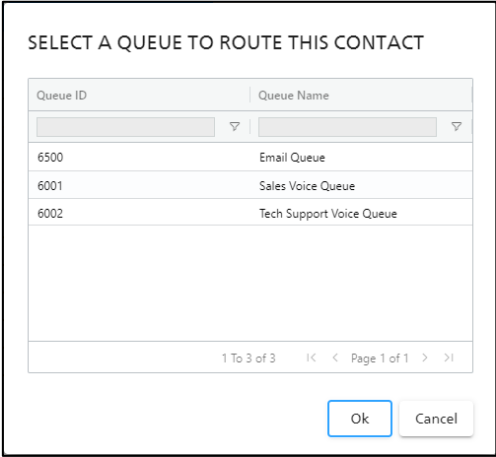
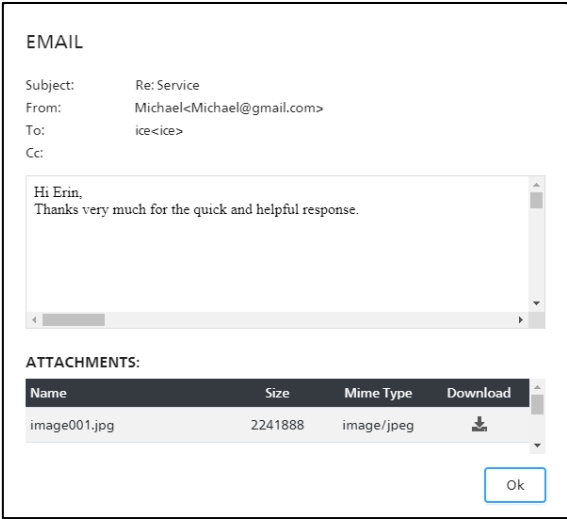
ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Number
> 1735	Voice	Kathika	sipKathika@computer-talk.com	Ended	Jun 25, 2021 01:31:32 PM	Jun 25, 2021 01:31:32 PM		
> 1736	Voice	Richard	sipRichard@computer-talk.com	Ended	Jun 25, 2021 01:35:51 PM	Jun 25, 2021 01:35:51 PM		
> 1737	Voice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

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

Active Contacts Right-Click Menu	
Menu Option	Function
<b>Release Contact</b>	<p>Select this option to release (end) the contact.</p> <p>When this option is selected, the following window appears:</p> <div data-bbox="540 1234 1214 1507" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> </div> <p>Click <i>Yes</i> to release the contact or click <i>No</i> or <i>x</i> to close the window.</p> <p><b>Note:</b> This option is only available for active contacts.</p>
<b>Remove Contact From Queue</b>	<p>Remove the contact from queue.</p> <p>When this option is selected, the following window appears to select a queue from:</p>

Active Contacts Right-Click Menu													
Menu Option	Function												
	<div data-bbox="542 407 953 783" data-label="Form"> <p>SELECT A QUEUE TO REMOVE THIS CONTACT</p> <table border="1"> <thead> <tr> <th>Queue ID</th> <th>Queue Name</th> </tr> </thead> <tbody> <tr> <td>7000</td> <td>IM Queue</td> </tr> </tbody> </table> <p>1 To 1 of 1    &lt;&lt; &lt; Page 1 of 1 &gt; &gt;&gt;</p> <p>Ok Cancel</p> </div> <p><b>Caution:</b></p> <ul style="list-style-type: none"> <li>• This option should only be used if the contact is queued in 2 separate queues.</li> <li>• If this option is selected while the contact is waiting in a single queue, the contact will be removed from queue, but will also remain in workflow.</li> </ul>	Queue ID	Queue Name	7000	IM Queue								
Queue ID	Queue Name												
7000	IM Queue												
<b>Route Contact to User</b>	<p>Route the contact to a specific user.</p> <p>When this option is selected, the following window appears to select a user from:</p> <div data-bbox="542 1270 1037 1724" data-label="Form"> <p>SELECT A USER TO ROUTE THIS CONTACT</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>1004</td> <td>Francis</td> <td>Not Ready</td> </tr> <tr> <td>1001</td> <td>Laura</td> <td>Ready</td> </tr> <tr> <td>1003</td> <td>Paula</td> <td>Ready</td> </tr> </tbody> </table> <p>1 To 3 of 3    &lt;&lt; &lt; Page 1 of 1 &gt; &gt;&gt;</p> <p>Ok Cancel</p> </div>	ID	Name	State	1004	Francis	Not Ready	1001	Laura	Ready	1003	Paula	Ready
ID	Name	State											
1004	Francis	Not Ready											
1001	Laura	Ready											
1003	Paula	Ready											
<b>Route Contact to Queue</b>	<p>Route the contact to a specific queue.</p> <p>When this option is selected, the following window appears to select a queue from:</p>												



Active Contacts Right-Click Menu	
Menu Option	Function
	
<b>View Email</b>	<p>Select this option to view the email interaction history.</p>  <p><b>Note:</b> This option is only available for email contacts.</p>




Layout Options

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

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



The table below provides information for each layout option.

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

## Row Groups

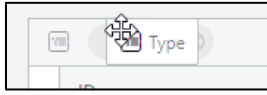
Click and drag columns to the top of the grid to categorize or group the rows in the grid.

An example of using Row Groups:

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

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

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



3. The rows are now grouped by Type:

Group	ID	Type	Name	Address	State	Start Time	End Time	Server	Email Tracking Num...	Subject
▶ Email (1)										
▶ Voice (3)										
▶ IM (1)										

The screenshot shows a data grid with columns: Group, ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Num..., and Subject. The rows are grouped by Type, with expandable headers for 'Email (1)', 'Voice (3)', and 'IM (1)'. The grid is currently on page 1 of 3.

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



## Appendix A: Adding to Allowed Sites

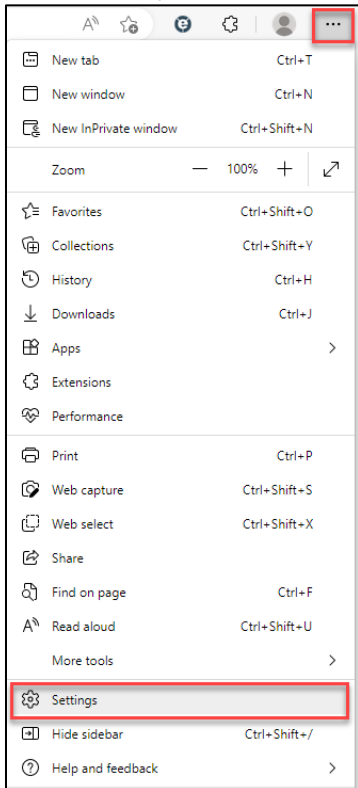
This section explains how to add iceManager to the list of allowed sites on your browser. Steps for adding allowed sites to Microsoft Edge, Google Chrome, and Firefox can be found below.

# Microsoft Edge

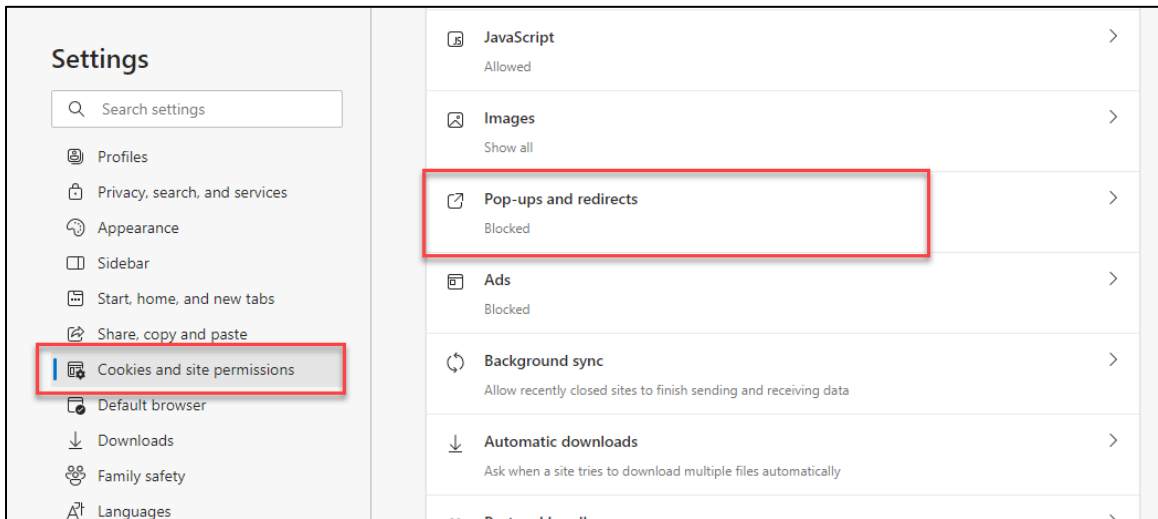
You can allow pop-up windows to open in a Web site by adding the Web site to the **Allowed sites** list.

To do this, follow these steps:

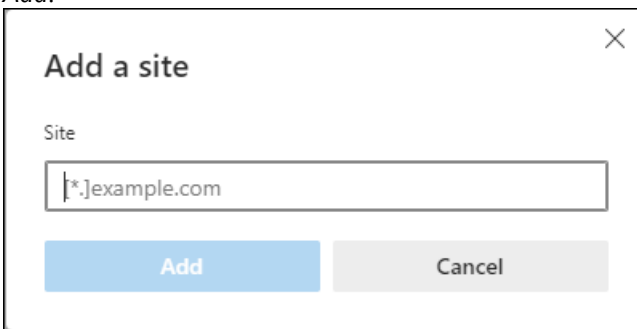
1. Open a Microsoft Edge browser window.
2. In the Menu (three dots in the top right corner), select *Settings*.



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>

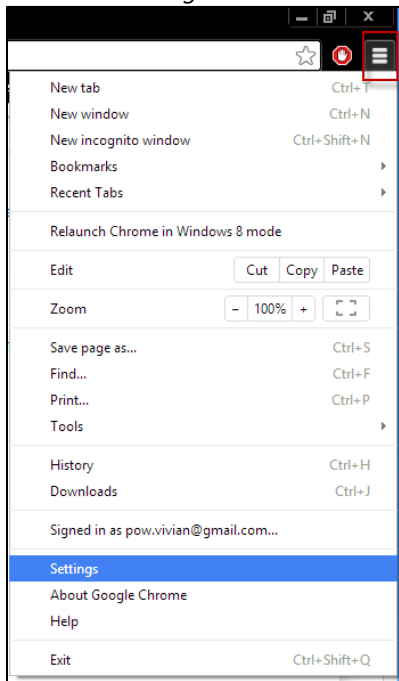
# Google Chrome

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

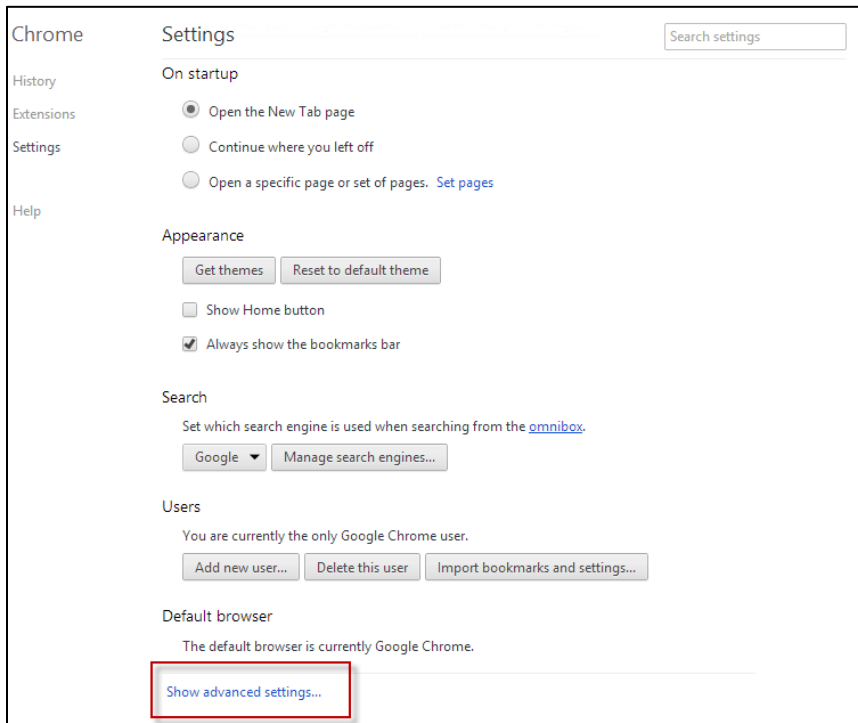
1. If pop-ups have been blocked, you'll see the  icon in the address bar. Click the icon to see a list of the blocked pop-ups.
2. Click the link for the pop-up window that you'd like to see.
3. To always see pop-ups for the site, select "Always show pop-ups from [site]." The site will be added to the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

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

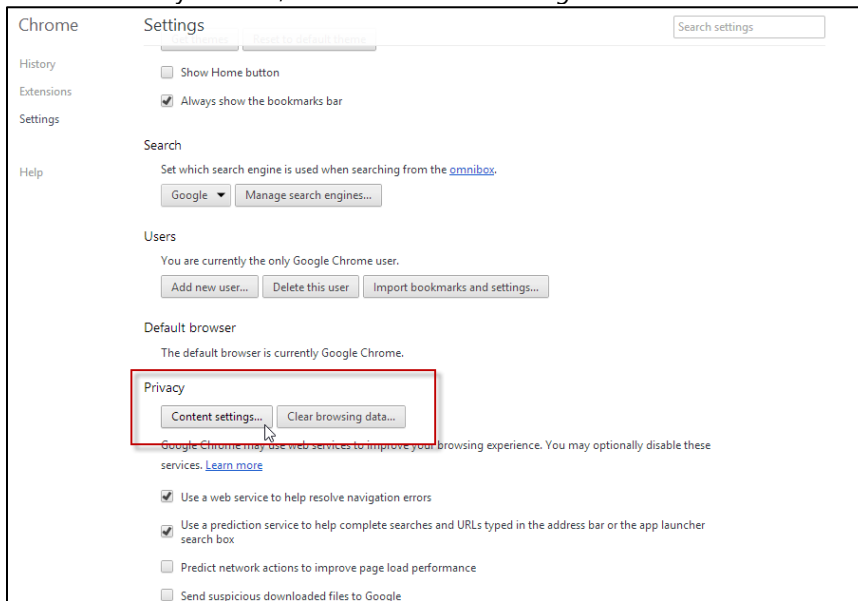
1. Click the Chrome menu  on the browser toolbar.
2. Select *Settings*.



3. Click *Show advanced settings*.

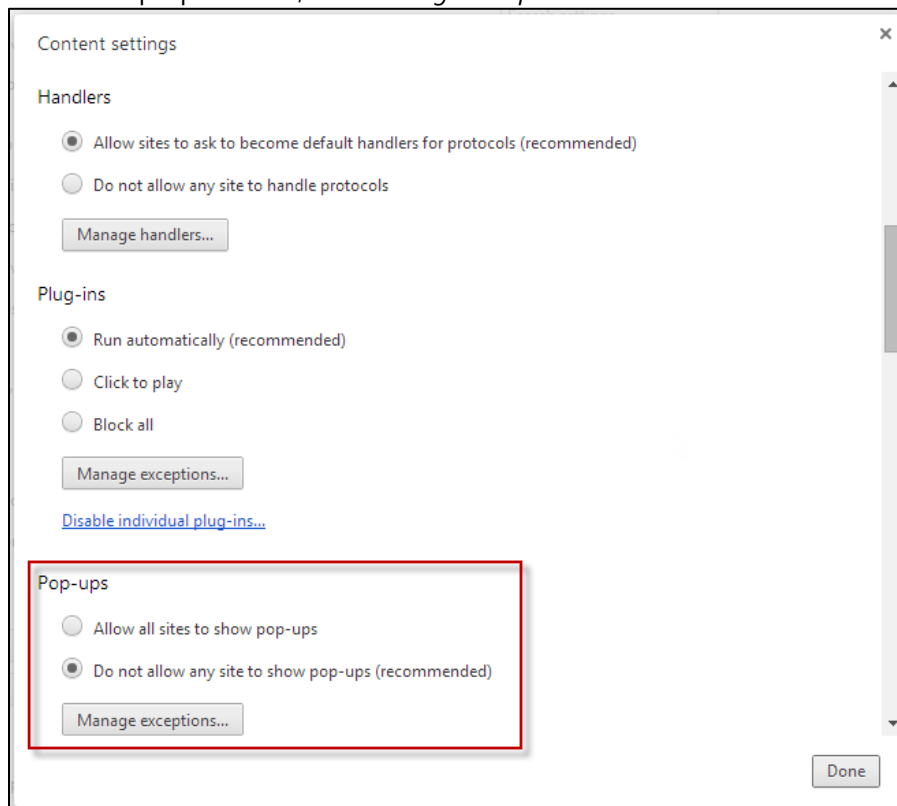


4. In the Privacy section, click the *Content settings* button.



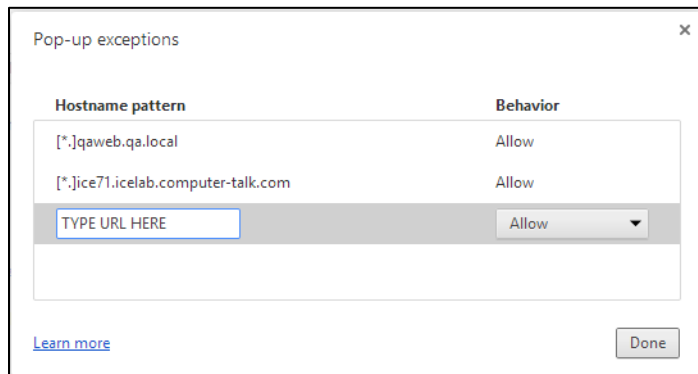


5. In the Pop-ups section, click *Manage exceptions*.



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

7. Click *Done*.



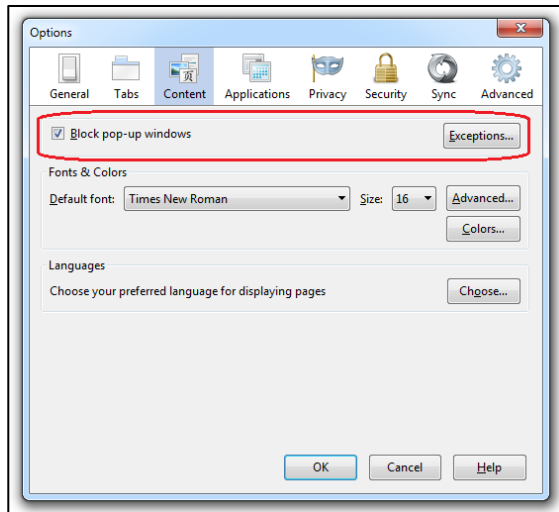
The website should no longer be blocked by the Pop-up Blocker.

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

# Firefox

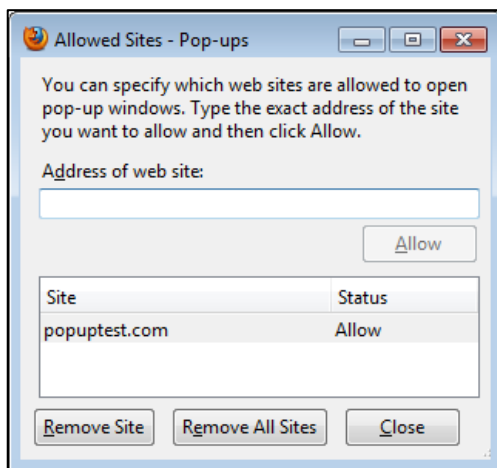
To access the pop-up blocker settings:

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



In the content panel:

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



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

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



## Appendix B: Recording Triggers

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

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

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

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