

Interaction Desktop: User Guide

Contents

Purpose	3
Introduction	3
How Do I Access Interaction Desktop?	3
Getting Started.....	4
Opening Interaction Desktop.....	4
Interaction Desktop interface.....	7
Call Control	9
Receiving Calls	9
Making Calls	10
General Call Controls.....	13
Checking Your Call History	15
Setting Your Status	16
Using Directories.....	17
Adding Directories.....	18
Removing a Directory.....	19
Listening to your voicemail messages.....	19
Interaction Desktop Help.....	22

Purpose

To provide an introduction to the Interaction Desktop interface. This document details how to access Interaction Desktop, login and perform common phone functions.

Introduction

Interaction Desktop is an interaction management application for call control at CSU. Interaction Desktop offers more functionality than a standard telephone. In addition to making and receiving phone calls, it is used to manage voicemail, conference calls, phone queue's and web chats.

Interaction Desktop can be accessed using CSU computers on the CSU network either on campus or via Virtual Private Network (VPN).

How Do I Access Interaction Desktop?

Interaction Desktop requires the purchase of a one-off license to grant access.

To obtain an access license, please contact the Service Desk (providing an account code). You can contact the Service Desk either by calling x84357 or [Online Self Service](#).

Attempting to login to Interaction Desktop without a license will present the error:

The following licenses were not available: I3_ACCESS_CLIENT

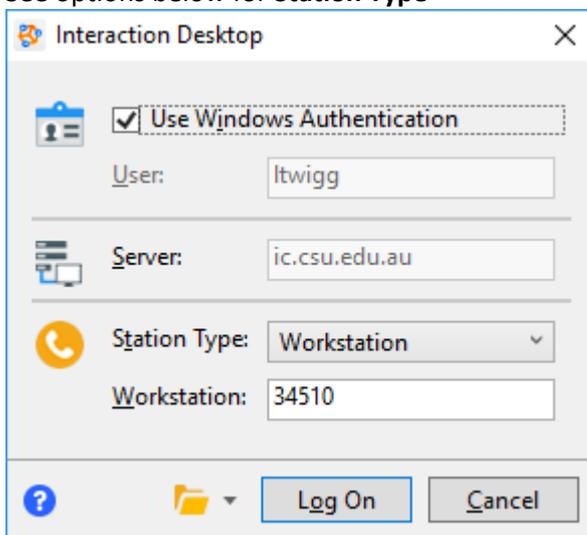
Getting Started

Opening Interaction Desktop

- Double-click the Interaction Desktop icon that appears on your desktop



- At the login screen, click **Use Windows Authentication**
- The server is **ic.csu.edu.au**
- See options below for **Station Type**

The image shows a Windows-style dialog box titled 'Interaction Desktop'. It has a close button (X) in the top right corner. The dialog contains several fields: a checked checkbox for 'Use Windows Authentication', a 'User:' field with the text 'ltwigg', a 'Server:' field with the text 'ic.csu.edu.au', a 'Station Type:' dropdown menu set to 'Workstation', and a 'Workstation:' field with the text '34510'. At the bottom, there is a help icon (question mark), a folder icon, and two buttons: 'Log On' and 'Cancel'.

CSU users using call queue's or managing multiple numbers may have different login requirements. Please contact the Service Desk for additional assistance if your particular requirement is not addressed here.

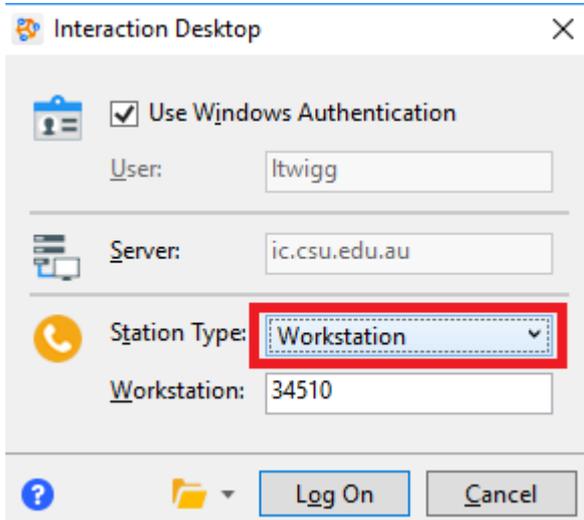
At the Choose a Station page, specify where you would like your calls to be sent. You have a number of options:

- [Sitting at your usual workstation, using a CSU telephone](#)
- [Sitting at a hotdesk or alternate location, using a CSU telephone](#)
- [Sitting at a hotdesk or alternate location, using a mobile or alternate landline](#)

Sitting at your usual workstation, using a CSU Telephone

Select **Use Windows** Authentication and under station type choose **Workstation**

Enter your normal CSU extension



The screenshot shows the 'Interaction Desktop' login window. It has a title bar with a close button. The main area contains the following fields and options:

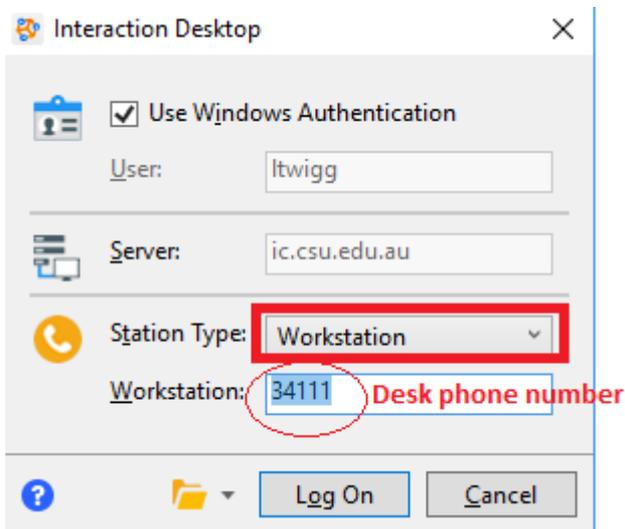
- Use Windows Authentication
- User: Itwigg
- Server: ic.csu.edu.au
- Station Type: Workstation (highlighted with a red box)
- Workstation: 34510

At the bottom, there is a help icon, a folder icon, and two buttons: 'Log On' and 'Cancel'.

Sitting at a hotdesk or alternate location, using a CSU telephone

Select **Use Windows** Authentication and under station type choose **Workstation**

Enter the extension of the phone on the desk in the **Workstation** field



The screenshot shows the 'Interaction Desktop' login window, similar to the one above. The fields are:

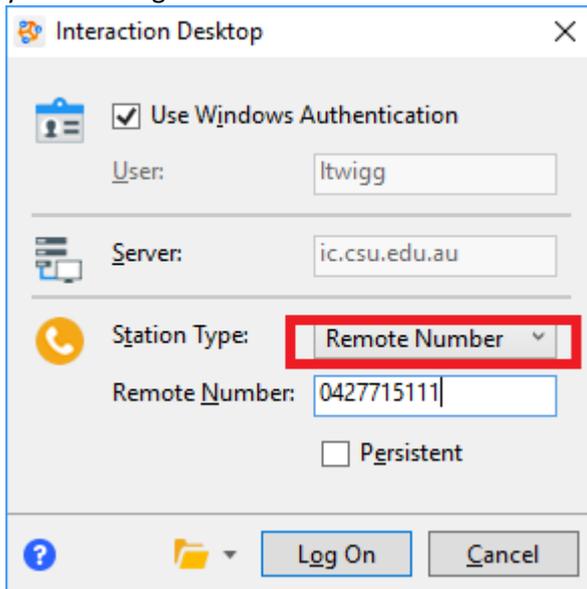
- Use Windows Authentication
- User: Itwigg
- Server: ic.csu.edu.au
- Station Type: Workstation (highlighted with a red box)
- Workstation: 34111 (circled in red with the text 'Desk phone number' next to it)

At the bottom, there is a help icon, a folder icon, and two buttons: 'Log On' and 'Cancel'.

Sitting at a hotdesk or alternate location, using a mobile or alternate landline

If you are not sitting at your usual desk, you can manage calls using Interaction Desktop and use a remote phone number, such as a home landline or mobile phone. (Please note: Interaction Desktop can only be used on a CSU device either on campus or via VPN connection)

- Send calls to another number by selecting **Remote Workstation** and enter the phone number you are using.



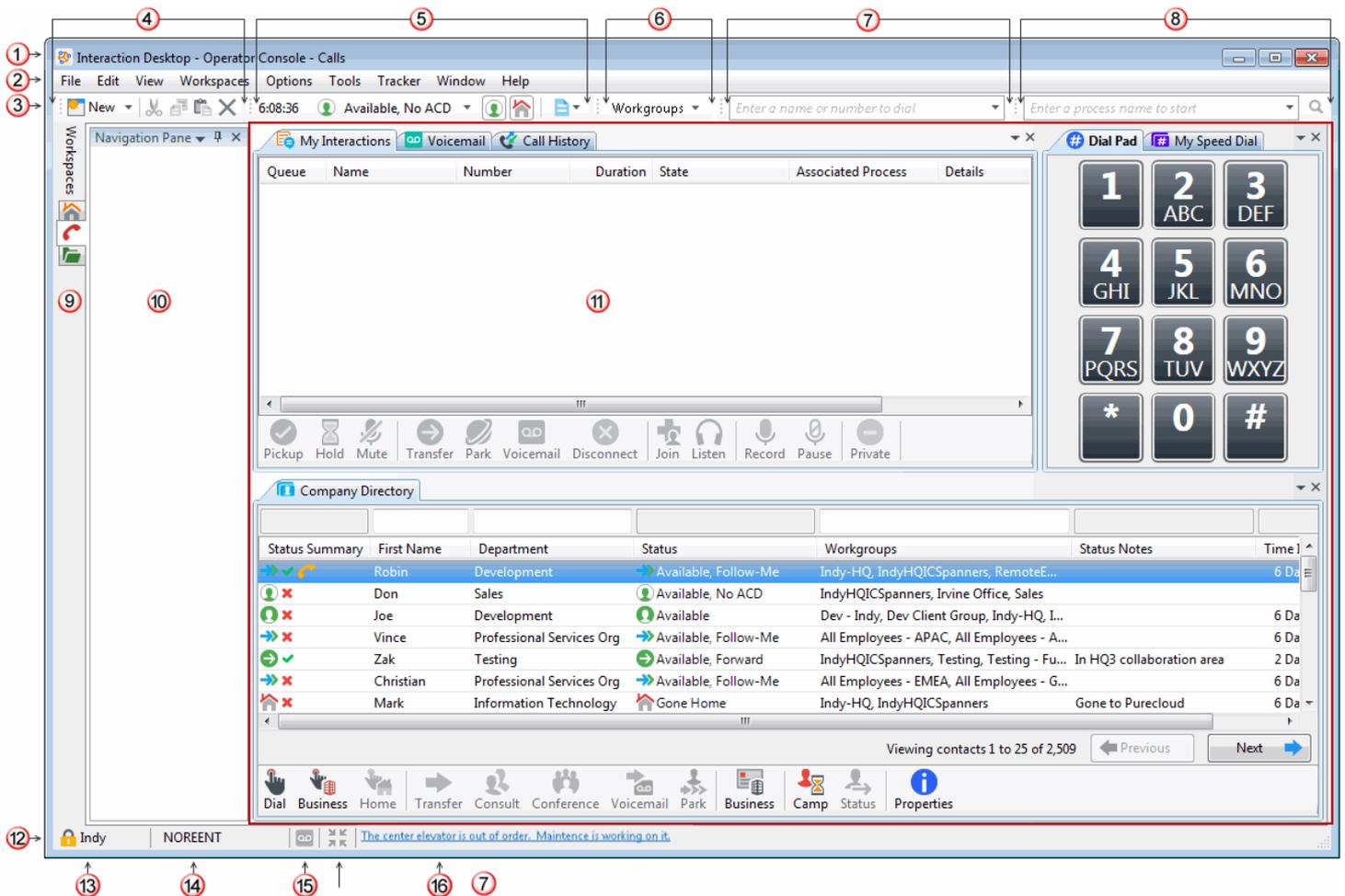
The screenshot shows the 'Interaction Desktop' dialog box. It has a title bar with a close button. Below the title bar, there is a checked checkbox for 'Use Windows Authentication'. Underneath, the 'User' field contains 'ltwigg'. The 'Server' field contains 'ic.csu.edu.au'. The 'Station Type' dropdown menu is highlighted with a red box and shows 'Remote Number' selected. Below that, the 'Remote Number' field contains '0427715111'. There is an unchecked checkbox for 'Persistent'. At the bottom, there are three buttons: a help icon, a folder icon, and 'Log On' and 'Cancel' buttons.

- Click on **Log On**

When making calls, dial using Interaction Desktop – your remote number will then ring. When you pick up the call will then dial to the number you entered.

Interaction Desktop interface

Interaction Desktop provides a user interface for easy access to the features of application modules. The interface includes navigation panes, menus, toolbars, Workspace tabs, and a workspace.



The Interaction Desktop interface can be customized to suit your individual needs. Many views are available to display other data and perform certain actions. For more detailed instructions visit the Interaction Desktop support page:

[Genesys Support Article: Customising Interaction Desktop](#)

Or watch the **'Managing Views in Interaction Desktop'** from the Genesys Interaction Desktop playlist on youtube:

[Genesys Demonstration Video's: Interaction Desktop](#)

1	Title bar	The title bar appears on the main Interaction Desktop window.
2	Menu bar	Menus organize the Interaction Desktop commands and actions you can use when working with program modules.
3	Toolbar area	The Interaction Desktop toolbar area contains several smaller toolbars that you can show or hide
4	Standard toolbar	Add new views or workspaces to Interaction Desktop. Use the standard editing tools for cut, copy, paste, and delete in text boxes.
5	Status toolbar	View or change your Customer Interaction Center (CIC) status. This toolbar also displays how long you have spent in your status. You can add status notes to provide more information about your status.
6	Workgroup Activation toolbar	Select or clear activation status check boxes for the workgroups to which you belong.
7	Make Call toolbar	Call by typing a phone number. Lookup and dial a number from your Company Directory by typing part of the contact's name. Or, click the drop-down arrow to choose from a list of names and numbers you have recently called.
8	Processes toolbar	Search for and start an Interaction Process.
9	Workspaces	The selected tab identifies the currently displayed workspace. To switch between workspaces, click a tab.
10	Navigation Pane	The Navigation Pane provides easy access to the module components in the default workspace or built-in workspaces. Module components appear as views in a workspace.
11	Workspace	The currently displayed workspace.
12	Status bar	The status bar displays your current connection state, server name, station name, voice mail indicator, and notifications.
13	Connection state	If disconnected, click this section to reconnect. If connected, point to this section to display your User ID, IC server name, and Session Manager server name. A lock icon indicates that the connection is encrypted.
14	Station or Remote number	Displays the name of your currently active workstation or your remote number. Tip: To change stations, click this section.
15	Voice mail indicator	If you have one or more unheard voice mail messages, this icon is in color. If the icon appears dimmed, you do not have any voice mail messages.
16	Show in Mini Mode	To display the CIC client in Mini Mode, click this control.
17	Notification area	CIC administrators can use client memos to communicate with selected users, workgroups, or roles. The administrator creates these client memos in Interaction Supervisor. These memos appear in the notification area or as desktop pop-ups (toast) in the lower right side of your Windows desktop.

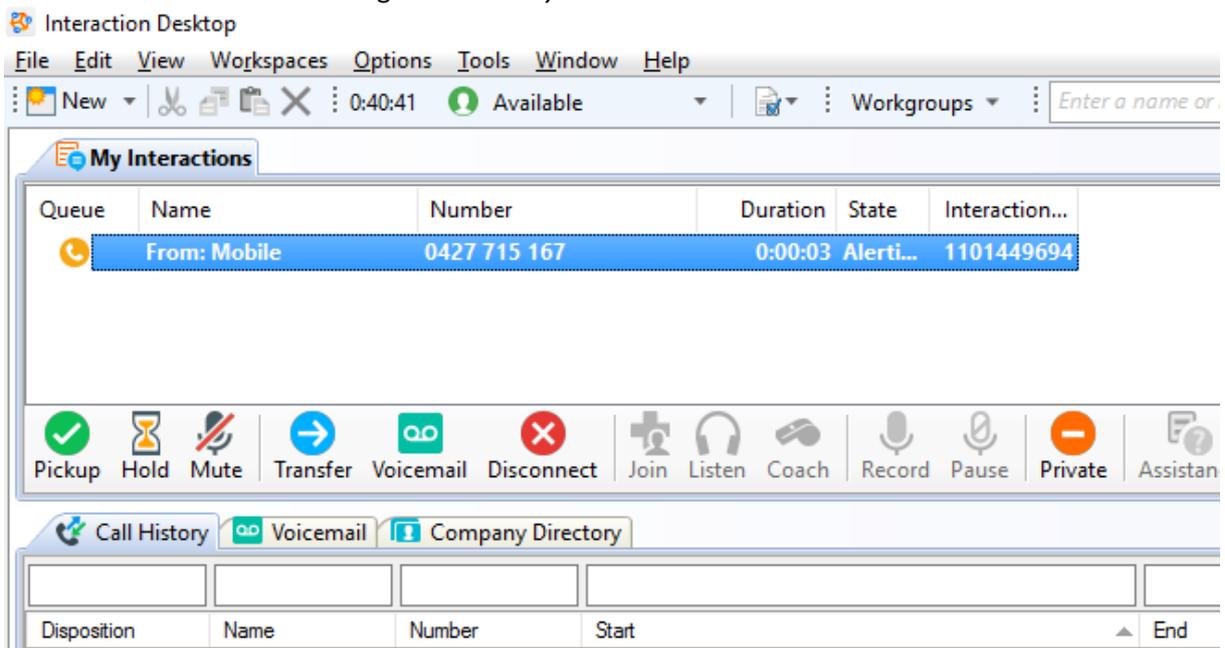
Call Control

Receiving Calls

When you receive a call, a new call will display inside Interaction Desktop.

To answer a call:

- Click the call in the My Interaction window and click on **Pickup** icon
- Double-click the alerting call in the *My Interactions* window



If you do not wish to answer a call:

Place Call on Hold

To place a current or incoming call on hold:

- select the **Hold** icon (caller will hear on hold music)
- press either the **Hold** or **Pickup** icon to take the selected call off hold

Send to Voicemail

Send a current or incoming call to Voicemail by selecting the interaction in the My Interaction window and click on **Voicemail**

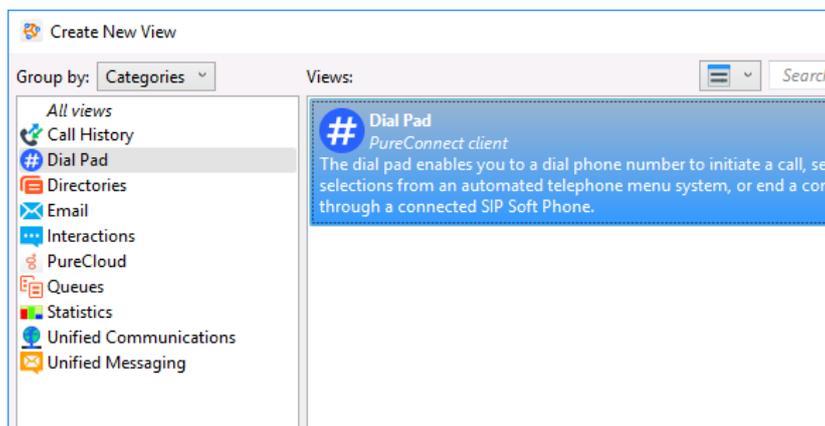
Making Calls

There are a number of ways to make a call in Interaction Desktop

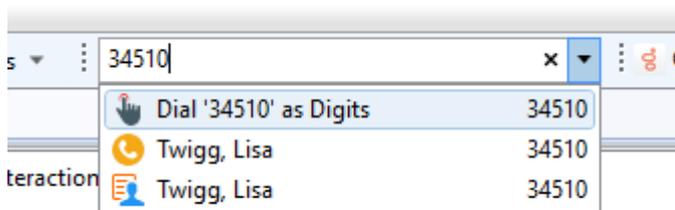
- Using the dial pad
- Using your keyboard
- Double clicking an entry from the directory
- From the recent calls drop down

To make a call using the dial pad:

- To display the dialpad, right click anywhere within the *My Interactions* window and click on **'New View'**
- In the *Create New View dialog box*, set **Group by to Categories**, and then from the list of categories, select **Dial Pad**.
- In the **Views** list, select **Dial Pad**.
- Click **OK**.

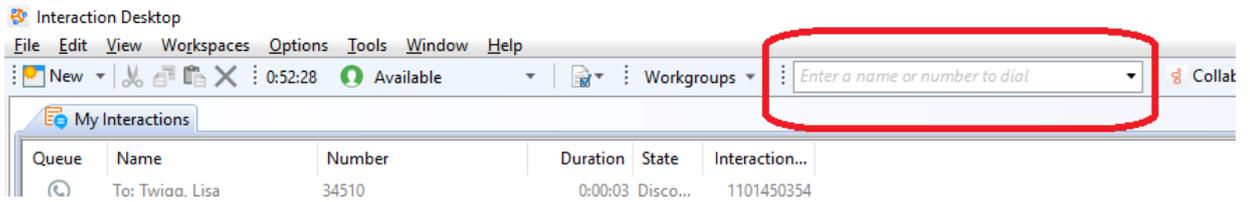


- Click the numbers required and then click on the drop down in the *Enter a name or number to dial* field at the top of screen, select the appropriate option to dial

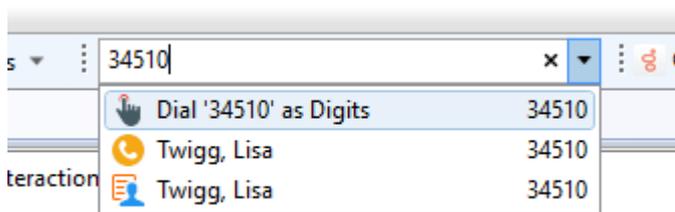


To make a call using your keyboard:

- Click on the *Enter a name or number to dial* field at the top of screen

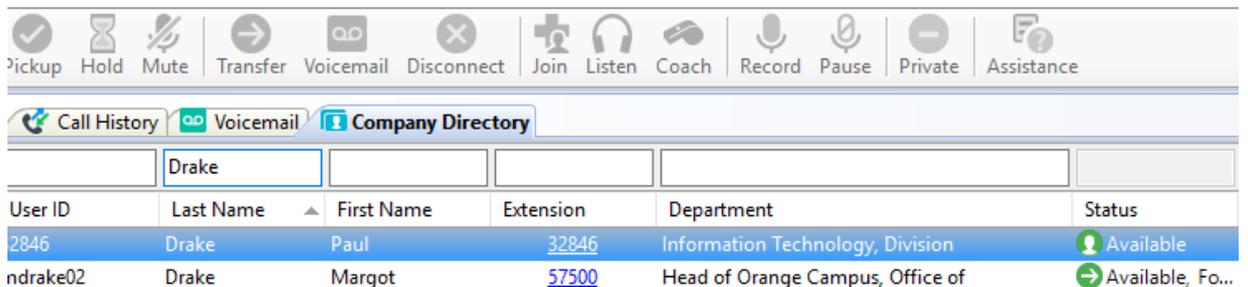


- Using your keyboard, enter the number required and click on the appropriate option provided for you



To make a call from the directory:

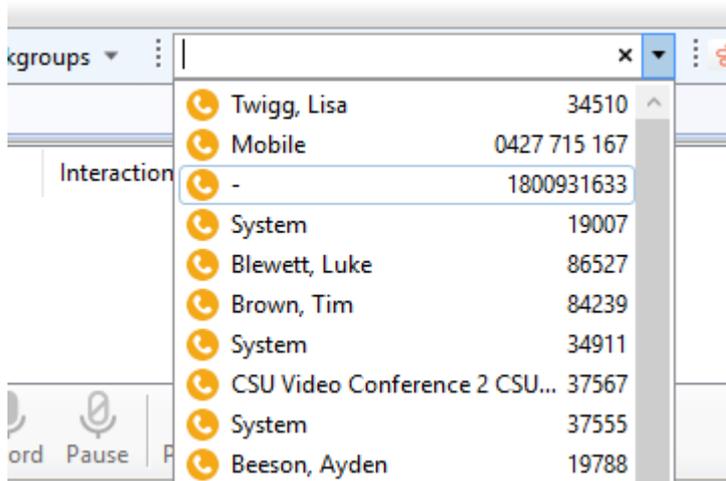
- Click on the search fields at the top of the directory window
- Enter your search term/s in the fields



- To make the call, click either on the blue extension, or double click the entry

To make a call from your recent calls:

- Click on the drop down icon at the top of screen to open the *Enter a name or number* field
- Click on the small arrow on the right hand side to display your recent calls



- Click on a recent call to dial the number

General Call Controls

While on a call, the call control icons at the centre of screen will become available



Mute

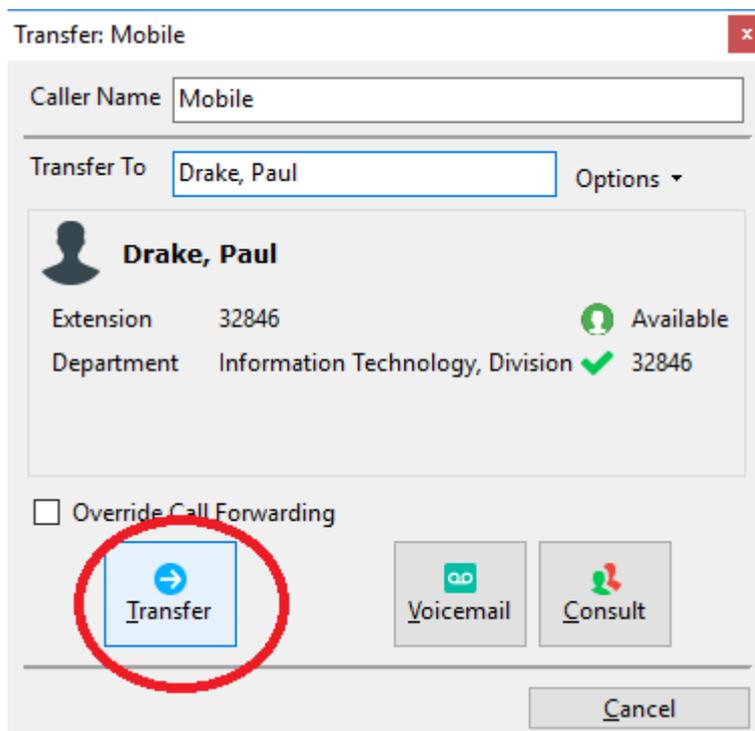
Mute your microphone to stop the system sending sound to the other party

- select the **Mute** icon
- select the **Mute** icon again to disable

Transfer

To transfer a call:

- select **Transfer** icon (will open a dialog box)
- enter the name or number you wish to transfer the call to in the dialog box
- As you type the recipients name or number into the text box, a drop-down of choices appears
 - Selecting “Dial *your entry*’ as digits, creates a call as you have typed the number
 - Selecting a contact name from the drop down will phone the associated extension.
- Click on **Transfer**



Transfer: Mobile

Caller Name

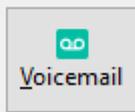
Transfer To Options ▾

 **Drake, Paul**

Extension 32846  Available

Department Information Technology, Division  32846

Override Call Forwarding

 Transfer  Voicemail  Consult

Disconnect a Call

To end a call, select the interaction from the *My Interactions* window and click on **Disconnect**

Make a conference call

Conferences will show up in the main queue list (in a tree fashion) with your call at the top of the list.

To expand or collapse the list of callers on the conference, a plus or minus sign can be clicked.

To add parties to a conference, a user may drag a connected call to the conference:

- call the first participant you want in the conference and then call the second participant (the first participant will be put on hold)
- once the second participant answers - hold down the mouse button and drag the second call to the first call and release the mouse (a new interaction called **Conference** will appear)
- to add other participants, call and then drag and drop the connected call onto the conference

Forward calls to another number

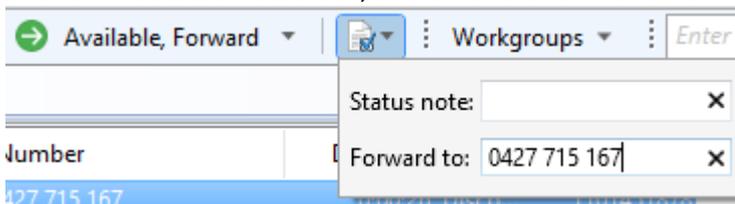
If you will be away from your desk but wish to be accessible at another number, you can forward your calls. Calls can be forwarded to another internal extension, local number, long distance or a mobile phone.

To configure your call forward:

- Click on the Status drop down on the top right toolbar
- Select **Available, Forward**



- Click on the Status Notes icon, and enter the number to forward your calls to



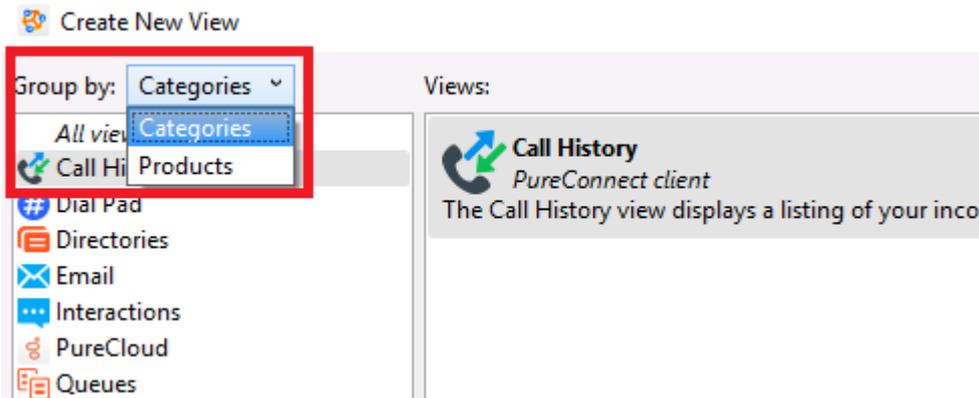
- To cancel, return your status to **Available**

Checking Your Call History

Add your Call History view to Interaction Desktop to check for calls made, received and missed

Displaying the Call History View

1. To display the Call History, right click anywhere within the *My Interactions* window and click on **'New View'**
(or click on **File > New > View**)
2. In the Create New View dialog box, set **Group by** to **Categories**, and then from the list of categories, select **Call History**.



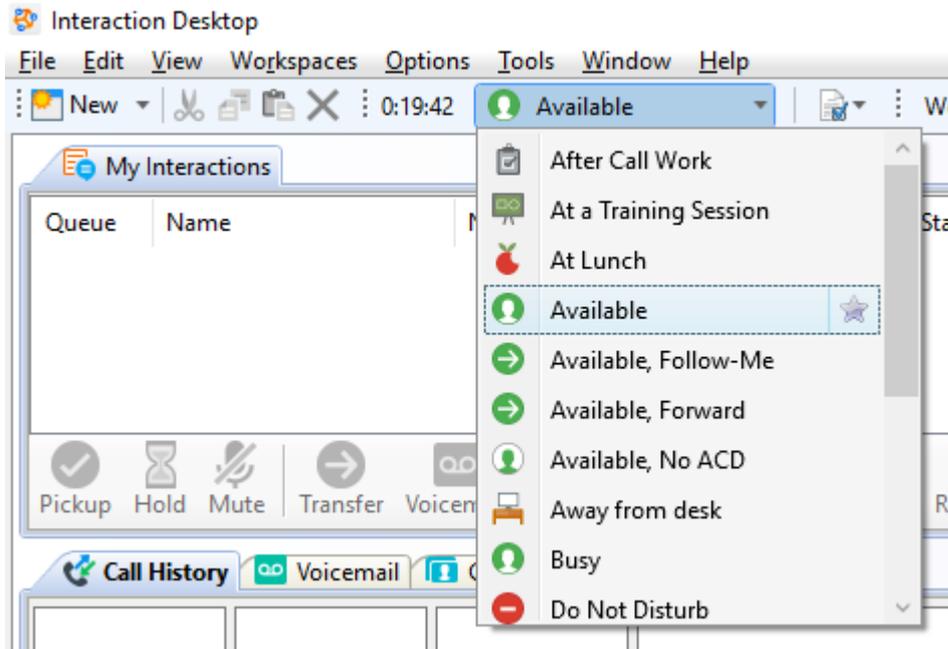
2. In the **Views** list, select **Call History**.
3. Click **OK**.

Once added Call History will appear as a tab on the bottom half of screen

Disposition	Name	Number	Start
Called	CSU Video Confe...	37567	Tuesday, April 2, 2019, 9:30 AM
Called	System	37555	Tuesday, April 2, 2019, 9:30 AM
Answered	Brown, Tim	84239	Tuesday, April 2, 2019, 9:47 AM
Called	Foale, Alison	19669	Tuesday, April 2, 2019, 9:49 AM
Answered	Brown, Tim	84239	Tuesday, April 2, 2019, 10:20 AM
Called	System		Today, 9:38 AM
Called	System		Today, 9:38 AM

Setting Your Status

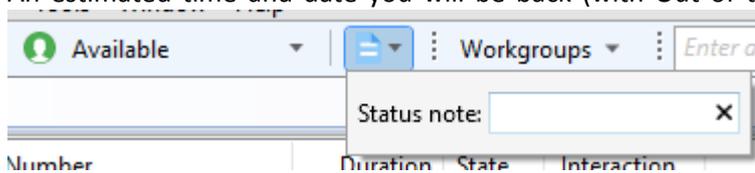
Your status can be set using the drop down menu on the top toolbar.



You can also select up to 5 favourite statuses by clicking the star to the right.

To the right of **My Status**, you will see **Status Details** icon. By clicking this, you can set:

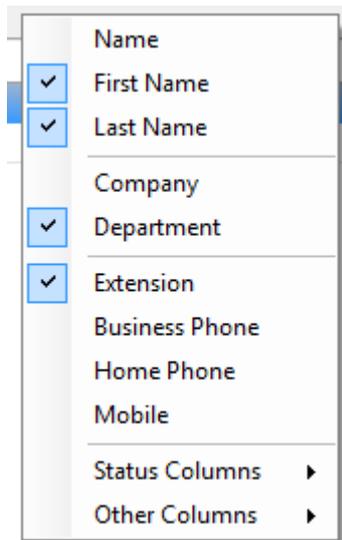
- Set a forward number for the *Available, Forward* status
- Notes that other people with IC can read
- An estimated time and date you will be back (with Out of the Office or At Lunch statuses)



Using Directories

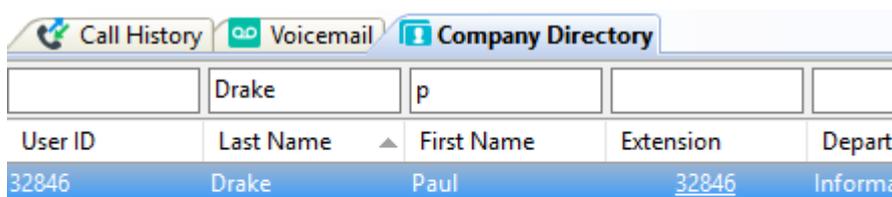
The default directory (Company Directory) contains the contact information of all CSU users. Additional information about contacts can be displayed by adding fields to this view.

To do this, click on the columns icon at the right hand side of the Directory window. Tick the columns to add. Common used columns are Name, Status and On Phone.



Searching Directories

This directory can be searched by entering search terms into the search fields at the top and pressing enter.



Making Calls from Directories

To call a person from within a directory:

- click the blue number listed under **Extension**, or
- select the entry and click **Dial** at the bottom of the page



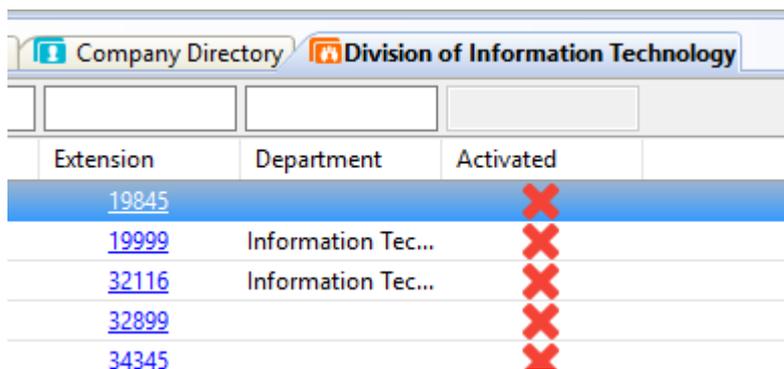
Adding Directories

Extra directories can be added to the window with most University workgroups listed.

Workgroups break down into listings of sections, schools and divisions at CSU.

To add a directory:

1. To display another directory, right click anywhere within the *My Interactions* window and click on **'New View'**
(or click on **File > New > View**)
 2. In the Create New View dialog box, set **Group by** to **Categories**, and then from the list of categories, select **Directories**.
 3. Select **Workgroup directories** and **ok**
 4. From the left-hand window, select the directory you would you like to add, and click **Add**
 5. Click **OK**
- The new directory will appear as a tab next to the *Company Directory*



Removing a Directory

To remove a directory:

- click **Close**  on the **Directories** tab.

Any tab you remove can be added again. The company directory cannot be removed.

Listening to your voicemail messages

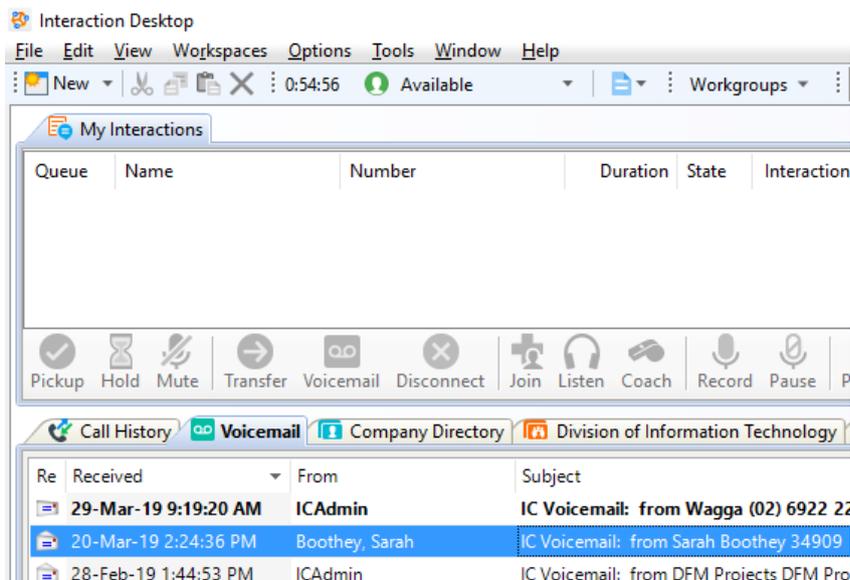
Voicemail can be accessed in 3 ways

- Play from Voicemail view within Interaction Desktop
- Play from the voicemail notification email in Outlook
- Dial the voicemail service '99'

Listen to Voicemail through Interaction Desktop

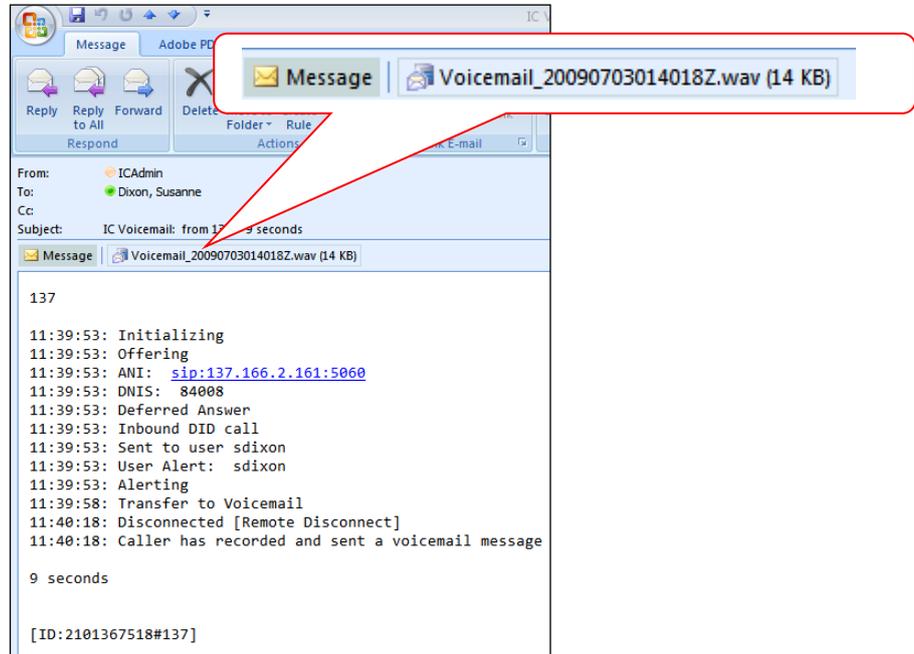
Add the voicemail viewer:

1. To display another directory, right click anywhere within the *My Interactions* window and click on **'New View'**
(or click on **File > New > View**)
2. In the Create New View dialog box, set **Group by** to **Categories**, and then from the list of *All views*, select **Voicemail** and click **OK**
3. Voicemail will appear as a tab at the middle of screen
To listen, double click the message.

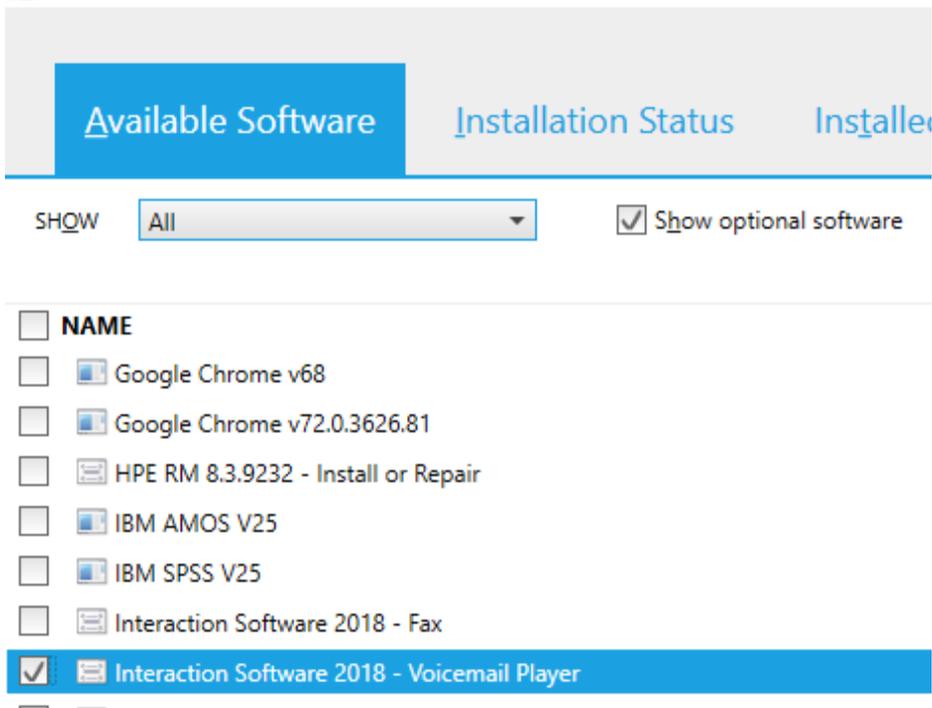


Listen to Voicemail messages on Email

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



The voicemail will play in your preferred media software. Alternatively, you can install the Voicemail Player from Install Software to handle voicemail audio.



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



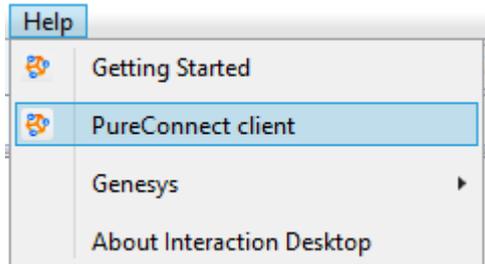
You have options to stop, rewind fast forward and turn the sound up or down.

Listen to Voicemail through the Voicemail Service '99'

To listen to voicemail messages through the phone system, dial 99 and enter your pin when prompted.

Interaction Desktop Help

For more information, access the Interaction Desktop help by clicking on the menu icon at the top right of screen, and click on **Help** and **PureConnect client**



A separate browser window will display the help topics along with Contents, Index, Search and other navigation controls.



Access additional support articles from the Genesys support database

[Genesys Support Articles: Interaction Desktop](#)

Or watch informational video's from the Interaction Desktop playlist on youtube

[Genesys Demonstation Video's: Interaction Desktop](#)