ORACLE®

Contact Center Anywhere:
Interaction Manager (IM) Overview

What is Interaction Manager?

Interaction Manager is the software that each call center agent uses to take and place customer calls through Contact Center Anywhere (CCA).

**It is a java-based client accessed through each agent's browser.**

As long as the agent can reach the public internet from their PC, he/she can use the IM.

ORACLE

Login

- **Start Internet Explorer (IE)**

- **Enter the Interaction Manager URL address for Oracle Contact Center**
- **Anywhere provided by your call center Administrator. The Launch page appears.**

- **Fill in boxes:**
  - **Company alias**
  - **Username**
  - **Password**
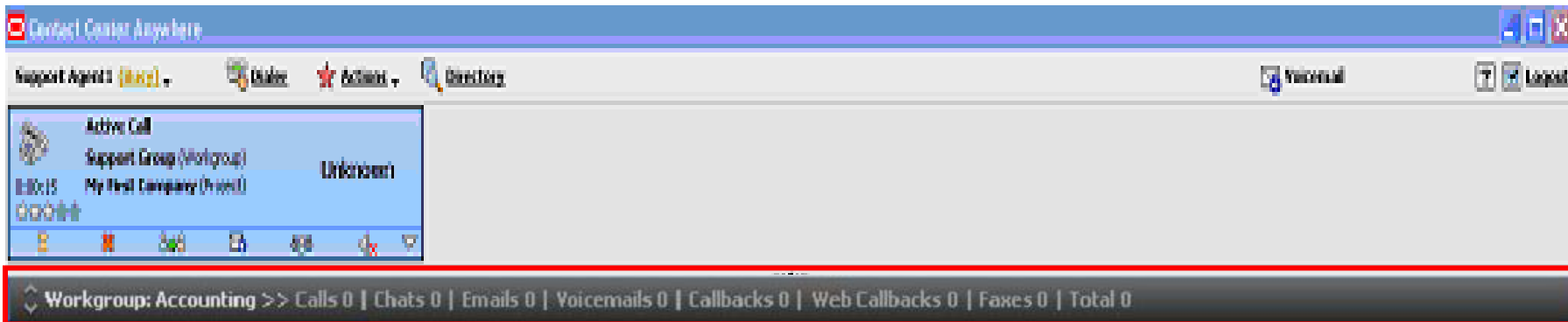 - **Select language to work with**

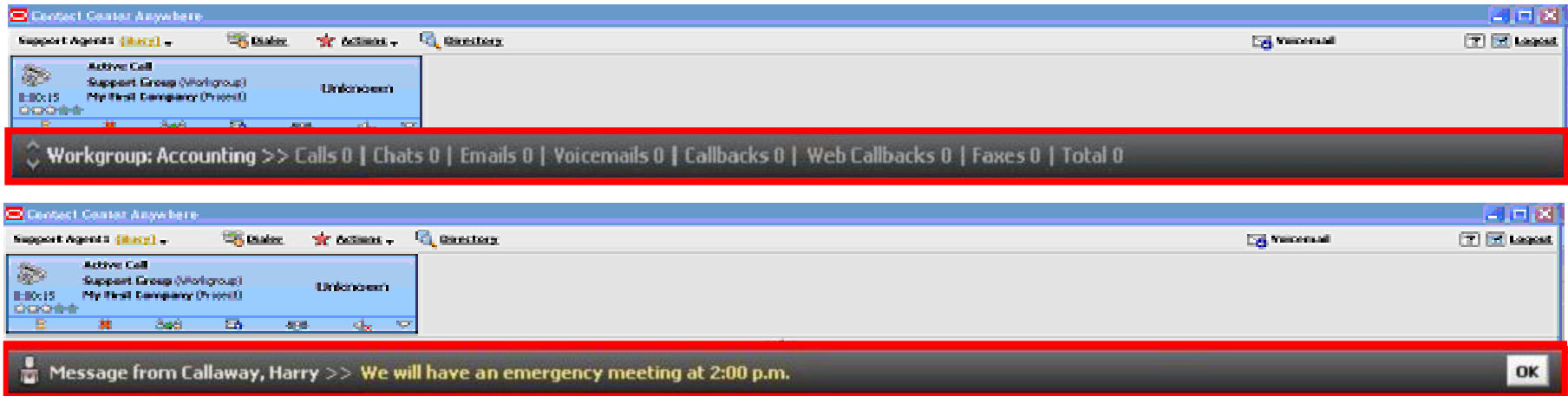- **Click Login button**
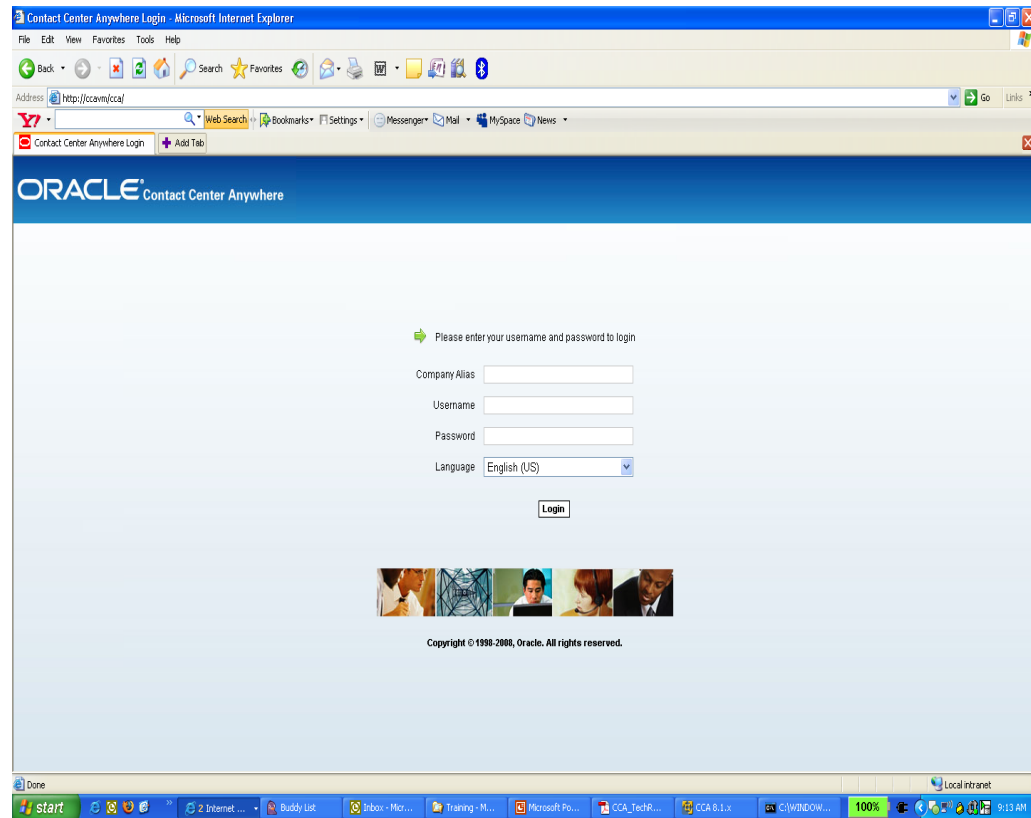
Main Screen Overview
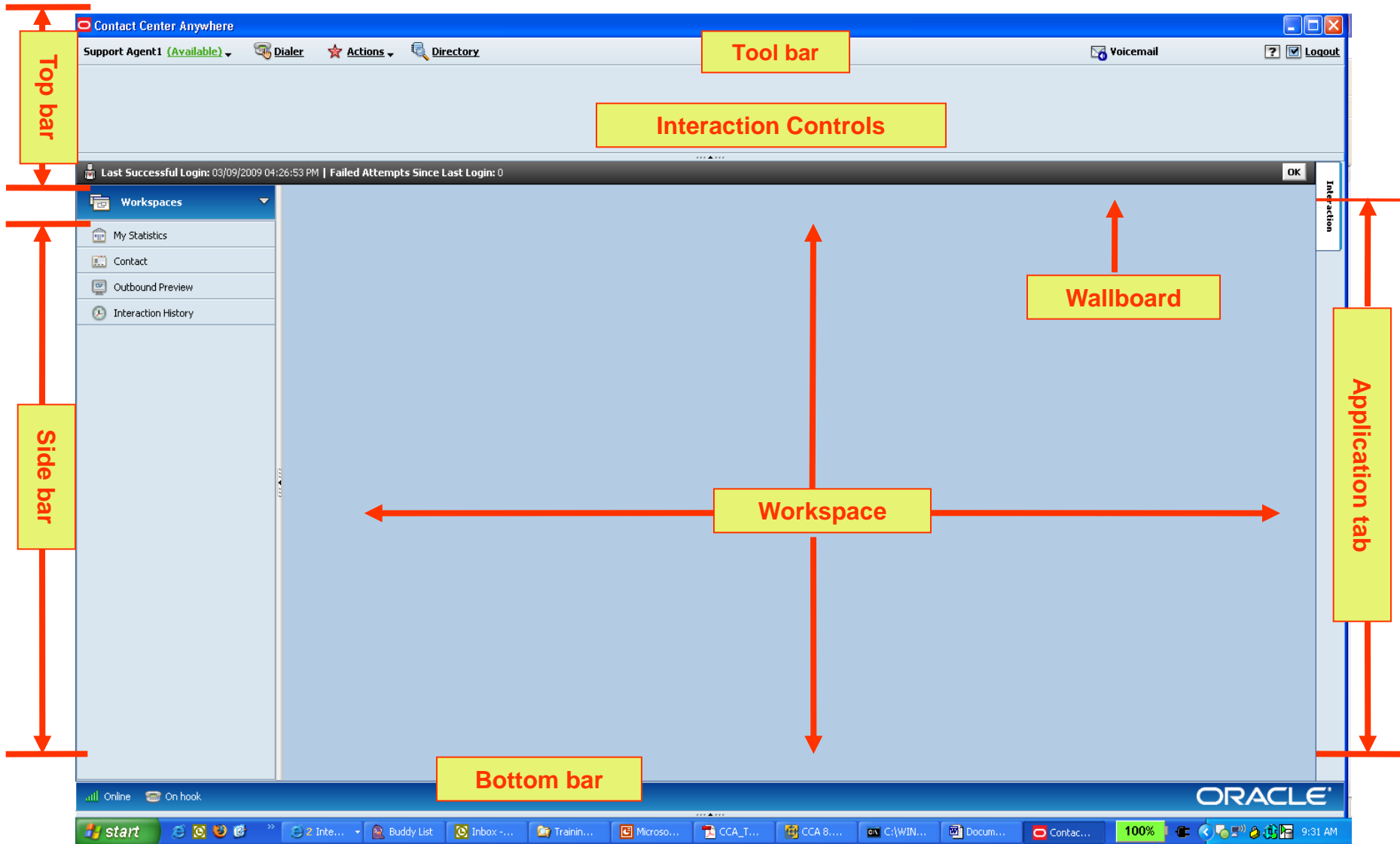
Wallboard

This is a real-time message board that displays statistics or messages from supervisors. Statistics are typically Workgroup statistics for each of the your associated workgroups.

ORACLE

Wallboard

The wallboard shows statistical information of the workgroup(s) that an agent belongs to. It includes:

• All workgroups that an agent belongs to

• Numbers of interactions in queue for each workgroup

• Scroll buttons (previous/next)

• Supervisory message (if any)

The workgroup statistics is scrolled up automatically every 10 seconds.

ORACLE

Side Bar - Overview

This area provides access to independent activities or plug-ins, which may include your statistics, contacts, tasks, outbound previews, workitems, and Interaction histories

ORACLE
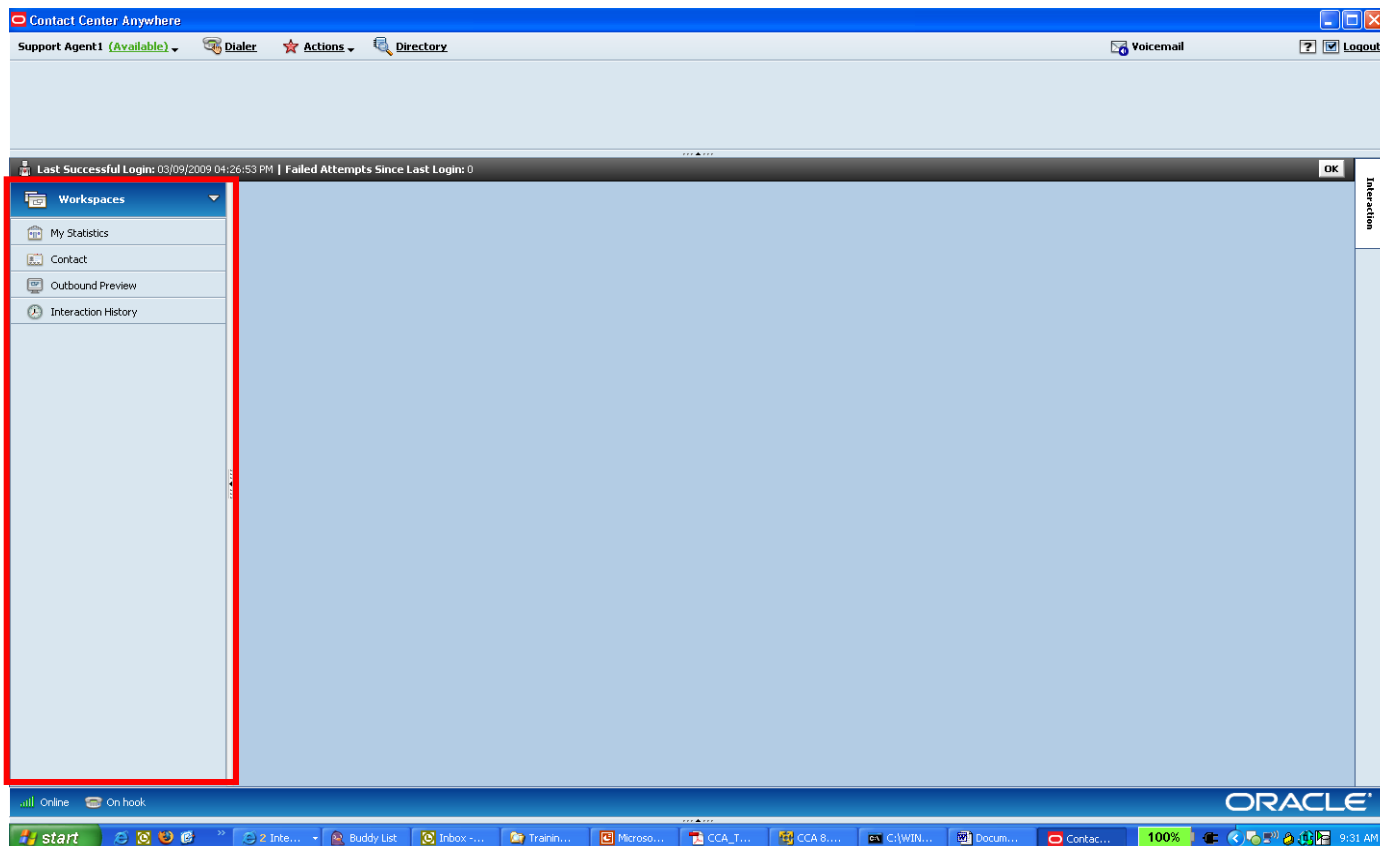
Side Bar – My Statistics Screen

- **My Statistics shows:**
- **The agent's name, username, email address, telephone number, and extension number.**
- **Real-time statistics about agent's activities**

- **My Statistics includes:**
- **Daily Totals: shows daily statistical information of the agent**
- **Media Statistics: shows the number of each interaction type that the agent accepted since 12:00 AM today.**
- **Things to do: shows each task that the agent still needs to finish, by Interaction type, along with the current or past due date.**

- **The statistics information is auto updated every 15 minutes**

ORACLE

Side Bar – Contact Screen

Contact shows

• **System contacts and custom contact (if any).**

• **Find Contact as default page**

Contact includes

• **Find a contact**

• **Add a contact**

• **Contact History**

• **View a contact**

ORACLE
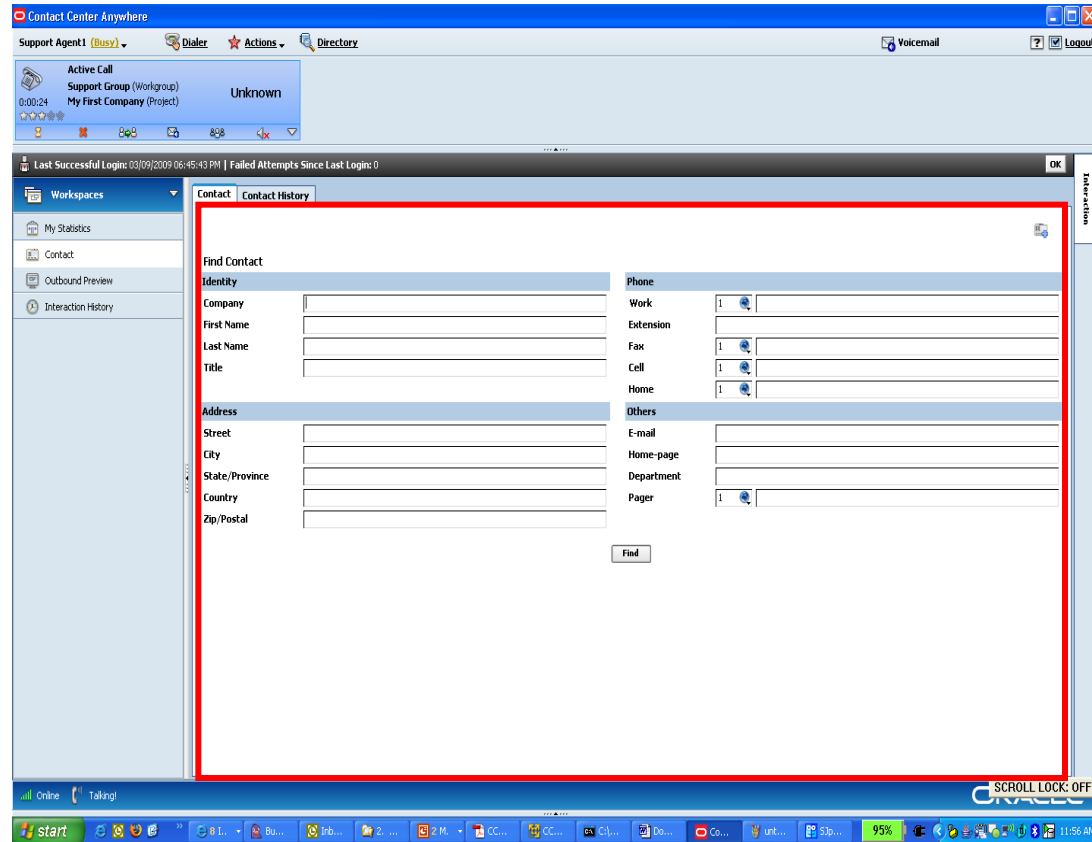
Side Bar – Interaction History Screen

- **Integrated Client keeps track of every step of a customer's Interaction in a Contact History record.**

- **Agent can find an interaction history by many criteria.**

ORACLE
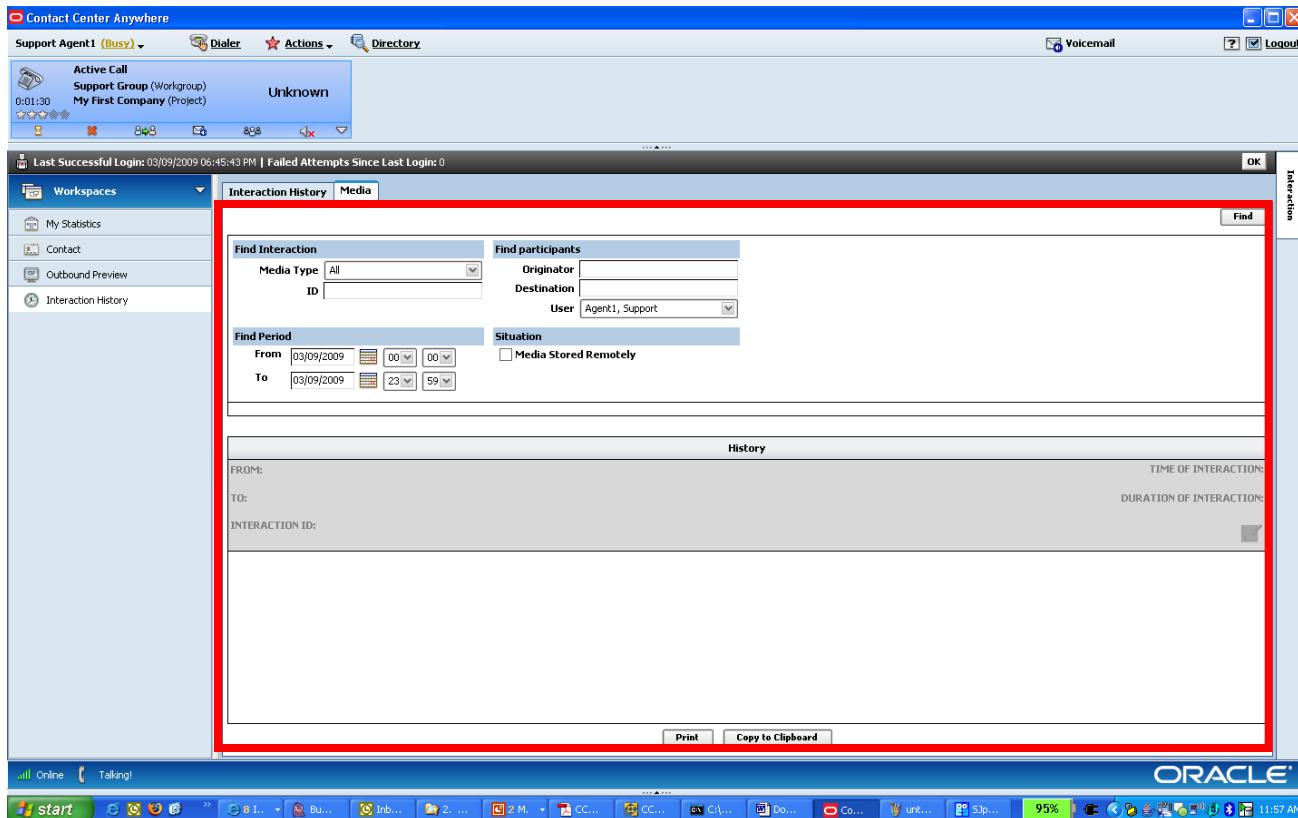
Bottom Bar

Displays the status of the current session with words and icons. Includes Connect quality indicator (Online/Offline), On Hook, Off Hook, Ringing, Talking.

ORACLE
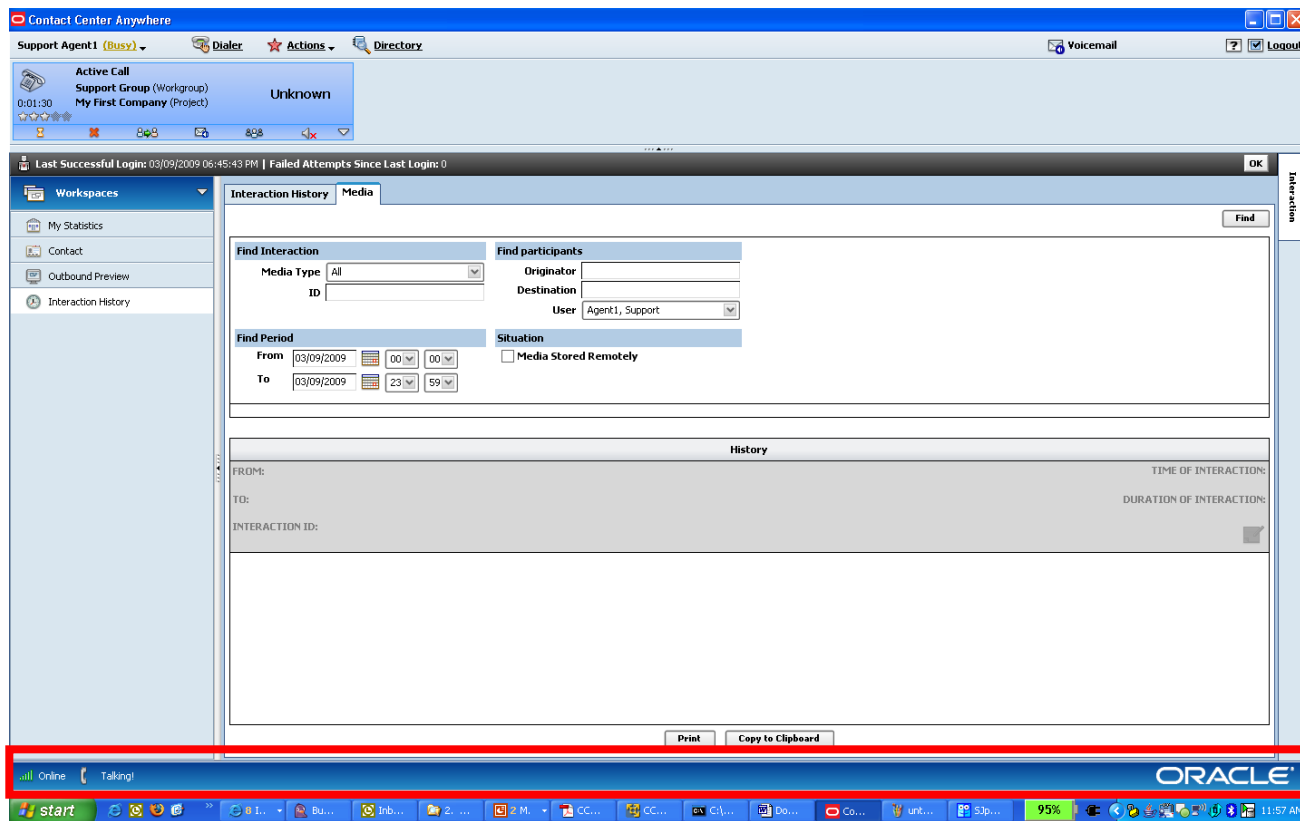
Connection Quality Indicator (Online / Offline)

- **The Connection quality indicator is visible to an agent at the Bottom Bar. It shows if an agent is connected to Contact Center Anywhere or not.**

- **Online indicator will appear if agent can connect to Contact Center Anywhere.**

- **Offline indicator appears when there is a temporary issue. For example: the agent has issues accessing data during this time.**

ORACLE
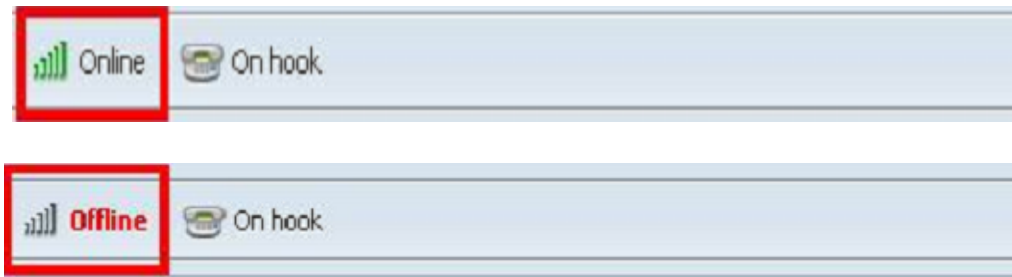
Application Tabs

• **These tabs provide the agent abilities to handle interactions, supervise another agent/workgroup/project, or control recording quality.**

• **Additional tabs may appear here, depending on user rights. If you have supervisor rights, you will see some more tabs such as Supervising, Reporting, Quality Control.**
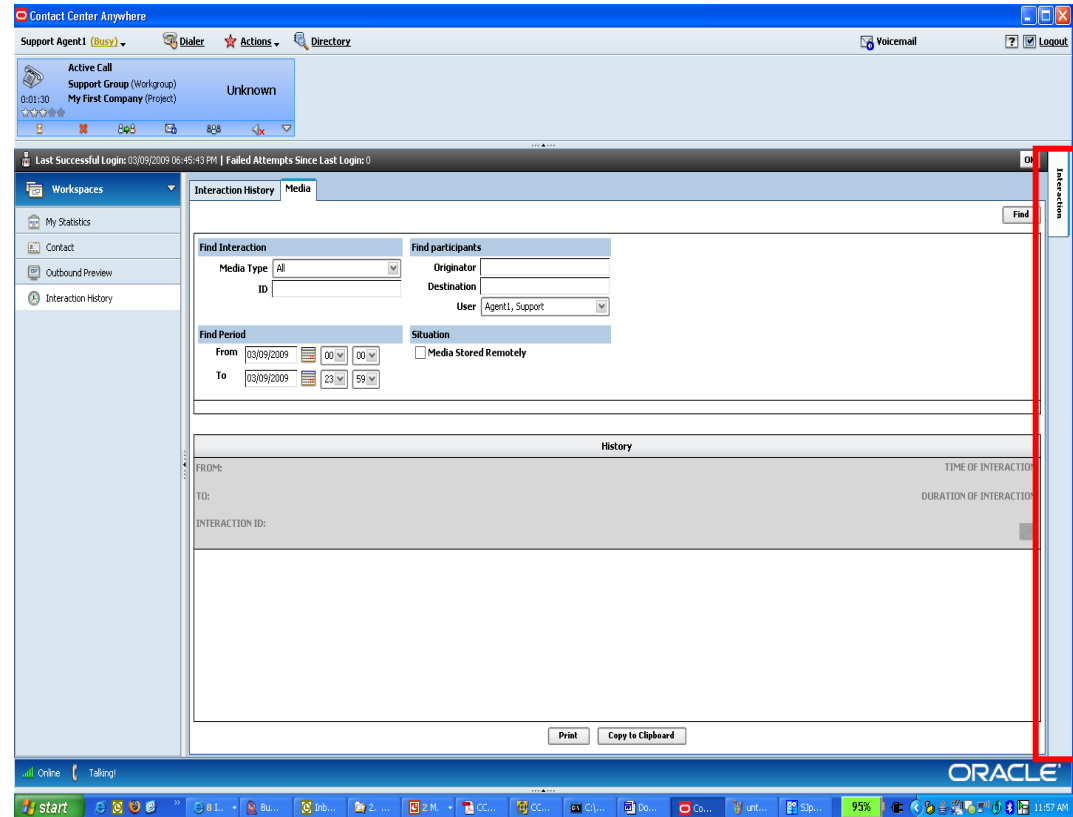
Agent Status

- **Agent status includes system and custom statuses**

- **System statuses**

- **System always provides an agent 3 visible statuses: Available, Last Call and On Break. Other system statuses are visible in specific situations (for example: No Answer).**

- **Custom statuses (Company Defined Status)**

- **They are optional and defined by your Administrator.**

- **For example: Meeting**

Interaction Control (Single / Multi Interactions)

• **An agent is able to handle multiple interactions at the same time.**

• **The Interaction Control bar includes Interaction Indicators.**

• **The Interaction Control bar provides agent with ability to access to all interactions being handled by this agent:**

• **Context sensitive buttons for each kind of interaction**

Interaction

Indicators

ORACLE
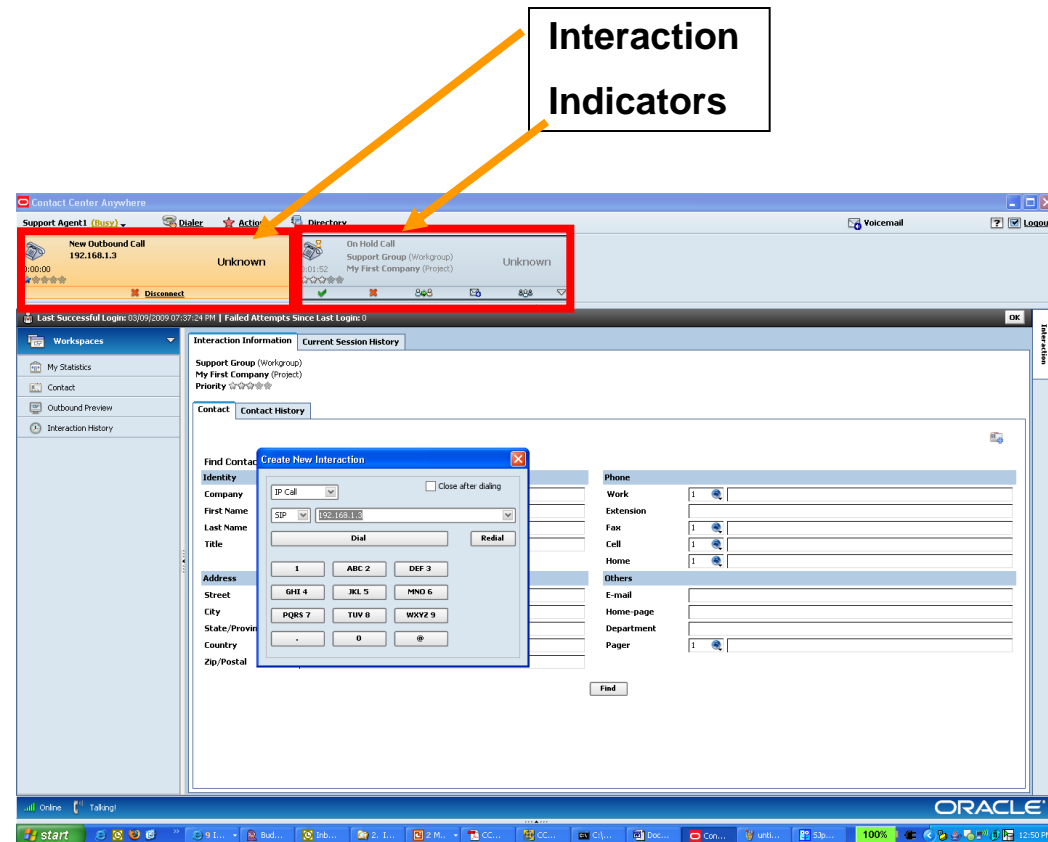
Agent Configuration Control

ORACLE

Configuration Dialog

- **Agents need to ensure their Integrated Client is configured with their correct Phone Extension and Email information.**
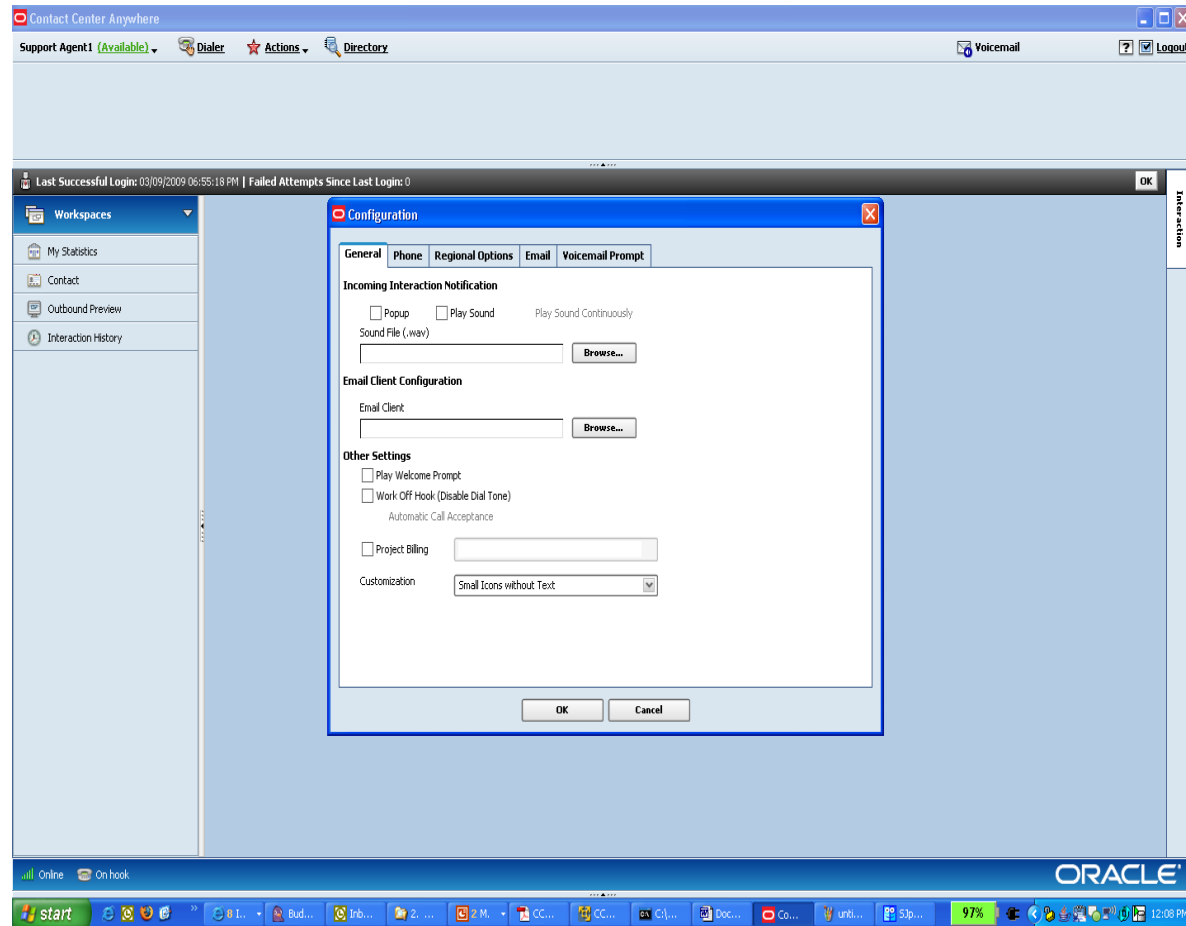
- **Click on Configure link at the top-right corner of the screen to launch the Configure dialog.**

There are 5 Tabs presented:
- **General**
- **Phone**
- **Regional Option**
- **Email**
- **Voicemail Prompt**

ORACLE

Configuration Dialog – General Tab (1)

- **Set up Incoming Interaction Notification mode.**

- **The Integrated Client will play a sound file when there is an incoming interaction.**

- **Check the option Play Sound.**

- **Click on Browse button to select a sound file.**

- **Agent can only use a WAVE (.wav) formatted file.**

- **Check option Play Sound Continuously if agent wants the selected file is played until agent accepts the interaction.**

ORACLE
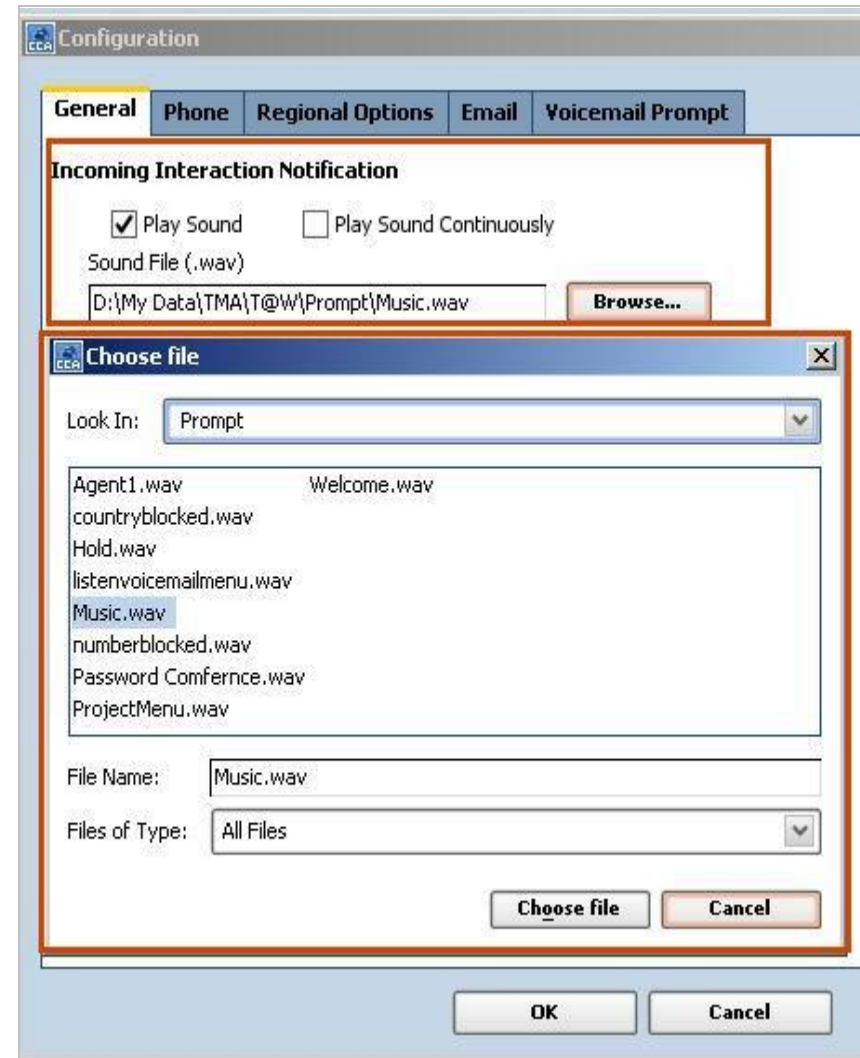
Configuration Dialog – General Tab (2)

- **Set up Email Client:**

- **Click on Browse button to select the Email Client (such as Outlook Express).**
- **Integrated Client automatically launches this program when agent engages in email activities.**

ORACLE
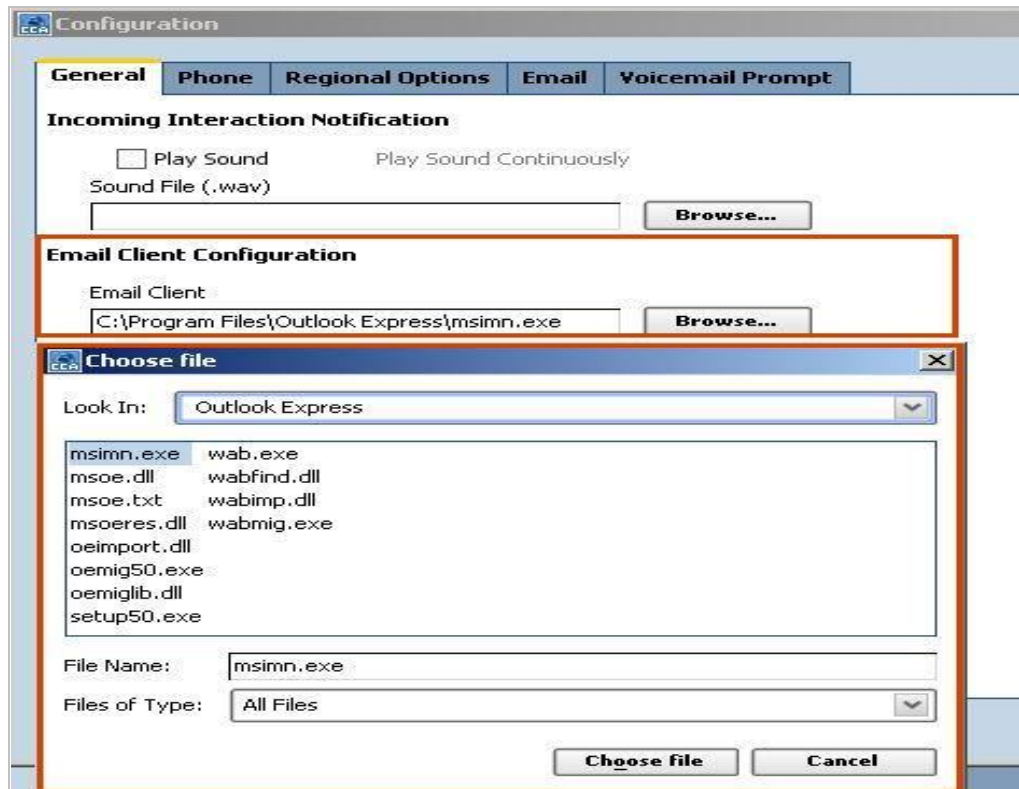
Configuration Dialog – General Tab (3)

Other Settings
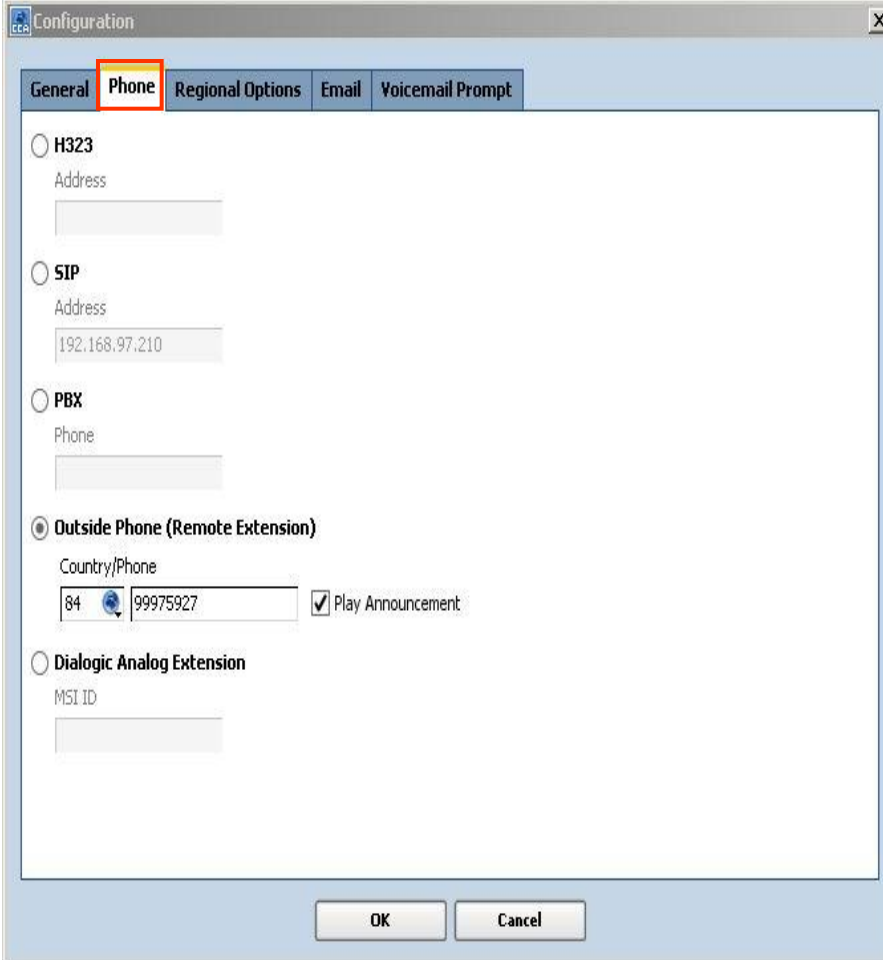
• **Play Welcome Prompt**: This feature enables a pre-recorded standard greeting to be played for the Caller at the beginning of each ACD call.

• **Work Off Hook:** Instead of picking up the phone each time an Interaction arrives, *work off-hook*, which disables the dial tone and lets you use the "Accept Interaction" button instead.

• **Automatic Call Acceptance** option only works with ACD calls. When this option is checked, ACD Call is automatically accepted as soon as it arrives in Integrated Client.

• **Customization**: Choose how the icons appear in Integrated Client.

• **Project Billing**: If call center allows agents to make outbound calls, select a *project* to bill against the call.

ORACLE
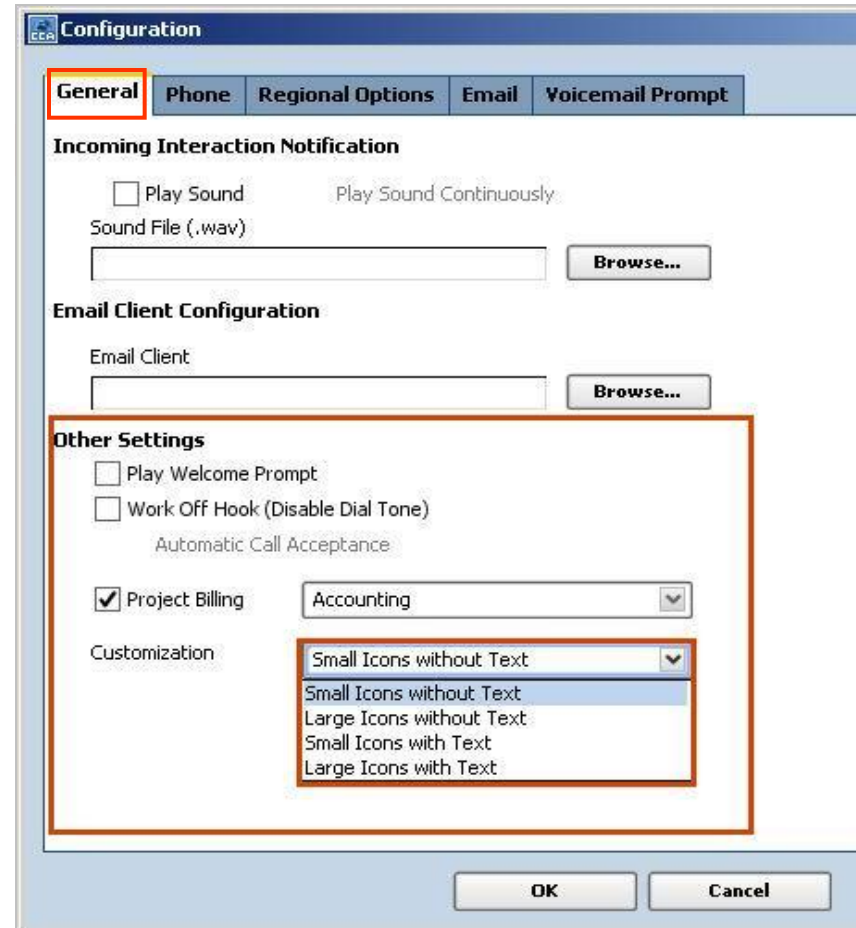
Configuration Dialog – Phone Tab

Phone tab Options

• **SIP: This selects a workstation IP address as a Phone Number using SIP protocol.**

• **Outside Phone (Remote Extension): This is for users who work from an offsite location, where the system will need to make an outbound call to reach the agent.**

• **If the Play Announcement option is checked, a recorded message will be played to announce that you have a phone Interaction waiting to be connected and also provide agent an option to accept or to decline the interaction.**

ORACLE

Configuration Dialog – Regional Options Tab

Regional Options

• **Company Defined Time Zone**: default time zone which has been selected for everyone by the Administrator to use.

• **User Defined Time Zone:** allows the agent to manually select which time zone the Agent is located.

• **Company Defined Date Format:** default date format which has been selected for everyone by the Administrator to use.

• **User Defined Format:** the Agents decide which Date Format they want to view; either U.S. or European.
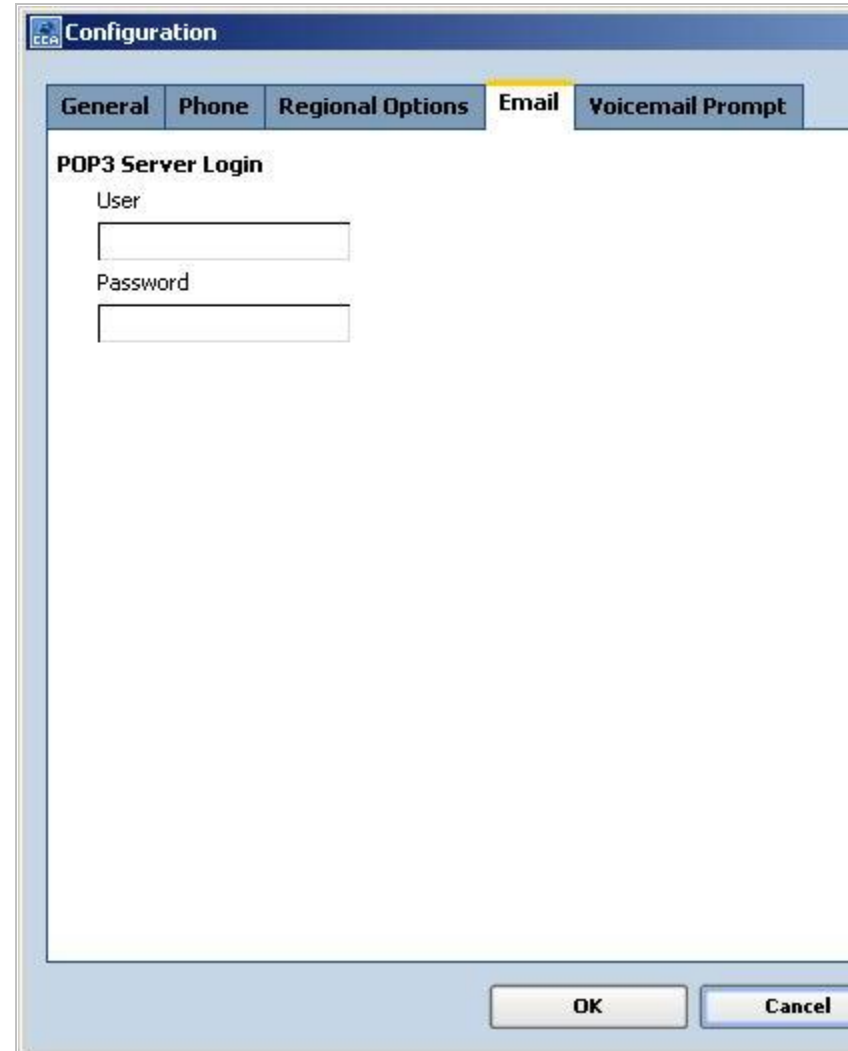
U.S. Date Format – MM/DD/YYYY
Euro Date Format – DD/MM/YYYY

Configuration

General | Phone | **Regional Options** | Email | **Voicemail Prompt**

Select Time Zone

◉ Company Defined Time Zone

(GMT+07:00/DST+00:00) Indochina Time; Asia/Saigon

○ User Defined Time Zone

(GMT+07:00/DST+00:00) Indochina Time; Asia/Saigon

Select Date Format

◉ Company Defined Date Format   mm/dd/yyyy

○ User Defined Date Format   mm/dd/yyyy

OK   Cancel

ORACLE

Configuration Dialog – Email Tab

This is not used for the DHS company

ORACLE

Configuration Dialog – Voicemail Prompt Tab

• **With Voicemail Prompt in Integrated Client, agents have the ability to customize a set of Voicemail prompts for callers to hear.**

• **The set includes: Agent Greeting, Agent Name, and the Welcome Prompt.**

Dialer - Making Calls

ORACLE
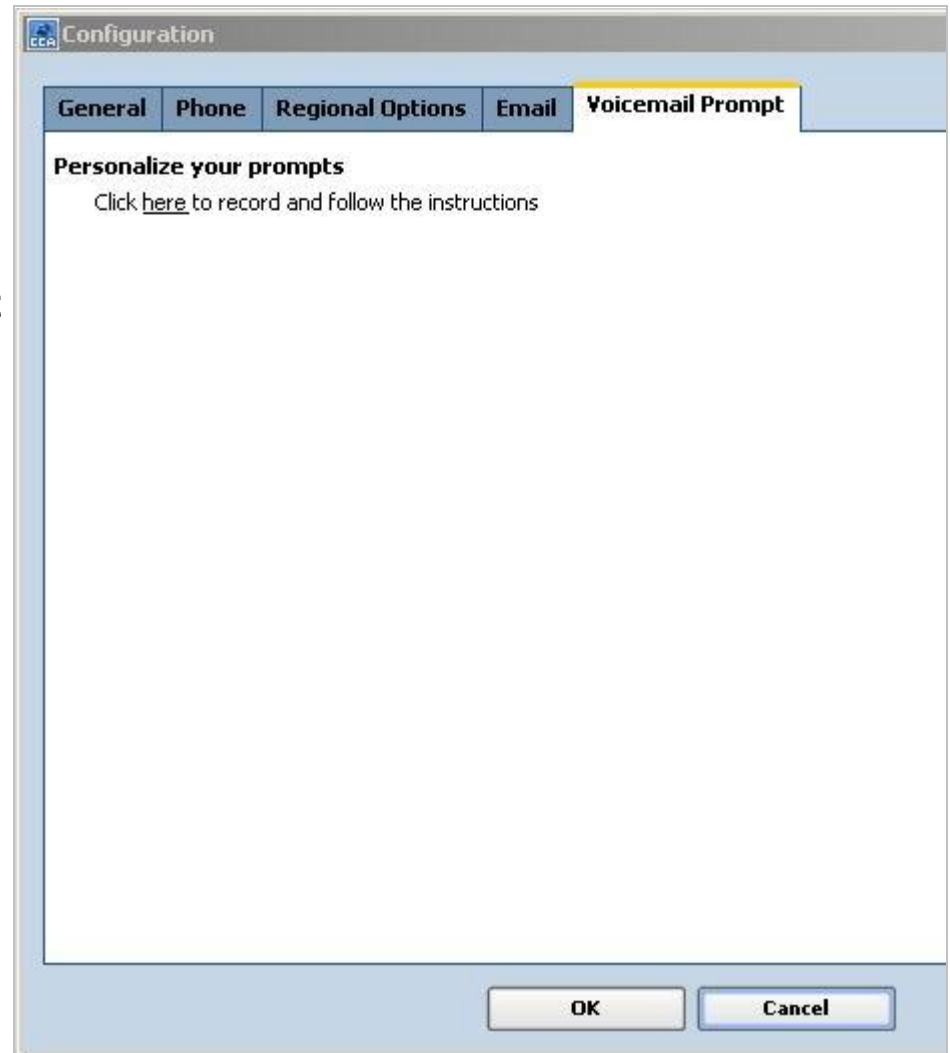
Dialer – Making Calls

Agent is allowed to make the following call types directly through the Dialer on the Tool bar:

- **Outbound Call**

- **Extension Call**

- **IP Call**

There will be a Context Sensitive Dial pad for each call type.

When launch Dialer for the first time, default option for drop-down list is Outbound Call. Afterwards it is the last dialed number.

If desired, check the Close after dialing box and the system will close the Create New Interaction window automatically after you click the Dial button.

ORACLE
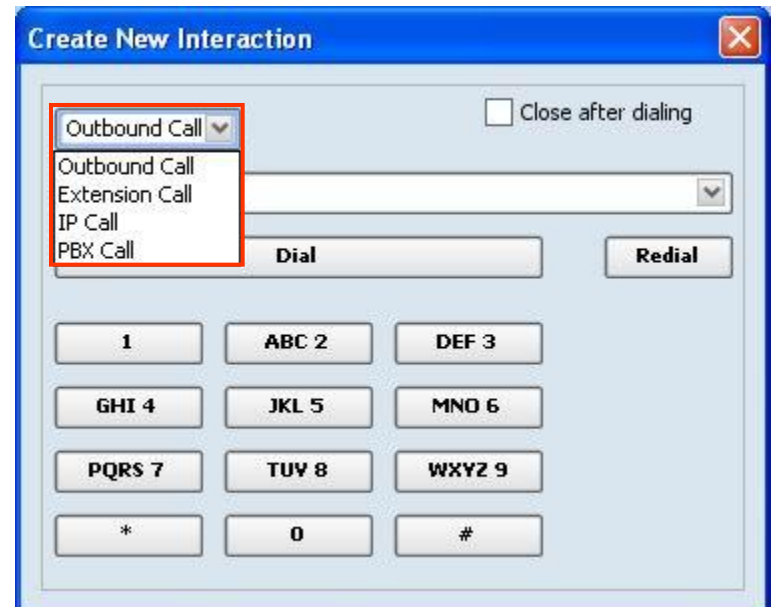
Dialer – Outbound Call

• **Select call type Outbound Call from the drop-down list**

• **Enter/select Country Code**

• **Enter phone number**

• **Click Dial button to make the Outbound call**

ORACLE
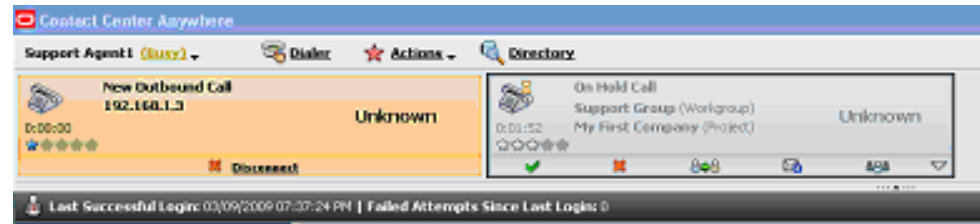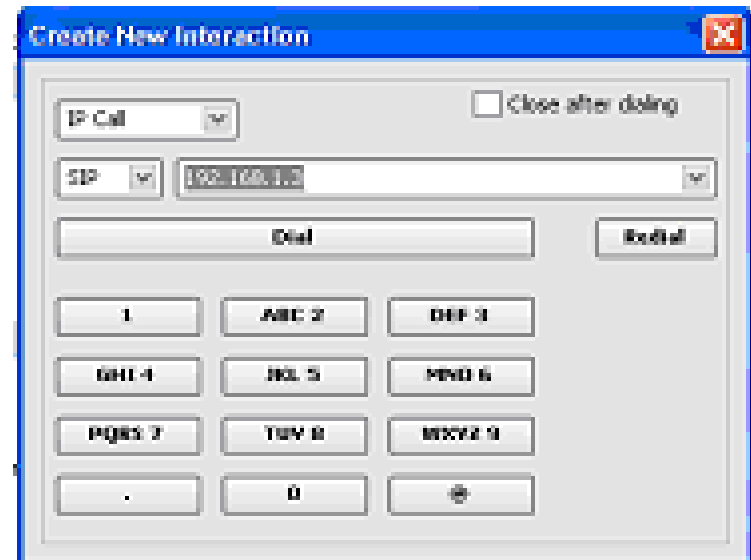
Dialer – Extension Call

Create Extension call via Dialer in Tool bar

• **Select call type Extension Call from the drop-down list**

• **Enter the extension number that you want to call**

• **Click Dial button to make the Extension call**
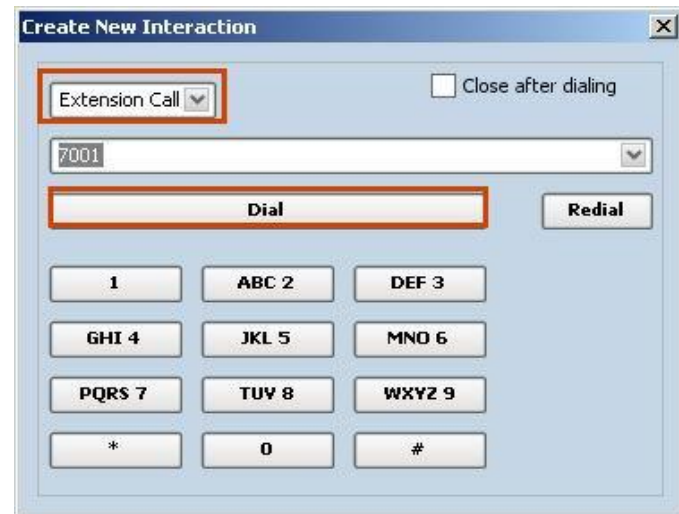
Create Extension call via Company Directory

• **Click Directory link to launch Company Directory dialog**

• **Select an agent to make extension call**

• **Click Dial icon or double-click on the selected agent to make Extension Call to the agent**
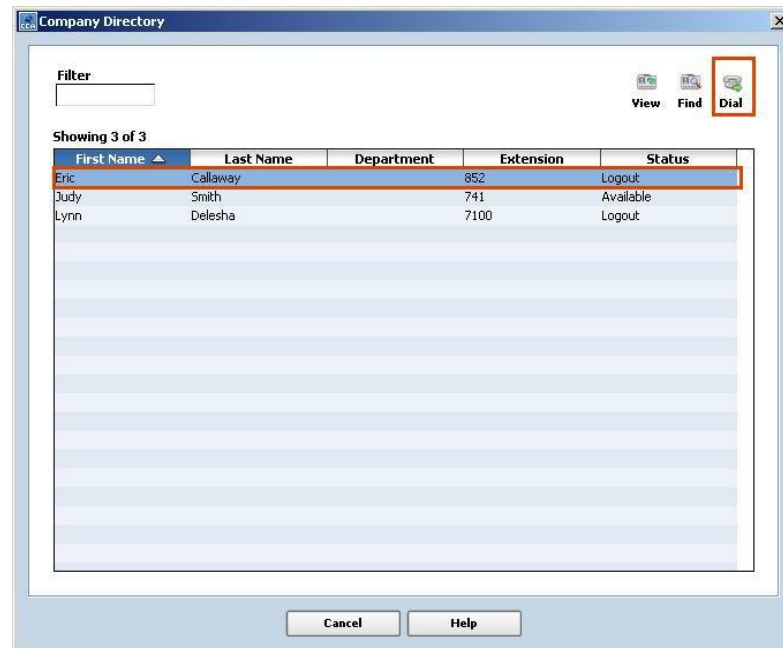
Dialer – Redial a Number

There are 2 ways to redial a Number (Outbound / Extension / IP / PBX).
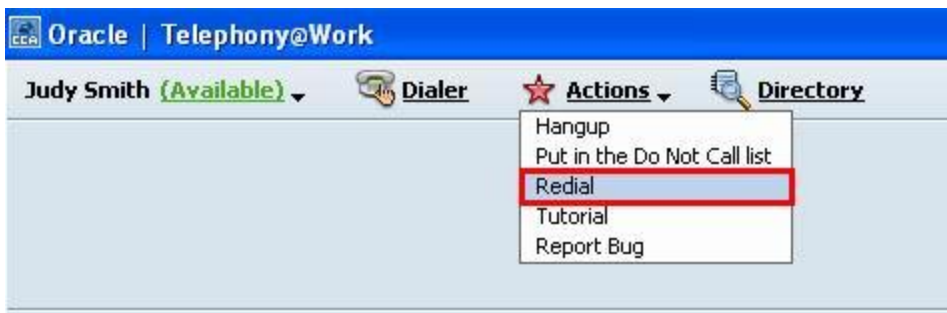
Redial option in Action menu: allows the agent to redial the last dialed number.
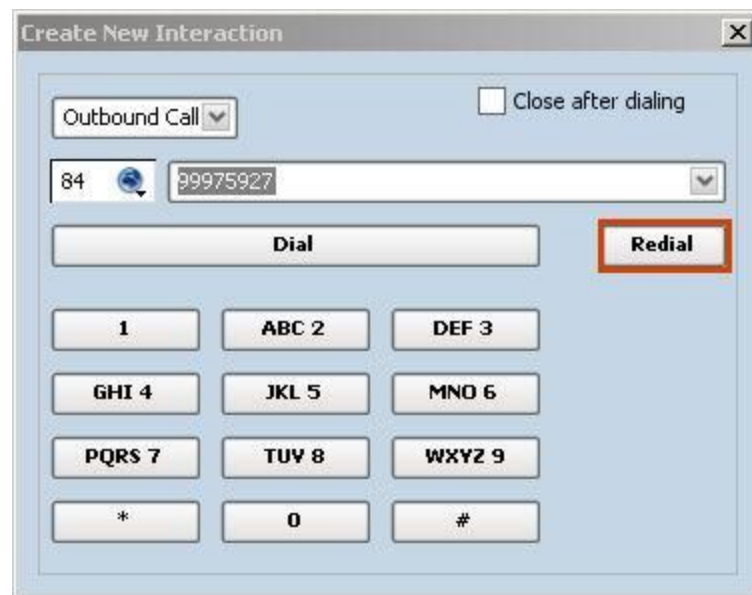
Redial button in Create New Interaction dialog: allows the agent to redial the last number of selected call type.

ORACLE

Handling Interactions

Phone Interactions

ORACLE

Handling Phone Interaction - Overview

Handling Phone interaction allows agent to

- **Accept a telephone call**
- **View the Active Caller information**
- **Place a caller on hold**
- **Send a caller straight to Voicemail**
- **Transfer a call**
- **Create a conference call**
- **Enter a conference call**
- **Put a caller into a Conference**
- **Exit a conference without disconnecting the caller**
- **Mute a call**
- **Record a call**
- **Disconnect an interaction**
- **Assign an Outcome**

ORACLE

Handling Phone Interaction – Accept Phone Call

- **The phone status in Bottom bar shows if the agent is working On Hook or Off Hook.**

- **Working *On-Hook* means that you will answer the physical phone every time it rings.**

- **When an Agent receives a Phone interaction:**

- **There appears a phone interaction indicator with Accept button in Interaction Control.**

- **The interaction indicator's status in orange indicates New Call.**

- **The phone line status in Bottom Bar is Ringing.**

ORACLE
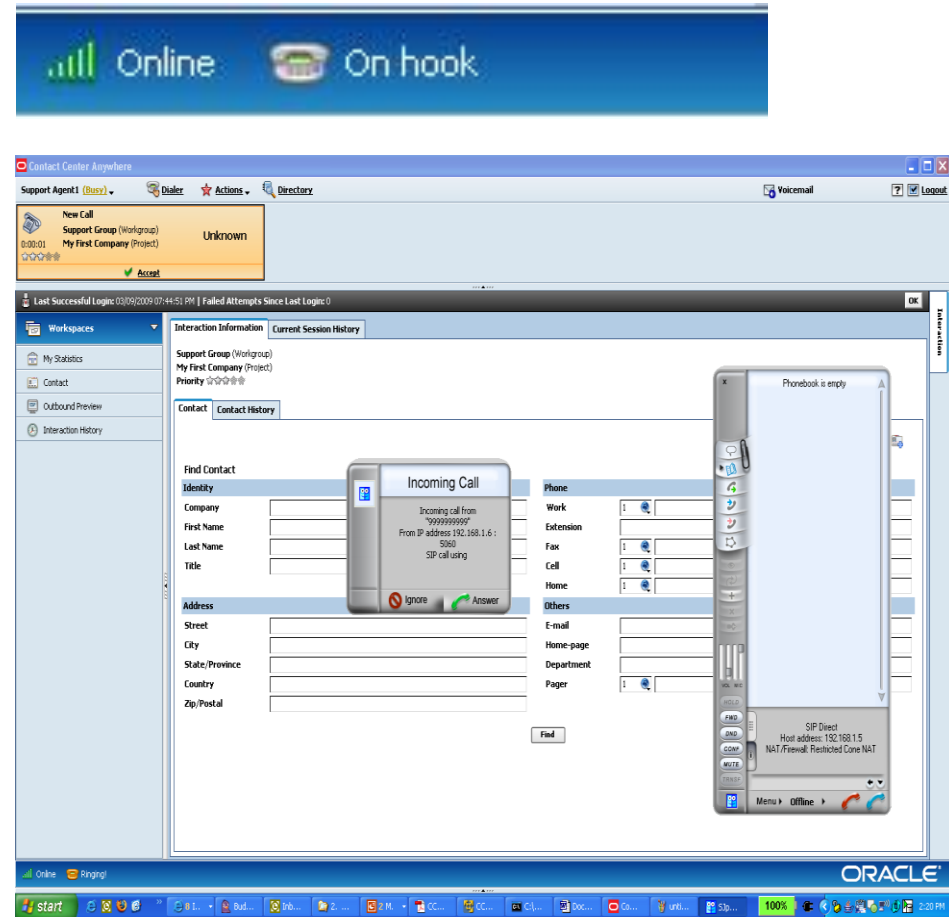
Handling Phone Interaction – Accept a new phone interaction (2)

- **Agent accepts the Phone interaction**

- **Orange color changes to blue with context**

- **sensitive buttons for Phone interaction**

    - **Hold: Puts the caller on hold**

    - **Disconnect: Hangs up the telephone**

    - **Transfer: Routes a call to an Agent, workgroup or External Number**

    - **Voicemail: Allows an agent to send a caller directly to voicemail**

    - **Conference: Adds a third party to a call**

    - **Mute: The caller cannot hear the agent**

- **Interaction indicator's status now is Active Call.**

- **Caller's information such as name, phone number will be displayed on the interaction indicator.**

- **The phone line status at Bottom Bar changes to Talking.**

ORACLE
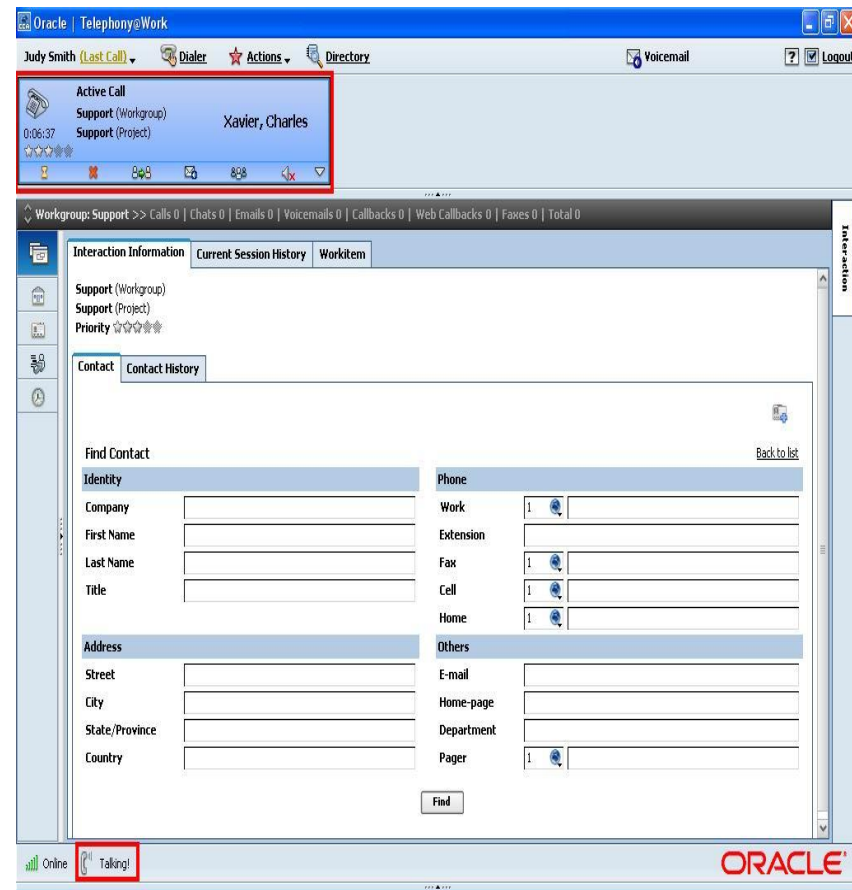
Handling Phone Interaction – Place a caller on Hold

- **There are 2 ways to put a caller on Hold:**

  - **Click on Hold icon in the interaction indicator.**

  - **Select Hold in drop-down list when clicking the down arrow in interaction indicator.**

- **The interaction indicator changes to grey to indicate that the call is put on hold.**

- **The Hold icon in the interaction indicator and in drop-down list change to Active.**

ORACLE
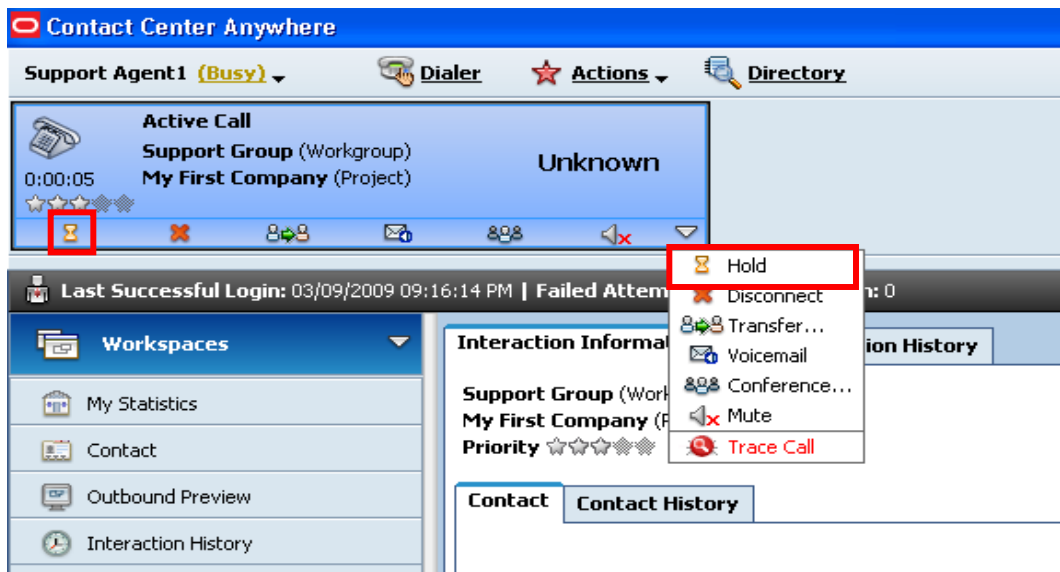
Handling Phone interaction – Resume speaking to the caller

- **There are 2 ways to resume speaking with the Hold Caller:**

  - **Click on Active icon in the interaction indicator.**

  - **Select Active in drop-down list when clicking the down arrow in the interaction**

  - **indicator.**

- **The interaction indicator changes to blue to indicate that the call is activated.**

- **The Active icon in the interaction indicator and in drop-down list when clicking the down arrow on interaction indicator change back to Hold.**

  ORACLE
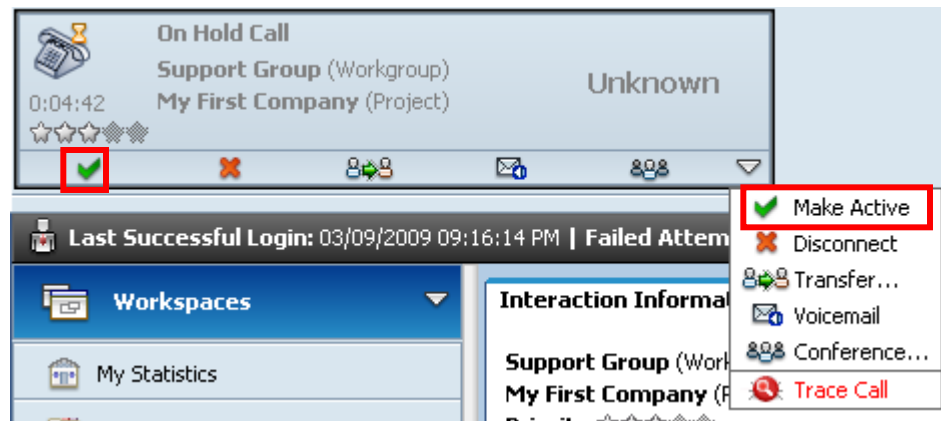
Handling Phone interaction – Put a caller to Voicemail

- **There are 2 ways to put a caller directly to Voicemail:**

  - **Click on Voicemail icon in the interaction indicator.**

  - **Select Voicemail in drop-down list when clicking the down arrow in**

  - **interaction indicator.**

- **The interaction indicator changes to grey to indicate that the caller is put to Voicema remains on the Top Bar until the caller completes leaving voicemail.**

- **Click Active icon if the agent want to resume speaking to the caller.**

ORACLE
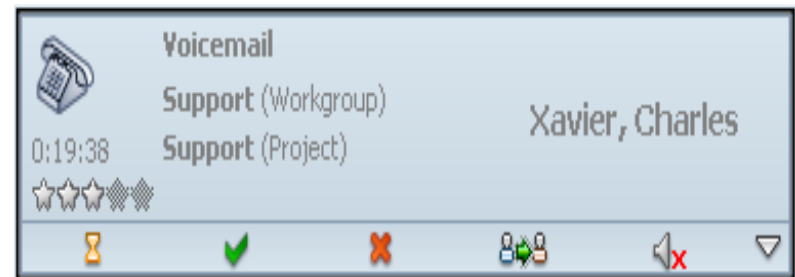
Handling Phone interaction – Transfer a caller

Transferring a caller

• **Transfer to Agent** – **This allows agent to send the caller to another agent.**
• **Transfer to Workgroup** – **This allows you to send the caller to another workgroup.**
• **Transfer to Outside Phone** – **This allows you send the caller to an external number.**

Two ways to transfer

• **Click on Transfer icon in the interaction indicator ; Select Transfer To in drop-down list when clicking the down arrow in the interaction indicator.**

A Transfer To dialog appears. Select Agent / Workgroup / External Number to transfer to an Agent / Workgroup / External Number accordingly.
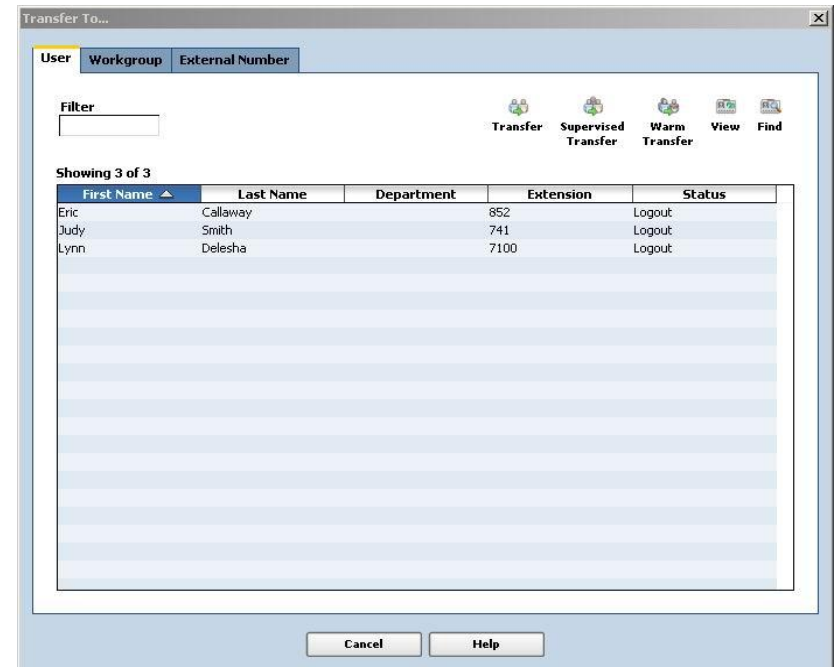
Handling Phone interaction – Overview of transferring a caller

Three kinds of transfers: Blind Transfer, Supervised Transfer and Warm Transfer.

Blind Transfer: **it does an immediate transfer; interaction cannot be retrieved**

Supervised Transfer: **it allows the agent to introduce the interaction to the receiving agent before transfer**

Warm Transfer: **it is a conference type transfer when the original agent may drop out when no longer needed**

When the caller is transferred, all relevant information is transferred with the interaction.

ORACLE

Handling Phone interaction – Supervised Transfer

- **Select Agent / External Number to perform Supervised Transfer.**

- **Click Supervised Transfer icon.**

- **There is a new Active Call interaction indicator of an original agent and transferred agent/number on the Interaction Control.**

- **The interaction between caller and the original agent will become On Hold call.**

- **A Supervised Transfer dialog appears.**

- **Click on the Complete button to finish transferring the interaction to another Agent / External Number.**
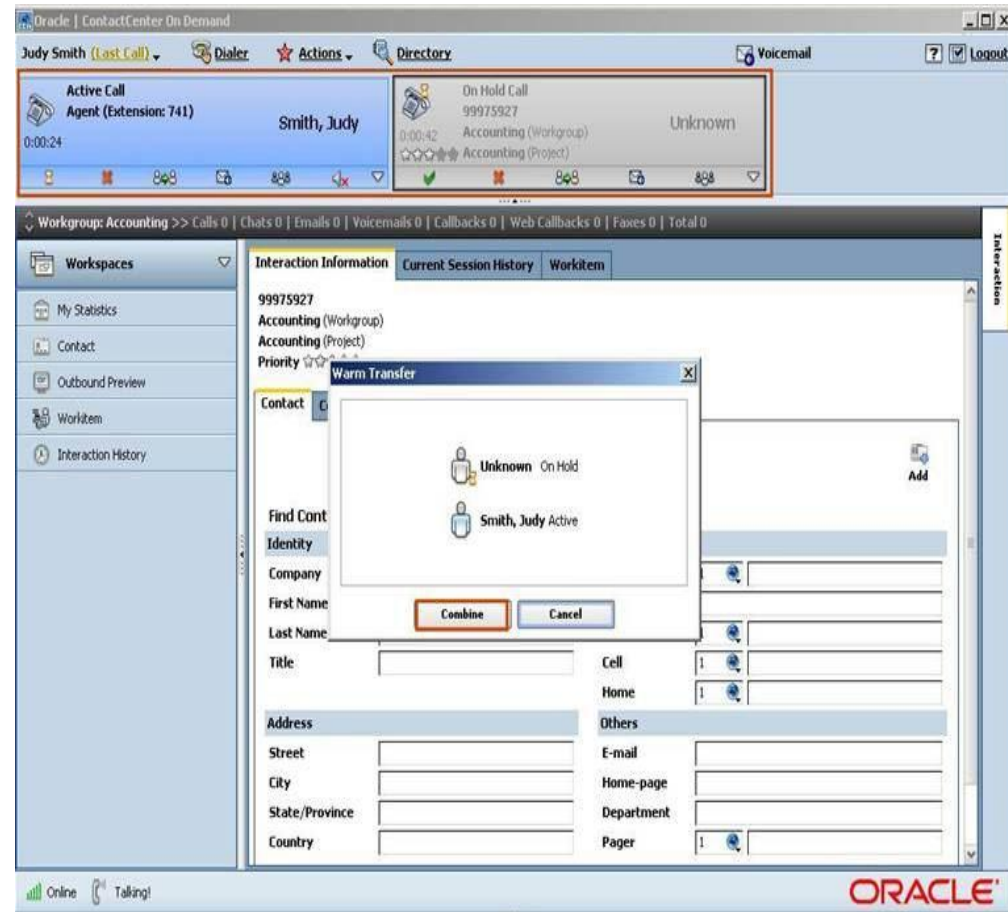
Handling Phone interaction – Warm Transfer

Select Agent / External Number to perform Warm Transfer

Click Warm Transfer icon.

There is a new Active Call interaction indicator of an original agent and transferred agent/number on the Interaction Control.

The interaction between caller and the original agent will become On Hold call.

A Warm Transfer dialog with Combine button appears.

Click on the Combine button.

The original agent, transferred agent/number and the caller can talk to each other.

A Warm Transfer dialog with Leave button appears.

Click Leave button to finish transferring the interaction to a transferred Agent/External Number.

ORACLE
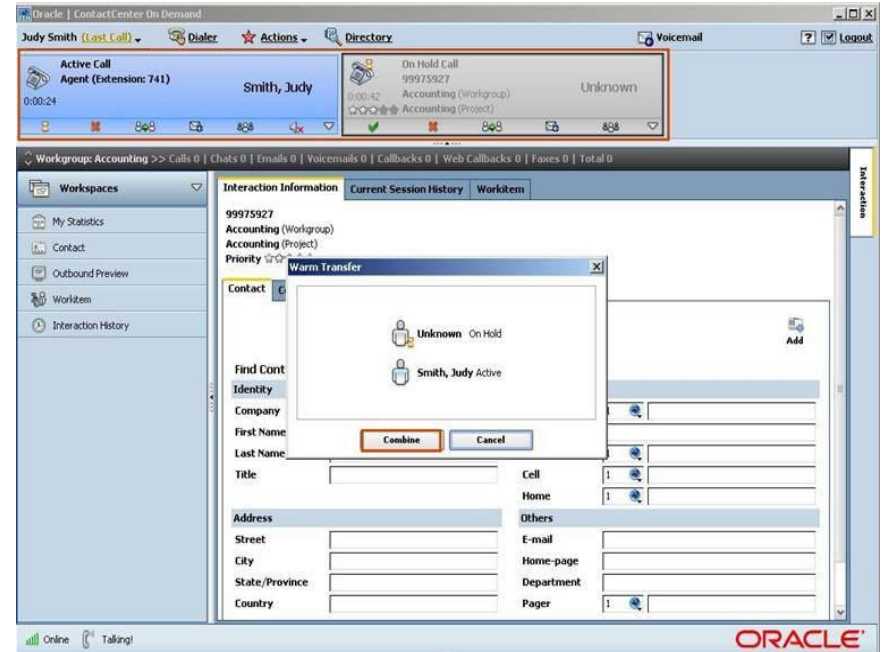
Handling Phone interaction – Blind Transfer

• **Select Agent / Workgroup / External Number to perform Blind Transfer (normal transfer).**

• **Click Transfer icon.**

• **The interaction is transferred to the selected Agent / Workgroup / External Number completely.**
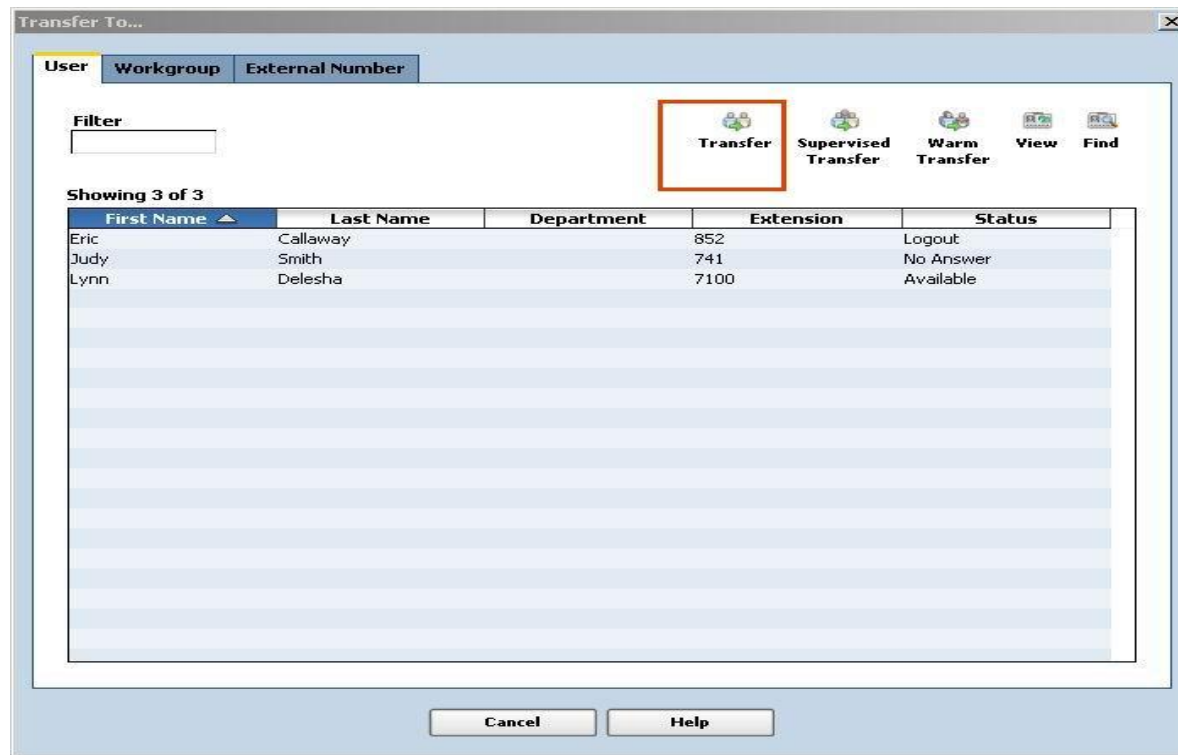
Handling Phone interaction – Conference

Create a Conference

**When agent sends a caller to a conference, several people can communicate simultaneously. Agent can exit the conference and if needed, return to the conference. All conference participants can hear each other while remaining in the conference, unless they deliberately mute their phone.**

To create a conference:

• **Select the caller**

• **Click on Conference icon in the interaction indicator or select Conference from the drop-down list when clicking the down arrow in the interaction indicator.**

• **The interaction indicator's status changes from**

•**Active Call to Conference, color flashes from grey to blue. Exit, Disconnect All, and Mute will be enabled.**

• **Repeat steps above to send another caller to conference**

• **The number of participants increase 1 every time agent put a caller to conference.**

ORACLE
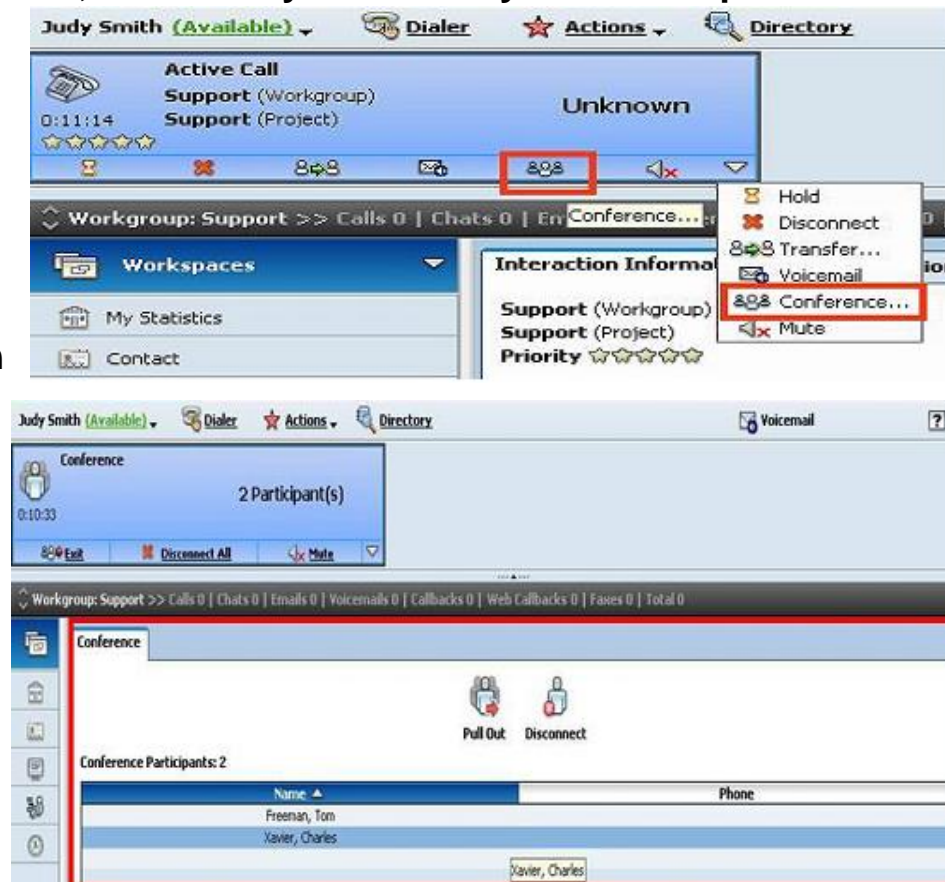
Handling Phone interaction – Conference
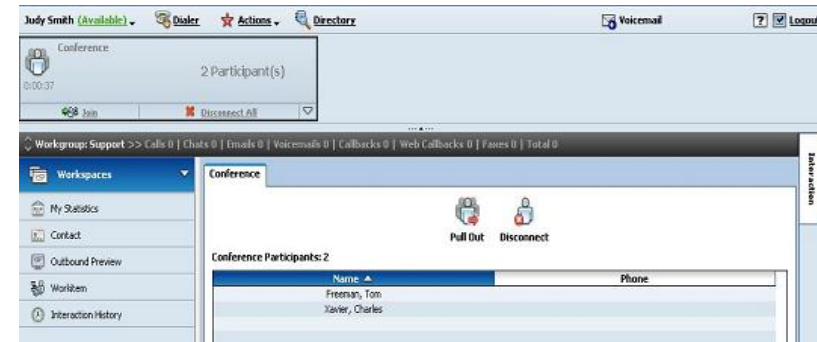
Exit a Conference

To exit from a conference that agent initiated

- **From the Conference indicator, click the Exit link.**
- **The Conference window will be greyed out to indicate agent is**
- **no longer in the conference.**
- **Agent can click on anywhere in the grey Conference indicator to open the Conference tab in his/her workspace. Agent can still see who are in the conference and their phone numbers as well.**

To exit from a conference that agent did not initiate

- **From the Active Call window, click the Disconnect icon or select the down arrow and then Disconnect.**
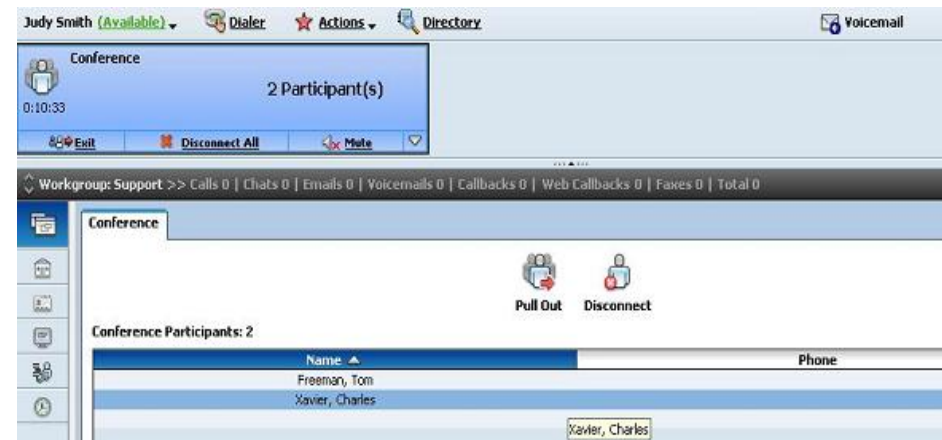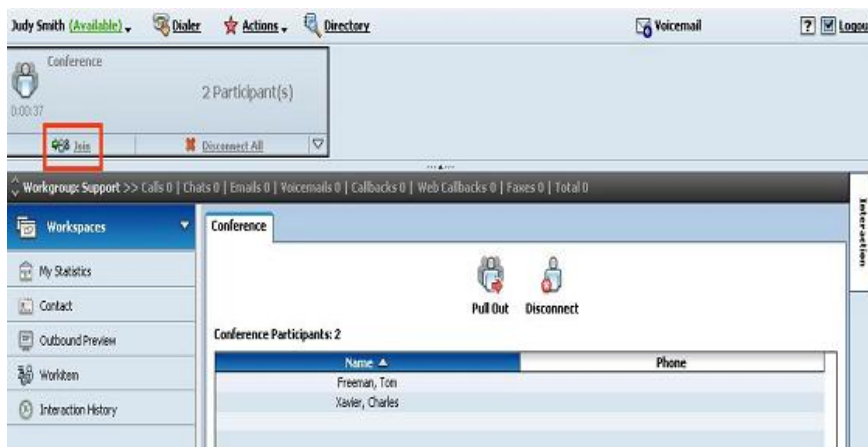
ORACLE

Handling Phone interaction – Conference

Re-enter a Conference

Agent can only re-enter (re-join) a conference that he/she initiated. To re-enter a conference
that agent initiated :

- **Click the Join icon.**
- **The Conference window will change to blue. Exit, Disconnect All, and Mute are**
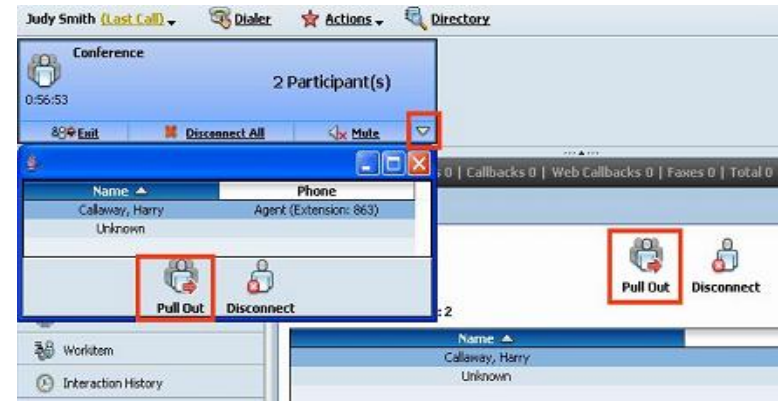**enabled in Conference Call Indicator.**

ORACLE

Handling Phone interaction – Conference

Remove a caller from a Conference

Agent can remove the caller that they initiated without disturbing rest of the parties in the conference

Two ways to remove the caller

- From the Conference Call indicator, click the drop-down arrow. A box displaying the names and phone numbers of all participants appears.

- From the Conference tab in workspace, highlight the person to remove from the list of participants.

- Click **Pull-Out** button

- A new Active Call appears (in the Interaction Control bar), and the Conference Call window shows one less participant.

To remove All callers from the conference

From the Conference Call indicator (in the Interaction Control Bar) click **Disconnect All**.

ORACLE

Handling Phone interaction – Mute / Unmute

Sometimes agent needs to block out background noise that may distract others while handling the interaction. Agent can do this using the Mute feature.

Mute

• **There are 2 ways to mute an interaction:**

   • **Click on Mute icon in the interaction indicator**

   • **Select Mute in the drop-down list when clicking the down arrow in the interaction indicator.**

• **The Mute icon changes to Unmute icon.**

• **The Phone icon in the interaction indicator is changed.**

• **The Agent can hear the caller but the caller hears nothing from the Agent.**

Unmute

• **Click the Unmute icon in the interaction indicator.**

• **The Unmute icon changes to Mute again.**

• **The caller and the Agent can talk to each other again.**
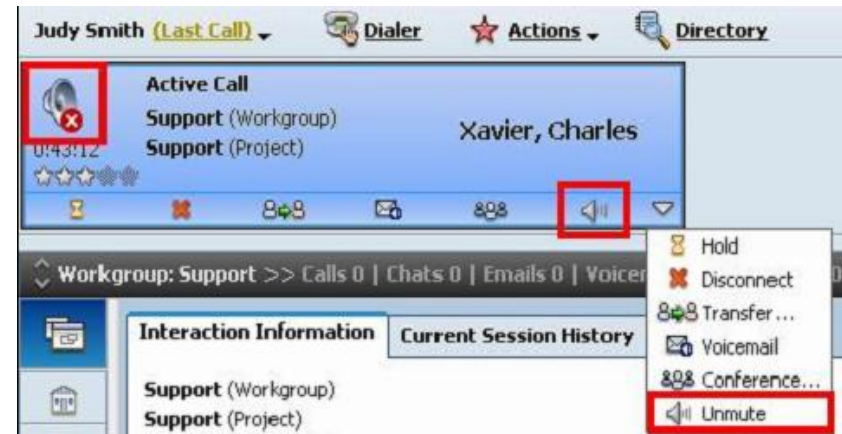
Handling Phone interaction – End an Interaction

Two ways to end a phone interaction

• **Select the interaction to disconnect.**

• **Click on Action icon on Tool bar.**

• **Select Hangup in the drop-down list of Action menu.**

• **The interaction is disconnected.**

• **Select the interaction to disconnect.**

• **Click Disconnect icon in interaction indicator.**

• **The call is disconnected.**

ORACLE

Handling Phone interaction – Assigning an Outcome

This function is available only if the Administrator has configured outcomes.

• **The agent ends the handling interaction**

• **The interaction indicator's status changes to Selecting Outcome. An Outcomes dialog appears.**

• **Select an outcome from the drop-down list of the Outcome dialog.**

• **Click Select button in Outcomes dialog**

ORACLE
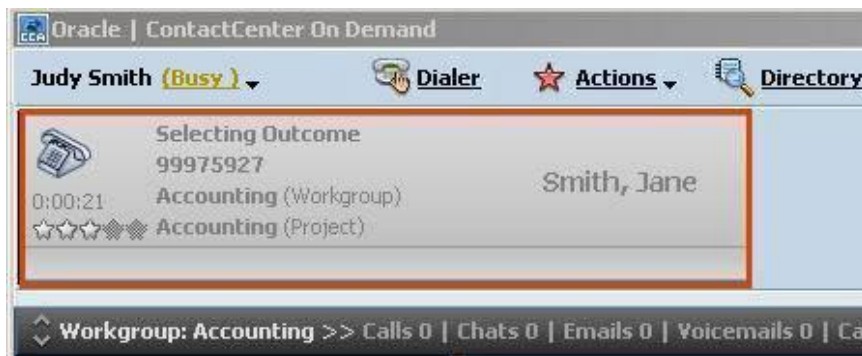
Handling phone interaction – Wrapup time

• **If the agent is configured to use Wrap-up, then after an Interaction the agent has time to finish different tasks, such as filling out a form and making sure a contact record exists.**

• **The wrapup time appears when either the agent or the caller ends the Interaction. Wrapup time starts after the agent finish selecting outcome for the interaction or when the interaction ends.**

• **The Interaction continues to display in the Active Information Area until Wrap-up ends**

• **Wrap-up ends when the agent reaches the amount of time set by the Administrator. The agent can, however, end the Wrap-up time immediately by clicking the End Wrap-Up button. The agent's status returns to *Available.***

ORACLE

Handling Interactions

Callback / Webcallback Interactions

ORACLE

Handling Callback / Web Callback interaction - Overview

Sometimes an Agent is Busy and unable to answer the call. The caller can request the agent to call him back through provided phone number. These features are configured by the Administrator.

There are 2 kinds of callback requesting:

Callback: The caller follows the instructions (prompts) to leave a phone number by phone so that the agent can call the caller back when he/she is available.

Web Callback: It is a web-interface request. The caller fills out the Web Callback form and sends to an agent through the internet.

The ways to handle Callback and Web Callback interaction are the same.

ORACLE

Handling Callback / Web Callback interaction Accept the interaction

• **When an agent receives a Callback / Web Callback interaction, the indicator status with an Accept icon changes in orange to indicate New Callback / New Web Callback.**

• **The phone line status on the Bottom bar is Ringing.**

• **Click Accept icon in the interaction indicator.**

• **The interaction indicator's color changes to blue to indicate Active Callback / Active Web Callback.**

• **The phone line status on the Bottom bar is Talking.**

ORACLE

Handling Callback / Web Callback interaction – Reschedule the Interaction

A Callback/Web Callback interaction is available for an Agent to reschedule only if it is configured by the Administrator.

Click Disconnect icon or select Disconnect in the drop-down list when clicking on the down arrow in the interaction indicator to end the interaction.

• An Outcomes dialog appears. There are 3 options to reschedule a Callback / Web Callback interaction.

> **Not Needed: It's not necessary to reschedule the callback/web callback.**

> **Call Customer back Today at: An interaction is rescheduled at selected time of the same day.**

> **Callback Date: the interaction is rescheduled on selected date and time**

• Click Select button on the Outcomes dialog to completely end the interaction.
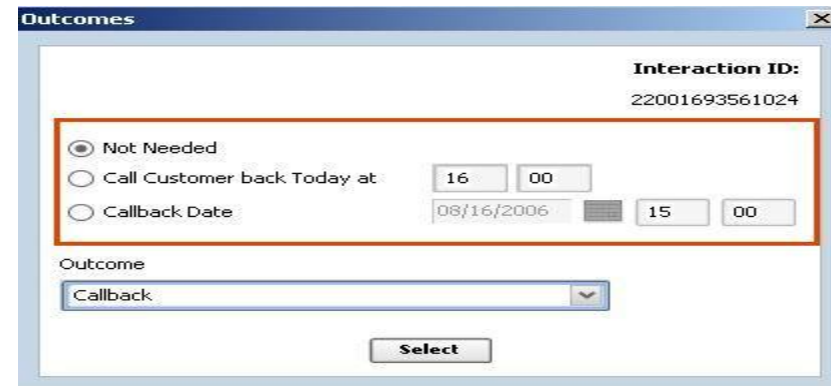
Handling Interactions

Voicemail Interactions

ORACLE

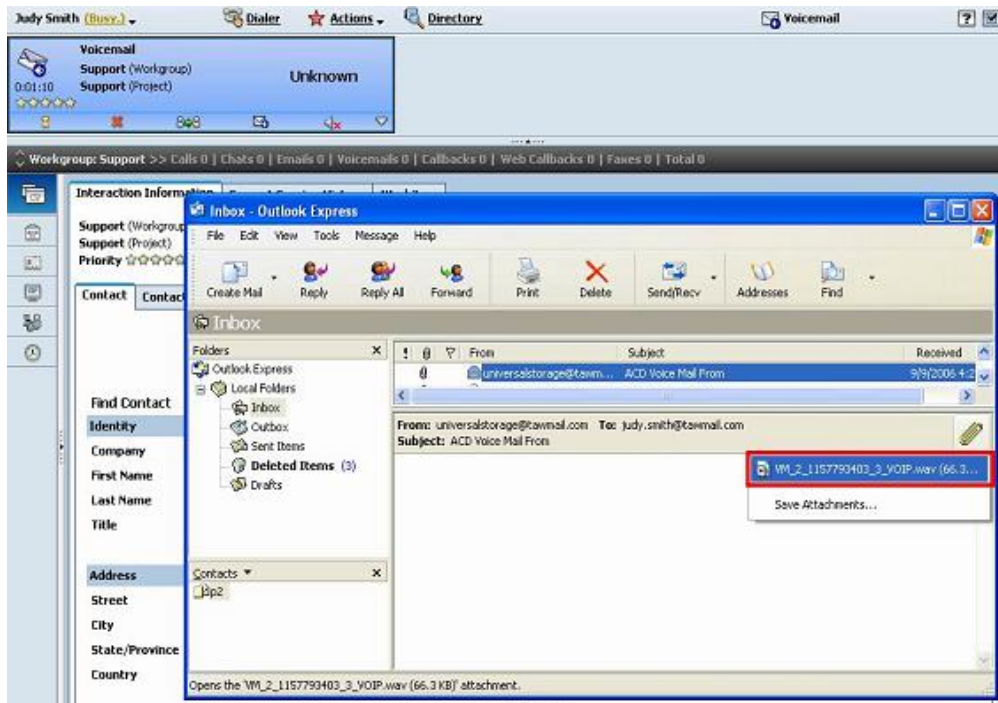# Handling Voicemail Interactions – ACD Voicemail

Voicemail allows a caller to leave you a voice message. If the caller comes through workgroup, it is an ACD Voicemail.

- **The Agent receives an ACD Voicemail Interaction and clicks "Accept".**

Handling Voicemail Interactions – ACD Voicemail

- An Active Voicemail window appears.
- If the agent is set to listen to ACD Voicemail by email, voicemail will appear as an email attachment in agent's mailbox. The agent opens and listens to the attachment.
- If the agent is set to listen to ACD Voicemail by phone, the call center will ring the Agent's phone and play message.

- An Agent can click Disconnect icon to disconnect the interaction.

ORACLE

Handling Voicemail Interactions – Personal Voicemail

If a caller calls an agent directly, and agent is not at his/her desk, the caller can leave him/her a voice message.

• Depends on agent's settings (which was set by admin), an agent has two ways to listen to his/her personal voicemail: by Voicemail Inbox or by his/her email client.

• Voicemail Indicator will highlight when new personal voicemails are in his/her mailbox.

To listen to personal voicemail by Voicemail Inbox

• Click Voicemail Indicator to launch Voicemail Inbox
• Click Play to play message.
• Click Delete to Delete message.

# Handling Voicemail Interactions – Personal Voicemail
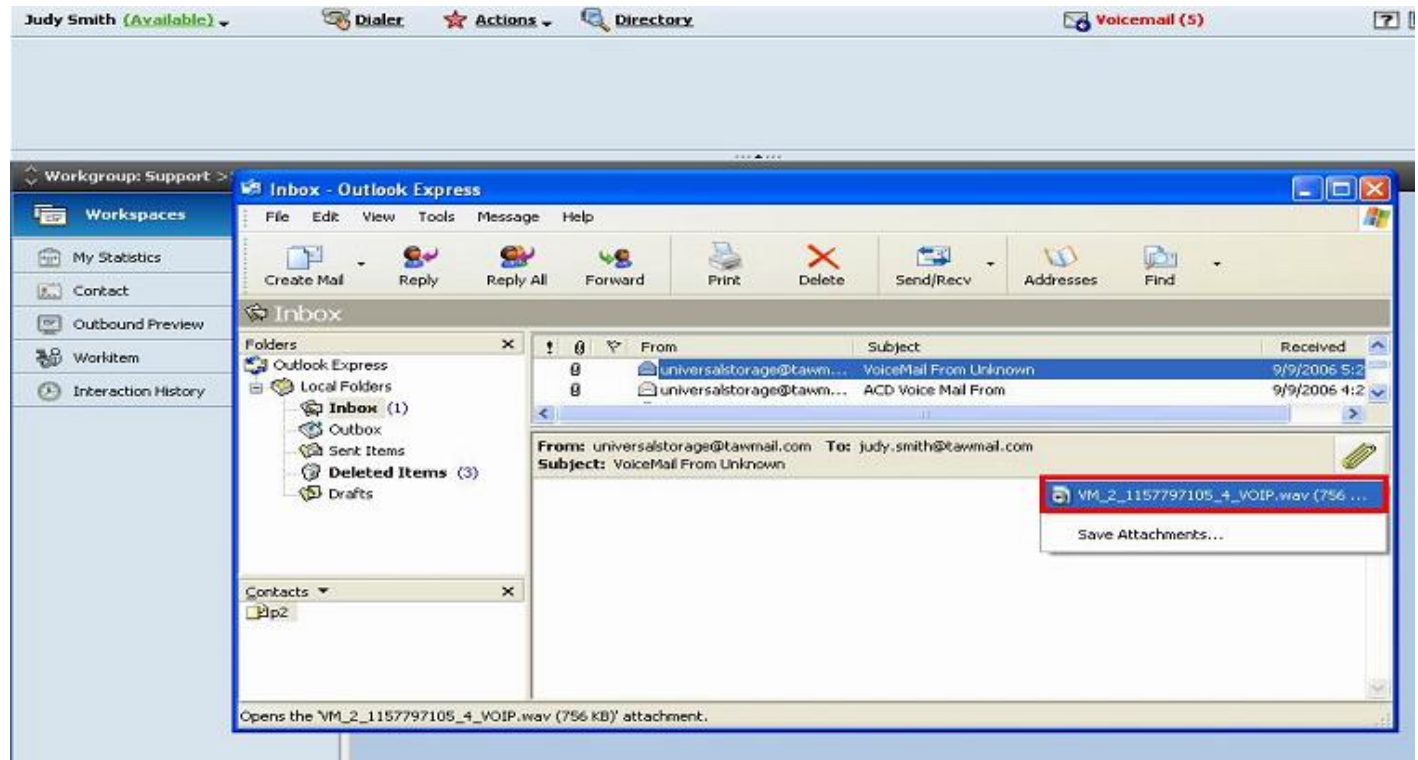
To listen to personal voicemail by Email Client:

- Click Voicemail Indicator to launch preset Email Client.
- Select voicemail message in attachment.

ORACLE

Logout

There are 2 ways to logout an agent:

• **Close the application**

• **Click on Logout link at the top-right corner of the page**

• **A dialog "Are you sure you want to logout?" appears.**

• **Click on Yes button to logout, or No button to cancel logging out.**

• **An agent can be forced to logout by his supervisor.**

ORACLE
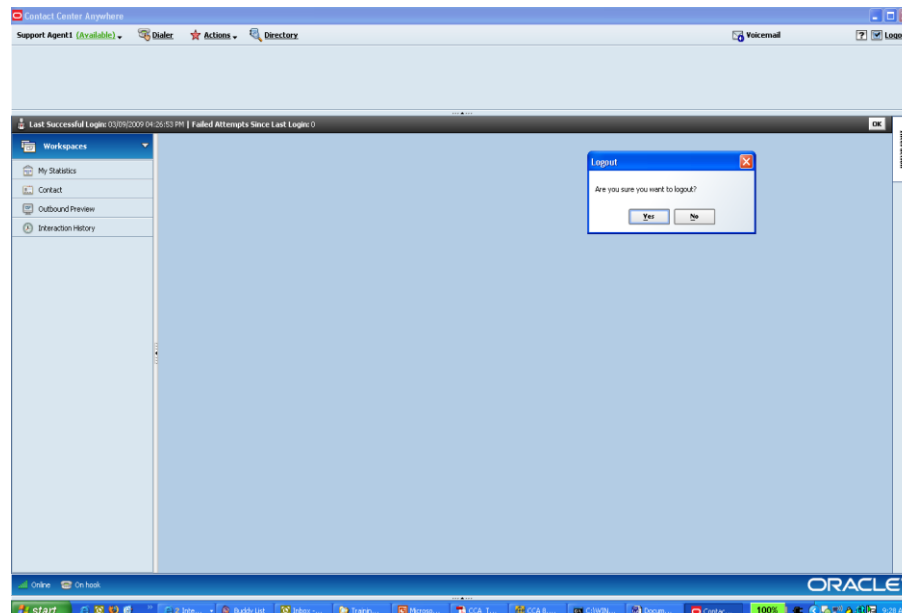
Dictionary

AM	Administrator Manager
ACD	Auto Call Distribution
CCA	Contact Center Anywhere
CRM	Customer Relationship Management
DNIS	Dialed Number Identification Service
FAQ	Frequently Asked Questions
IM	Interaction Manager
MSI ID	Medium-scale integration identification
PBX	Private Branch Exchange
POP3	Post Office Protocol
SM	Supervision Manager
SMTP	Simple Mail Transfer Protocol
SIP	Session Initiation Protocol
URL	Uniform Resource Locator
VOIP	Voice over IP

ORACLE