



iceManager  
User Manual  
Server Version 15.x

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iceManager and iceJournal for ice server version 15.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.)



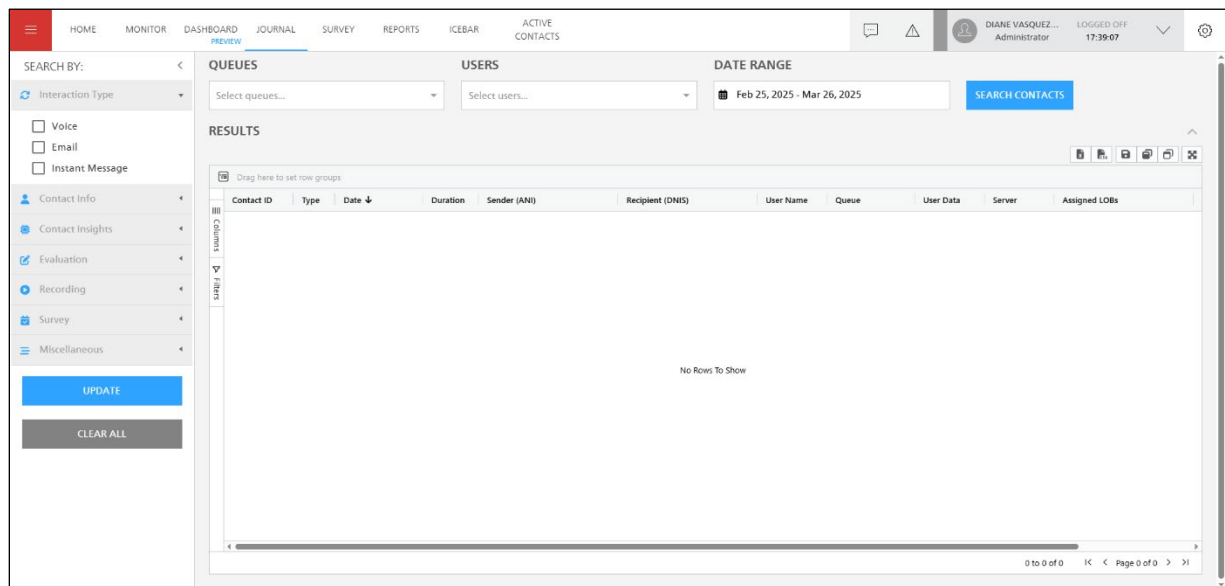
## Chapter 1: Getting Started

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 screen below shows the viewing experience on a tablet.

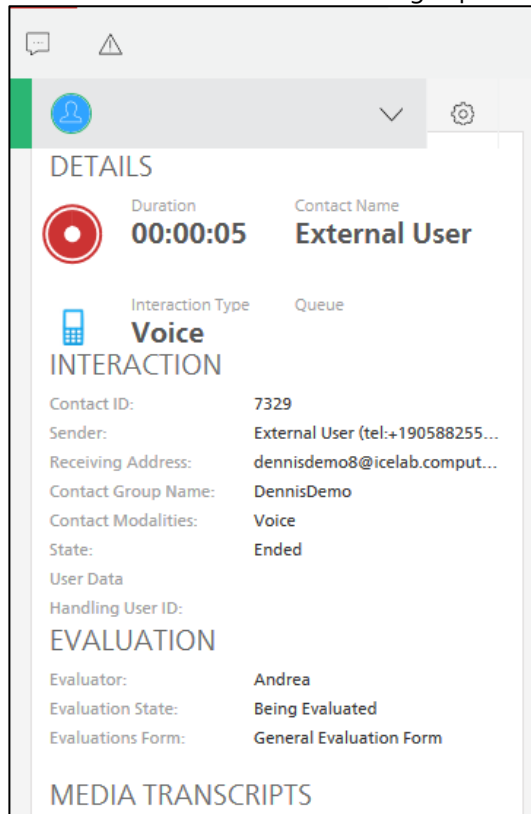
The screenshot displays the 'EVALUATION EXTERNAL USER' interface on a tablet. The top navigation bar includes a menu icon, a search bar, and user information for ANDREA Administrator (READY 20.1-8:5). The main content area is divided into three columns:

- DETAILS:** Shows a duration of 00:00:05 for an 'External User' interaction. The interaction type is 'Voice'.
- INTERACTION:** Lists details such as Contact ID (7329), Sender (External User), Receiving Address (dennisdemo8@icela...), Contact Group Name (DennisDemo), Contact Modalities (Voice), and State (Ended).
- EVALUATION:** Shows the Evaluator (Andrea), Evaluation State (Being Evaluated), and Evaluation Form (General Evaluation Form).

Below the main sections is the 'CALL QUALITY' section, which includes:

- Agent Attitude:** A star rating system (5 stars) with a 0% completion rate and a 'Comment' button.
- Caller attitude:** A slider control with a 0% completion rate and a 'Comment' button.
- Lync Call Quality:** A set of buttons for 'TERRIBLE', 'BAD', 'MEDIocre', 'GOOD', and 'EXCELLENT' with a 0% completion rate and a 'Comment' button.
- CALL QUALITY TOTALS:** A summary row showing 0/0 evaluations with a 0% completion rate and a 'Comment' button.

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.

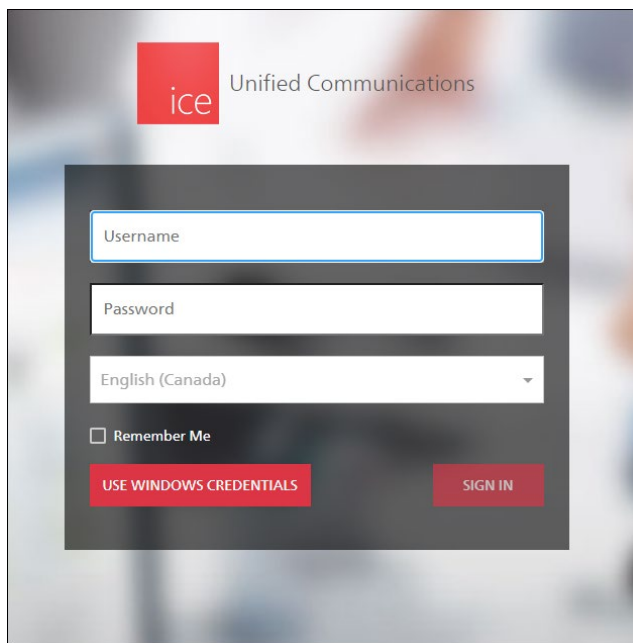
To access the iceManager website, open the web browser and type in the URL for the website. If you do not know the URL, contact your ice administrator.

## 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:

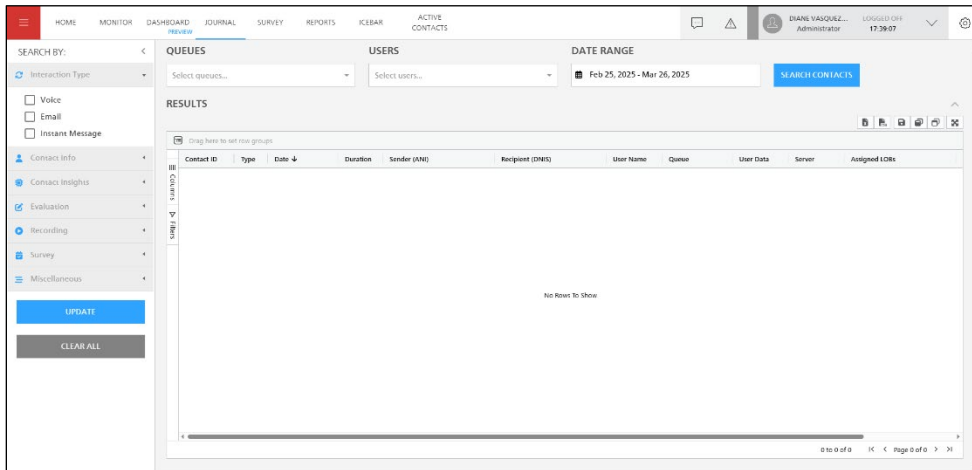
1. Open your Web browser and go to your iceManager site.



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.

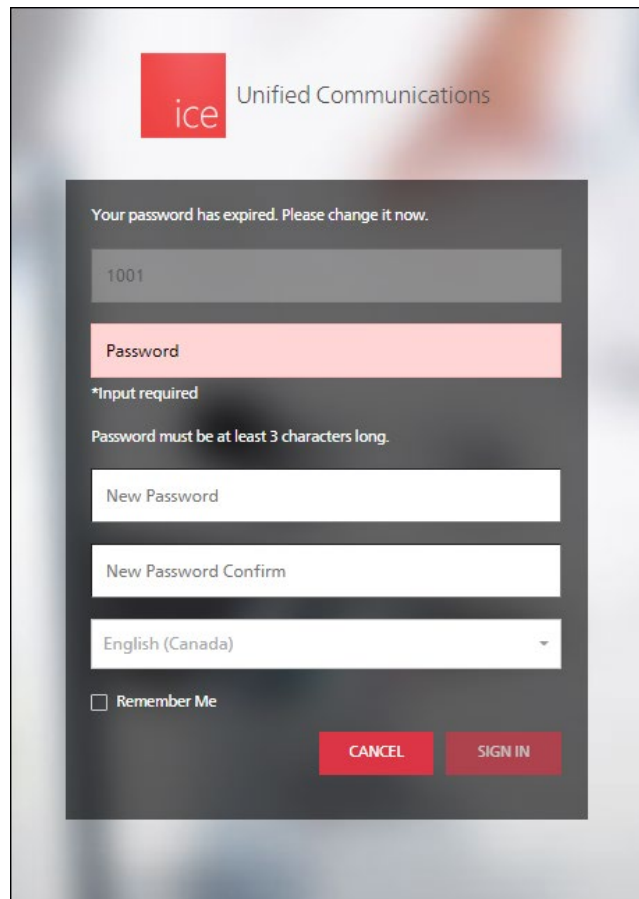
6. Click *Sign In*.
7. Once you have signed in, you will see the Journal page.



## 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 login interface for 'ice Unified Communications'. At the top left is the 'ice' logo. The main heading is 'Unified Communications'. Below this, a message states: 'Your password has expired. Please change it now.' The form contains several fields: a grey field with '1001' (likely a user ID), a red 'Password' field, a 'New Password' field, and a 'New Password Confirm' field. Below these is a dropdown menu currently set to 'English (Canada)'. At the bottom left is a checkbox labeled 'Remember Me'. At the bottom right are two red buttons: 'CANCEL' and 'SIGN IN'.

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

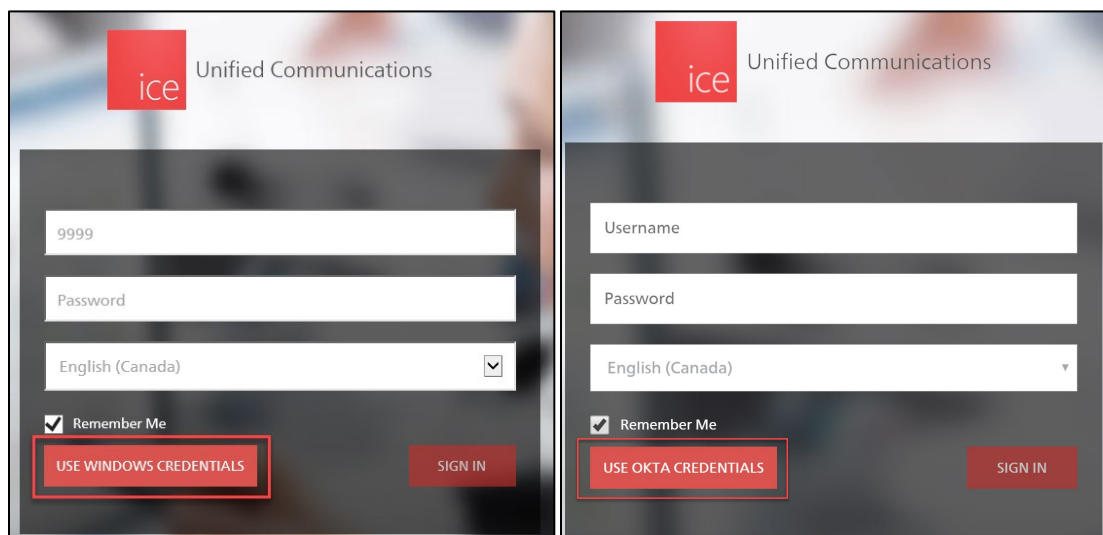
## Single Sign-On

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

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

### Signing on with Single Sign-On

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



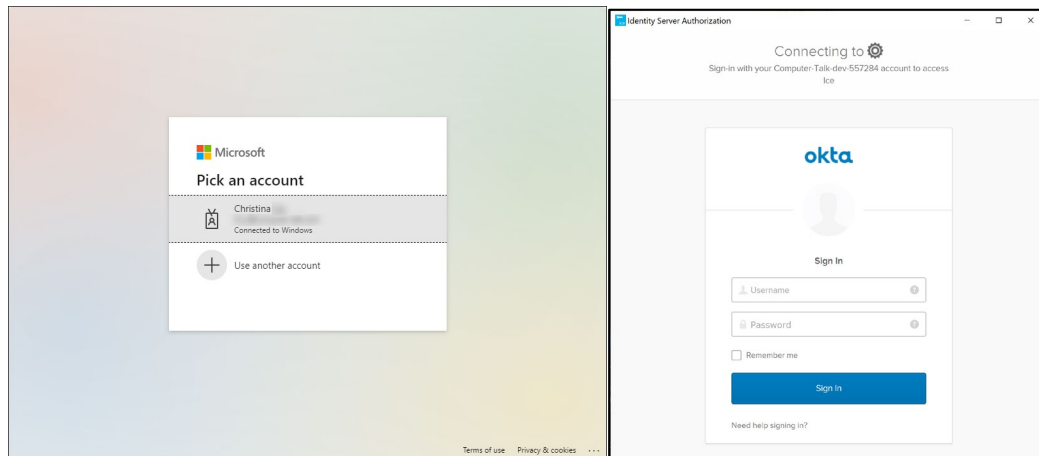
The image shows two side-by-side screenshots of the iceManager login page. Both screenshots feature the 'ice Unified Communications' logo at the top. The left screenshot shows a login form with fields for '9999', 'Password', and a language dropdown set to 'English (Canada)'. Below these fields is a checked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

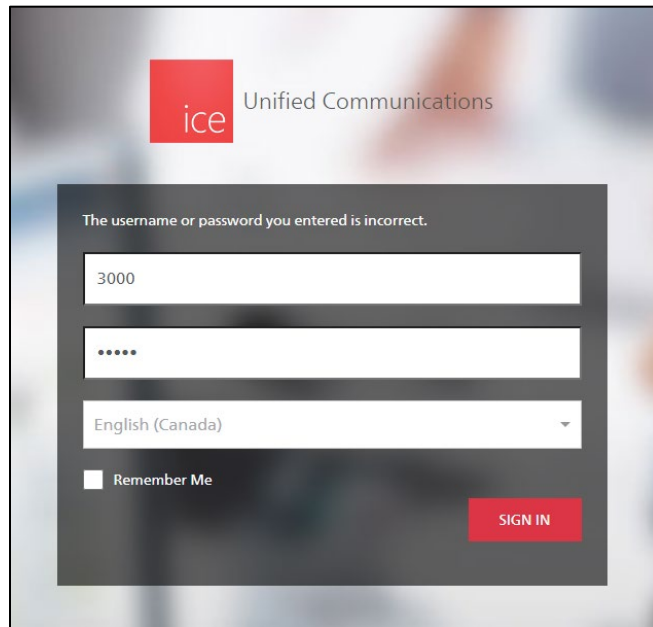
**Note:** This dialog box may look different, depending on the way your administrator has configured the system.



## Common Error and Warning Messages

### Authentication error

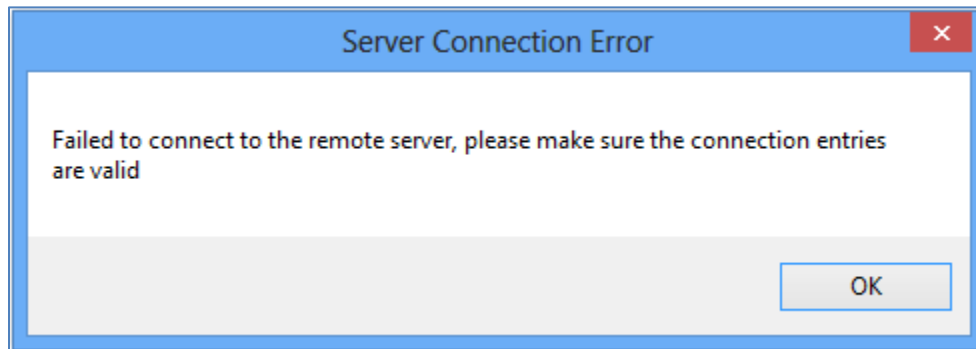
If a user types the wrong User ID or the wrong password, the following message appears.



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."

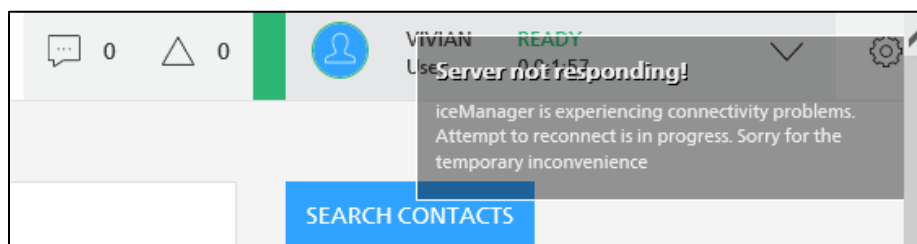
This error message indicates that the server is potentially experiencing a problem with connection. Please contact your ice administrator.

## 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       |   | ✓<br>For contacts handled by anyone assigned to the team | ✓<br>For any contact handled in the supervisor queue(s) or for any contact where the supervisor shares a queue with the handling agent. | ✓<br>For contacts handled by anyone assigned to his/her switch (similarly for Node and Site Admin) | ✓<br>For all contacts |
| Perform self-evaluation                                       | No one is allowed to perform self-evaluations |  |   |  |                       |
| Delete completed evaluations & evaluation of self in progress |   |  |   | ✓  | ✓                     |

|  | User  | Team Lead  | Supervisor  | Switch Admin   | Global Admin          |
|--|---|--|---|--|-----------------------|
| View evaluation of self  |   |  |   | ✓  | ✓                     |
| View Recordings, Transcripts and Contact Insights Fields (everyone can see contact search results) | These settings are now assigned Configuration Groups. |  |   |  |                       |
| Delete Recordings (can delete audio recordings, but not IMs and emails)                            | These settings are now assigned Configuration Groups. |  |   |  |                       |
| Delete Call Transcripts  | These settings are now assigned Configuration Groups. |  |   |  |                       |
| Assign LOBs  |   | ✓  | ✓   | ✓  | ✓                     |
| Change email resolution code   | ✓<br>Own contacts only                                | ✓<br>For contacts handled by anyone assigned to the team | ✓<br>For any contact handled in the supervisor queue(s) or for any contact where the supervisor shares a queue with the handling agent. | ✓<br>For contacts handled by anyone assigned to his/her switch (similarly for Node and Site Admin) | ✓<br>For all contacts |
| <b>Settings</b>  |   |  |   |  |                       |
| <b>Journal Settings</b>  |   |  |   |  |                       |
| Schedules  |   |  | ✓   | ✓  | ✓                     |
| Recording Server/Screen Recording  |   |  |   | ✓<br>Can view datastores   | ✓                     |

|                              | User                | Team Lead           | Supervisor          | Switch Admin                          | Global Admin                         |
|------------------------------|---------------------|---------------------|---------------------|---------------------------------------|--------------------------------------|
| Evaluations                  |                     | ✓                   | ✓                   | ✓                                     | ✓                                    |
| Datastore                    |                     |                     |                     | ✓<br>Can view datastores              | ✓                                    |
| Archiving/Purging Rules      |                     |                     |                     | ✓<br>Can view datastores              | ✓                                    |
| Campaign Settings            |                     |                     | ✓                   | ✓                                     | ✓                                    |
| Intranet/Session Settings    |                     |                     |                     | ✓<br>Can view and edit some settings. | ✓<br>Can view and edit all settings. |
| Browser Settings             | ✓                   | ✓                   | ✓                   | ✓                                     | ✓                                    |
| Language Settings            | ✓<br>Can view only. | ✓<br>Can view only. | ✓<br>Can view only. | ✓<br>Can view only.                   | ✓<br>Can edit settings.              |
| Server Settings              |                     |                     |                     | ✓                                     | ✓                                    |
| Configuration Group Settings | ✓<br>Can view only. | ✓<br>Can view only. | ✓<br>Can view only. | ✓                                     | ✓                                    |
| Line of Business Settings    | ✓<br>Can view only. | ✓<br>Can view only. | ✓<br>Can view only. | ✓                                     | ✓                                    |
| iceMail Settings             | ✓<br>Can view only. | ✓<br>Can view only. | ✓<br>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.

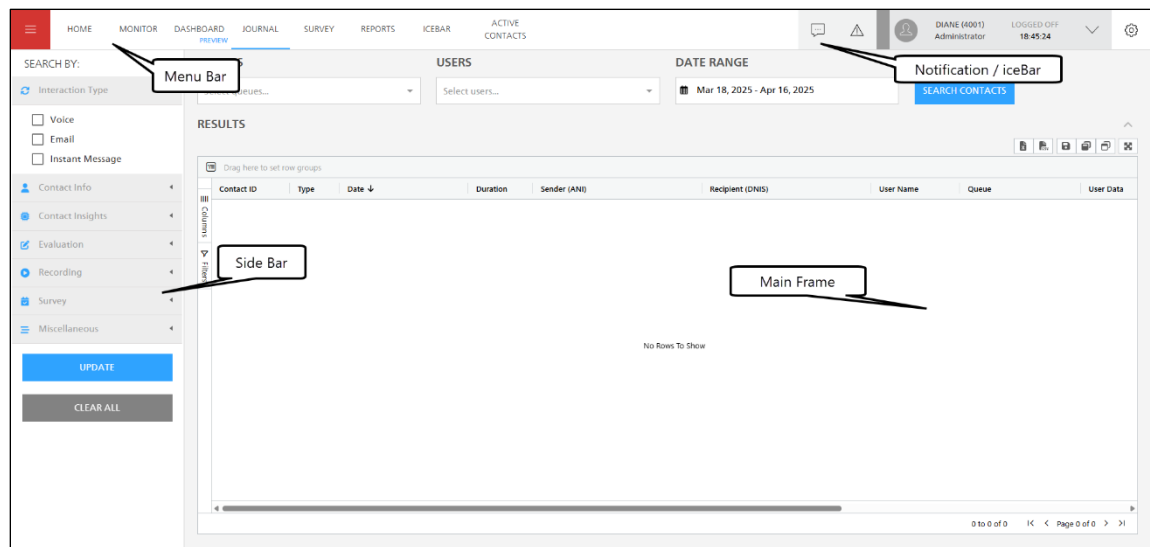


## Chapter 2: Components of iceManager

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.

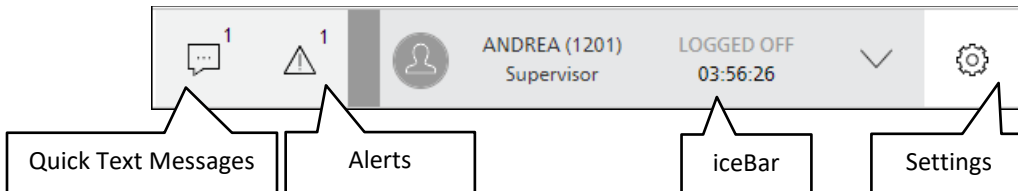
This Chapter provides information about all of these functionalities.



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

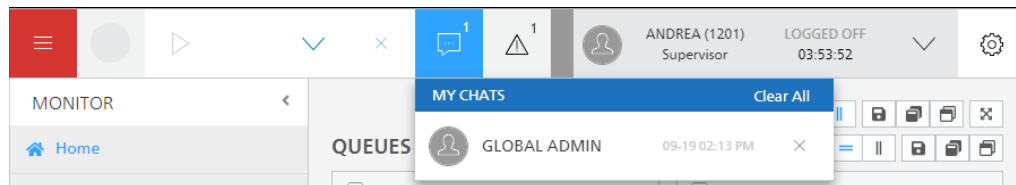
## Notification Bar

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.

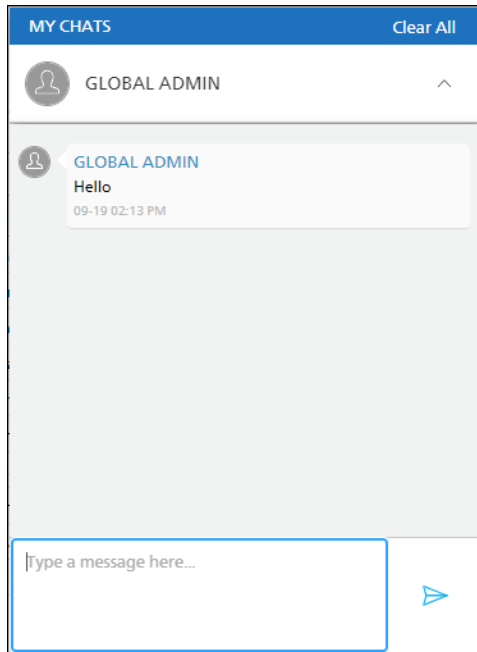


You can respond to the Quick Text message when the dialog box appears by clicking on the conversation.

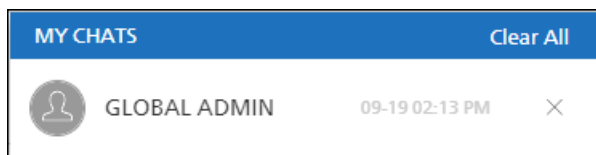
The conversation is kept until that entry in the drop-down list is permanently removed. To permanently remove the conversation from the list, click the X located on the right side of the drop-down dialog box.

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:



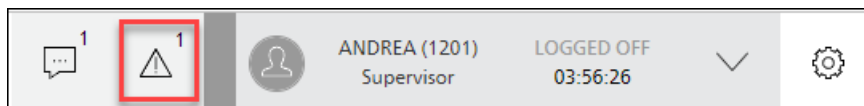
Now you can click on the X to delete the conversation.



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.

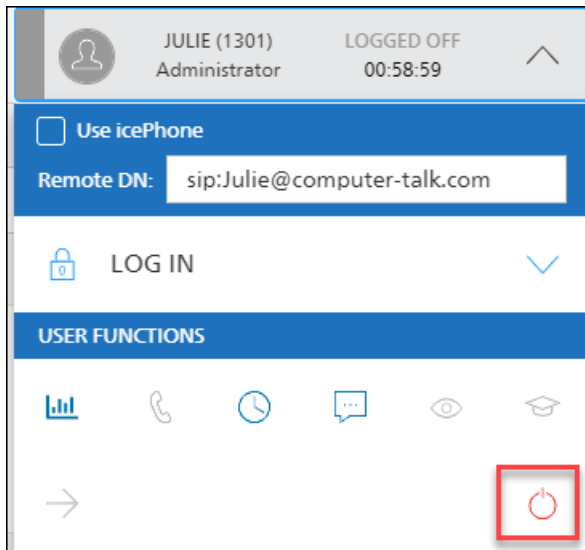


## iceBar for web

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.

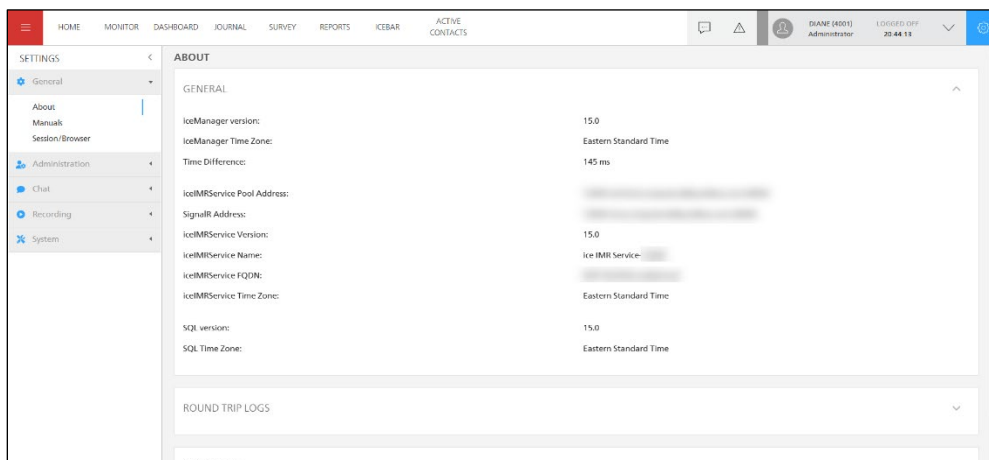
## Logging out

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:



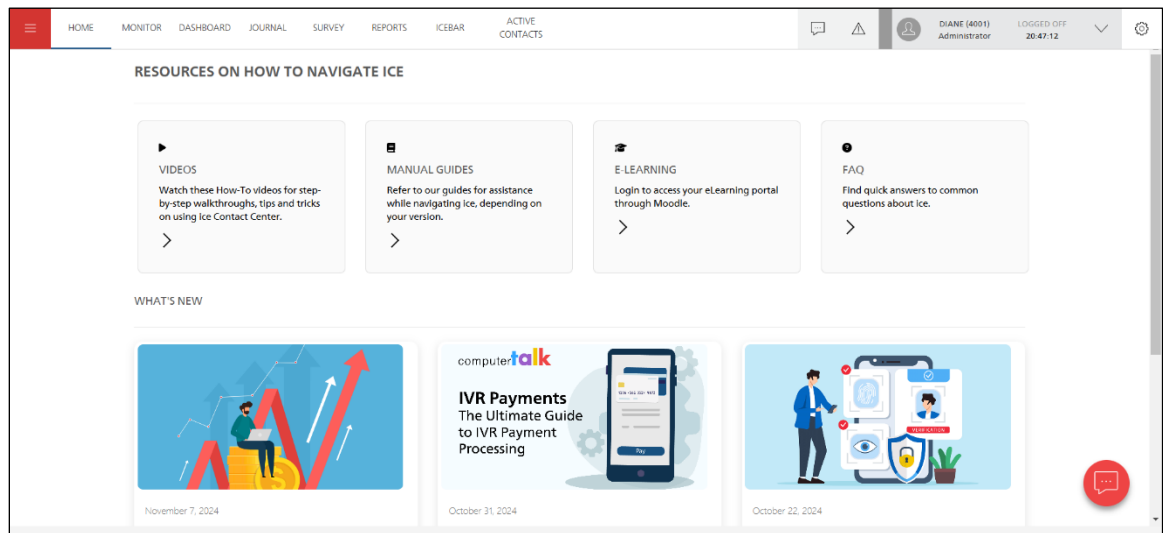
For more information about settings, refer to Chapter 3: Settings.

## 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.

The screenshot displays the iceManager interface in the MONITOR tab. The top navigation bar includes HOME, MONITOR, DASHBOARD, JOURNAL, SURVEY, REPORTS, ICEBAR, and ACTIVE CONTACTS. The user is logged in as DIANE VASQUEZ, Administrator, with a session timeout of 00:17:03. The left sidebar shows navigation options: Home, Queues, Users, Teams, and Settings.

The main content area is divided into two sections: QUEUES and USERS.

**QUEUES Section:** Filtered by 'Ice Servers: Aggregate' and 'Assigned Queues'. It displays a table with columns: ID, Name, Short Name, Status, TASA, TASA2, Server, and Ak. The table lists 19 queues, with IDs ranging from 6000 to 6019. The status for all queues is 'Day Service'.

| ID   | Name                | Short Name | Status      | TASA     | TASA2    | Server    | Ak  |
|------|---------------------|------------|-------------|----------|----------|-----------|-----|
| 6000 | Voice Queue 1       | D#6000     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6001 | Voice Queue 2 (...) | D#6001     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6002 | IM Queue 1          | D#6002     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6003 | IM Queue 2          | D#6003     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6004 | E-mail Queue        | D#6004     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6005 | E-mail Queue 2      | D#6005     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6006 | Hunt Queue          | D#6006     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6007 | Parallel Queue      | D#6007     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6010 | Overflow Queue      | D#6010     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6011 | Voice Queue 1(0)    | D#6011     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6012 | Voice Queue 1(1)    | D#6012     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6013 | Voice Queue 1(2)    | D#6013     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6014 | Voice Queue 1(3)    | D#6014     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6015 | Voice Queue 1(4)    | D#6015     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6016 | IM Queue 1(0)       | D#6016     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6017 | IM Queue 1(1)       | D#6017     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6018 | IM Queue 1(2)       | D#6018     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |
| 6019 | IM Queue 1(3)       | D#6019     | Day Service | 00:00:45 | 00:01:00 | Aggregate | 0.4 |

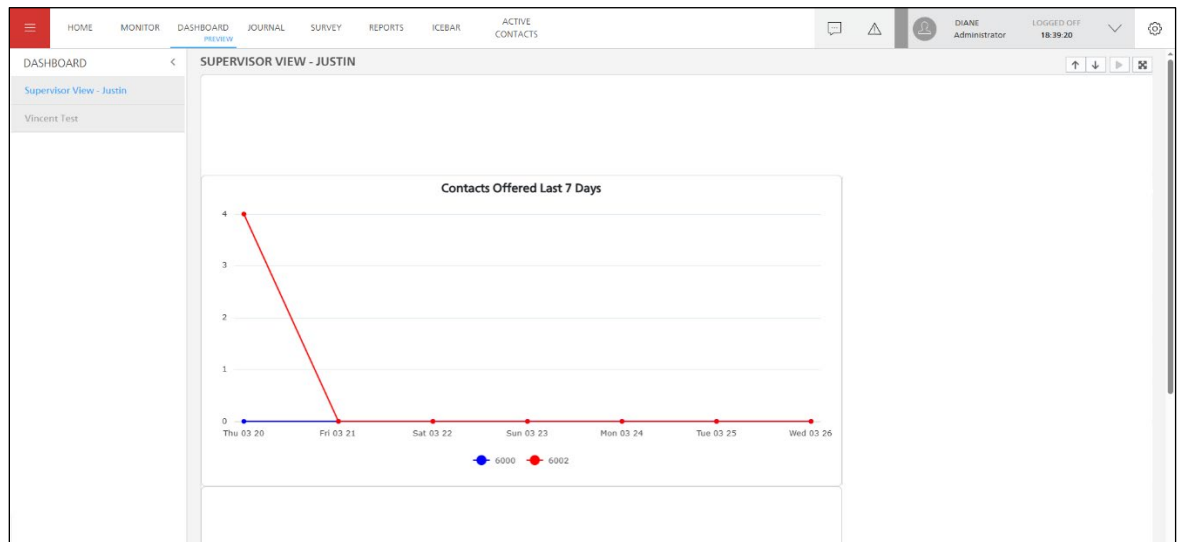
**USERS Section:** Displays a table with columns: ID, Name, Display Name, Role Name, State, and State D. It lists 18 users, with IDs ranging from 1000 to 1017. The states include 'Ready', 'Logged Off', and 'Administrator'.

| ID   | Im... | Name             | Display Name            | Role Name     | State      | State D |
|------|-------|------------------|-------------------------|---------------|------------|---------|
| 1000 |       | Default User     | Default User (1000)     | Supervisor    | Ready      | 0:00:1  |
| 1001 |       | Default User 2   | Default User 2 (1001)   | User          | Logged Off | 3:17:1  |
| 1002 |       | Default User 3   | Default User 3 (1002)   | User          | Logged Off | 3:17:1  |
| 1003 |       | Team Lead        | Team Lead (1003)        | Team Lead     | Logged Off | 3:17:1  |
| 1004 |       | Team Lead 2      | Team Lead 2 (1004)      | Team Lead     | Logged Off | 3:17:1  |
| 1005 |       | Team Lead 3      | Team Lead 3 (1005)      | Team Lead     | Logged Off | 3:17:1  |
| 1006 |       | Supervisor       | Supervisor (1006)       | Supervisor    | Logged Off | 3:17:1  |
| 1007 |       | Supervisor 2     | Supervisor 2 (1007)     | Supervisor    | Logged Off | 3:17:1  |
| 1008 |       | Supervisor 3     | Supervisor 3 (1008)     | Supervisor    | Logged Off | 3:17:1  |
| 1009 |       | ACS Agent 1      | ACS Agent 1 (1009)      | Administrator | Logged Off | 3:17:1  |
| 1010 |       | ACS Agent 2      | ACS Agent 2 (1010)      | Administrator | Logged Off | 3:17:1  |
| 1011 |       | ACS Agent 3      | ACS Agent 3 (1011)      | User          | Logged Off | 3:17:1  |
| 1012 |       | ACS Agent 4      | ACS Agent 4 (1012)      | User          | Logged Off | 3:17:1  |
| 1013 |       | ACS Nick Agent 1 | ACS Nick Agent 1 (10... | User          | Logged Off | 3:17:1  |
| 1014 |       | ACS Nick Agent 2 | ACS Nick Agent 2 (10... | User          | Logged Off | 3:17:1  |
| 1015 |       | Steve No Queues  | Steve No Queues (10...  | User          | Logged Off | 3:17:1  |
| 1016 |       | Liam Test Agent  | Liam Test Agent (1016)  | User          | Logged Off | 3:17:1  |
| 1017 |       | alin             | alin (1017)             | User          | Logged Off | 3:17:1  |

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

## Dashboard tab

The Dashboard tab displays a configurable dashboard that can show a combination of real-time and/or historical stats. For more information on how to manage your dashboards, please refer to Dashboard.



## 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 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.

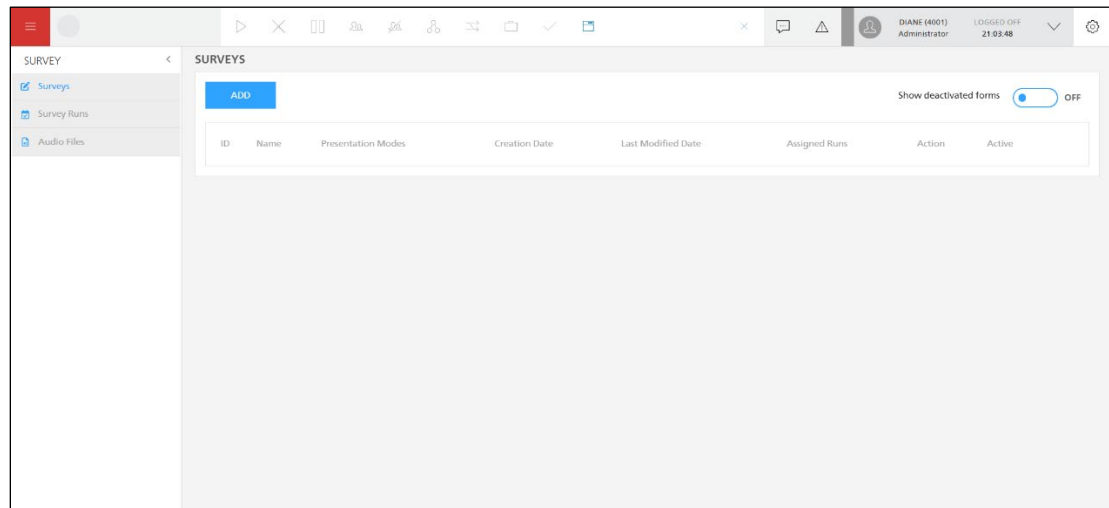
The following screenshot shows the results of an iceJournal search:

| Contact ID | Type  | Date               | Duration | Sender (ANI)       | User Name       | Queue          | User Data | Server | Assigned LOBs | Resolution Codes |
|------------|-------|--------------------|----------|--------------------|-----------------|----------------|-----------|--------|---------------|------------------|
| 56513      | IM    | 2025-03-27 01:4... | 00:00:04 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 281141     | Voice | 2025-03-27 01:3... | 00:01:56 | Diane Admin (2051) |                 |                |           | iceA   |               |                  |
| 56503      | IM    | 2025-03-27 01:2... | 00:00:06 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 56493      | IM    | 2025-03-27 01:2... | 00:00:07 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 56483      | IM    | 2025-03-27 11:0... | 00:00:04 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 56473      | IM    | 2025-03-27 11:0... | 00:00:06 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 56463      | IM    | 2025-03-27 11:0... | 00:00:08 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 281131     | IM    | 2025-03-27 12:0... | 00:00:23 | Akana              | Steve ACS (3... | IM Queue 1...  |           | iceA   |               |                  |
| 281121     | Voice | 2025-03-27 12:0... | 00:00:34 | Akana              | Steve MCH ...   | Voice Queue... |           | iceA   |               |                  |
| 281111     | Voice | 2025-03-26 11:4... | 00:01:14 | Akana              | Steve MCH ...   | Voice Queue... |           | iceA   |               |                  |
| 281101     | Voice | 2025-03-26 11:1... | 00:00:58 | Steve ACS (3328)   | Steve MCH ...   | Voice Queue... |           | iceA   |               |                  |
| 281091     | Voice | 2025-03-26 11:1... | 00:00:07 | Steve ACS (3328)   | Steve MCH ...   | Voice Queue... |           | iceA   |               |                  |
| 56453      | IM    | 2025-03-26 11:0... | 01:39:34 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 56443      | IM    | 2025-03-26 11:0... | 00:00:20 | External User      | Default User... | IM Queue 1...  |           | iceC   |               |                  |
| 281081     | Voice | 2025-03-26 11:0... | 00:00:35 | Steve              | Steve MCH ...   | Voice Queue... |           | iceA   |               |                  |
| 281071     | Voice | 2025-03-26 10:4... | 00:01:12 | Akana              | Steve ACS (3... | Voice Queue... |           | iceA   |               |                  |
| 281061     | IM    | 2025-03-26 07:0... | 00:01:44 | Steve              | Steve ACS (3... | IM Queue 1...  |           | iceA   |               |                  |

For more information on iceJournal, refer to Chapter 5: iceJournal.

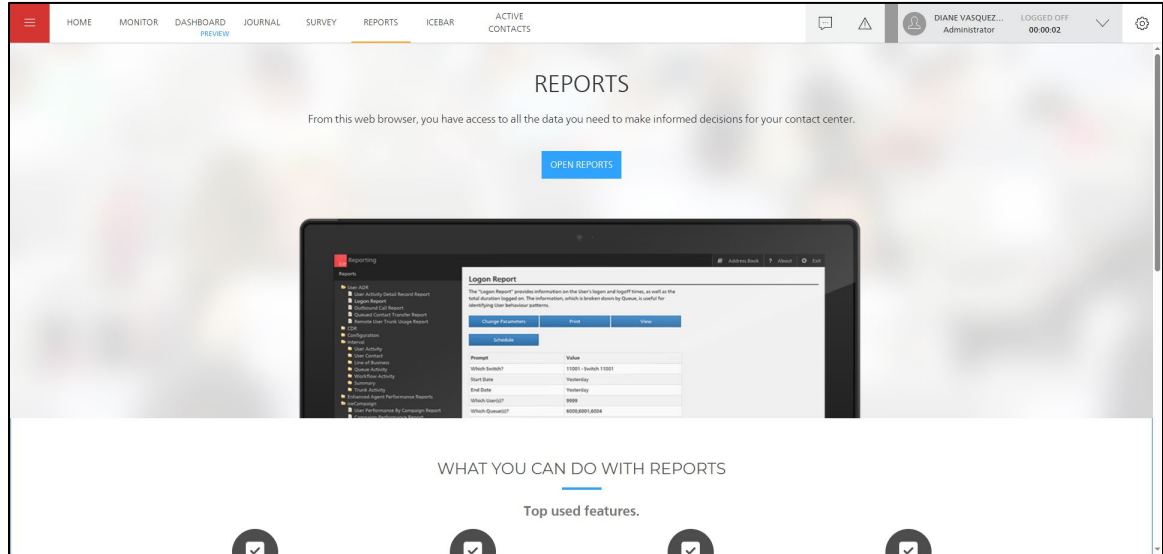
## Survey Tab

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



## Reports Tab

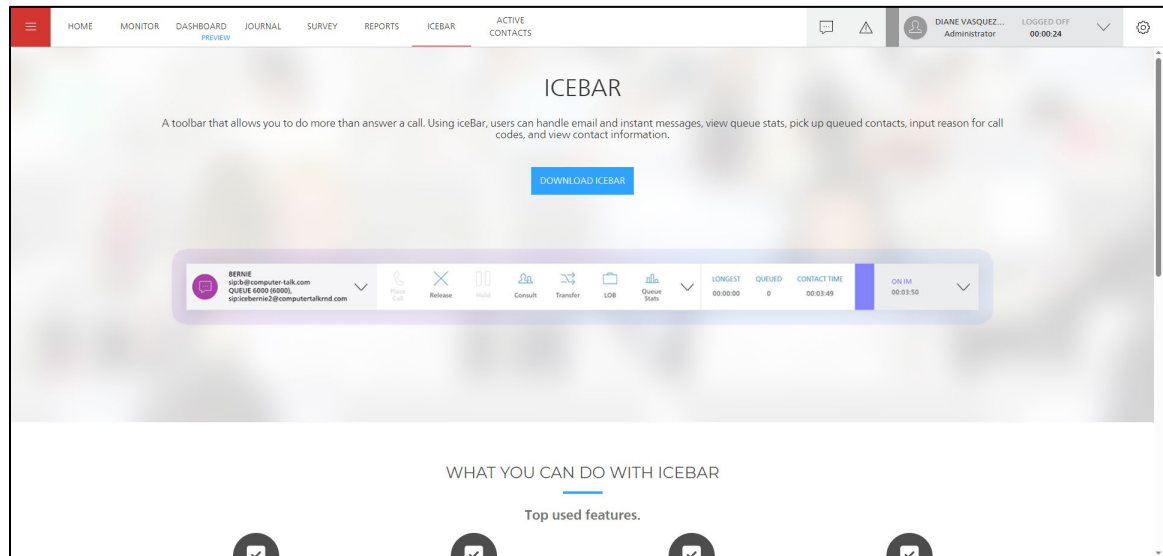
From the Reports tab, you can open iceReporting to run and schedule reports.



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

## iceBar Tab

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



## Active Contacts Tab

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

### Using Active Contacts, you can:

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

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

The screenshot displays the 'ACTIVE CONTACTS' interface. The top navigation bar includes 'HOME', 'MONITOR', 'DASHBOARD', 'JOURNAL', 'SURVEY', 'REPORTS', 'ICEBAR', and 'ACTIVE CONTACTS'. The user is logged in as 'DIANE (4001) Administrator' and is logged off at '01:13:10'. The main area is divided into sections for 'ICE SERVERS', 'QUEUES', and 'USERS'. Below these are search filters for 'Contact Type / State' (Voice, IM, Email, Autodial, Waiting, In Workflow, Active, Inactive) and 'Advanced Filters' (Contact ID, Subject, Start Time). A table shows the search results:

| ID  | Type  | Name | Address          | State   | Start Time                | Server | Email Tracking Number | Subject | User Data |
|-----|-------|------|------------------|---------|---------------------------|--------|-----------------------|---------|-----------|
| 931 | Email | Dan  | D@computer-ta... | Waiting | Mar 26, 2025 03:12:44 ... | iceA   | 591                   | Help    |           |

The bottom of the page shows '1 to 1 of 1' and 'Page 1 of 1'.

For more information on Active Contacts, refer to Chapter 6: Active Contacts on page 333.



## 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

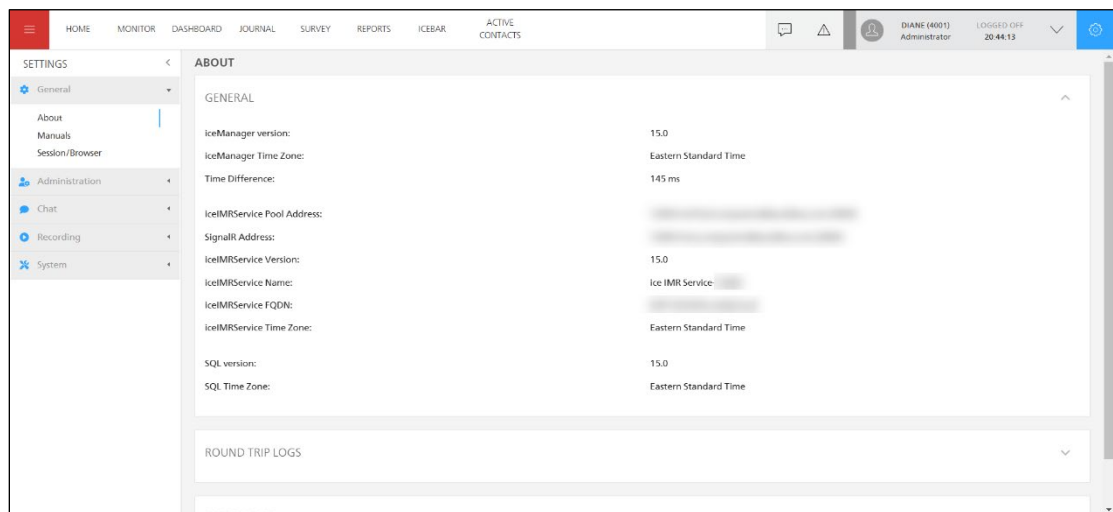
The General section in the sidebar contains information about browser settings, language, users, manuals, and ice. By default, items in the General sidebar option are shown.

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

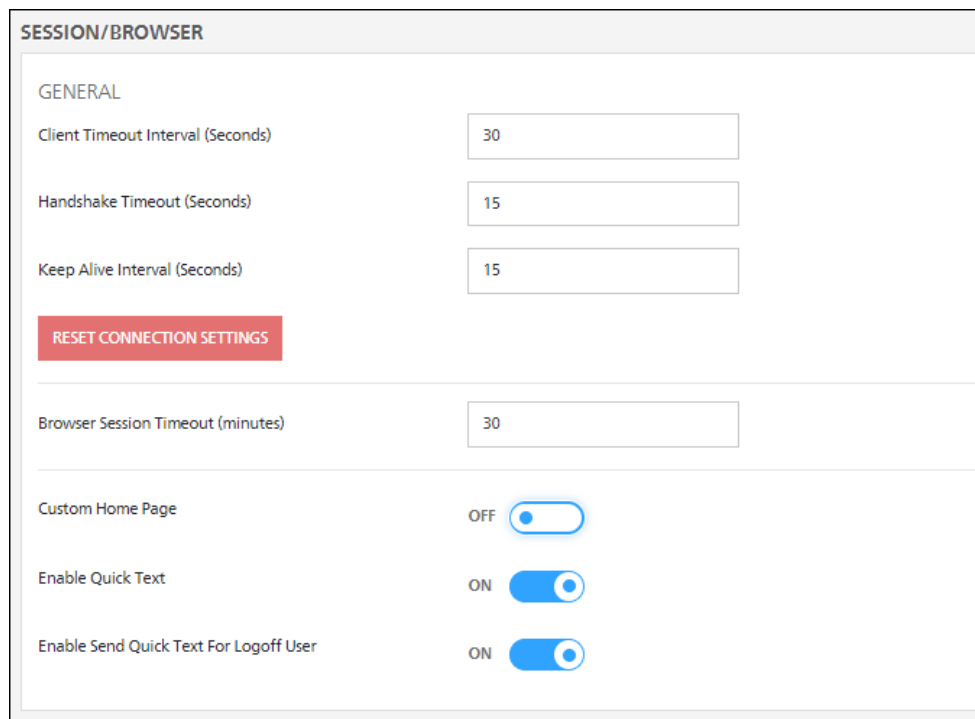
Launch our Education and Documentation site to find a full set of manuals and e-learning material. You will need a user name and password to gain access. Please contact your administrator if you do not have one.

## 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.<br><br>The recommended value is double the Keep-Alive Interval value. |

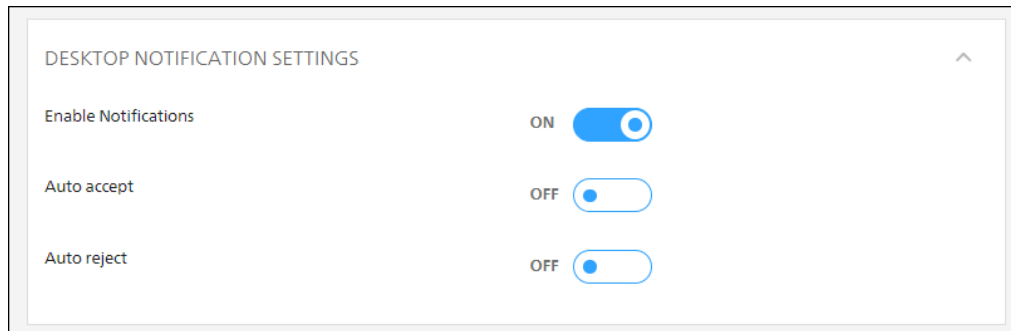
| Parameter                                    | Allowable values          | Description  |
|--|---------------------------|--|
| <b>Handshake Timeout</b>                     | The default is 15 seconds | If the client doesn't send an initial handshake message within this time interval, the connection is closed.<br><br>This is an advanced setting that should only be modified if handshake timeout errors are occurring due to severe network latency.  |
| <b>Keep-Alive Interval</b>                   | The default is 15 seconds | Enter the number of seconds for Keep-Alive value. By default, the server sends keep-alive pings every 10 seconds and the client checks for keep-alive pings about every 2 seconds (one-third of the difference between the keep-alive timeout value and the keep-alive timeout warning value).<br><br>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.<br><br><b>Note:</b> This timeout does not apply to the iceMonitor page. If you are on iceMonitor, the session will not timeout even once the threshold has been met.   |
| <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<br>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.

BROWSER SETTINGS

Browser Logging OFF

Log SignalR Push Event OFF

Log SignalR Push Event Table OFF

Theme Light

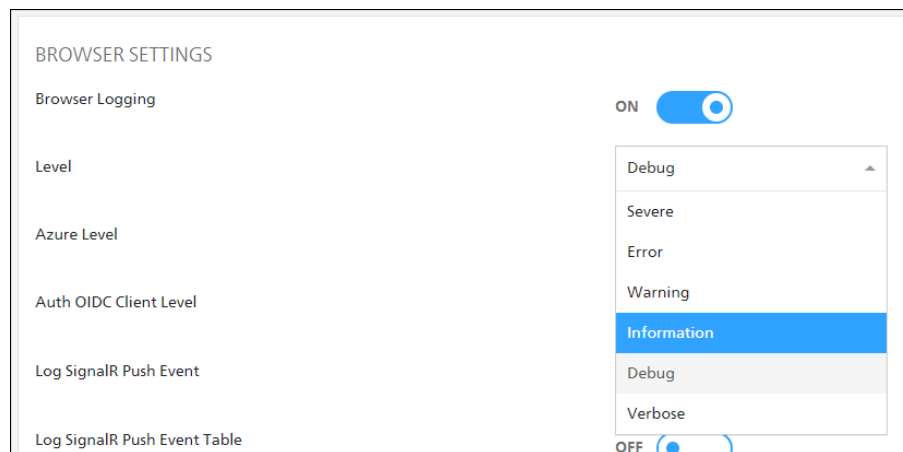
Cookies [CLEAR COOKIES](#)

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</p>   |

| Parameter                                 | Allowable values    | Description  |
|---|---------------------|--|
|   |                     | logged to console for every 'x' number of messages pushed. When this setting is enabled, you will see an additional input box to configure the value of 'x'. By default, Log SignalR Push Event is disabled. |
| <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   |
| <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.



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 going to import.
2. Select the Overwrite All toggle if you would like to overwrite the existing Not Ready Reasons on the page.
3. Enter the Not Ready Reasons that are in XML format into the field at the bottom of the page:

The screenshot shows a web interface for importing Not Ready Reasons. At the top left is a blue 'IMPORT' button. Below it, there is a 'Default Language:' dropdown menu currently set to 'English (Canada)'. To the right is an 'Overwrite All' toggle switch, currently in the 'OFF' position. 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:

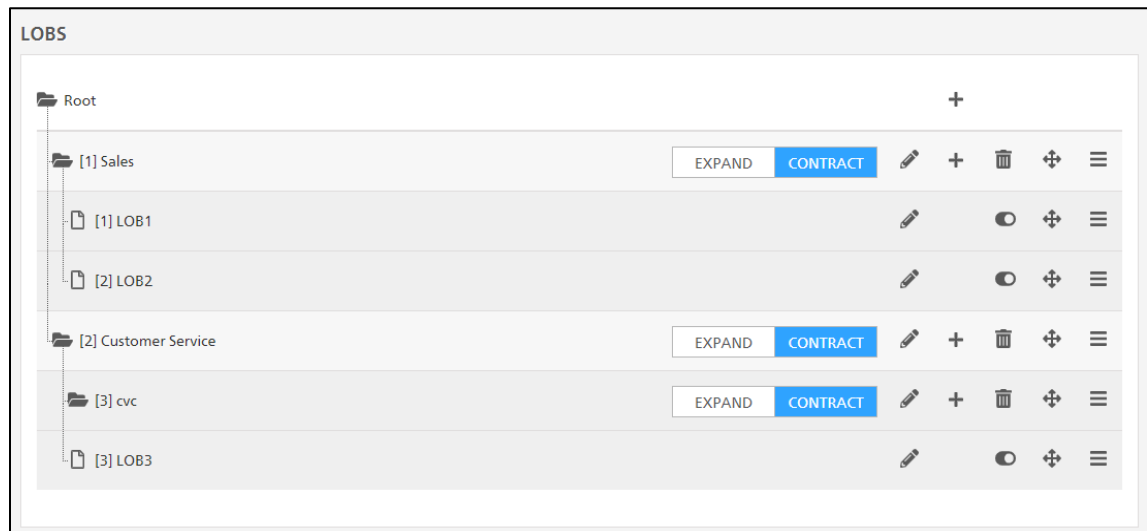
```
<NotReadyReasons override="always">
<NotReadyReason code="5">
  <Name language="en-CA">Lunch</Name>
  <Name language="fr-CA">Déjeuner</Name>
</NotReadyReason>
</NotReadyReasons>
```

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

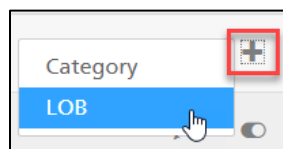
This section allows users to view the Line of Business (LOB) codes that have been configured for the system. Users with administrator privileges or higher are also able to add, edit, disable, or move LOBs.

**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.

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:

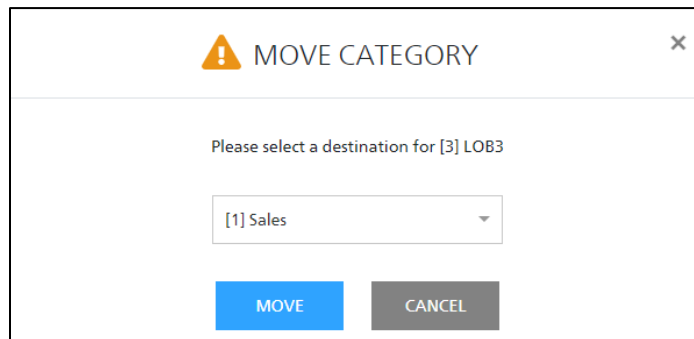
- Click the toggle on the LOB to disable the LOB.



- 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 you going to import.

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

**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.

The screenshot shows a web interface titled "EVALUATIONS". At the top left is a blue "ADD" button. At the top right is a toggle switch for "Show deactivated forms" which is currently set to "OFF". Below these is a table with the following columns: Name, ID, Ancestor ID, Times Used, Creation Date, Action, and Active. The table contains one row with the following data: Name: "Agent Evaluation Form - Template", ID: "1", Ancestor ID: "0", Times Used: "0", Creation Date: "2023-01-01 09:00:00 AM", Action: icons for edit, clone, and delete, and Active: "ON" with a blue toggle switch.

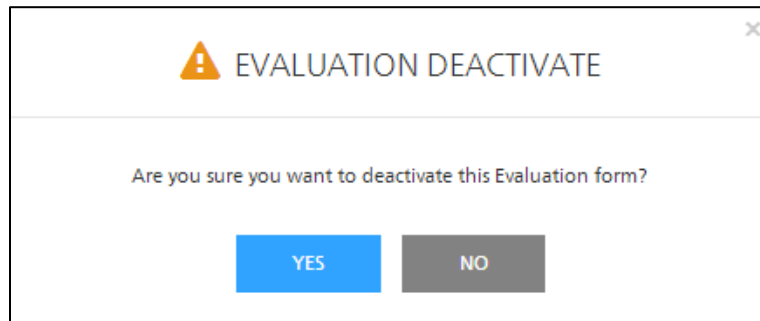
| Name                             | ID | Ancestor ID | Times Used | Creation Date          | Action | Active                                 |
|----------------------------------|----|-------------|------------|------------------------|--------|--|
| Agent Evaluation Form - Template | 1  | 0           | 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 off. Shows whether the form is active.  |

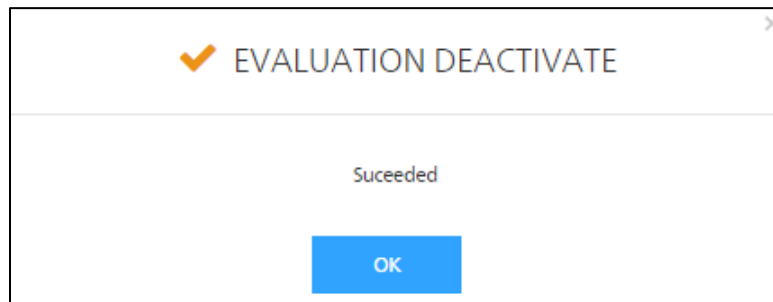
To edit an existing evaluation form, click the pencil. The evaluation form appears, and you can proceed to edit.

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

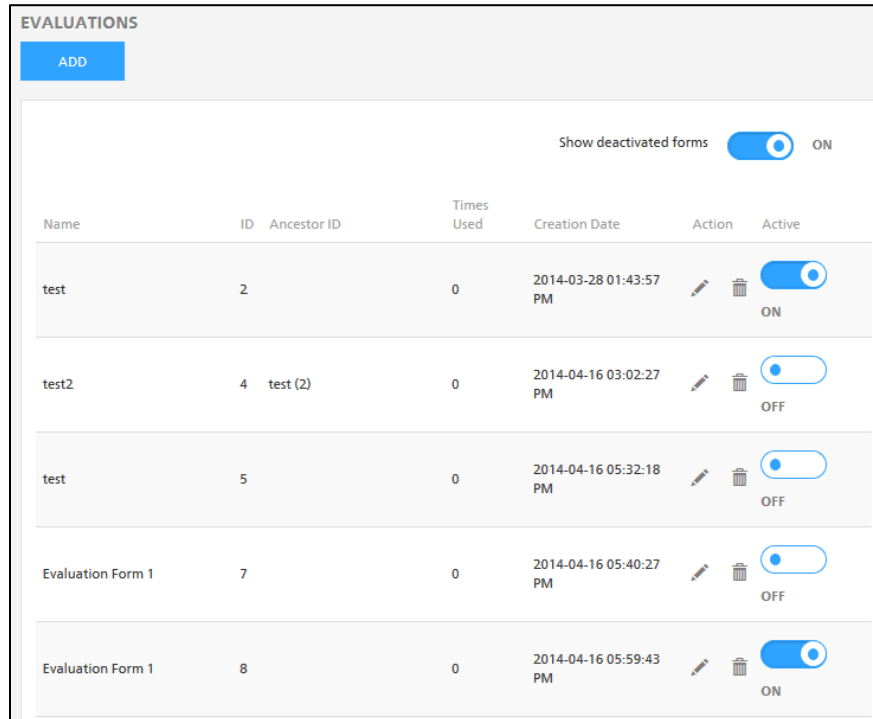












To proceed, click *Yes*. To cancel, click *No*.

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



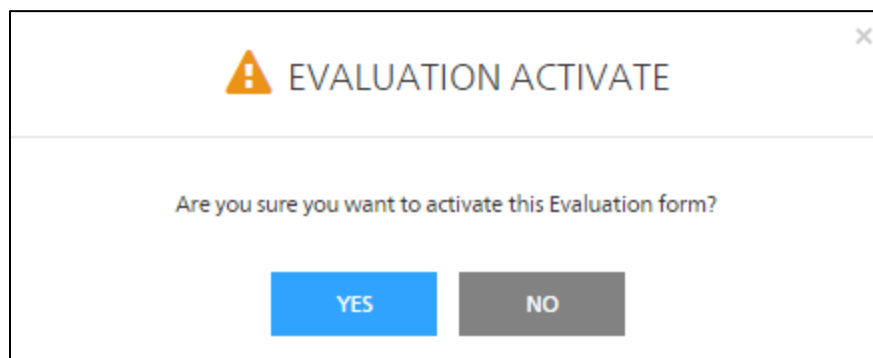
To view all deactivated forms, toggle Show deactivated forms. Once an evaluation form is deleted, all evaluations that were completed using that form will also be deleted therefore, it is highly recommended that you deactivate forms, rather than delete them.



| 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 |

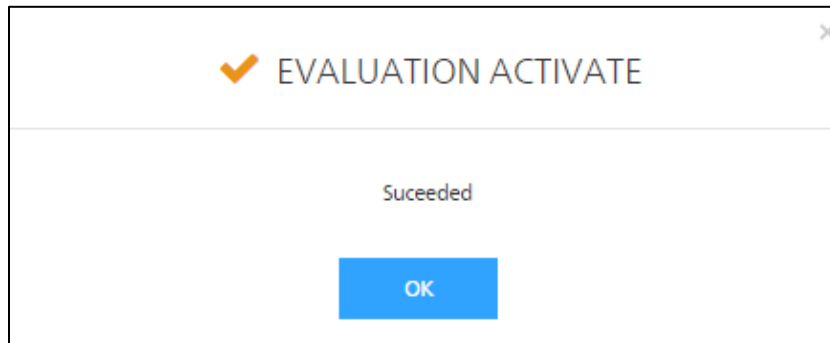
To reactivate a form, toggle the Active switch On.

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

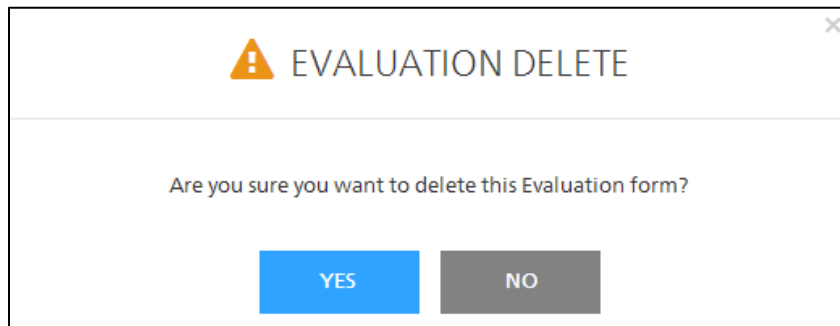


To proceed, click Yes. To cancel, click No.

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



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



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

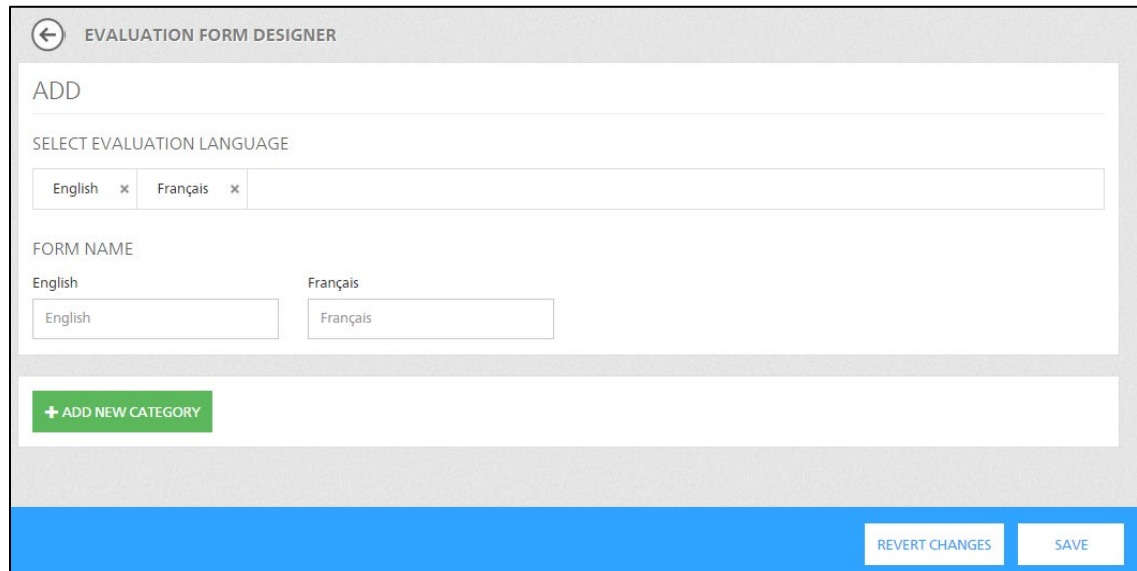
**Important:** Evaluation form deletion will delete all evaluations associated with it. You will not be able to view reports on evaluation results for deleted forms.

## Creating a New Evaluation Form

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

1. Click *Add*.

The Evaluation form designer appears.



The screenshot shows the 'EVALUATION FORM DESIGNER' interface. At the top left is a back arrow icon. Below it is a large text input field containing the word 'ADD'. Underneath is a section titled 'SELECT EVALUATION LANGUAGE' with a horizontal list of language tags: 'English' with a grey 'x' to its right, and 'Français' with a grey 'x' to its right. Below this is a 'FORM NAME' section with two columns. The left column is labeled 'English' and contains a text input field with 'English' typed in. The right column is labeled 'Français' and contains a text input field with 'Français' typed in. 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).

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

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

The criteria area expands to show additional options.

The screenshot shows the 'EVALUATION FORM DESIGNER' interface with the 'CRITERIA' section expanded. At the top, there is a back arrow and the title 'EVALUATION FORM DESIGNER'. Below this is a section titled 'ADD'. Underneath, there is a 'SELECT EVALUATION LANGUAGE' section with two tabs: 'English' and 'Français'. Below the language selection is a 'FORM NAME' section with two input fields: 'English' and 'Français'. Below the form name section is a 'CATEGORY NAME' section with two input fields: 'English' and 'Français'. At the bottom of the 'ADD' section is a red button labeled '+ ADD NEW CRITERIA'. Below the 'ADD' section is a green button labeled '+ ADD NEW CATEGORY'. The 'CRITERIA' section is expanded and shows the following configuration options: 'Type' is set to 'Stars', 'Optional' is set to 'OFF', 'Minimum Value' is set to '0', 'Maximum Value' is set to '1', and 'Number of Increments' is set to '5'. Below the configuration options is a 'PREVIEW' section showing a star rating of 0/1, a blue button labeled '0%', and a 'Comment' button. At the bottom of the 'CRITERIA' section is a red button labeled '+ ADD NEW CRITERIA'.

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

| Parameter                  | Permissible Values  | Description  |
|----------------------------|---|--|
| Select Evaluation Language | Languages configured in the system  | Select one or more languages from the drop-down. There must be a minimum of one language selected.   |
| Form Name                  | Free text   | Enter form name.   |
| <b>Category</b>            |   |  |
| Category Name              | Free text   | Enter category name.   |
| <b>Criteria</b>            |   |  |
| Criteria Type              | <ul style="list-style-type: none"> <li>▪ Stars</li> <li>▪ Buttons</li> <li>▪ Drop Down</li> <li>▪ Slider</li> </ul> | Select one of the criteria types.  |
| Optional/Mandatory         | Optional/Mandatory  | Select to make criteria optional or mandatory.   |
| Minimum Value              | 0 to N  | Enter the minimum score value.   |
| Maximum Value              | 1 to N  | <p>Enter the maximum score value. This does not necessarily correspond to the number of stars or buttons displayed. See Number of Increments.</p> <p>The total score for the evaluation is the sum of all maximum values for each criteria in the form.</p> <p>You may use the maximum value to create weighted questions.</p>                                       |
| 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  OFF

Minimum Value:  Maximum Value:  Number of Increments:

Name: English (Canada)  
How would you rate the caller's attitude throughout the call?

---

PREVIEW

How would you rate the caller's attitude throughout the call? ★ ★ ★ ★ ☆ 4.00/5 80%  / 4000

## **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 'CRITERIA' section includes:

- Type: Slider (dropdown)
- Optional: OFF (toggle)
- Minimum Value: 0
- Maximum Value: 10
- Number of Increments: 11
- Name: English (Canada) - How would you rate the caller's attitude

The 'PREVIEW' section shows a slider with a range from 0 to 10. The current value is 7.00/10, which is 70%. A comment field is visible with the text 'Comment' and a character count of 7/4000.

## **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 'CRITERIA' section includes:

- Type: Buttons (dropdown)
- Optional: OFF (toggle)
- Minimum Value: 0
- Maximum Value: 1
- Number of Increments: 5
- Name: English (Canada) - How well was the problem solved?

The 'PREVIEW' section shows five buttons: NOT AT ALL, BARELY, SOMEWHAT, ALMOST, and COMPLETELY. The current value is 0.00/1, which is 0%. A comment field is visible with the text 'Comment' and a character count of 7/4000.

## **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: Drop Down, Optional: OFF

Minimum Value: 0, Maximum Value: 1, Number of Increments: 3

Name: English (Canada)


0.00: Pass/Fail

0.50: Fail

1.00: Pass

PREVIEW

Pass/Fail: Fail, 0.00/1, 0%, Comment: / 4000

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?

YES NO

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

**Note:** To create a weighted question, modify the maximum value of the criteria as needed. The following screenshots show two evaluation criteria.

The first question has a max value of 1, and a minimum value of 0. If the evaluator selects *No*, the agent will be given a score of 0. If they select *Yes*, the agent will receive a score of 1 for this criteria.

The screenshot displays the 'CRITERIA' configuration panel for a question. The 'Type' is set to 'Buttons', 'Optional' is checked, and the 'OFF' toggle is active. The 'Minimum Value' is 0, 'Maximum Value' is 1, and 'Number of Increments' is 2. The question name is 'Did the agent introduce themselves?' in English (Canada). The scale shows 0.00 for 'No' and 1.00 for 'Yes'. The 'PREVIEW' section shows the question with 'NO' and 'YES' buttons, a score of /1, a 0% progress indicator, and a comment field with a 4000 character limit.

We can compare it to this second question with a max value of 5.

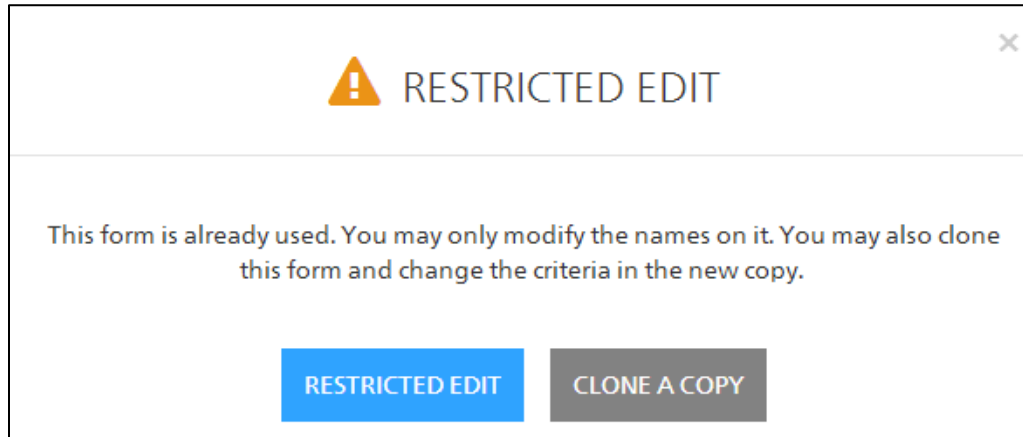
If the agent is scored *No*, they will receive 0, but if they are scored *Yes*, they will receive a value of 5.

The screenshot displays the 'CRITERIA' configuration panel for a second question. The 'Type' is 'Buttons', 'Optional' is checked, and the 'OFF' toggle is active. The 'Minimum Value' is 0, 'Maximum Value' is 5, and 'Number of Increments' is 2. The question name is 'Did the agent provide a ticket number?' in English (Canada). The scale shows 0.00 for 'No' and 5.00 for 'Yes'. The 'PREVIEW' section shows the question with 'NO' and 'YES' buttons, a score of /5, a 0% progress indicator, and a comment field with a 4000 character limit.

The total score of the form is calculated by adding up all maximum values in the form. In this example, for a form with these two questions, the total value is 6. Therefore, the second question is weighted 5x more than the first.

## 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.

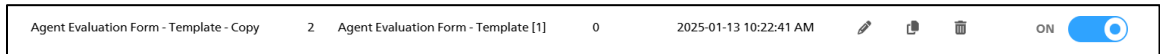
- To add or delete categories and criteria to the evaluation form, select *Clone a Copy*.
  - When a clone is created, new report entries are also created in the database. You can add, delete, and modify all parts of the evaluation form.
- To make modifications to the wording of a category or criteria,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

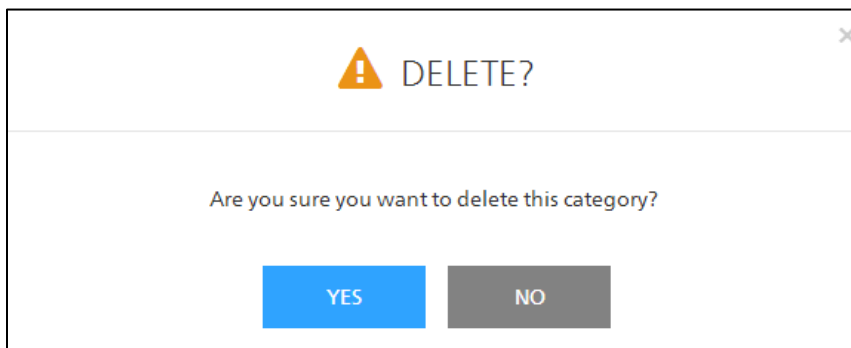
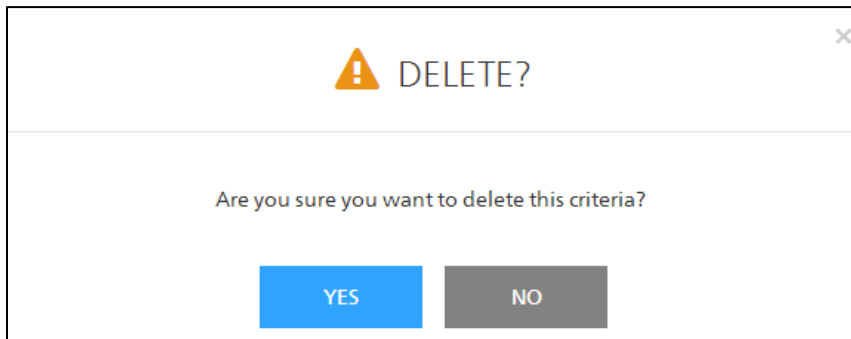
In this mode, you can add evaluation languages and modify all aspects of each criterion. Clone a copy duplicates the structure, using the original as a template for the cloned version.



## 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 minimize or expand each criterion or category, click the arrow on the side of the question.

The expanded view:

The screenshot shows the expanded configuration for a criterion. At the top left, the word "CRITERIA" is displayed. In the top right corner, there are three icons: a trash can, an upward-pointing arrow (highlighted with a red box), and a hamburger menu icon. The configuration fields are as follows:

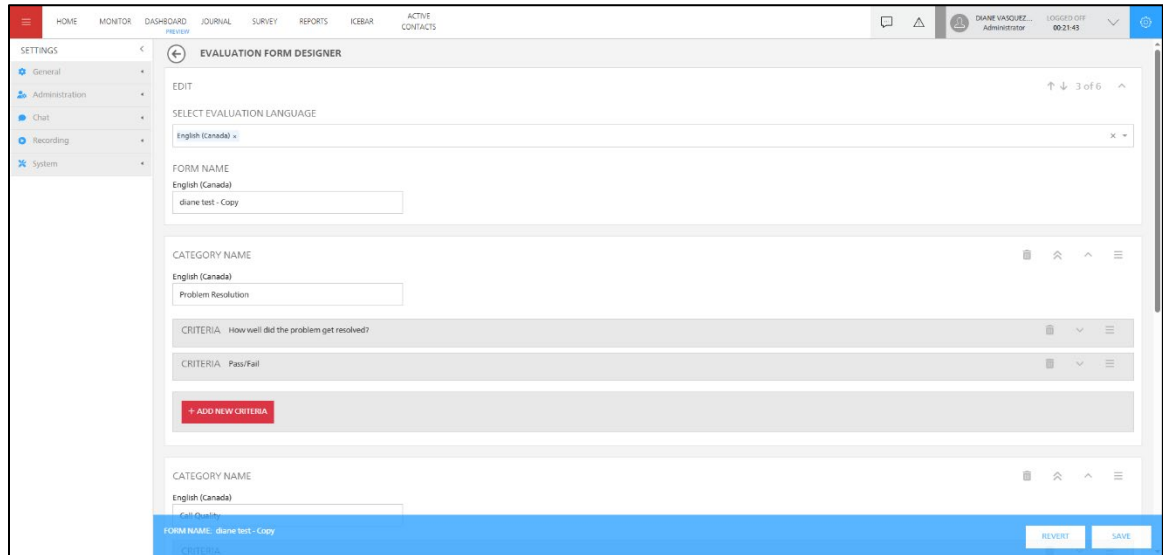
|               |  |               |     |                      |   |
|---------------|--|---------------|-----|----------------------|---|
| Type          | Buttons  | Optional      | OFF |                      |   |
| Minimum Value | 0  | Maximum Value | 10  | Number of Increments | 5 |
| Name          | English (Canada)<br>How well did the problem get resolved? |               |     |                      |   |
| 0.00          | Not at all   |               |     |                      |   |
| 2.50          | Barely   |               |     |                      |   |
| 5.00          | Marginally   |               |     |                      |   |
| 7.50          | Sort of  |               |     |                      |   |
| 10.00         | Mostly   |               |     |                      |   |

The minimized view:

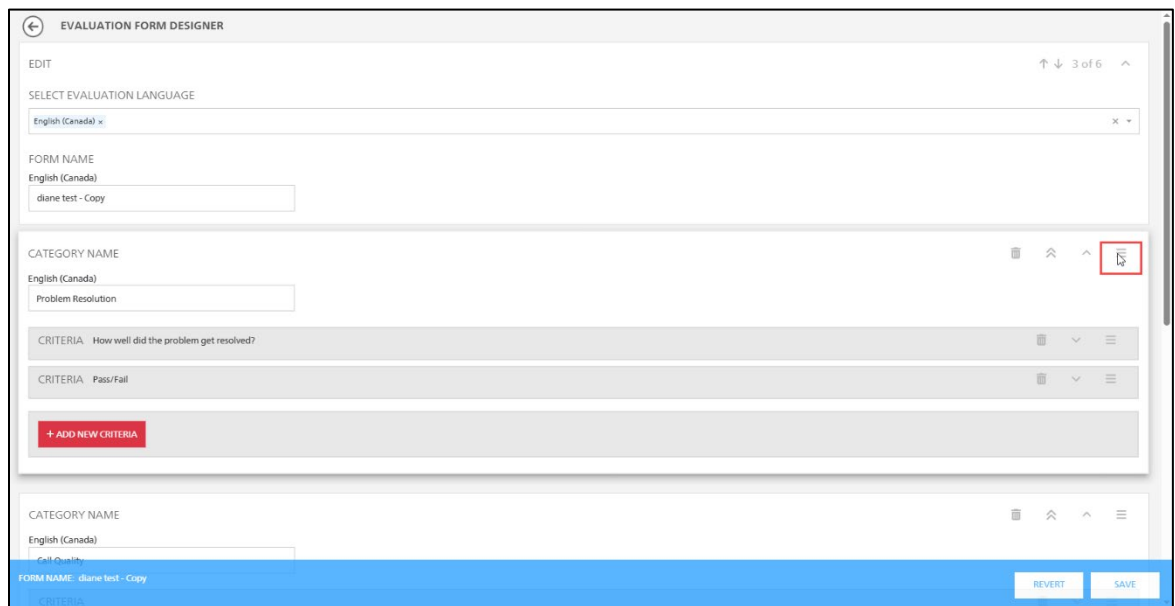
The screenshot shows the minimized view of the criterion. It consists of a single horizontal bar with the text "Problem Resolution" on the left and "CRITERIA How well did the problem get resolved?" on the right. On the far right of this bar, there are three icons: a trash can, a downward-pointing arrow, and a hamburger menu icon.

## 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 two category configuration forms in a list. The top form is for the 'Problem Resolution' category, and the bottom form is for the 'Call Quality' category. A red double-headed arrow is positioned between the two forms, indicating their relative positions. The 'Problem Resolution' form includes a 'CATEGORY NAME' field with 'English (Canada)' selected and 'Problem Resolution' entered, and two criteria: 'How well did the problem get resolved?' and 'Pass/Fail'. The 'Call Quality' form includes a 'CATEGORY NAME' field with 'English (Canada)' selected and 'Call Quality' entered, and one criterion: 'Call Quality'. Both forms have an '+ ADD NEW CRITERIA' button. The bottom of the interface shows a blue bar with 'FORM NAME: diane test - Copy', '+ ADD NEW CATEGORY', 'REVERT', and 'SAVE' buttons.

## Restricted edit

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

The screenshot displays the 'Restricted edit' interface for a criterion. At the top, the 'CATEGORY NAME' section shows 'English (Canada)' and 'Problem Resolution'. Below this, the 'CRITERIA' section is visible, containing several fields: 'Type' (Buttons), 'Optional' (toggle OFF), 'Minimum Value' (0), 'Maximum Value' (10), and 'Number of Increments' (5). The 'Name' field is 'How well did the problem get resolv'. Below the name, there are five buttons for evaluation: 'Not at all', 'Barely', 'Marginally', 'Sort of', and 'Mostly'. The interface also includes a 'PREVIEW' section at the bottom.

**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.<br>Users: members are selected from a list of ice users<br>Teams: members are selected from a list of ice teams<br>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 Dashboard [Review](#) Contact Permissions

Contact Insights Field

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 Assign

iceA (iceA.computertalk.com)

### 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  | 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 INHERIT |
| ...         | INCLUDE EXCLUDE INHERIT |

7. Configure the Not Ready Reasons.

|                                     |                                |
|-------------------------------------|--------------------------------|
| Default Not Ready Reason Assignment | Inherit                        |
| Not Ready Reason Assignments        |                                |
| [0] No Reason                       | INCLUDE EXCLUDE <b>INHERIT</b> |
| [1] Comfort Break                   | INCLUDE EXCLUDE <b>INHERIT</b> |
| [2] Post Call Admin Break           | INCLUDE EXCLUDE <b>INHERIT</b> |
| [3] Approved Admin Break            | INCLUDE EXCLUDE <b>INHERIT</b> |
| [4] Other                           | INCLUDE EXCLUDE <b>INHERIT</b> |

## 8. Configure the iceBar for Desktop settings.

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

## 9. Configure the iceBar for Web settings.

|                             |        |
|-----------------------------|--------|
| Enable iceBar for web       | Enable |
| Disable Web iceBar on Login | Never  |
| Enable Set User Data        | Enable |
| Maximum PAQ Number          | Custom |
|                             | 9      |
| iceBar Buttons              | Custom |

## 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  |

## 12. Configure the Dashboard assignments, if applicable.

|                                   |   |                                  |
|-----------------------------------|---|----------------------------------|
| [100] Baxter                      | <input checked="" type="checkbox"/> INCLUDE | <input type="checkbox"/> EXCLUDE |
| [109] Chris Team Leader Dashboard | <input checked="" type="checkbox"/> INCLUDE | <input type="checkbox"/> EXCLUDE |
| [107] Christina                   | <input checked="" type="checkbox"/> INCLUDE | <input type="checkbox"/> EXCLUDE |

## 13. Configure the Contact Permissions.

|                               |     |
|-------------------------------|-----|
| <b>Voice &amp; Transcript</b> |     |
| View                          | All |
| Download                      | All |
| Purge                         | All |
| <b>Screen Recording</b>       |     |
| View                          | All |
| Download                      | All |
| Purge                         | All |
| <b>Contact Attachment</b>     |     |
| View                          | All |
| Download                      | All |
| Purge                         | All |

| Instant Message |     |
|-----------------|-----|
| View            | All |
| Download        | All |
| Email           |     |
| View            | All |
| Download        | All |
| Purge           | All |

#### 14. Configure the Contact Insights Field visibility.

|                                  | View |
|----------------------------------|------|
| iceContactSummary                | All  |
| iceContactSummaryCompletionUsage | All  |
| iceContactSummaryMaxTokens       | All  |
| iceContactSummaryPromptUsage     | All  |

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.<br>Users: members are selected from a list of ice users<br>Teams: members are selected from a list of ice teams<br>Roles: members are selected based on their ice user type  |
| General                                 |  |
| <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. |

| 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.<br><br><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.   |
| <b>Default Category Expansion</b>                                       | 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.  |
| <b>Auto Ready (iceBar Desktop)</b>                                      | 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. |
| <b>Number of Seconds Before Setting Agent to Ready (iceBar Desktop)</b> | 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.  |
| <b>Auto Submit</b>  | 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   |
| <b>Number of Seconds Before Auto Submit After LOB Selection (iceBar Desktop)</b> | 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.  |
| <b>Close on Submit</b>   | 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. |
| <b>Journal Search – Filter LOB Codes</b>   | Options are <i>Enable</i> , <i>Disable</i> , and <i>Inherit</i> .<br>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.  |
| <b>LOB Assignments</b>   | Shows all available categories and LOBs. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each LOB. The <i>Inherit</i> option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings. By default, this field is set to <i>Inherit</i> .               |
| Canned Response  |   |
| <b>Default Canned Response 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 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.<br><br><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.<br><br><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.<br><br>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.<br><br><b>Note:</b> Only Global Administrator has access to this configuration option. |
| iceBar Configuration XML        | Contains the iceBar configuration settings in xml format.<br><br><b>Note:</b> The <code>override="always"</code> attribute in the Queues element in the iceBar configuration will be added if <i>Force Logon All Queues</i> is enabled.  |
| <b>iceBar for Web</b>           |  |

| Configuration Group Properties     |  |
|------------------------------------|--|
| Parameter                          | Details  |
| <b>Enable web iceBar</b>           | 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.   |
| <b>Disable Web iceBar on Login</b> | Options include, <i>Always</i> , <i>Never</i> , and <i>Inherit</i> which will decide whether this configuration group has access to iceBar for web upon logging in. The <i>Always</i> option will disable iceBar for web upon logging into iceManager. However, if <b>Enable web iceBar</b> is enabled, users will see a <i>Launch iceBar for Web</i> button in the User Panel. This button allows the user to use iceBar for Web until they log out of iceManager. The <i>Never</i> option allows the user to use iceBar for Web upon logging in. 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.<br><br><b>Note:</b> If <b>Enable web iceBar</b> has been disabled, this setting will be hidden. |
| <b>Enable Set User Data</b>        | 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.  |
| <b>Maximum PAQ Number</b>          | 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 Properties |  |
|--------------------------------|--|
| Parameter                      | Details  |
|                                | configuration group, the system will use the Default Config Group settings.  |
| <b>iceBar Buttons</b>          | <p>Options include <i>Custom</i> and <i>Inherit</i> which will decide the buttons displayed on the iceBar for Web for this configuration group. The Custom option displays section to select and configure the buttons displayed on the iceBar for Web. Refer below to see the configuration options available for iceBar for Web.</p> <p>The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.</p> |
| <b>Survey</b>                  |  |
| <b>Surveys</b>                 | Options include <i>None</i> , <i>View (View)</i> , <i>Edit (View / Edit)</i> , Full Control ( <i>View / Edit / Delete</i> ), and <i>Inherit</i> which will decide the permissions that this configuration group has on the Survey page. The Inherit option forces the system to look at a parent configuration group that a user is also part of. If the user is not part of another configuration group, the system will use the Default Config Group settings.   |
| <b>Survey Runs</b>             | Options include <i>None</i> , <i>View (View)</i> , <i>Edit (View / Edit)</i> , Full Control ( <i>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.   |
| <b>Survey Response</b>         | 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 Group Properties       |  |
|--------------------------------------|--|
| Parameter                            | Details  |
| 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> .<br>If enabled, agents belonging to this configuration group will be allowed to upload contact attachments.<br><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 Extensions for Agent</i> setting in <i>Core Settings &gt; Contact Attachments</i> must have at least one file type specified.   |
| <b>Dashboard</b>                     |  |
| Dashboard Assignments                | Shows all available Dashboards. Users have the options <i>Include</i> , <i>Exclude</i> , or <i>Inherit</i> for each Dashboard.<br>Including a dashboard makes it available to view on the dashboard page in iceManager.<br>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>Contact Permissions</b>           |  |
| Voice & Transcript                   | Set the view, download and purge permissions for accessing voice recordings and transcripts in journal.<br>Options include:  |

| Configuration Group Properties |   |
|--------------------------------|---|
| Parameter                      | Details   |
|                                | <ul style="list-style-type: none"> <li>• All: Provides the specified permission to all users within the configuration group.</li> <li>• All Assigned: Allows access to all segments that were handled in the user's assigned queues.</li> <li>• Participating: Allows access to every segment in which the user is a participant, or where the user has a supervisory relationship to a participant (team lead, supervisor, or administrator).</li> <li>• Related: Allows access to every segment in which the user is a participant, and every segment where there is a relationship. This would give agents access to segments of contacts they were consulted on that they did not participate in, or segments of contacts that are linked through RelatedContacts that they did not participate in.</li> <li>• None: Restricts the specified permission for all users in the configuration group.</li> <li>• Inherit: 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.</li> </ul> <p><b>Note:</b> Inherit in the default configuration group is different from all other created configuration groups. In the default configuration group, inherit means applying the pre ice 15 permissions. In other words, the permissions will continue to be user based. For example, users can only listen to call recording segments that they participated in. Team Leads can only listen to call recording segments for users belonging to their team(s). Supervisors can only listen to call recording segments for users with whom they share a common queue. Administrators can listen to all call recordings.</p> |

| <b>Configuration Group Properties</b> |   |
|---------------------------------------|---|
| <b>Parameter</b>                      | <b>Details</b>  |
| <b>Screen Recording</b>               | <p>Set the view, download and purge permissions for accessing screen recordings in journal.</p> <p>Options include: All, All Assigned, Participating, Related, None and Inherit.</p>  |
| <b>Contact Attachment</b>             | <p>Set the view, download and purge permissions for accessing chat contact attachments in journal.</p> <p>Options include: All, All Assigned, Participating, Related, None and Inherit.</p>   |
| <b>Instant Message</b>                | <p>Set the view, download and purge permissions for accessing instant message transcripts in journal.</p> <p>Options include: All, All Assigned, Participating, Related, None and Inherit.</p>  |
| <b>Email</b>                          | <p>Set the view, download and purge permissions for accessing email transcripts in journal.</p> <p>Options include: All, All Assigned, Participating, Related, None and Inherit.</p>  |
| <b>Contact Insights Field</b>         |   |
| <b>Field Name</b>                     | <p>Set the view permissions for each configured contact insights field in journal.</p> <p>Options include:</p> <ul style="list-style-type: none"> <li>• All: Provides the specified permission to all users within the configuration group.</li> <li>• All Assigned: Allows access to all segments that were handled in the user's assigned queues.</li> <li>• Participating: Allows access to every segment in which the user is a participant, or where the user has a supervisory relationship to a participant (team lead, supervisor, or administrator).</li> <li>• Related: Allows access to every segment in which the user is a participant, and every segment where</li> </ul> |

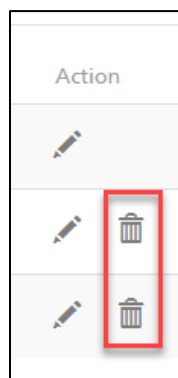
| Configuration Group Properties |   |
|--------------------------------|---|
| Parameter                      | Details   |
|                                | <p>there is a relationship. This would give agents access to segments of contacts they were consulted on that they did not participate in, or segments of contacts that are linked through RelatedContacts that they did not participate in.</p> <ul style="list-style-type: none"> <li>• None: Restricts the specified permission for all users in the configuration group.</li> <li>• Inherit: 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.</li> </ul> |

15. Click *Add* in the blue banner at the bottom of the screen.

16. The 'Save Configuration Group' message will appear. Click *OK* to complete the change.

To delete a configuration group:

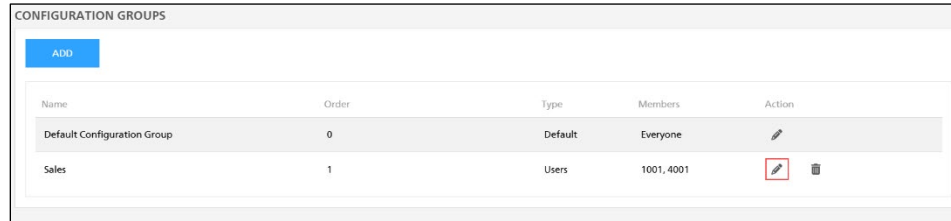
1. Under 'Action', select the trash icon in the row of the group you would like to delete.



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                        | Order | Type    | Members    | Action |
|-----------------------------|-------|---------|------------|--------|
| Default Configuration Group | 0     | Default | Everyone   |        |
| Sales                       | 1     | Users   | 1001, 4001 |        |

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.

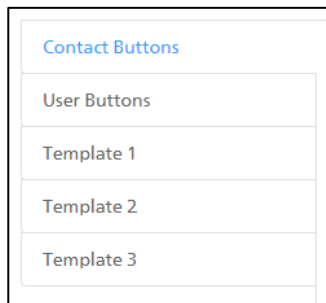
| Buttons panel summary   |  |  |
|---|--|--|
| Button  | Available when                           | Use Button to...   |
| <br>Answer           | Alerting with a contact.                 | Answer a call alerting at your workstation if off-hook.  |
| <br>Release          | On a contact.                            | End the contact you are on.  |
| <br>Place Call       | Logged on and not handling another call. | Place a call to another user, or to an external number.  |
| <br>Hold             | On a call.                               | Place a caller on hold. The caller hears music while on hold.  |
| <br>Transfer        | On a call.                               | Transfer a caller to another user, queue or external number.   |
| <br>Consult        | On a call.                               | Consult a third party when you are on a call.  |
| <br>End Consult    | On a consult or on a conference.         | While on a consult, release the active party and return to the caller on hold<br>OR While on a conference, release the third party and stay on the line with your original caller. |
| <br>Conference     | On a consult.                            | Initiate a conference call with your original caller while you are consulting.   |
| <br>LOB            | On a contact.                            | Tag a call with a Line of Business code.   |
| <br>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...   |
| <br>Coach                 | Logged on                | Receive a notification when an ice Administrator is coaching you or initiate silent monitoring.          |
| <br>Quick Text            | Application is open.     | Send a Quick Text message to another iceBar user.  |
| <br>PAQ                   | Application is open.     | View Personal Access Queue (PAQ) window and manage contacts as a Multi-Contact Handling user.            |
| <br>Apply Resolution Code | In Email state.          | Attach a resolution code to the email currently being handled. Also used to create new Resolution codes. |
| <br>Contact History     | Application is open.     | Open iceJournal and view Contact History.  |
| <br>Queue Stats         | Application is open.     | View Queue Statistics in iceMonitor.   |
| <br>Elevate             | User is on a call or IM. | Create a separate multi-party conference, for application sharing and video.                             |
| <br>Add Participant     | On a call.               | Add additional participants to a call.   |
| <br>Conference Roster   | In the In Meeting state. | View all participants on the call.   |
|  Mute                   | On a call.               | Mute your microphone.  |


| 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.

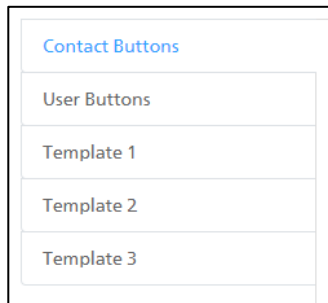


**Note:** Templates 1, 2, and 3 can be used to create and save alternative layouts. Templates can be copied and imported into the Contact Buttons or User Buttons pages. Refer below to learn how to copy and import templates.


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.

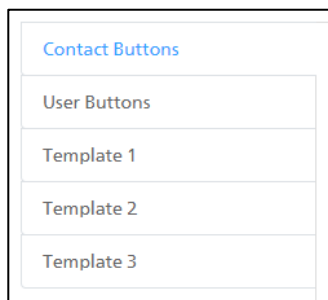
3. The column on the left shows the other buttons available for the user to add to the toolbar. The column on the right shows the buttons currently displayed on the toolbar.
4. In the column on the right, highlight the button that you wish to remove from the Buttons panel.
5. Click  to move the selected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



- Click the Add Button. A dialog box appears:

The screenshot shows a dialog box titled "ADD BUTTON". It contains the following fields from top to bottom:

- Tooltip:** A text input field.
- Icon:** A text input field followed by an ellipsis button "...".
- Command:** A drop-down menu.
- Queue ID:** A text input field.
- Dialed Digits:** A text input field.
- User Data:** A text input field.

At the bottom right of the dialog are two buttons: "Ok" and "Cancel".

- Add the information about the new button.
 

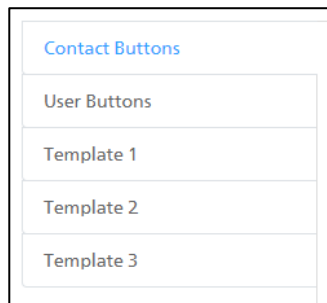
**Note:** More information about the parameters in the table below.
- Click OK to add the new button or click Cancel to discard your changes.
- Click Save to save your changes.

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

| 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:

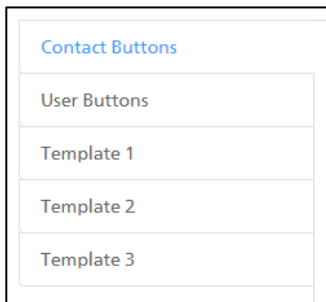
5. Make the desired changes outlined in the table below.
6. Click OK to apply your changes or click Cancel to discard your changes.
7. Click Save to save your changes.

| <b>Edit Button Options</b> |   |
|----------------------------|---|
| <b>Parameter</b>           | <b>Description</b>  |
| <b>Tooltip</b>             | Edit the text that will be displayed in the tooltip section.  |
| <b>Icon</b>                | Change the icon. <ol style="list-style-type: none"> <li>1. Click the ellipsis button to open the 'select icon' window.</li> <li>2. Click on the desired icon you wish to use</li> <li>3. Click <i>OK</i> to apply your changes or <i>Cancel</i> to discard your changes.</li> </ol> |
| <b>Command</b>             | Click the dropdown menu to select the command that you wish to associate with this button.<br><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.<br><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.<br><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.<br><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.

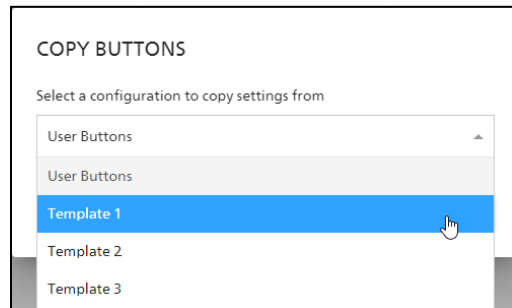


2. Locate the button you wish to delete on any of the columns that appear.
3. Click the Delete button to delete the button.
4. Click Save to save the changes.

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:

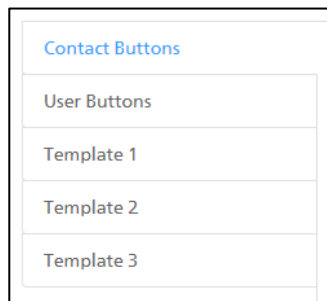
1. Navigate to the Contact Buttons or User Buttons page that you wish to configure.
2. Click the Copy button.
3. In the window that appears, select a page you wish to copy from by highlighting it in the drop-down list.



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 '1 of 2' indicator. A horizontal menu contains several tabs: 'General' (selected), 'Server', 'LOB', 'Canned Response', 'Not Ready Reason', 'iceBar for desktop', 'iceBar for web', 'Survey', and 'icePhone'. 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 visible settings include 'Allow Multi Contact Handling' (unchecked), 'Auto Answer Calls' (checked), and 'Outbound Presentation' (unchecked).

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'.

The screenshot shows the 'EDIT CONFIGURATION GROUP' interface. The 'Default User Connectivity' dropdown menu is open, showing the following options: 'icePhone', 'iceAdministrator defined', and 'IcePhone'. The 'IcePhone' option is highlighted with a red box.

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

The screenshot shows the 'Properties' tab in the user configuration interface. The 'IM Address' section is expanded, showing the following options: 'Use Connection Address', 'Use This Address', 'Can Handle IM Contacts from ice', and 'Use ACS'. The 'Can Handle IM Contacts from ice' and 'Use ACS' checkboxes are checked. The 'IM Address' field contains the value '8:acs:'.

## 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.

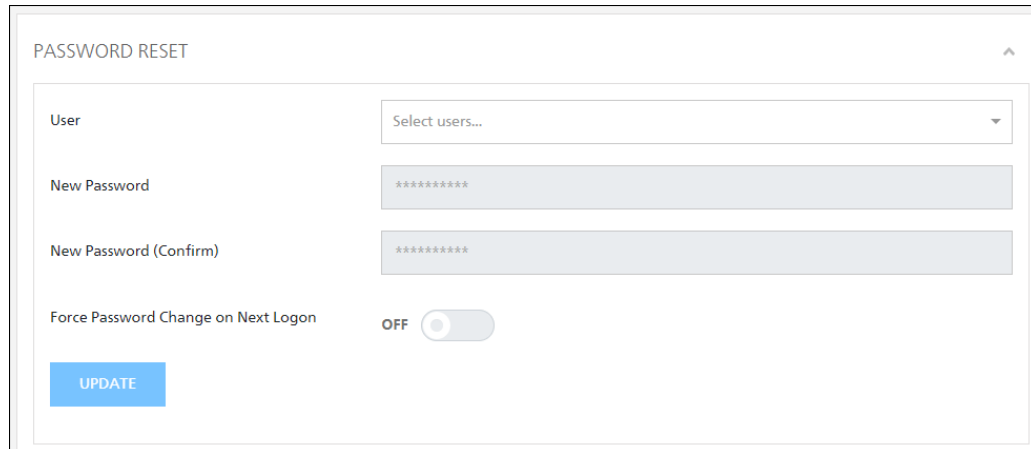
PASSWORD POLICY ▲

|                             |   |
|-----------------------------|---|
| Password Regular Expression | <input type="text" value="^({3,31})\$"/>  |
| Password Description        | English (Canada)<br><input type="text" value="Password must be at least 3 characters long."/> |
| Default Password            | <input type="text" value="*****"/>  |

| 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.   |

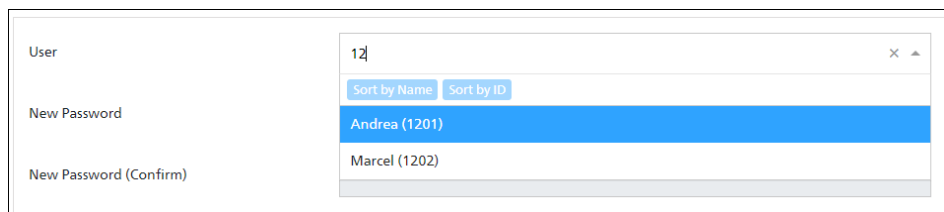
Password Reset:

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

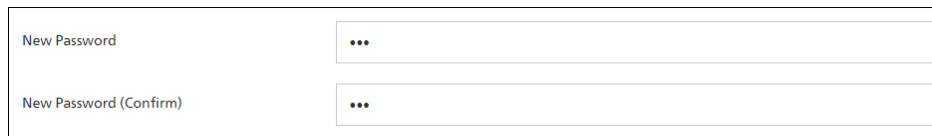


To reset a user's password, follow the steps below:

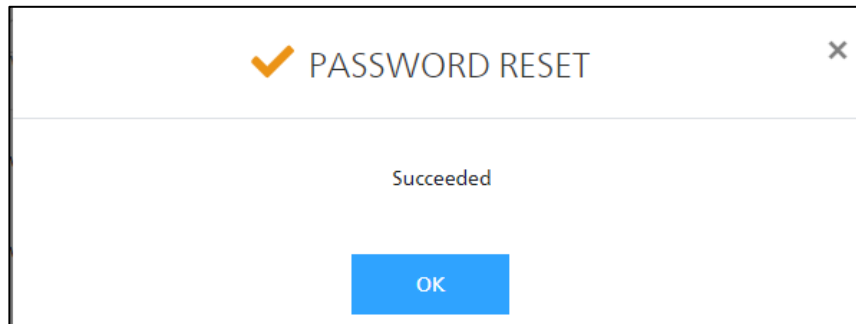
1. Select the user from the drop down list.



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

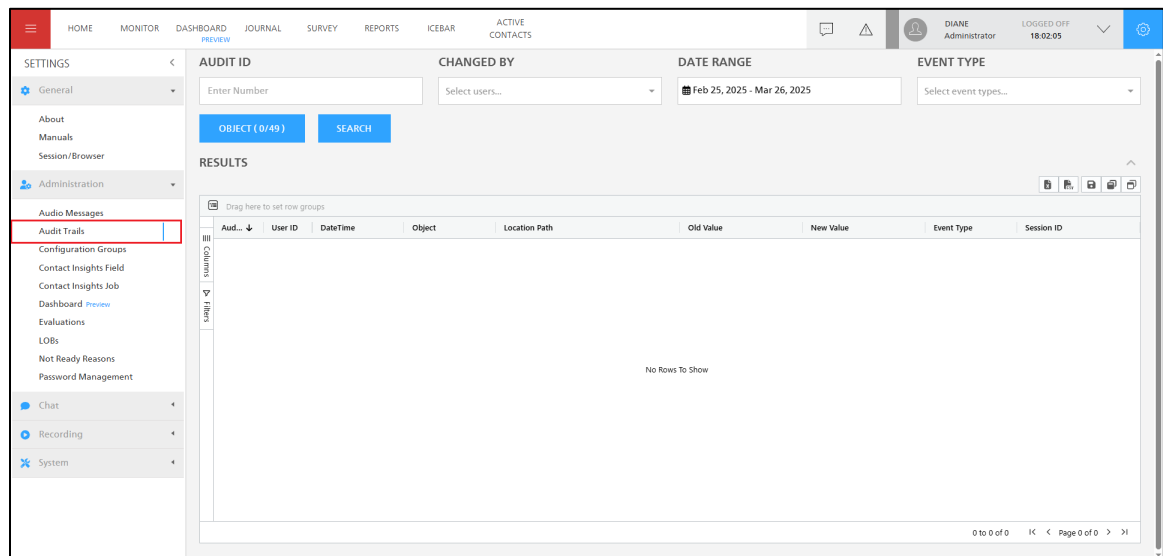


3. Toggle the *Force Password Change on Next Logon* on if you would like the user to reset their password the next time they logon.
4. Select the Update button to update the password.
5. The Password Reset Succeeded message will appear. Click OK.



## 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.



## 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 search interface with the following components:

- AUDIT ID:** Input field with placeholder "Enter Number".
- CHANGED BY:** Dropdown menu with placeholder "Select users...".
- DATE RANGE:** Calendar icon and text "Jul 01, 2024 - Jul 30, 2024".
- EVENT TYPE:** Dropdown menu with placeholder "Select event types...".
- OBJECT (0/48):** Blue button.
- SEARCH:** Blue button.
- RESULTS:** Section header.
- Grid:** A table with columns: "Audi...", "User ID", "DateTime", "Object", and "Location Path". The grid is currently empty, displaying "No Rows To Show".
- Columns List:** A sidebar on the left with a "Columns" section containing a list of fields with checkboxes: Audit ID, User ID, DateTime, Object, Location Path, Old Value, New Value, Event Type, and Session ID. A red box highlights the "Columns" header.
- Filters:** A "Filters" section below the columns list.
- Groups:** A "Groups" section at the bottom of the sidebar with a "Drag here to set row groups" prompt.
- Page Info:** "0 to 0 of 0" and "Page 0 of 0" with navigation arrows.

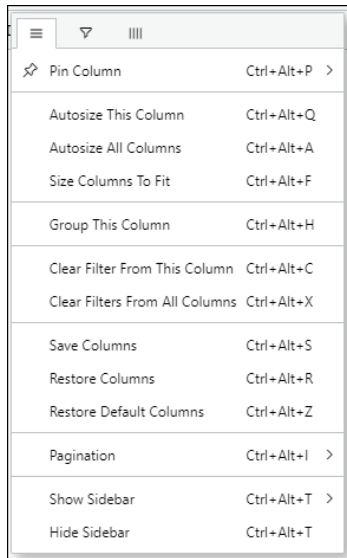
The grid will refresh with the selected columns. By default, all columns are displayed.

**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.

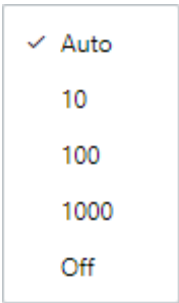
This close-up screenshot shows the column header "Audi..." in the grid. A red box highlights the "Actions" button (represented by a hamburger menu icon) located to the right of the column name. The "Actions" menu is open, showing the text "Actions".



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.<br>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>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.   |

| Column Heading Action Menu Options    |   |
|---------------------------------------|---|
| Menu Option                           | Function  |
| <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>  <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... |            |

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

**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 ► 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

## Filter Options

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

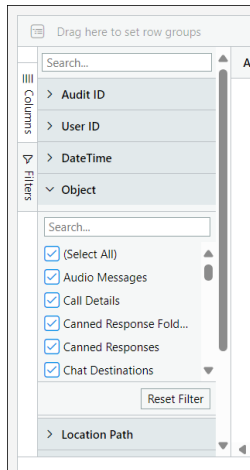
**RESULTS**

Drag here to set row groups

| Search... | 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.

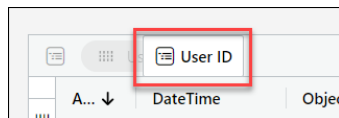
**RESULTS**

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

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

| 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

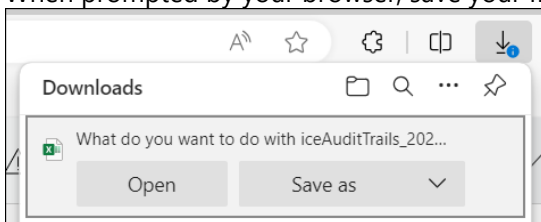
- To export the data to an excel file, select the *Export to Excel File* button.



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.



## Searching for an Audit Trail

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

- 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.

A screenshot of a search field titled "AUDIT ID". Below the title is a text input box with the placeholder text "Enter Number".

- 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.

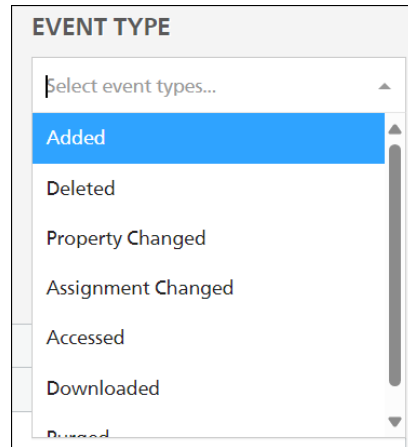
A screenshot of a dropdown menu titled "CHANGED BY". The dropdown is open, showing a list of users. The first user, "Christina (3164)", is selected and has a grey 'x' icon to its left. Below the list are two buttons: "Sort by Name" and "Sort by ID". The list of users includes: Andrea (1201), Andrea Administrator (2000), Antonio (1102), Diane (1111), Francis (1004), Global Admin (9999), and Global Admin 2 (9999).

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

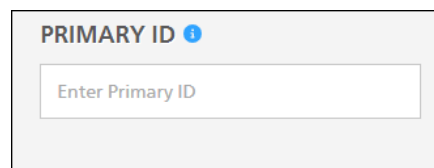
A screenshot of a date range filter interface. It features two calendar views side-by-side. The left calendar is for May 2024, with the date 21 selected at 12:00 a.m. The right calendar is for June 2024, with the date 19 selected at 11:59 p.m. Below the calendars are two time pickers: one for 12:00 AM and one for 11:59 PM. To the right of the calendars are several preset interval buttons: "Today", "Yesterday", "Last 7 Days", "Last 30 Days", "This Month", and "Last Month". At the bottom right are "SUBMIT" and "CANCEL" buttons.

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.

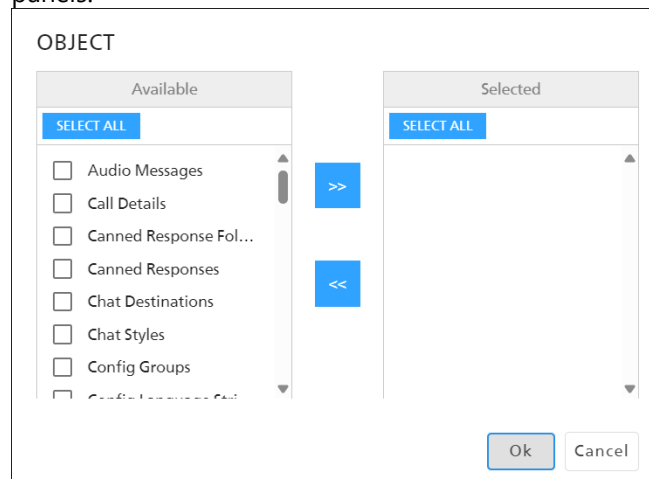


- The Primary ID filter is the first ID or subdirectory within a path. For example, in the location path *ID:6001 / No Answer Time*, the Primary ID is 6001.



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

- 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.



- 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>    | The event type associated with the object. Options include: <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  
Windows NT 10.0; Win64; x64; rv:109.0; Gecko/20100828/Firefox/109.0" }

## 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:

The screenshot displays the iceManager audit trail interface. At the top, there are four filter sections: **AUDIT ID** (with an input field for 'Enter Number'), **CHANGED BY** (with a dropdown for 'Select users...'), **DATE RANGE** (set to 'May 27, 2024 - Jun 25, 2024'), and **EVENT TYPE** (set to 'Property Changed'). Below these filters is an **OBJECT FILTER (0/45)** and a **SEARCH** button.

The main area is divided into two sections: **RESULTS** and **AUDIT TRAIL DETAIL**. The **RESULTS** section shows a table with columns: **Audit ID**, **User ID**, **DateTime**, **Object**, and **Location Path**. The table contains 20 rows of data, with the row for Audit ID 5342, User ID 9999, and DateTime 2024-06-19 01:33:36 PM highlighted. The **AUDIT TRAIL DETAIL** section provides a detailed view for the selected row, showing the following information:

- 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

At the bottom of the results table, there is a pagination indicator showing '169 to 189 of 1,000' and 'Page 9 of 48'.

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](#)

---

|                      |                             |
|----------------------|-----------------------------|
| <b>DateTime</b>      | June 20, 2024 10:28:50 a.m. |
| <b>Object</b>        | Call Details                |
| <b>Location Path</b> | ID: 431                     |

---

|                   |          |
|-------------------|----------|
| <b>Event Type</b> | Accessed |
| <b>New Value</b>  |          |
| <b>Old Value</b>  |          |

---

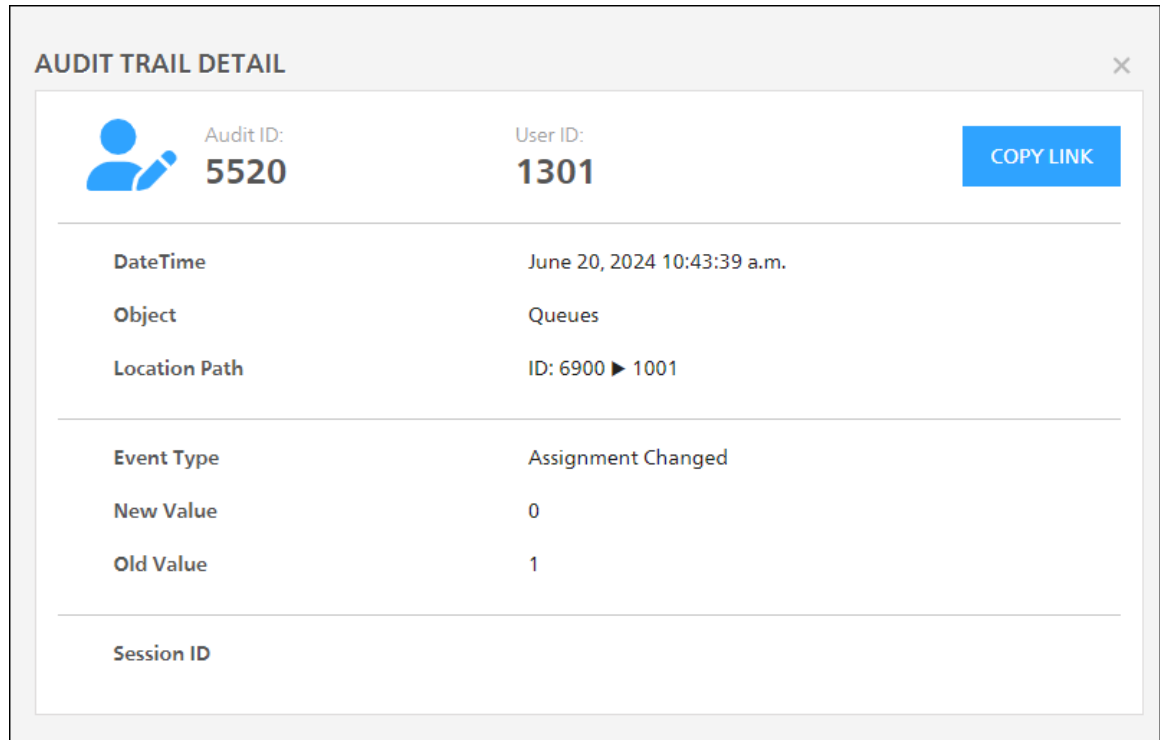
|                   |  |
|-------------------|--|
| <b>Session ID</b> | { "UserAgent": "Mozilla/5.0 (Windows NT 10.0; Win64; ... |
|-------------------|--|

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:



The screenshot shows a window titled "AUDIT TRAIL DETAIL" with a close button (X) in the top right corner. The window contains the following information:

|   |                             |                      |                           |
|---|-----------------------------|----------------------|---------------------------|
|  | Audit ID: <b>5520</b>       | User ID: <b>1301</b> | <a href="#">COPY LINK</a> |
| <b>DateTime</b>   | June 20, 2024 10:43:39 a.m. |                      |                           |
| <b>Object</b>   | Queues                      |                      |                           |
| <b>Location Path</b>  | ID: 6900 ▶ 1001             |                      |                           |
| <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.

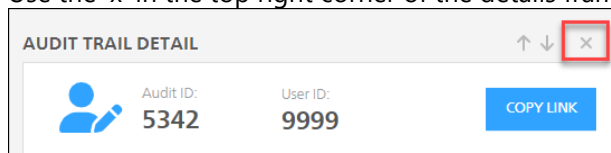
The event type shows that this item was an assignment change and the object field shows that it was related to queues, so you can see this item was a queue assignment change.

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

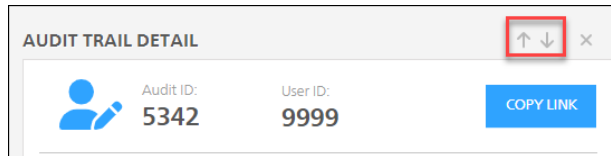
Lastly, from the new and old value, we can see that the old value was set to 1 (true), meaning the queue was originally assigned to the user. It has been updated to a value of 0 (false), indicating queue 6900 has been unassigned from user 1001.

**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

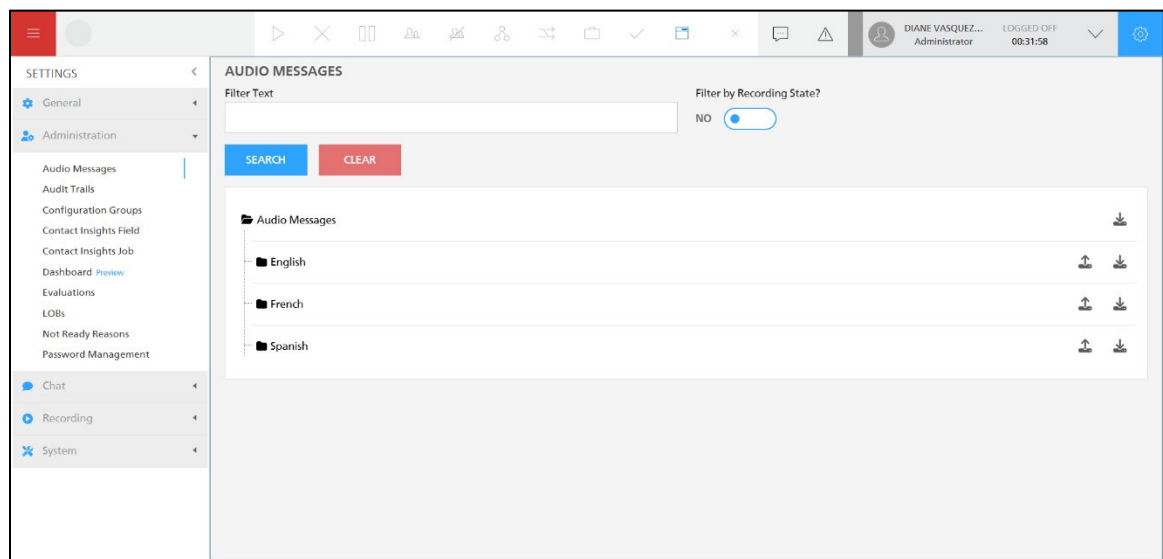
The audio message section allows team leaders, supervisors and administrators to listen to, manage and update the audio prompts used in the IVR.

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.

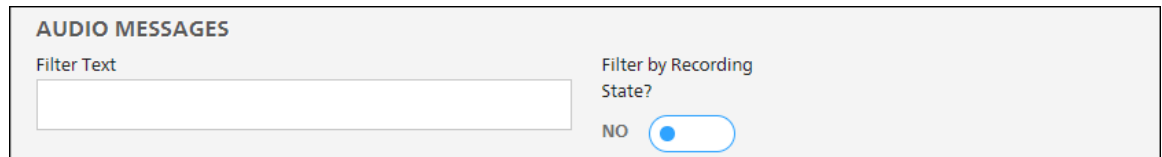
The audio file is the prompt file that plays in the system and can be created within this audio messages section. The audio messages tool allows users to record, generate TTS or upload the audio file that corresponds with the audio message record. The supported audio file formats are WAV, WMA, and MP3, with a maximum upload size of 25 MB.

**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.



**AUDIO MESSAGES**

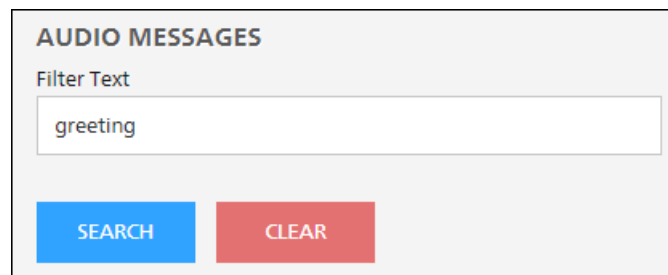
Filter Text

Filter by Recording State?  NO

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:

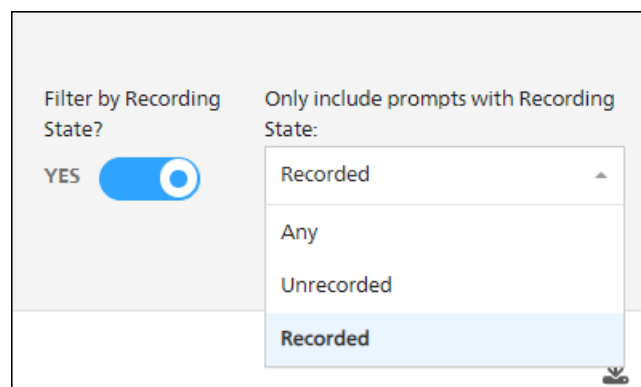
1. In the Filter Text field, enter your keyword or phrase.



**AUDIO MESSAGES**

Filter Text

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:

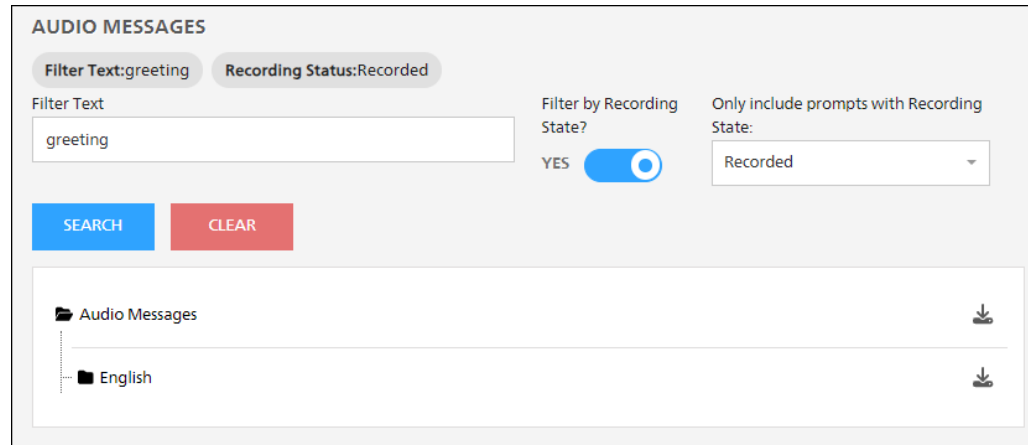
Recorded

Any

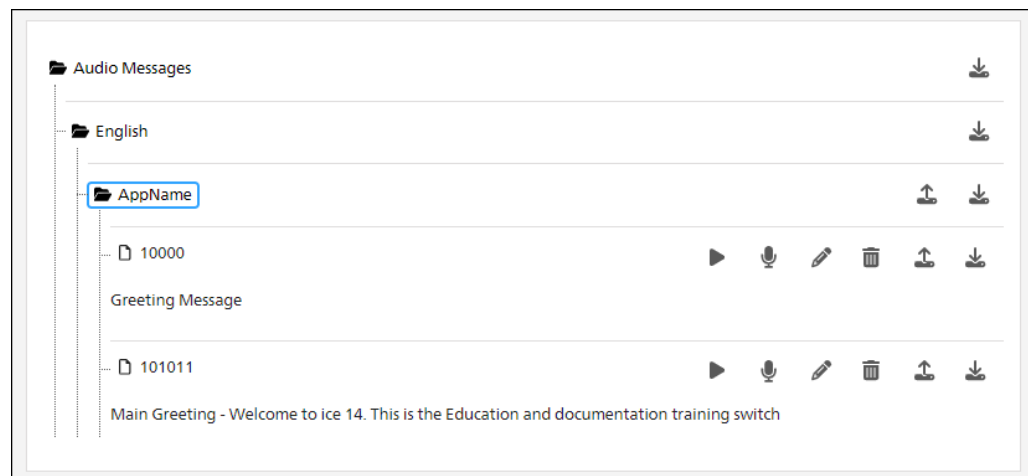
Unrecorded

Recorded

3. Click the Search button.



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.

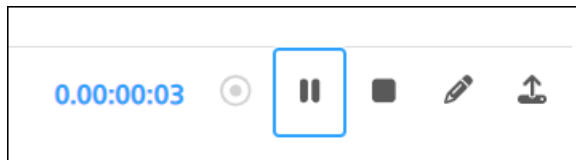


2. If there is no current audio file associated with the audio message, you will see three buttons in the top right corner of the message. These buttons that allow you to record

the file, edit the file, or upload a file.

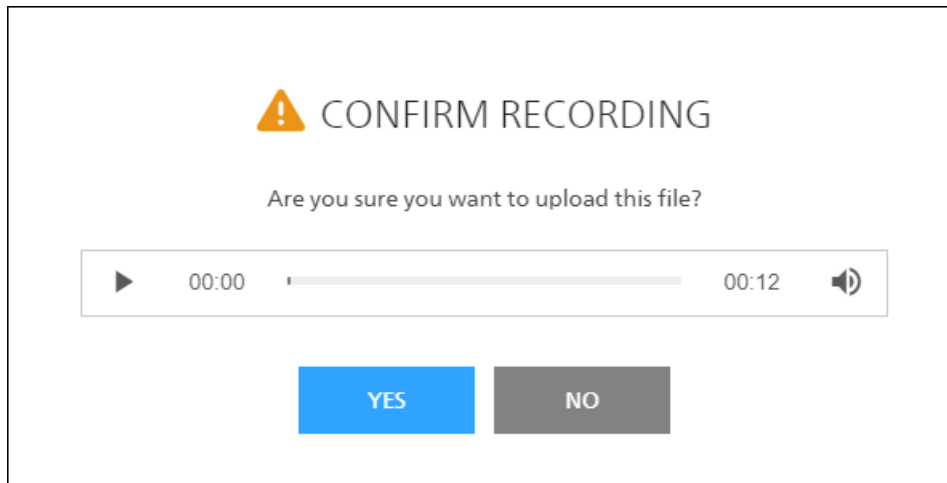


3. To record the file, click on the record button. The recording will begin directly in the browser. The inline controls allow you to pause, resume or stop the recording when you are finished.



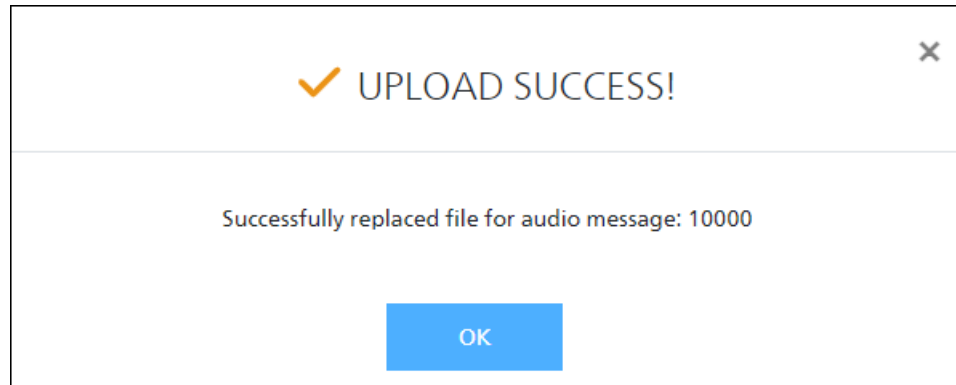
4. When you have clicked the stop button, the following confirmation window will display.

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*.

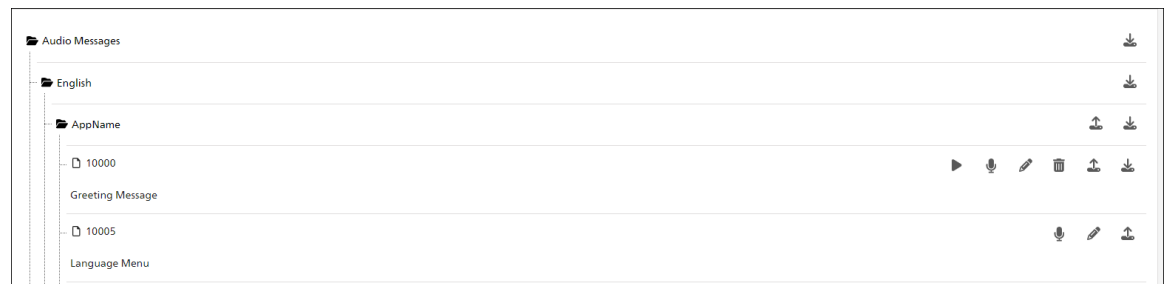
5. If you have selected *Yes*, the following window will display. Click OK to close the window.



## Editing an audio file

Follow the steps below to edit an audio file:

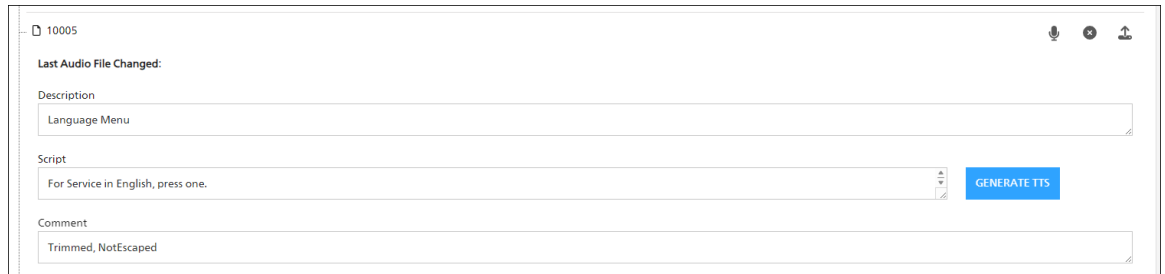
1. Locate the audio message you wish to modify.



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.

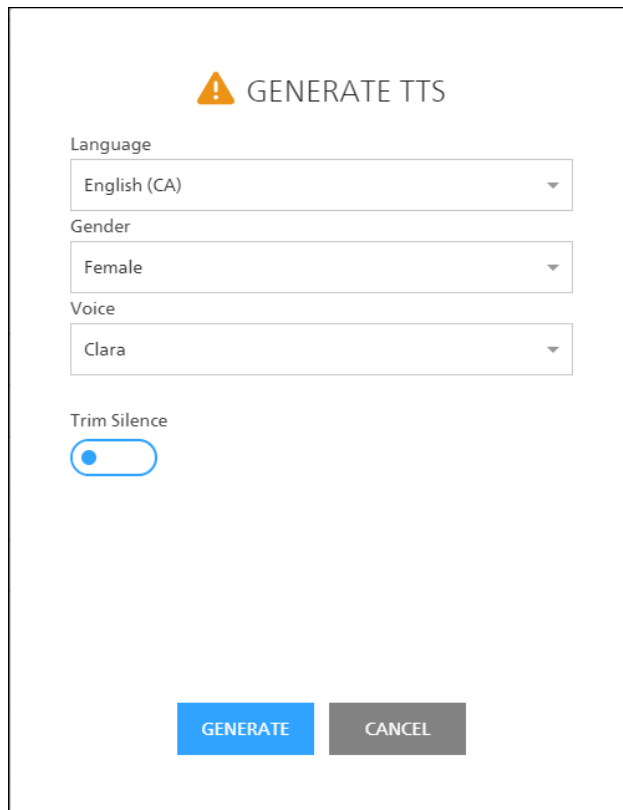


The screenshot shows a window titled "10005" with a microphone icon, a close button, and a share icon in the top right corner. Below the title bar, it says "Last Audio File Changed:". There are three text input fields: "Description" containing "Language Menu", "Script" containing "For Service in English, press one.", and "Comment" containing "Trimmed, NotEscaped". A blue "GENERATE TTS" button is positioned to the right of the "Script" 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 and has a limit of 4000 characters.

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



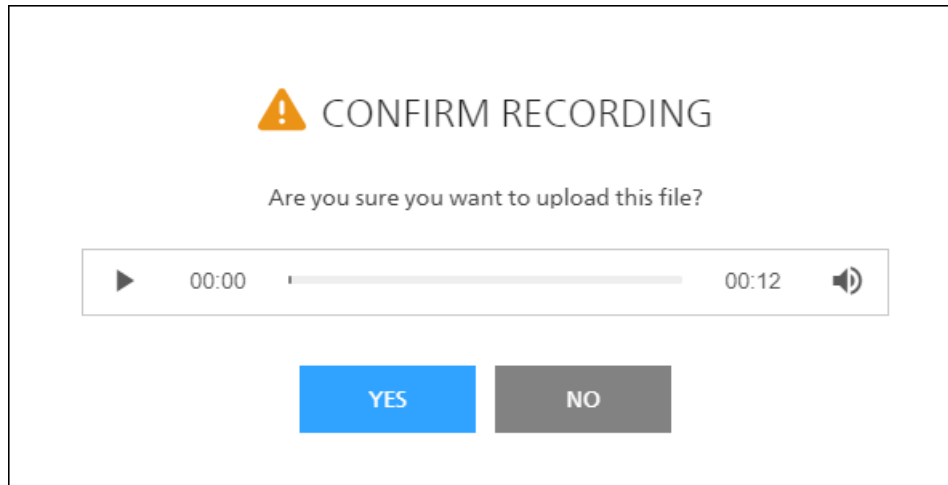
The dialog box is titled "GENERATE TTS" with a warning icon. It contains three dropdown menus: "Language" set to "English (CA)", "Gender" set to "Female", and "Voice" set to "Clara". Below these is a "Trim Silence" toggle switch, which is currently turned on. At the bottom, there are two buttons: "GENERATE" (blue) and "CANCEL" (grey).

Click *Generate* to generate the file.

**Note:** Your selected TTS voice settings (language, gender, and voice) will be remembered the next time you generate TTS.

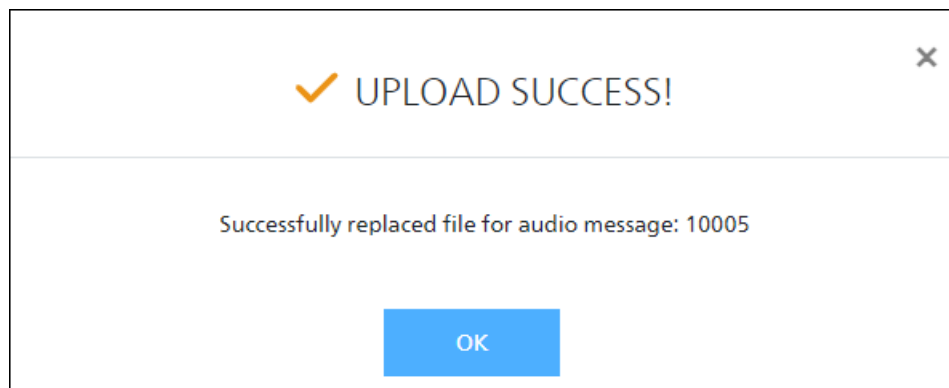
6. The following message will appear.

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*.

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:

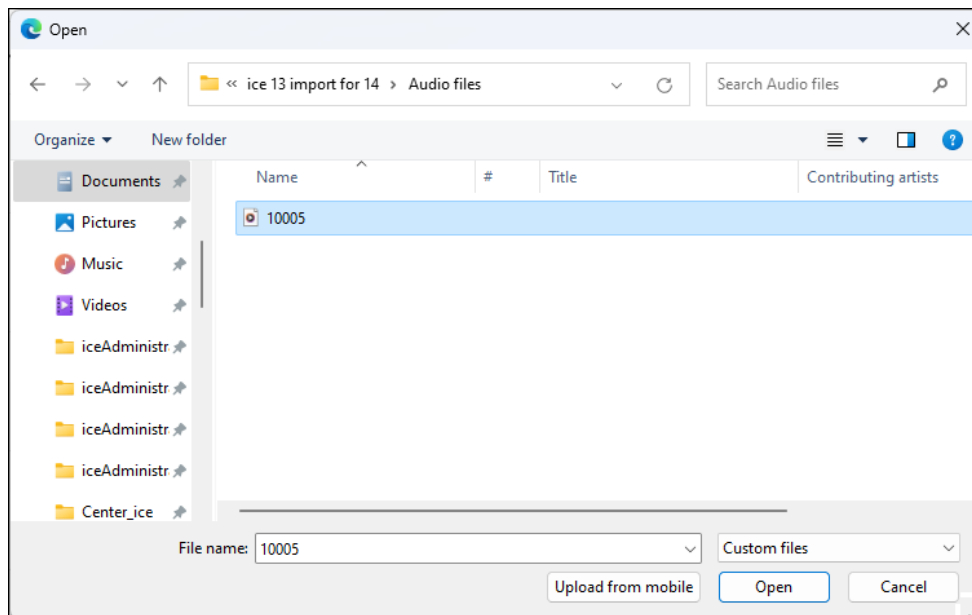
1. Locate the audio message you wish to upload.



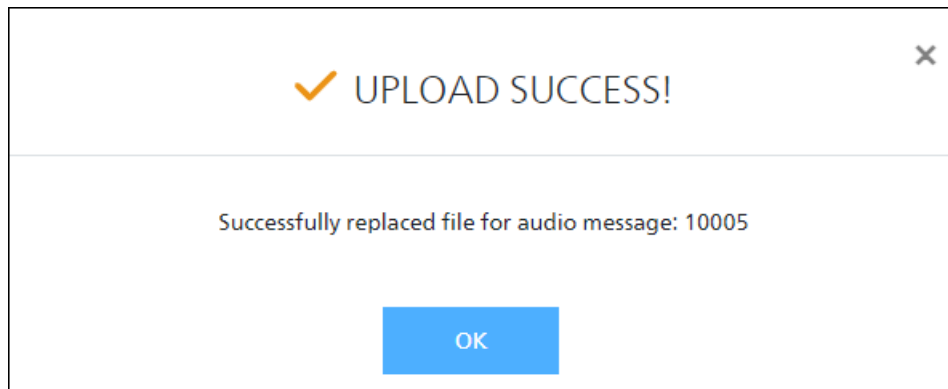
2. In the top right corner of the message select the upload button.



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



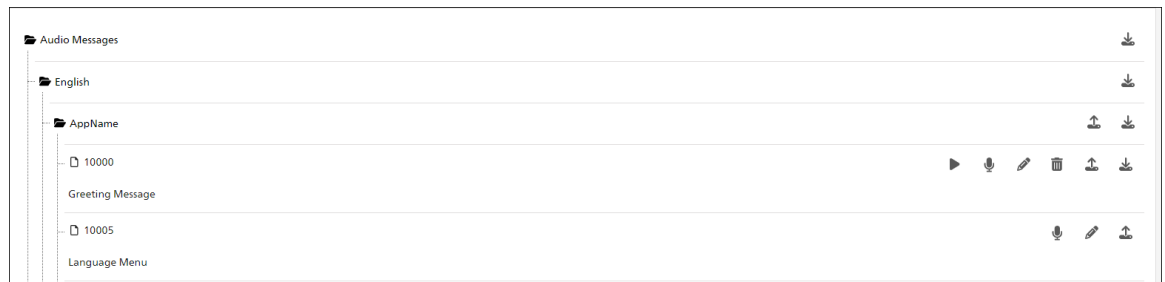
8. The following window will display. Click OK to close the window.



## Listening to an audio file

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

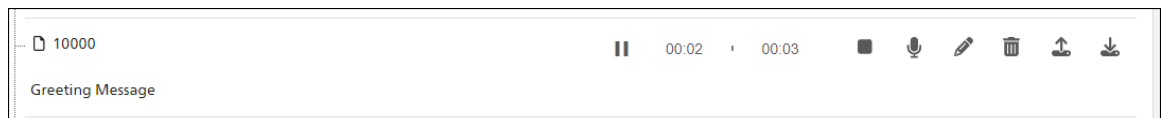
1. Locate the audio message you wish to listen to.



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:

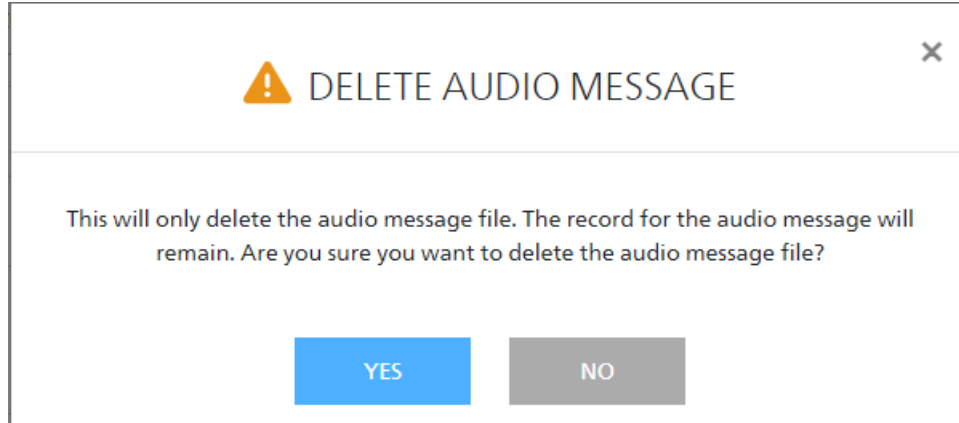
1. Locate the audio file you wish to delete.



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

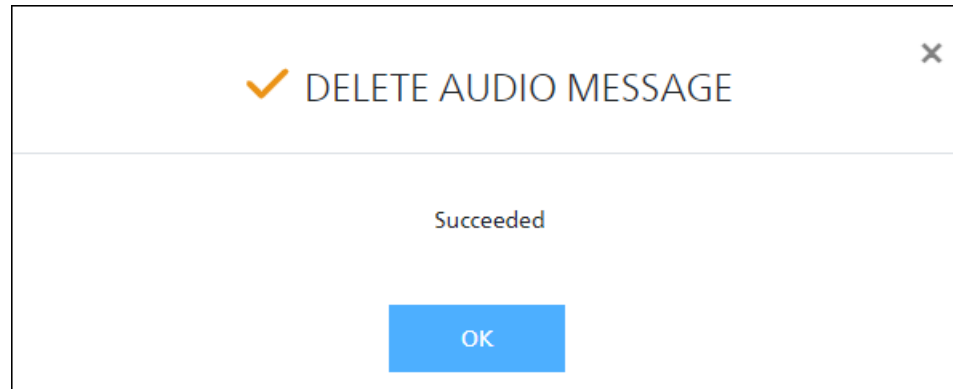


3. The following confirmation message will display. Remember, deleting the audio file will not delete the audio message.



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

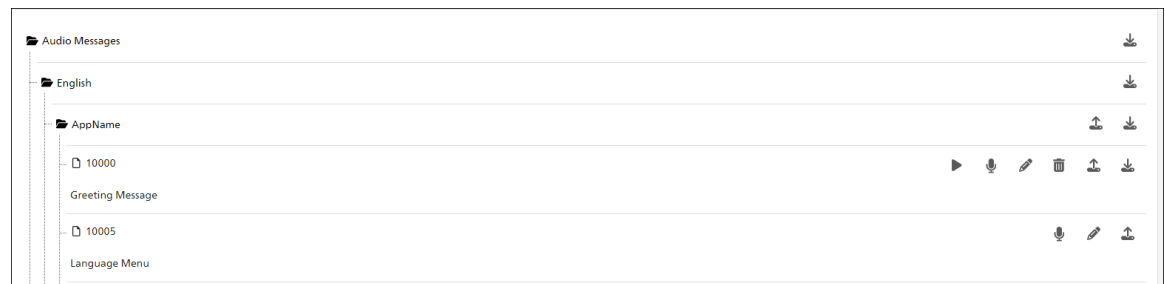
4. Upon successful deletion, the following message will display.



## Downloading an audio file

Follow the steps below to download an existing audio file:

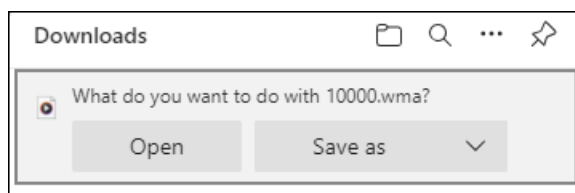
1. Locate the audio message you wish to download.



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



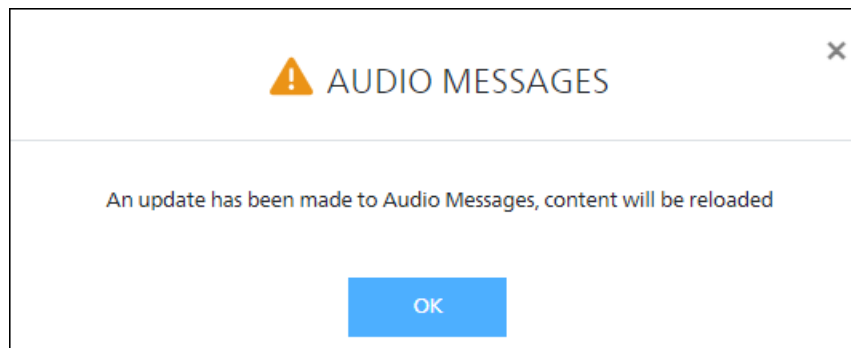
3. Save the file to your preferred location on your local machine.



**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 Insights

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

### Contact Insights Field

This section can only be modified by Administrators.





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

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

- iceContactSummary

- iceContactSummaryCompletionUsage
- iceContactSummaryMaxTokens
- iceContactSummaryPromptUsage

These fields cannot be deleted.

| CONTACT INSIGHTS FIELD  |  |   |
|---|--|---|
| ADD   |  |   |
| Setting Name  | Display Name                                   | Action  |
| iceContactSummary<br><i>Summary of a contact transcription</i>                              | Summary  |  |
| iceContactSummaryCompletionUsage<br><i>Number of tokens used for the summary completion</i> | Contact Summary Completion Usage               |  |
| iceContactSummaryMaxTokens<br><i>Max tokens allowed when running contact summary Job</i>    | Maximum Tokens limit for the summarization Job |  |
| iceContactSummaryPromptUsage<br><i>Number of tokens used for the summary prompt</i>         | Contact Summary Prompt Usage                   |  |

To add, delete, or modify contact insights fields, click *Contact Insights 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 INSIGHTS FIELD**

ADD

Setting Name i

Display Name i

English (Canada)

English (US)

Français (Canada)

Español (México)

Display As i

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

The table below explains the parameters.

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

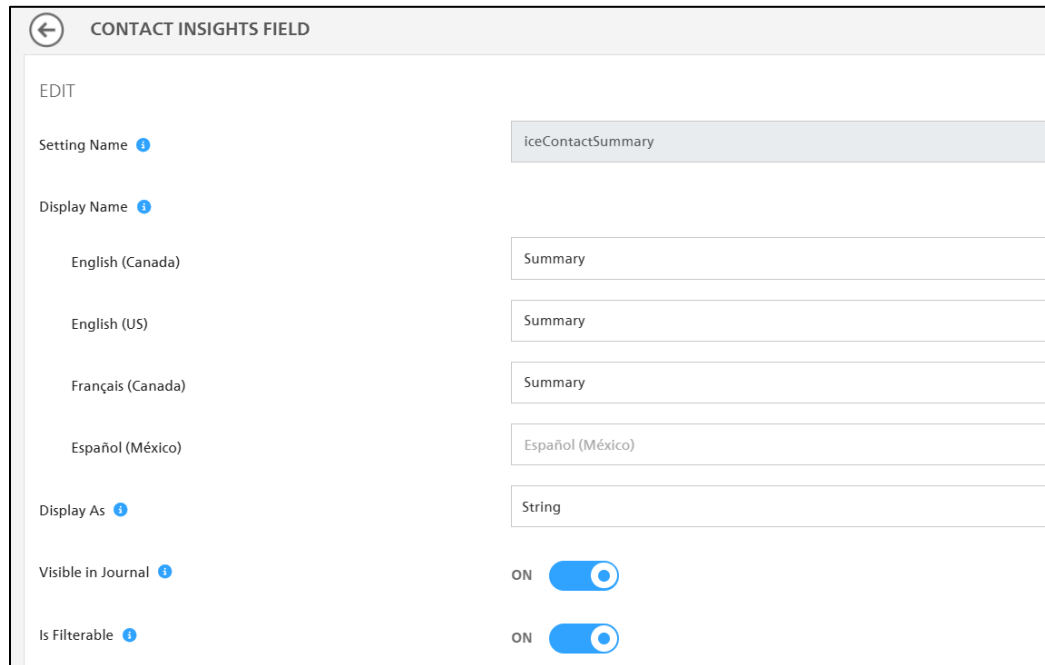
| Parameter                       | Allowable values | Description   |
|---------------------------------|------------------|---|
| <b>Is Filterable</b>            | On/Off           | If enabled, the field will be displayed in the Contact Insights filter in journal. This will allow users to filter contacts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

EDIT

Setting Name ⓘ iceContactSummary

Display Name ⓘ

English (Canada) Summary

English (US) Summary

Français (Canada) Summary

Español (México) Español (México)

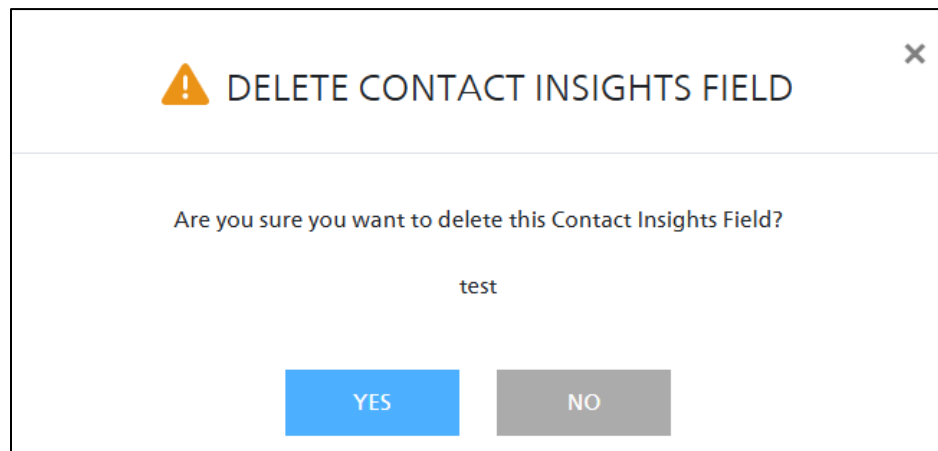
Display As ⓘ String

Visible in Journal ⓘ ON

Is Filterable ⓘ ON

#### 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 Insights Field" message appears.
2. Select *Yes* to proceed with the deletion. Click *No* to cancel the deletion.



⚠️ DELETE CONTACT INSIGHTS FIELD

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

test

YES NO

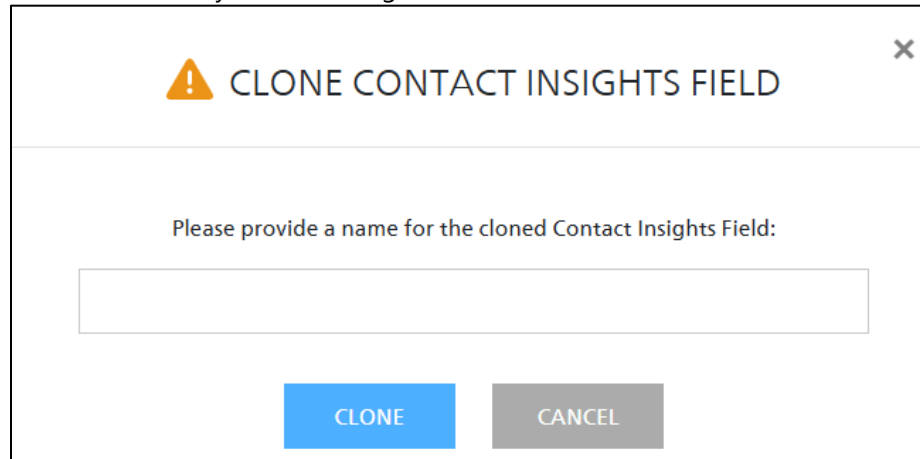
Once you click *Yes* the field is removed from the list.

#### To clone the field:

1. Click the clone icon located in the Action column.

When you clone a field, you will be asked to provide a name for your cloned Contact Insights Field.

2. Enter in a name for your cloned Contact Insights Field. If left blank, it will copy the name of the field you are cloning.



The screenshot shows a modal dialog box titled "CLONE CONTACT INSIGHTS FIELD". At the top left of the dialog is a yellow warning triangle icon. Below the title bar, the text "Please provide a name for the cloned Contact Insights Field:" is centered above a single-line text input field. At the bottom of the dialog, there are two buttons: a blue button labeled "CLONE" and a grey button labeled "CANCEL".

3. Select *Clone* to proceed with the cloning. Click *No* to cancel the cloning.

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

## Contact Insights Job

This section can only be modified by Administrators.

Contact insights jobs are created to run when contacts are completed, in order to populate contact insights 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.

**Note:** Transcription & Summarization GenAI jobs are included in the platform. Additional GenAI jobs will incur usage-based charges calculated by tokens used. By initiating extra jobs, users agree to accept these charges, with rates subject to change.

**CONTACT INSIGHTS JOB**

[ADD](#)

Please Note: Transcription & Summarization GenAI jobs are included in the platform. Additional GenAI jobs will incur usage-based charges calculated by tokens used. By initiating extra jobs, users agree to accept these charges, with rates subject to change.

| ID | Name   | State   | Job Type                    | Action |
|----|--|---------|-----------------------------|--------|
| 3  | iceRealtimeTranscription<br><small>Built in job required to process RealtimeTranscriptions to RecordingTranscripts</small> | Enabled | Process Realtime Transcript |        |
| 1  | iceVoiceContactSummary14<br><small>Built in job for contact transcript summarization</small>                               | Enabled | Azure OpenAI                |        |

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

### Add a Job

To add a virtual workflow job, follow these steps:

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

**CONTACT INSIGHTS JOB**

[ADD](#)

Name

Description

State

Trigger

Modality

Job Type

**AZURE OPENAI SETTINGS**

Azure OpenAI Endpoint

Azure OpenAI Key

Max Input Tokens Allowed

Deployment Name

[ADD](#)

AZURE OPENAI SETTINGS

Azure OpenAI Endpoint ?

Azure OpenAI Key ?

Max Input Tokens Allowed ?

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 INSIGHTS JOB FIELD ^

Select Contact Insights Fields v

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 insights job.  |
| <b>State</b>       | Enabled<br>Disabled<br>Preview                          | Enabled: This state is required to configure jobs to run on a schedule.<br>Disabled: The job does not run.<br>Preview: The job runs ad hoc by clicking the <i>Preview</i> button in iceJournal.   |
| <b>Trigger</b>     | Transcript Complete<br>Contact Complete<br>Job Complete | The trigger which is required for the job to run. Contact insights 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<br>Unknown                            | The contact modality. Currently, GenAI jobs are only supported for voice contacts.  |

| Parameter                         | Allowable values                            | Description  |
|-----------------------------------|---|--|
|                                   | Voice<br>IM<br>Autodial<br>Email            | Virtual workflow jobs support all modalities except for email.   |
| <b>Job Type</b>                   | Azure OpenAI<br>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   |
| <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 Insights Job Field</b> | Text  | The list of insights 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<br>IM                                 | The type of contact that the job will run for.<br><br><b>Note:</b> Only IM and voice groups have endpoints in a UC group, email groups are not supported for virtual workflow. |
| <b>UC Group</b>                   | A dropdown list of your available UC Groups | The UC Group associated with the job.  |

| Parameter | Allowable values | Description  |
|-----------|------------------|--|
| User Data | 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. |

4. 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 create an Azure OpenAI job, use the clone button to ensure that you are able to copy the Azure OpenAI Settings.

#### To clone a job:

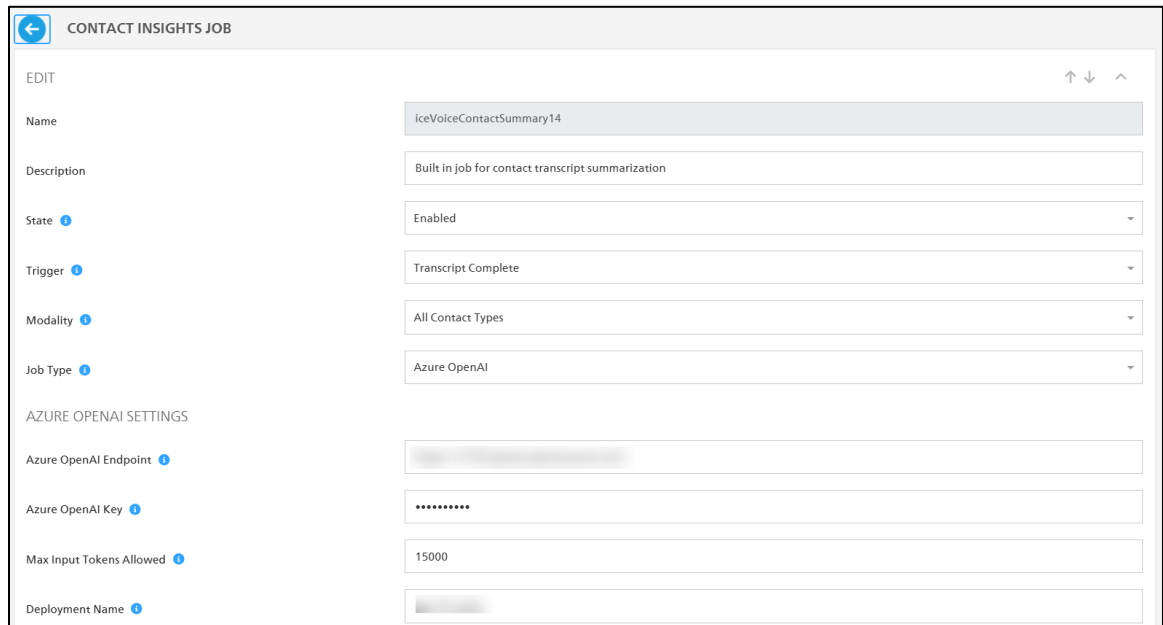
When you select *Clone*, a copy of the insights job is created, with “– Copy” appended to the name. Click the edit pencil to edit the copy.

In this mode, you can modify all properties of the job including the system prompt. Clone a copy duplicates the structure, using the original as a template for the cloned version.

Ensure that you modify the associated contact insights job field before saving your changes.

#### To edit a job:

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



CONTACT INSIGHTS JOB

EDIT

Name: IceVoiceContactSummary14

Description: Built in job for contact transcript summarization

State: Enabled

Trigger: Transcript Complete

Modality: All Contact Types

Job Type: Azure OpenAI

AZURE OPENAI SETTINGS

Azure OpenAI Endpoint: [Redacted]

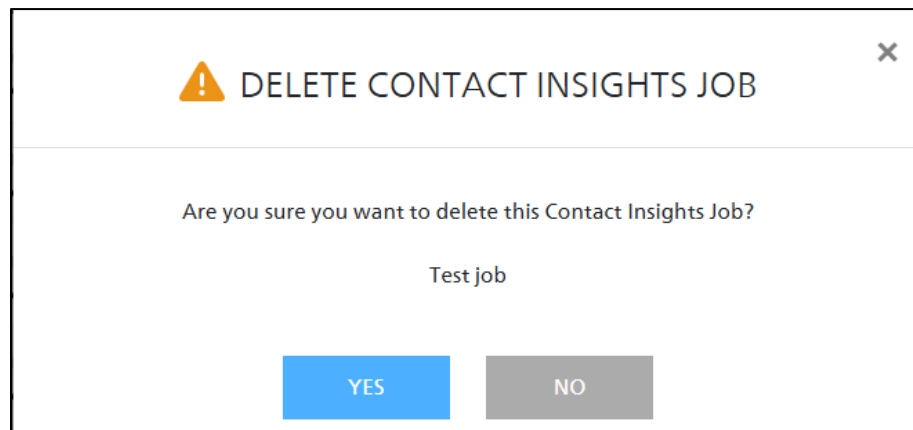
Azure OpenAI Key: [Redacted]

Max Input Tokens Allowed: 15000

Deployment Name: [Redacted]

#### 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 Insights Field" message appears.
2. Select *Yes* to proceed with the deletion. Click *No* to cancel the deletion.



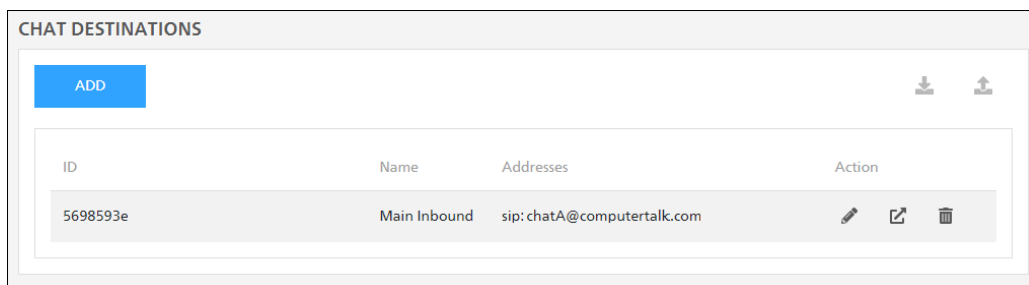
Once you click *Yes* the job is removed from the list.

## 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  |
|------------------|--|
| <b>ID</b>        | The chat destination ID.   |
| <b>Name</b>      | The name given to the chat destination.  |
| <b>Addresses</b> | The sip addresses of the chat destination.   |
| <b>Action</b>    | <p>Allows users with administrator privileges or higher to edit or delete the destination. All other user types cannot add or modify chat destinations.</p> <p>The Test iceChat option opens a chat session and allows administrators to test the iceChat settings and configurations. The Copy Chat Link button allows administrators to share the link to other users to test the iceChat URL.</p> |

#### To add a chat destination:

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

| EDIT        |                                      | ↑ ↓ of 1 ^ |
|-------------|--------------------------------------|------------|
| ID          | 00000000-0000-0000-0000-000000000000 |            |
| Name        | <input type="text"/>                 |            |
| Addresses   | <input type="text"/>                 |            |
| Lookup Type | Sequential                           |            |

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

|   |  |
|---|--|
| Style                                   | Light                                  |
| Chat Rehydration Mode                   | Rehydrate                              |
| Require SSO                             | OFF <input type="checkbox"/>           |
| Allow Contact Attachments from Web User | ON <input checked="" type="checkbox"/> |

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

| IFRAME CONFIGURATION      |   | ^ |
|---------------------------|---|---|
| Embed iceChat into iFrame | ON <input checked="" type="checkbox"/>  |   |
| Allowed Directives        | <input type="text"/>  |   |
| Chat Button Icon          | <input type="text" value="&lt;svg xmlns='http://www.w3.org/2000/svg' viewBox='-50 -80 620 620' width='100%' height='100%'&gt;&lt;path d"/>  |   |
| Chat Button Styles        | <pre>.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; }</pre> |   |
| Height                    | 550   |   |
| Width                     | 380   |   |

|                 |   |
|-----------------|---|
| Referrer Policy | strict-origin-when-cross-origin   |
| Source URL      | <input type="text" value="https://[redacted].computertalksandbox.com/iceChat/assets/js/iceChatIframe.js"/>  |
| iFrame Styles   | <pre>.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 0px 1px;   display: flex;   flex-direction: column;   justify-content: space-between;   overflow: hidden;   position: fixed;   right: 1.7rem;   z-index: 2147483646; }</pre> |

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:
  onload="IceChat.init(iceChatSettings);" async"></script>
```

[RESET TO DEFAULTS](#)

IFRAME LOCALIZATION

**Chat Button Aria-Label**

English (Canada)

Français (Canada)

**Chat Button Tooltip**

English (Canada)

Français (Canada)

**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)

Français (Canada)

[RESET TO DEFAULTS](#)

**Note:** Login pages using iFrame require the use of an Adaptive Card. Custom login pages without Adaptive Cards are supported only in pop-up windows.

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

The screenshot displays the configuration interface for the Chat Landing Page using Adaptive Cards. It is divided into three main sections:

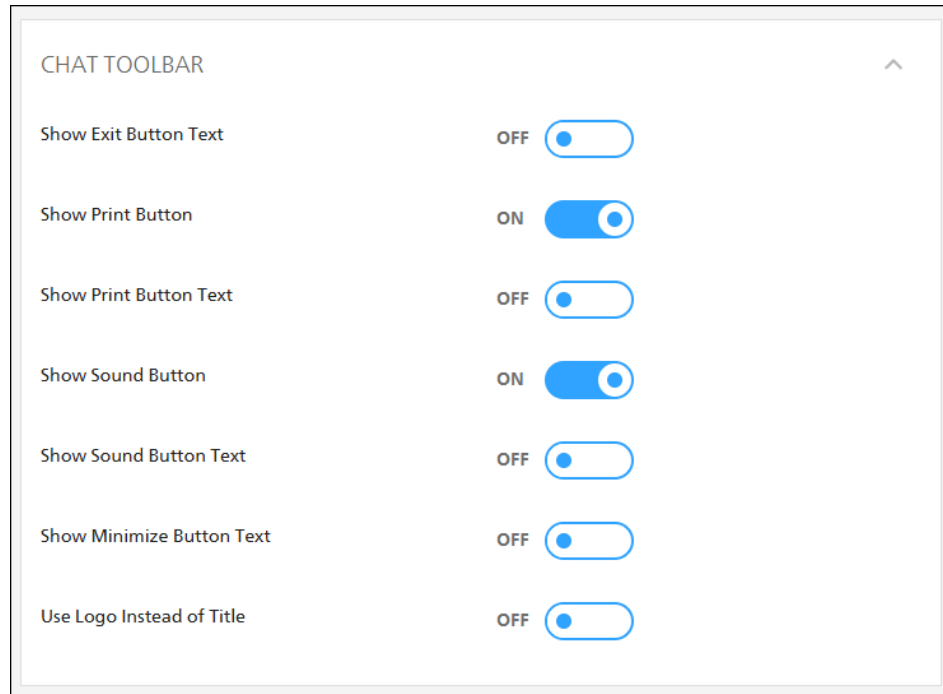
- CHAT LANDING PAGE USING ADAPTIVE CARDS**: The top section contains a toggle switch for "Use Adaptive Cards Login", which is currently set to "OFF".
- CHAT LANDING PAGE USING ADAPTIVE CARDS**: The middle section has the "Use Adaptive Cards Login" toggle set to "ON". Below it, the "Adaptive Card JSON Data" field is empty, with a reference to the [Adaptive Card designer](#) tools for generating the JSON. A code editor shows the following JSON structure:

```
{
  "$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**: The bottom section provides a reference to the [documentation at Adaptive Cards Native styling](#) for more information. A code editor shows the following CSS rules:

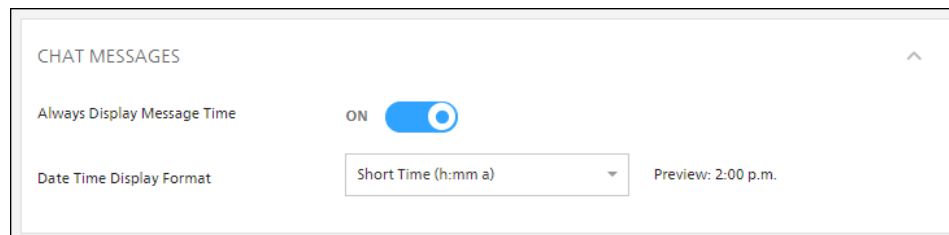
```
/* sign in button */
#signInLabel {
  color: #323232 !important;
  font-weight: 400 !important;
  font-size: 28px !important;
  line-height: 42px !important;
}
/* remove outline from adaptive card container */
.ac-container.ac-adaptiveCard:focus-visible {
  outline: none;
}
/* actions rendered like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

A "RESET TO DEFAULTS" button is located at the bottom left of the CSS Styling section.

## 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   |
|                             | <p>3. Closing the browser: The contact is still alive in ice and the contact can be re-hydrated (restored).<br/>           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.<br/>           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.<br/>           If the rehydration mode is set to <b>Prompt</b> and the parameters have not changed, the previous chat will be rehydrated.<br/> <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.</p> <p>4. Refreshing the browser on an active chat:<br/>           Refreshing the chat browser page without changing any of the chat parameters (for example, destination ID, language, etc) will always rehydrate the active chat.</p> <p>5. Opening a new tab and clicking on the <b>start chat</b> button:<br/>           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.<br/>           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.<br/>           If there is no existing chat, a new chat is created.</p> <p>6. Opening a new browser and clicking on the start chat button:<br/>           If it is a different browser, a new chat is created.</p> |

| 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>                      | The list of allowed directives.  |
| <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>  |

| <b>Chat Destination Properties</b>            |   |
|---|---|
| <b>Parameter</b>                              | <b>Details</b>  |
| <b>Chat Button Styles</b>                     | The chat button styles in CSS.  |
| <b>Height</b>                                 | The height of the iFrame.   |
| <b>Width</b>                                  | The width of the iFrame.  |
| <b>Referrer Policy</b>                        | The referrer policy controls how much referrer information should be included with requests.  |
| <b>Source URL</b>                             | Specifies the URL of the page you want to display.  |
| <b>iFrame Styles</b>                          | The iFrame styles in CSS.   |
| <b>Embed Code (JS)</b>                        | Code to embed iceChat in iFrame   |
| <b>iFrame Localization</b>                    |   |
| <b>Chat Button Aria-Label</b>                 | The text for the chat button aria-label.  |
| <b>Chat Button Tooltip</b>                    | The tooltip text for the chat button.   |
| <b>Title</b>                                  | 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. |
| <b>Chat Landing Page Using Adaptive Cards</b> |   |
| <b>Use Adaptive Cards Login</b>               | If enabled, the chat landing page can be configured using adaptive cards.   |
| <b>Adaptive Card JSON Data</b>                | 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.                                  |
| <b>Adaptive Card CSS Styling</b>              | 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.  |
| 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> <li>• Long Time (h:mm:ss a z)</li> <li>• Short Date (yyyy-MM-dd)</li> <li>• Medium Date (MMM dd, yyyy)</li> </ul> |

| Chat Destination Properties           |  |
|---------------------------------------|--|
| Parameter                             | Details  |
|                                       | <ul style="list-style-type: none"> <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> where a denotes a.m. or p.m. and z denotes the time zone. |
| Localization                          |  |
| Window Title                          | The title text to be displayed in the window.  |
| Toolbar Title                         | The title text to be displayed in the toolbar.   |
| Logo                                  | The file path for your logo.   |
| Logo Alt Text                         | The alternate text displayed in place of your logo if the image fails to load.   |
| Chat Generic Error Message            | The text to be displayed in the chat generic error message.  |
| Chat Busy Message                     | The text to be displayed in the chat busy message.   |
| Chat Terminated Message               | The text to be displayed in the chat terminated message.   |
| Chat Rehydration Prompt Message       | The text to be displayed when a user is prompted to continue the chat or begin a new chat.   |
| Screen Reader Message Replay for User | The screen reader text to be replayed for a user message.  |

| Chat Destination Properties               |   |
|---|---|
| Parameter                                 | Details   |
| 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.<br>Defaults to 10 px.                         |
| <b>System Message Bubble Border Thickness (px)</b>   | The border thickness of the system message bubble border.<br>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.<br>Defaults to 10 px.                       |
| <b>Workflow Message Bubble Border Thickness (px)</b> | The border thickness of the workflow message bubble border.<br>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.  |

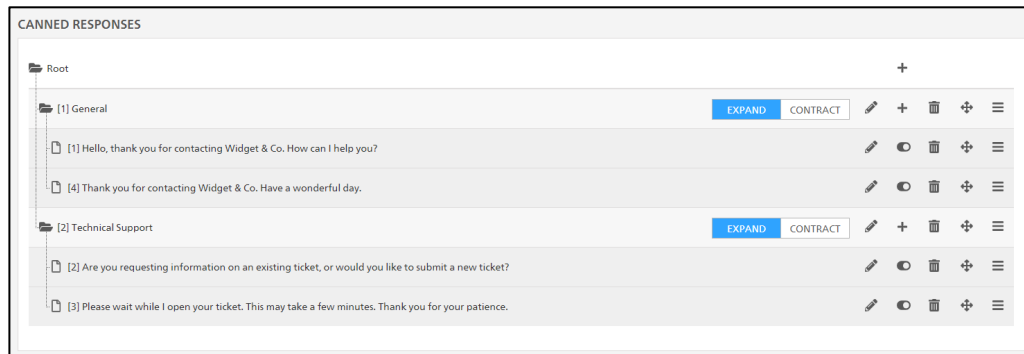
| Chat Style Properties                  |  |
|--|--|
| Parameter                              | Details  |
| Toolbar Button Hover Text              | The hover / focus toolbar text colour. Defaults to #005999.                      |
| Toolbar Button Icon                    | The toolbar button icon 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. |
| End Chat Button Background             | The end chat button background colour. Defaults to #005999.                      |
| End Chat Button Focus Indicator Colour | Colour of the focus outline for the end chat button. Defaults to #000000.        |
| End Chat Button Hover Background       | The hover / focus end chat button background colour. Defaults to #ffffff.        |
| End Chat Button Hover Text             | The hover / focus end chat button text colour. Defaults to #005999.              |
| End Chat Button Icon                   | The end chat button icon colour. Defaults to #ffffff.                            |
| End Chat Button Hover Icon             | The hover / focus end chat button icon colour. Defaults to #005999.              |
| End Chat Button Text                   | The end chat button text colour. Defaults to #ffffff.                            |

| <b>Chat Style Properties</b>                        |   |
|---|---|
| <b>Parameter</b>                                    | <b>Details</b>  |
| <b>Toolbar Label</b>                                | The toolbar label colour. Defaults to #ffffff.  |
| <b>Tooltip Text Colour</b>                          | The colour of the font for tooltips. Defaults to #000000.   |
| <b>Tooltip Background Colour</b>                    | The colour of the background for the tooltips. Defaults to #000000.   |
| <b>Tooltip Border Colour</b>                        | The colour of the border for the tooltips. Defaults to #000000.   |
| <b>End Chat Popup Button Focus Indicator Colour</b> | When clicking the end chat button, a pop up is displayed. This allows you to change the focus indicator colour. |
| <b>Fonts</b>  |   |
| <b>Agent Message Date Time</b>                      | The font used for the incoming message date and time.   |
| <b>Agent Message</b>                                | The font used for the incoming message text.  |
| <b>Agent Message Name</b>                           | The font used for the name in the incoming message.   |
| <b>User Message Date</b>                            | The font used for the outgoing message date and time.   |
| <b>User Message</b>                                 | The font used for the outgoing message text.  |
| <b>User Message Name</b>                            | The font used for the name in the outgoing message.   |
| <b>System Message Date Time</b>                     | The font used for the system message date and time.   |
| <b>System Message</b>                               | The font used for system messages.  |

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

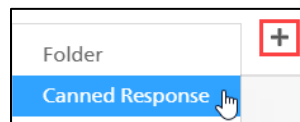
## Canned Responses

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

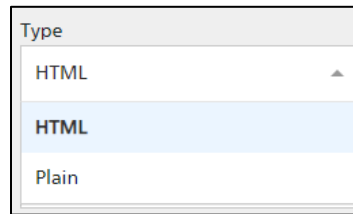


### To add a Canned Response:

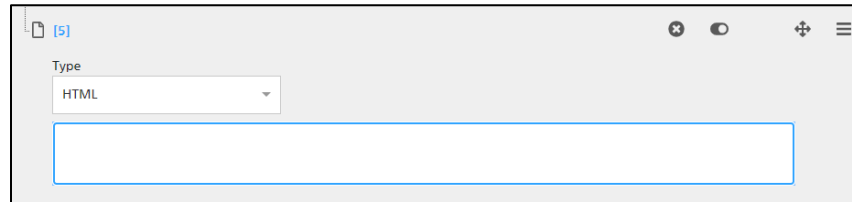
1. Choose a folder under which you want to add a Canned Response.
2. Click the *add* (+) button in the same row as the chosen folder. Select Canned Response from the list. A new entry will be added to the folder.



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



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.

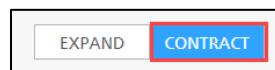
**Note:** Canned responses and folder names are restricted to a maximum of 2000 characters.

#### 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:

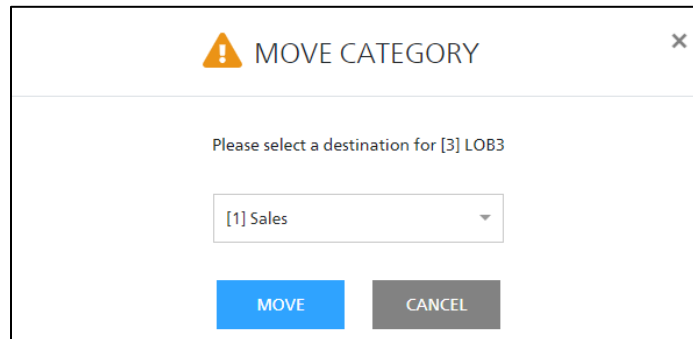
- Click the toggle on the Canned Response to disable the Canned Response.



- 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.

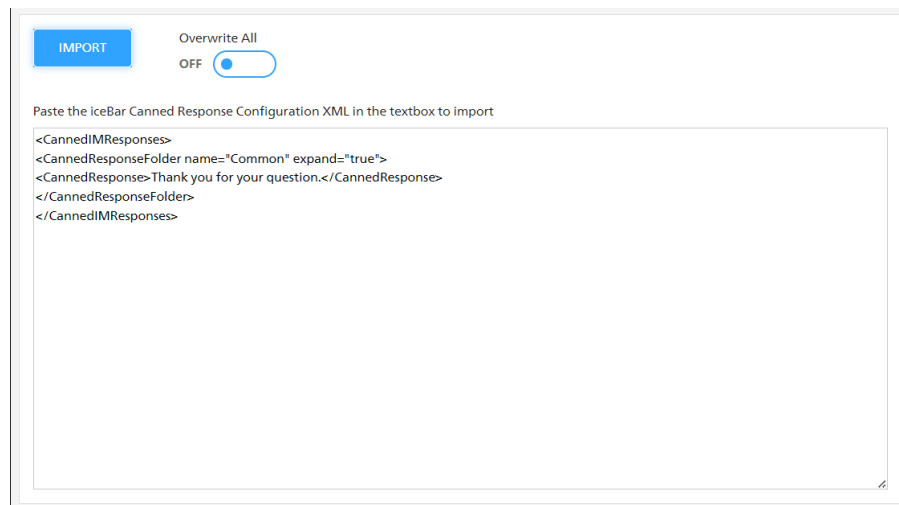
#### Reorder a Canned Response or folder:

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

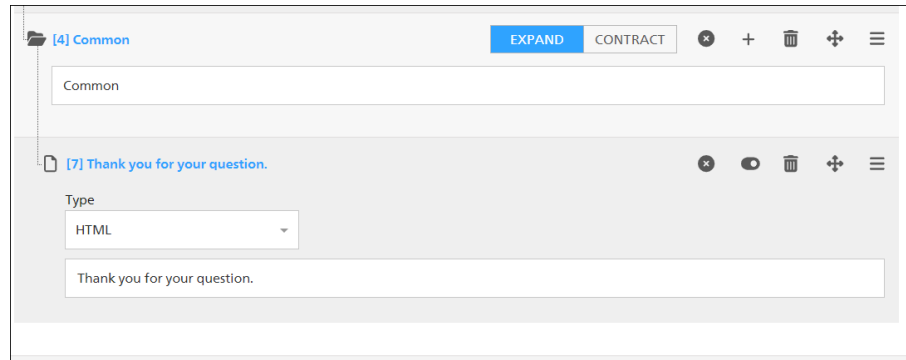


#### To import Canned Responses from XML format:

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:



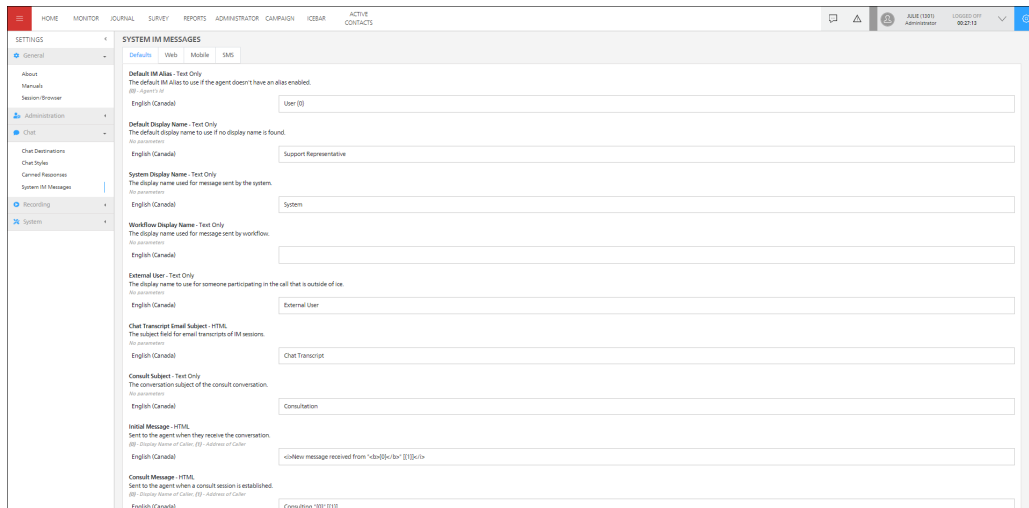
3. Click the Import button to import the Canned Responses.
4. New Canned Response fields open populated with your imported Canned Responses.



- 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.                               |
| <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</b>          | HTML      | Sent after the configured idle time max retries has been reached.                     |

| Parameter                           | Format | Description   |
|-------------------------------------|--------|---|
| <b>Message Final</b>                |        |   |
| <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.                        |
| <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.                                |

**Web / Mobile / SMS**

| Parameter                                 | Format | Description   |
|---|--------|---|
| <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. |
| <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.  |

| Parameter                          | Format | Description   |
|------------------------------------|--------|---|
| Connection Timeout Message (Agent) | HTML   | Sent when the IM session has timed out based on the configured setting for connection loss. |

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

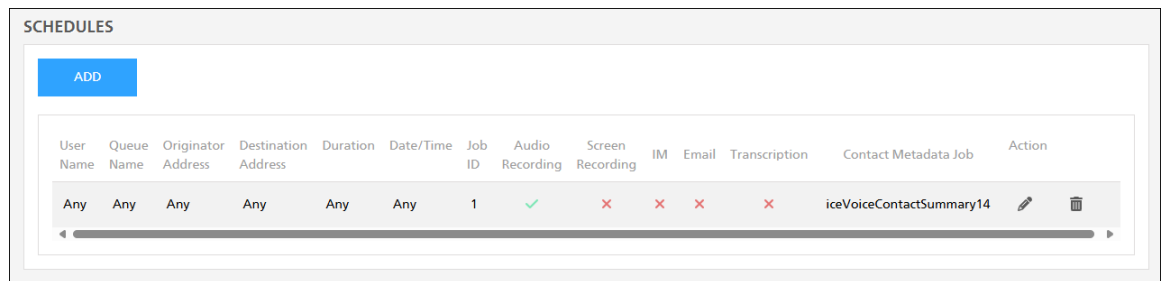
## Recording settings

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



### Schedules

This section can only be modified by Administrators and Supervisors.

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



The screenshot shows a web interface titled "SCHEDULES". At the top left is a blue "ADD" button. Below it is a table with the following columns: User Name, Queue Name, Originator Address, Destination Address, Duration, Date/Time, Job ID, Audio Recording, Screen Recording, IM, Email, Transcription, Contact Metadata Job, and Action. A single row is visible with the following values: Any, Any, Any, Any, Any, Any, 1, a green checkmark, a red X, a red X, a red X, a red X, iceVoiceContactSummary14, and edit/delete icons.

| User Name | Queue Name | Originator Address | Destination Address | Duration | Date/Time | Job ID | Audio Recording | Screen Recording | IM | Email | Transcription | Contact Metadata Job     | Action  |
|-----------|------------|--------------------|---------------------|----------|-----------|--------|-----------------|------------------|----|-------|---------------|--------------------------|---|
| Any       | Any        | Any                | Any                 | Any      | Any       | 1      | ✓               | ✗                | ✗  | ✗     | ✗             | iceVoiceContactSummary14 |   |

#### 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:

The screenshot shows the 'ADD SCHEDULE' configuration interface. It includes the following fields and controls:

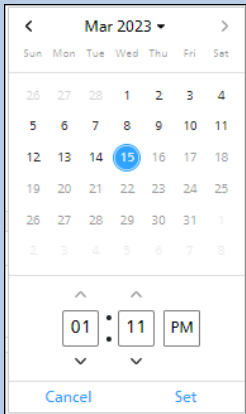
- Users:** A dropdown menu labeled 'Select users...'.
- Queues:** A dropdown menu labeled 'Select queues...'.
- Destination Address:** A dropdown menu labeled 'Destination Address'.
- Originator Address:** A radio button group with 'Any' selected.
- Duration (Seconds):** A radio button group with 'Any' selected.
- Date/Time:** A radio button group with 'Any' selected.
- Audio Recording:** A toggle switch set to 'ON'.
- Screen Recording:** A toggle switch set to 'OFF'.
- Recording Transcription:** A toggle switch set to 'OFF'.
- Contact Insights Job:** A toggle switch set to 'OFF'.

At the bottom of the screen, there is a navigation bar with tabs for: User, Queue Name, Originator, Destination, Duration, Date/Time, Audio, Screen, and Transcription.

- 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>IM</b>                      | Off/On                                   | Select <i>On</i> to provide the IM transcription.   |
| <b>Email</b>                   | Off/On                                   | Select <i>On</i> to provide email transcription.  |
| <b>Recording Transcription</b> | Off/On                                   | Select <i>On</i> to enable recording transcription and select your transcription provider.  |
| <b>Contact Insights Job</b>    | Off/On                                   | Select <i>On</i> to enable the contact insights job and specify the job ID.<br><b>Note:</b> The contact insights 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 | Job ID | Audio Recording | Screen Recording | IM | Email | Transcr |
|---------------|-------------------------------------|--------------------|---------------------|----------|-----------|--------|-----------------|------------------|----|-------|---------|
| Any           | Any                                 | Any                | Any                 | Any      | Any       | 1      | ✓               | ✗                | ✗  | ✗     | ✗       |
| Andrea (1201) | Customer Service Voice Queue (6003) | Any                | Any                 | Any      | Any       | Any    | ✓               | ✗                | ✓  | ✓     | ✗       |

## Edit a Schedule

To edit a schedule:

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

The screenshot shows the 'EDIT SCHEDULE' form with the following fields and controls:

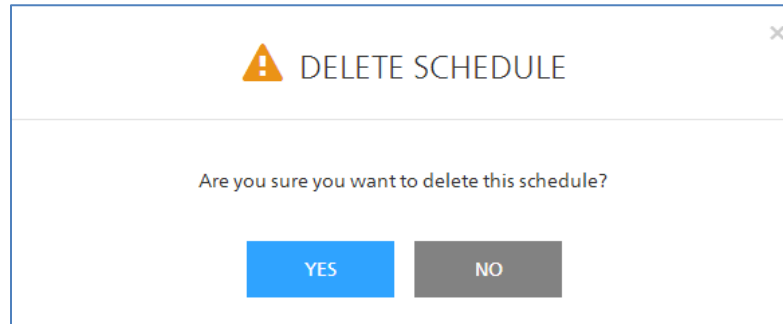
- EDIT** (header)
- Users**: Dropdown menu with 'Andrea (1201)' selected.
- Queues**: Dropdown menu with 'Customer Service Voice Que...' selected.
- Destination Address**: Dropdown menu with 'Destination Address' selected.
- Originator Address**: Radio button with 'Any' selected.
- Duration (Seconds)**: Radio button with 'Any' selected.
- Date/Time**: Radio button with 'Any' selected.
- Audio Recording**: Toggle switch set to ON.
- Screen Recording**: Toggle switch set to OFF.
- IM**: Toggle switch set to ON.
- Email**: Toggle switch set to ON.
- Recording Transcription**: Toggle switch set to OFF.
- Contact Metadata Job**: Toggle switch set to OFF.

## Delete a schedule

To delete the schedule:

1. Click the garbage can icon located in the Action column.  
When you delete a schedule, an "Are you sure you want to delete this schedule" message appears.

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



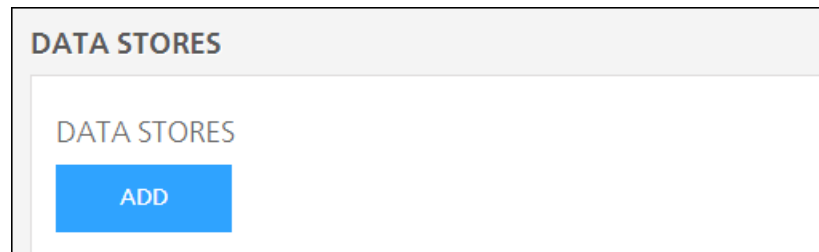
Once you click *Yes* the schedule is removed from the list.

## Datstores

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> |                    |             |

|                          |                     |  |
|--------------------------|---------------------|--|
| <b>Name</b>              | Free text           | Enter datastore name.  |
| <b>FTP</b>               |                     |  |
| <b>Server</b>            | Free text           | Enter FTP server URL.  |
| <b>Port</b>              | Typically 21        | Enter FTP port. The default is 21.   |
| <b>Is Passive</b>        | Checked / Unchecked | <p>Select the checkbox to indicate if FTP is passive.</p> <p>With passive FTP, the connection is initiated between the FTP server's 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<br>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.<br>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.<br>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.<br>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<br>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.<br>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.<br>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.<br>Note: This option applies to both audio and screen recording.   |
| <b>Schedule</b>                                   | On/Off             | Select <i>On</i> to enable scheduled recordings.<br>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.<br>For this option, the system will record the number of calls entered in the Max Unscoored Recordings Per User field per user. After a recording has been evaluated, the system will record the user's next call.<br>Note: This option only applies to audio recordings.                   |
| <b>Max Unscoored Recordings Per User</b>          | 1 to 124           | Enter the number of unscoored recordings for each user.<br>An unscoored recording is one that has not been evaluated and scored through the Journal.<br>This feature allows iceRecording to record random recordings at the same pace with which contacts are evaluated.<br>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.<br>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.<br>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

Use Default Port **ON**

User Name

Password

Root Directory

Alias Root Directory

---

**PAUSE**

Caption

Foreground

Background

### TRANSCODING

Enable Automatic Transcoding (Proxy Recording To MP4) ON

---

Proxy Recording To WMV

Original Video Codec

Encoder Mode

Peak Bit Rate

Screen Capture Quality

Time Per Frame

Key Frame Distance

Modify Frame Size OFF

---

WMV To MP4

Transcoded Container Format

Transcoded Video Codec

Transcoded Audio Codec

### VENDOR

Vendor Name

Product Name

Product Info

Cur Version

Min Version

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

| Parameter            | Permissible Values  | Description   |
|----------------------|---|---|
| <b>Proxy Server</b>  |   |   |
| Server Name          | Text  | Name or IP address of the 3rd party server.   |
| Use Default Port     | On/off  | Select <i>On</i> to use the default port or select <i>Off</i> to enter a server port number.                |
| Server Port          | 1 to N  | Port number for communication (if any).   |
| User Name            | Text  | Login username.   |
| Password             | Text  | Login password.   |
| Root Directory       | Text  | Root directory of the recorded file. This is the same across all the recording servers for easy management. |
| Alias Root Directory | Text  | UNC path to the root directory, accessible by the Recording Transcoder.                                     |
| <b>Pause</b>         |   |   |
| Caption              | Text  | Enter the text of the message displayed while recording is paused.  |
| Foreground           | Black, Blue, Green<br>Cyan, Red, Magenta<br>Yellow, White, Grey,<br>Bright blue, Bright<br>green, Bright cyan,<br>Bright red, Bright<br>magenta, Bright<br>yellow, Bright white | The color the text in the caption appears.  |
| Background           | Black, Blue, Green<br>Cyan, Red, Magenta<br>Yellow, White, Grey,<br>Bright blue, Bright<br>green, Bright cyan,<br>Bright red, Bright  | The color of the screen when screen recording is paused.  |

| Parameter                     | Permissible Values   | Description   |
|-------------------------------|--|---|
|                               | magenta, Bright yellow, Bright white                           |   |
| Transcoding                   | 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> |  |   |
| Original Video Codec          | Windows Media Video 9 Screen, Windows Media Video 9            | Select the video codec of the WMV file encoded from a proxy screen recording. Default codec is Windows Media Video 9 Screen.  |
| Encoder Mode                  | Encoded at a constant bit rate, Encoded at a variable bit rate | Select Encoded at a constant bit rate to specify the video will be encoded at a constant bit rate or select <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> . |
| Peak Bit Rate                 | 0-125  | Peak bit rate (in bits per second) of the video encoding when in Constant Bit Rate mode. This value cannot be modified.<br><b>Note:</b> The Peak Bit Rate is only visible when Encoder Mode is set to <i>Encoded at a constant bit rate</i> .                                   |
| 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  |

| Parameter                   | Permissible Values    | Description   |
|-----------------------------|-----------------------|---|
|                             |                       | 20 to 50 times the Time Per Frame value, giving a typical value between 4 seconds (4000) and 6 seconds (6000). The smallest allowable value is Time Per Frame, and the largest allowable value is 200 times the Time Per Frame. Values outside of that range will result in an error. |
| Modify Frame Size           | On/Off                | Select <i>On</i> to change the size of the frame.   |
| New Frame Width             | 176-2048              | The width of the output video.  |
| New Frame Height            | 144-1536              | The height of the output video.   |
| <b>WMV to MP4</b>           |                       |   |
| Transcoded Container Format | MP4                   | Target container format.  |
| Transcoded Video Codec      | H.264                 | The video codec used in the container. H.264 is the only supported video code for mp4 for now.  |
| Transcoded Audio Codec      | ACC, MP3              | The audio codec used in the container. For the mp4 container format, it can be either as ACC or mp3.  |
| <b>Vendor</b>               |                       |   |
| Vendor Name                 | Static – unchangeable | Name of the service provider used to create screen recording capability.  |
| Product Name                | Static – unchangeable | Name of product used for screen recording.  |
| Product Info                | Static – unchangeable | Description of product used for screen recording.   |
| Cur Version                 | Text                  | Current version of the product used.  |

| Parameter   | Permissible Values    | Description                              |
|-------------|-----------------------|--|
| Min Version | Static – unchangeable | Minimum version of the product required. |

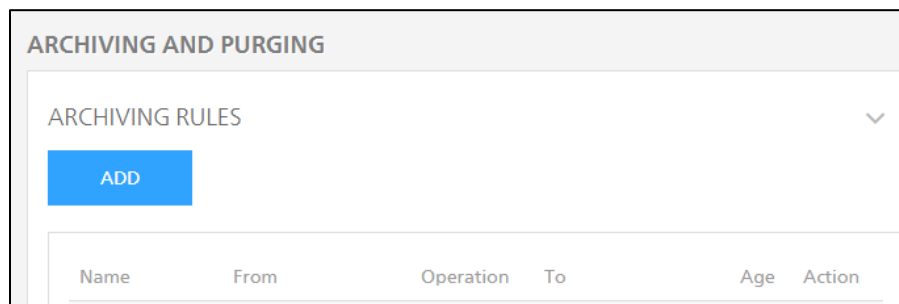
## Archiving and purging

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

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

### Archiving:

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



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

To add an Archiving operation, complete the following steps:

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

←
ARCHIVING RULES

ADD

Name

From

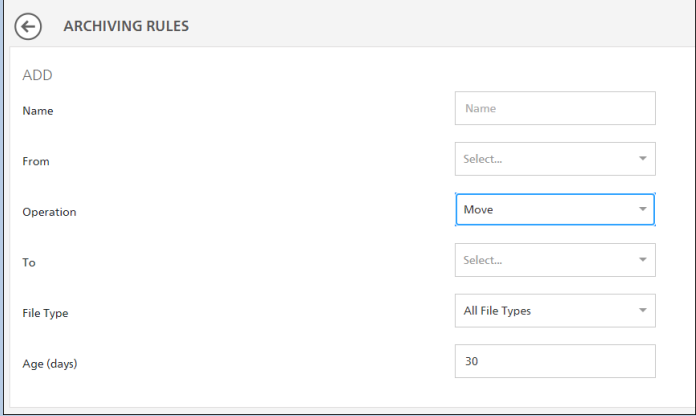
Operation

File Type

Age (days)

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

| Parameter        | Permissible Values   | Description   |
|------------------|--|---|
| <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> | <p>Select one of the archiving operations. A copy is done before a move, which is done before a delete.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Operation <input style="width: 100px;" type="text" value="Select..."/></p> <p>File Type</p> <p>Age (days)</p> <div style="position: absolute; top: 20px; right: 0; border: 1px solid black; background: white; padding: 2px;"> <p>Select...</p> <p style="background-color: #007bff; color: white;">Copy</p> <p>Move</p> <p>Delete</p> </div> </div> <p>A delete operation will also delete the recording file if it is not in any other datastore.</p> <p>When <i>Move</i> is selected, additional options appear:</p> |

| Parameter        | Permissible Values                    | Description  |
|------------------|---------------------------------------|--|
|                  |                                       |    |
| <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

---

**IM Recording**

Delete IM recordings older than (days)

---

**Audio Recording**

Only purge audio recordings with no file ON

Delete audio recordings older than (days)

---

**Screen Recording**

Only purge screen recordings with no file ON

Delete screen recordings older than (days)

When duplicate recordings exist, delete the recordings of type

Delete duplicate recordings after (days)

**Legacy Recording**

Delete legacy recordings after they have been converted?  ON

Delete converted legacy recordings after (days)

---

**Evaluation**

Delete evaluations older than (days)

---

**Transcription Call Recordings**

Delete transcript older than (days)

The following table provides more information on the options:

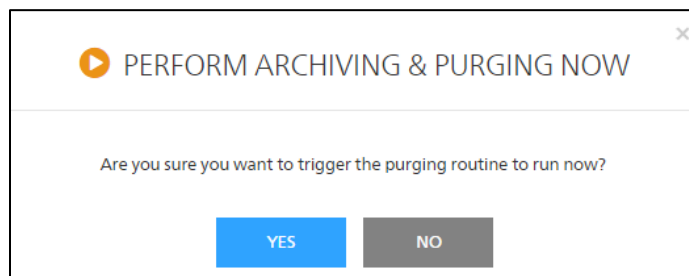
| Parameter                                       | Permissible Values            | Description   |
|---|-------------------------------|---|
| <b>Enabled</b>                                  | On/Off                        | Select <i>On</i> to enable purging.   |
| <b>IM Recording</b>                             |                               |   |
| <b>Delete IM recordings older than (days)</b>   | 1 to N days<br>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. |

| Parameter  | Permissible Values           | Description  |
|--|------------------------------|--|
| Delete audio recordings older than (days)                      | 1 to N days<br>Default is 90 | Enter the number of days after which purging for audio recordings would kick in.   |
| <b>Screen Recording</b>  |                              |  |
| Only purge screen recordings with no file                      | On/Off                       | Select <i>On</i> to purge screen recordings that have corresponding records in the database but without the actual recording file. |
| Delete screen recordings older than (days)                     | 1 to N days<br>Default is 15 | Enter the number of days after which purging for screen recordings would kick in.  |
| When duplicate recordings exist, delete the recordings of type | None<br>PRXREC<br>MP4        | Select the file type of the duplicate screen recordings you want deleted.  |
| Delete duplicate recordings after (days)                       | 1 to N days<br>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  | 1 to N days<br>Default is 30 | Enter the number of days after which purging for converted legacy recordings would kick in.  |

| Parameter                            | Permissible Values            | Description   |
|--------------------------------------|-------------------------------|---|
| recordings after (days)              |                               |   |
| <b>Evaluation</b>                    |                               |   |
| Delete evaluations older than (days) | 1 to N days<br>Default is 90  | Enter the number of days after which purging for evaluations would kick in. |
| <b>Transcription Call Recordings</b> |                               |   |
| Delete transcript older than (days)  | 1 to N days<br>Default is 365 | Enter the number of days after which purging for transcripts 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) | Realtime Transcription | Action  | Enabled                                |
|-------|----------|----------------------------|------------------------|---|--|
| Azure | Azure    | 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

  Unlimited

Select Transcription Provider:

Tethr ▼

Realtime Transcription OFF

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 Recording Hours</b> | 1 to N             | Select the maximum number of hours of recordings to be transcribed. |
| <b>Select Transcription Provider</b>     | Tethr<br>Azure     | Select the transcription provider.                                  |

| Parameter                        | Permissible Values | Description  |
|----------------------------------|--------------------|--|
| <b>Realtime Transcription</b>    | Off/On             | Enable this toggle to use this transcription resource for real time transcription.   |
| <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)   |
| <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.  |
| <b>Base Path</b>                 | Free text          | Azure base path.   |
| <b>Custom Phrase List</b>        | Free text          | <p>A list of words or phrases provided to help improve their recognition. Examples of phrases include:</p> <ul style="list-style-type: none"> <li>• Names</li> <li>• Geographical locations</li> <li>• Homonyms</li> <li>• Words or acronyms unique to your industry or organization</li> </ul> <p>This list is pipe delimited, for example:<br/>iceBar   iceManager</p> |
| <b>Corrections</b>               | Free text          | A list of words that the transcriber may frequently return incorrectly.  |

| Parameter | Permissible Values | Description  |
|-----------|--------------------|--|
|           |                    | <p>The correction is formatted as string = string and is pipe or comma delimited.</p> <p>For example:<br/>"Computer Talk" = "ComputerTalk", "ice bar" = "iceBar"</p> |

## 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

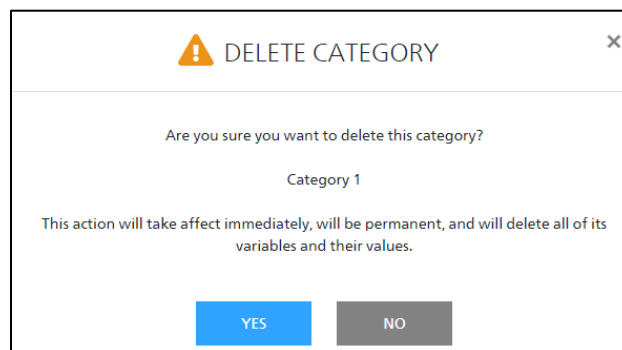
Categories allow you to group variables together.

#### 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:

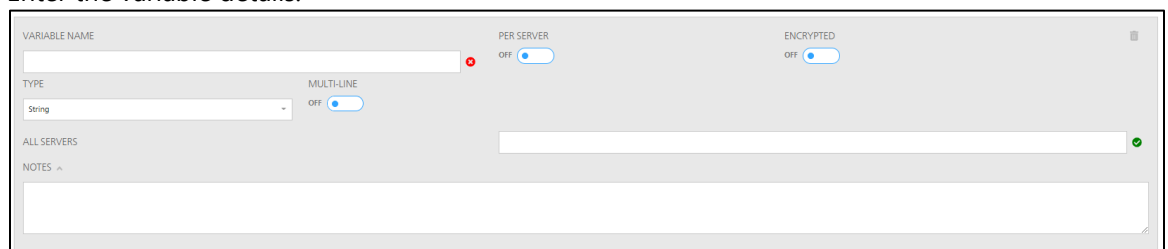
| Parameter               | Description  |
|-------------------------|--|
| <b>Category</b>         | Enter a name for the category.   |
| <b>Notes</b>            | Enter information regarding the category.  |
| <b>User Permissions</b> |  |
| <b>Type</b>             | This is how members have been grouped.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

## Variables

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

### Add a new server variable

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




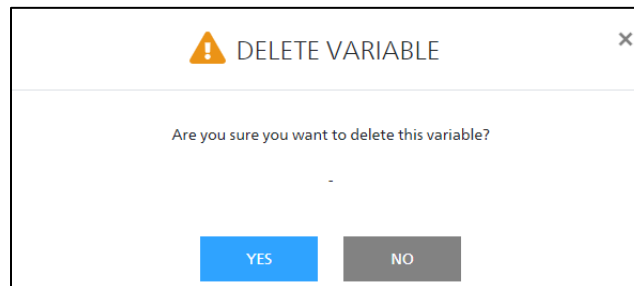
The screenshot shows a form for adding a new server variable. The form has the following fields and controls:

- 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 set to 'String'.
- MULTI-LINE:** A toggle switch set to 'OFF'.
- ALL SERVERS:** A checkbox.
- NOTES:** A text area with a downward arrow icon.

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   |
|----------------------|---|
| <b>Variable Name</b> | Enter a name for the server variable.   |
| <b>Per Server</b>    | Use this toggle to set configurations for all servers or each server individually.  |
| <b>Encrypted</b>     | Use this toggle to encrypt the value of the variable when stored in the database.   |
| <b>Type</b>          | <p>Select a variable type from the dropdown list. Options include:</p> <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.<br>This value is set to Off by default.   |
| <b>All Servers</b> | Set the value of the variable to be applied for all servers.<br>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:<br>True(1)=<br>Application is Available<br>False(0) =<br>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:<br>True(1) = Enabled<br>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:<br>True(1) = Enabled<br>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:<br>True(1) = Enabled<br>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:<br>True(1) = Enabled<br>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:<br>True(1) = Enabled<br>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:<br>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:<br>True(1) = Caller can key through the message<br>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:<br>True(1) = Caller can key through the message<br>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:<br>True(1) = Caller can key through the message<br>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:<br>True(1) = Caller can key through the message<br>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:<br>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:<br>True(1) = Caller can key through the message<br>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. |

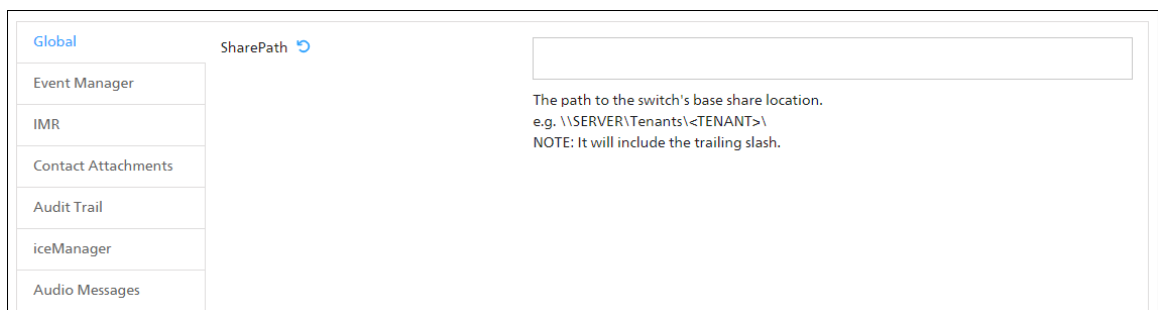
## Core Settings

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



Global

SharePath 

Event Manager

IMR

Contact Attachments

Audit Trail

iceManager

Audio Messages

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<br>The default value is 5000.  | Interval at which Event Manager will push queue stats to clients.  |
| <b>Stats Database Reconnect Interval (s)</b>   | Text<br>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.<br>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<br>The default value is 30. | Heartbeat interval for every single TAPI connection. |

| Parameter                          | Permissible Values  | Description  |
|------------------------------------|---|--|
| <b>Listener Connection Timeout</b> | Text<br>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<br>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<br>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<br>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><br><input type="text" value="24"/>  |
| Max Attachment Size (MB)                           | <i>Default Value 25MB. Should not exceed 100MB.</i><br><input type="text" value="25"/>   |
| Max Files Per Session                              | <i>Default Value 10. Should not exceed 20.</i><br><input type="text" value="10"/>  |
| Allowed File Extensions for Agent <span>?</span>   | <i>Allowed File Extensions are: '.wav', '.wma', '.mp3', '.mp4', '.xlsx', '.docx', '.pdf', '.txt', '.jpg', '.jpeg', '.png'</i><br><input type="text" value=".wav"/><br><input type="text" value=".wma"/><br><input type="text" value=".mp3"/><br><input type="text" value=".mp4"/><br><input type="text" value=".xlsx"/><br><input type="text" value=".docx"/><br><input type="text" value=".pdf"/> |
| Allowed File Extensions for Contact <span>?</span> | <input type="text" value=".wav"/><br><input type="text" value=".wma"/><br><input type="text" value=".mp3"/><br><input type="text" value=".mp4"/><br><input type="text" value=".xlsx"/><br><input type="text" value=".docx"/><br><input type="text" value=".pdf"/>  |

| Parameter                       | Permissible Values   | Description   |
|---------------------------------|--|---|
| <b>Purge Interval (Days)</b>    | Integer.<br>The default value is 365 days.                           | The number of days that attachments remain accessible in journal. |
| <b>Expiry Interval (Hours)</b>  | Integer.<br>The default value is 24 hours.                           | The amount of time in hours that attachment links remain valid.   |
| <b>Max Attachment Size (MB)</b> | Integer.<br>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.<br>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.<br>For example, for a text file enter: .txt<br>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.<br><br>For example, for a text file enter: .txt.<br>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.<br>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<br>The default is 50.     | Number of levels of allowed nested building block calls.                               |
| <b>Routing Cycle Detection Count</b>              | Text<br>The default is 10.     | Maximum number of routing cycles in workflow before iceServer throws an error.         |
| <b>Queue Info Expiry Interval (s)</b>             | Text<br>The default is 1800.   | Interval which indicates how often queue info is refreshed by ice.                     |
| <b>Send Email Protocol Timeout (ms)</b>           | Text<br>The default is 15000.  | Protocol timeout.  |
| <b>Send Email Message Data Timeout (ms)</b>       | Text<br>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<br>The default is 500.    | Maximum number of routing cycles in workflow before iceServer throws an error.         |
| <b>Auto-Logon Defer Time (s)</b>                  | Text<br>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<br>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<br>The default is 15.   | Interval in milliseconds indicating how often server instances exchange heartbeats.      |
| <b>Max Parallel Alert</b>                  | Text<br>The default is 11.   | Maximum number of alerts to send at once.  |
| <b>Maximum Number of Workflow Replies</b>  | Text<br>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: iceA

Session Name:

UC Group ID: Voice

Contact Type: Voice

Number of Sessions: 0

Restart Delay: 0

Run Once: ON

Session Data:

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

| Parameter          | Permissible Values   | Description  |
|--------------------|--|--|
| 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 the 'Global' settings page. On the left is a sidebar with a list of settings categories: Global, Voice, IM, UCMA, ACS, and Recording. The 'Global' category is selected. The main content area shows the 'Append SwitchID Param to SIP' setting, which is currently set to 'OFF' with 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      | ^\+7\d{10,}\$                          |
| 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<br>Default is 20. | The call waiting interval.  |
| Default Refer Mode            | On/Off                 | The default refer mode.   |
| Hold Reminder Interval (s)    | Text<br>Default is 10. | Timeout interval for hold reminders   |
| Password DTMF Timeout (s)     | Text<br>Default is 5.  | Timeout interval for a user to input their password when a password callback is initiated from ice. |
| AV Reject Code                | Text<br>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         | 9   |
| IM Keepalive Interval (s) | 540 |
| IM Reject Code            | 503 |

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










### UCMA

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

| Parameter                      | Permissible Values | Description  |
|--------------------------------|--------------------|--|
| <b>Conference Deactivation</b> | Text               | Number of seconds that the TIM will delay before deactivating conferences. |

| Parameter                                       | Permissible Values  | Description  |
|---|---|--|
| <b>Grace Period (hrs)</b>                       |   |  |
| <b>Conference Endpoint</b>                      | Text  | Skype provisioning information.  |
| <b>Conference Inactivity Grace Period (hrs)</b> | Text  | Number of seconds that the TIM will delay before deactivating conferences due to inactivity. |
| <b>TCP Idle Timeout (s)</b>                     | Text  | Interval of time that TCP connections to the server can remain idle before being closed.     |
| <b>Trusted Domains</b>                          | Text  | Comma delimited list of the domains that the server will accept connections from.            |
| <b>UCMA Tim Trace Level</b>                     | <ul style="list-style-type: none"> <li>• Off</li> <li>• Errors</li> <li>• Normal</li> <li>• Debug</li> <li>• Verbose</li> </ul> | Trace setting for UCMA connection.   |

## ACS

|   |  |   |
|---|--|---|
| Primary ACS Connection String    | <input type="text"/>                   |  |
| Secondary ACS Connection String  | <input type="text"/>                   |  |
| Immutable Resource Id   | <input type="text"/>                   |  |
| Active ACS Connection String     | Primary ACS Connection String          |  |
| Offhook Idle Timeout (s)         | <input type="text" value="30"/>        |   |
| Test Call DN  | <input type="text" value="8:echo123"/> |   |
| Offhook DN  | <input type="text"/>                   |   |
| Server - iceA   | <input type="text"/>                   |  |
| Event Grid Probe Interval (s)   | <input type="text" value="60"/>        |   |
| Chat Polling Interval (s)   | <input type="text" value="5"/>         |   |
| Group Call Inactivity Timeout (s)   | <input type="text" value="60"/>        |   |

| Parameter                       | Permissible Values   | Description   |
|---------------------------------|--|---|
| Primary ACS Connection String   | Text   | The primary ACS endpoint.   |
| Secondary ACS Connection String | Text   | The secondary ACS endpoint.   |
| Immutable Resource ID           | Text   | The Azure Resource ID.<br><br><b>Note:</b> This field will auto populate during ACS script configuration and is non-editable.   |
| Active ACS Connection String    | <ul style="list-style-type: none"> <li>Primary ACS Connection String</li> <li>Secondary ACS Connection String</li> </ul> | The active ACS connection string.   |
| 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.  |

| Parameter                            | Permissible Values | Description   |
|--------------------------------------|--------------------|---|
| <b>Group Call Inactivity Timeout</b> | Text               | The period of time ACS agents can rejoin a call before the call times out in the browser. |

### 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)

Message Data Timeout (ms)

Keep Additional Emails (Internal) ON

Keep Additional Emails (External) ON

| Parameter                            | Permissible Values | Description       |
|--------------------------------------|--------------------|-------------------|
| <b>Message Protocol Timeout (ms)</b> | Text               | Protocol timeout. |

| Parameter                         | Permissible Values | Description   |
|-----------------------------------|--------------------|---|
| Message Data Timeout (ms)         | Text               | Message timeout.  |
| Keep Additional Emails (Internal) | 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. |
| Keep Additional Emails (External) | On/Off             | If this setting is enabled, any non-iceMail email addresses on external 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. |

## icelidentity

| Core                          | Workflow | Virtual Workflow Sessions | UC | iceMail | icelidentity                 | Microsoft Graph | Services | Api Keys |
|-------------------------------|----------|---------------------------|----|---------|------------------------------|-----------------|----------|----------|
| Identity URL                  |          |                           |    |         | <input type="text"/>         |                 |          |          |
| Legacy Identity URL           |          |                           |    |         | <input type="text"/>         |                 |          |          |
| Use Legacy Identity URL       |          |                           |    |         | OFF <input type="checkbox"/> |                 |          |          |
| Login URL                     |          |                           |    |         | <input type="text"/>         |                 |          |          |
| icelMRSservice Redirect URI   |          |                           |    |         | <input type="text"/>         |                 |          |          |
| Accepted Referrers            |          |                           |    |         | <input type="text"/>         |                 |          |          |
| Refresh Token Expire Time (s) |          |                           |    |         | 600                          |                 |          |          |
| Access Token Expire Time (s)  |          |                           |    |         | 300                          |                 |          |          |
| Cookie Expire Time (s)        |          |                           |    |         | 15                           |                 |          |          |
| Auto Link On First Login      |          |                           |    |         | OFF <input type="checkbox"/> |                 |          |          |
| WS-Fed: Azure AD Metadata URI |          |                           |    |         | <input type="text"/>         |                 |          |          |
| WS-Fed: Azure AD App ID URI   |          |                           |    |         | <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                 | <input type="text" value="AzureAD"/>                                     |
| External Identity Provider Caption         | English (Canada)<br><input type="text" value="Use Windows Credentials"/> |
| Auto Single Sign-On <a href="#">?</a>      | OFF <input type="checkbox"/>   |

| Parameter                            | Permissible Values | Description  |
|--------------------------------------|--------------------|--|
| <b>Identity URL</b>                  | Text               | URL for Identity.  |
| <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.  |

| Parameter                            | Permissible Values  | Description   |
|--------------------------------------|---|---|
| <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.   |
| <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.   |

| Parameter                                 | Permissible Values | Description  |
|---|--------------------|--|
| <b>External Identity Provider Caption</b> | Text               | The text displayed on the single sign-on button on the logon page.   |
| <b>Auto Single Sign-on</b>                | Off/On             | Enable this toggle to remove ice authentication as a log on option. You may enable this when users are configured for SSO. |

## Microsoft Graph Settings

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

| CORE SETTINGS                   |   |
|---------------------------------|---|
| Parameter                       | Value   |
| Use IceIdentity Settings        | ON <input checked="" type="checkbox"/>  |
| Azure Client ID                 |   |
| Azure Tenant ID                 |   |
| Azure API permissions           | Directory.AccessAsUser.All, OrgContact.Read.All, Presence.Read.All, User.Read, User.Read.All, Contacts.Read |
| Include Org Contact             | ON <input checked="" type="checkbox"/>  |
| Include Personal Contacts       | ON <input checked="" type="checkbox"/>  |
| Include Presence                | ON <input checked="" type="checkbox"/>  |
| Include Sip Address (for Voice) | ON <input checked="" type="checkbox"/>  |
| Exclude Duplicate               | ON <input checked="" type="checkbox"/>  |

| Parameter                       | Description  |
|---------------------------------|--|
| <b>Use IceIdentity Settings</b> | If enabled, the Azure Client ID and Azure Tenant ID fields will be disabled and the settings configured in the IceIdentity tab will be used instead.<br><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.  |

| Parameter                              | Description  |
|--|--|
| <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.<br>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 Personal Contacts</b>       | If enabled, personal contacts (contacts under Outlook People) 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.   |
| <b>Exclude Duplicate</b>               | If enabled, duplicates will be excluded in the search results.   |

## 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 ⓘ ↺     | 3     |
| iceArchiver       |                            |       |
| iceBackendServ... | IMR Retry Timeout (ms) ⓘ ↺ | 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 ⓘ ↻                | <input type="text"/>                   |
| iceBackendS...  |                                      |  |
| iceIMRService   | Allowed Hash Add on ⓘ ↻              | ice                                    |
| iceMediaTra...  | Log Messages ↻                       | ON <input checked="" type="checkbox"/> |
| iceMessaging    |                                      |  |
| icePresenceS... | Cors Origins ⓘ ↻                     | <input type="text"/>                   |
| iceRecordin...  |                                      |  |
| iceScreenRe...  | IMR Retry Timeout (ms) ⓘ ↻           | 10000                                  |
| iceTeamsBot     | AAD Tenant ID ⓘ ↻                    | XXXXXXXX-XXXX-XXXX-XXXX-XXXX           |
| iceUCMARE...    | AAD Workflow Verification Password ↻ | .....                                  |
|                 | SignalR Connection Timeout (s) ⓘ ↻   | 110                                    |
|                 | SignalR Disconnect Timeout (s) ⓘ ↻   | 30                                     |
|                 | SignalR KeepAlive Timeout (s) ⓘ ↻    | 10                                     |

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

















| Parameter                                 | Description  |
|---|--|
| <b>Allowed Hash Add on</b>                | If specified, it will allow a destinationHash to be specified to allow flexible allowed addresses.   |
| <b>Log Messages</b>                       | If this setting is enabled, messages will be logged.   |
| <b>Cors Origins</b>                       | The list of origin domains to allow in CORS requests delimited by comma.<br>If left blank, it will allow all domains. <b>Note:</b> This will log a security error. |
| <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.  |
| <b>AAD Tenant ID</b>                      | The Azure Active Directory Tenant ID from the Azure Application setup for iceMessaging SSO. This is a GUID.  |
| <b>AAD Workflow Verification Password</b> | The Azure Active Directory workflow verification password.   |
| <b>SignalR Connection Timeout (s)</b>     | The maximum number of seconds that long polling connections will wait for a response before triggering a timeout command to make the client reconnect.             |
| <b>SignalR Disconnect Timeout (s)</b>     | The maximum number of seconds after a transport connection is lost before raising the Disconnected event to terminate the SignalR connection.                      |
| <b>SignalR KeepAlive Timeout (s)</b>      | 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.<br>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   |
|-------------------------------------|---|
| <b>Transfer Retry Interval (ms)</b> | The interval in between transfer attempts in milliseconds.  |
| <b>Transfer Num Retries</b>         | The number of times it will retry a transfer before asking for new transfer parameters.   |
| <b>Recorder Reg Timeout (ms)</b>    | The timeout interval in milliseconds between registration verification attempts.<br><b>Note:</b> This value must be at least three times greater than the UCMARecorder RegistrationIdleTimeout. |
| <b>Only Record Agents</b>           | 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)         | 30000                        |
| iceIMRService     | Registration Failed RetryTimeout (ms)  | 10000                        |
| iceMediaTransc... |   |                              |
| iceMessaging      |   |                              |
| icePresenceSync   |   |                              |
| iceRecordingM...  |   |                              |
| iceScreenRecor... |   |                              |
| iceTeamsBot       |   |                              |
| iceUCMARecor...   |   |                              |

| Parameter                        | Description   |
|----------------------------------|---|
| <b>Discard Rec on Fault (ms)</b> | 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         |                                   |   |
| iceBackendService   | Bot ID                            | <input type="text"/>  |
| iceIMRService       | Bot Secret                        | <input type="password" value="*****"/>  |
| iceMediaTranscoder  |                                   |   |
| iceMessaging        | IMR Retry Timeout (ms)            | <input type="text" value="60000"/>  |
| icePresenceSync     | Ice State Expiry (ms)             | <input type="text" value="60000"/>  |
| iceRecordingManager |                                   |   |
| iceScreenRecorder   | Monitored Agent Range             | <input type="text" value="1000-9999"/>  |
| iceTeamsBot         | Enable Inline Email Reply         | ON <input checked="" type="checkbox"/>  |
| iceUCMARRecorder    | Auto Ready After Email Reply      | ON <input checked="" type="checkbox"/>  |
|                     | Nack Timeout (s)                  | <input type="text" value="30"/>   |
|                     | Enable OWA                        | ON <input checked="" type="checkbox"/>  |
|                     | 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.<br>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)          | <input type="text" value="30000"/> |
| iceIMRService     | Registration Failed RetryTimeout (ms)  | <input type="text" value="10000"/> |
| iceMediaTransc... |  |                                    |
| iceMessaging      | Trimmer Over Under Threshold (ms)     | <input type="text" value="10000"/> |
| icePresenceSync   | Faulted Size Monitor (MB)             | <input type="text" value="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" style="margin-left: 20px;"> <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

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 ) | <input data-bbox="1133 1493 1154 1520" type="button" value="+"/> |

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.

| SERVERS  |      |            |                        |      |      |                        |                   |                     |                      |           |                 |        |  |
|--|------|------------|------------------------|------|------|------------------------|-------------------|---------------------|----------------------|-----------|-----------------|--------|--|
| ICE SERVERS  |      |            |                        |      |      |                        |                   |                     |                      |           |                 |        |  |
| <div style="display: flex; justify-content: space-between; align-items: center;"> <span style="background-color: #007bff; color: white; padding: 2px 10px; border-radius: 4px;">ADD</span> <span>Show deactivated servers <input checked="" type="checkbox"/> ON</span> </div> |      |            |                        |      |      |                        |                   |                     |                      |           |                 |        |  |
| 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  |
|------------------------|--|
| <b>Connection Time</b> | The amount of time the server has been in a Connected state.   |
| <b>Action</b>          | Allows a user to edit the settings of the server. This option is only available for Global Administrators. |
| <b>Active</b>          | Select On to activate  |

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

← 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:

The screenshot shows the 'EDIT' page for a server in the 'SERVERS' section. The page has a header with a back arrow and the title 'SERVERS'. Below the header, there is a sub-header 'EDIT' and a pagination indicator '2 of 3'. The main content area contains several form fields:

- Name: iceB
- Short Name: iceB
- DNS Name: iceB.computer-talk.com
- Port: 2060
- Mode:  TCP  TLS
- Internal DNS Name: iceB.computer-talk.com
- Interflow Address: (empty)
- Starting Contact ID: 1000
- Contact ID Increment: 10

At the bottom of the page, there is a blue banner with two buttons: 'REVERT' and 'SAVE'. A note at the bottom of the form states: 'Note: Changing Contact ID Increment will apply to all servers'.

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.

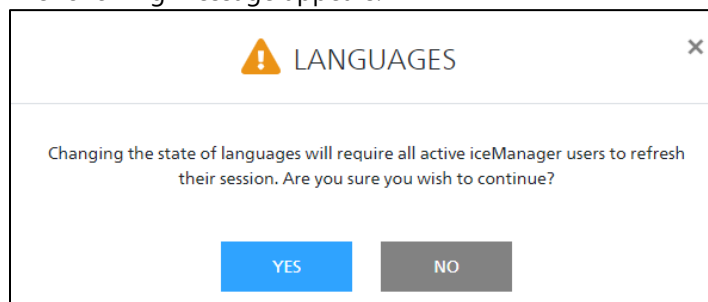
| LANGUAGES         |       |     |                                     |
|-------------------|-------|-----|-------------------------------------|
| Name              | Order |     | Enabled                             |
| English (Canada)  | 0     | ↓   | <input checked="" type="checkbox"/> |
| English (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:



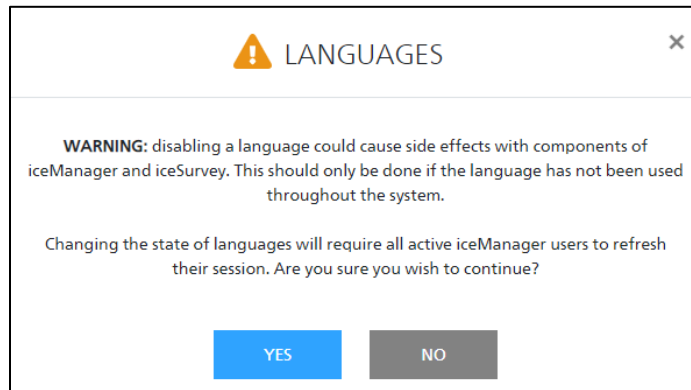
3. Select Yes to enable the language, or No to cancel.

To turn off a language option:

1. Select the toggle under the Enabled column.



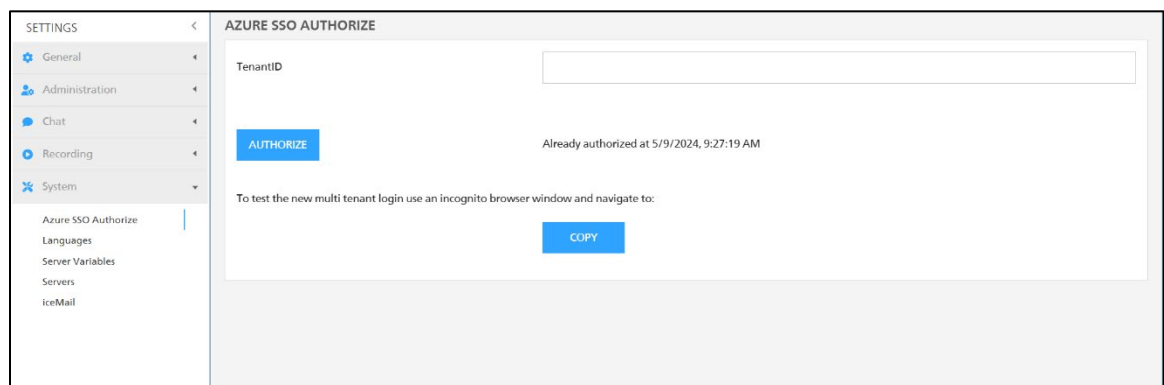
2. The following message appears:



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

## Azure SSO Authorize

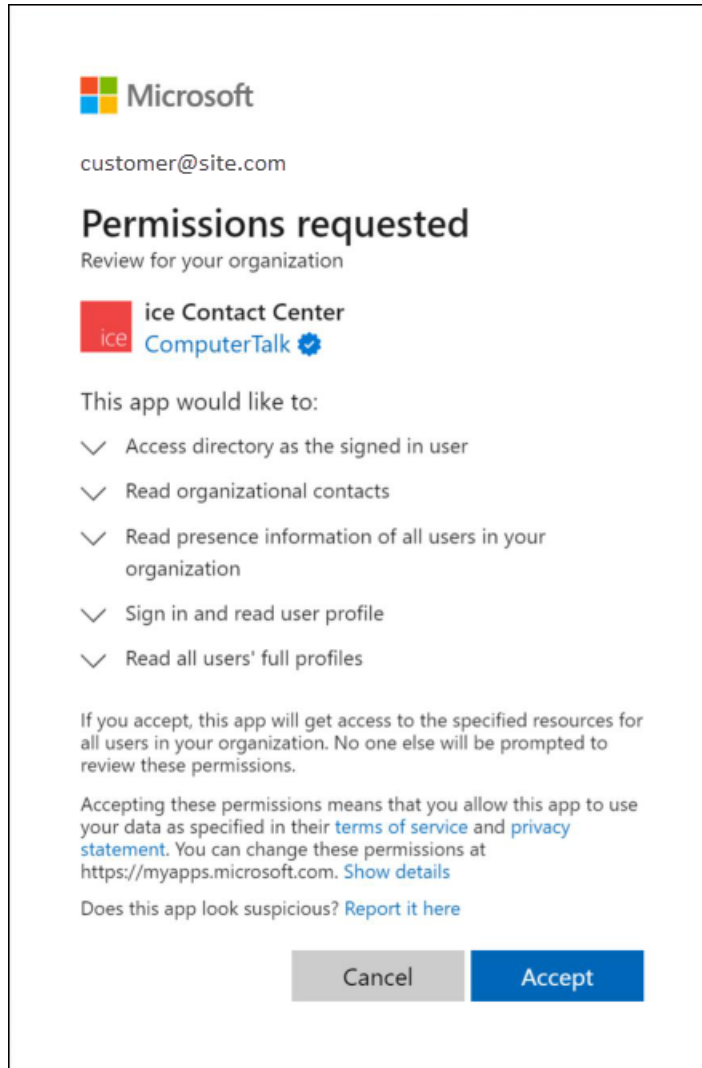
This section is only accessible by administrators. It allows an administrator with Azure administrator access, to set up multitenant single-sign on and graph search once the appropriate settings have been configured by Computer Talk.



Once ComputerTalk 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: Dashboards

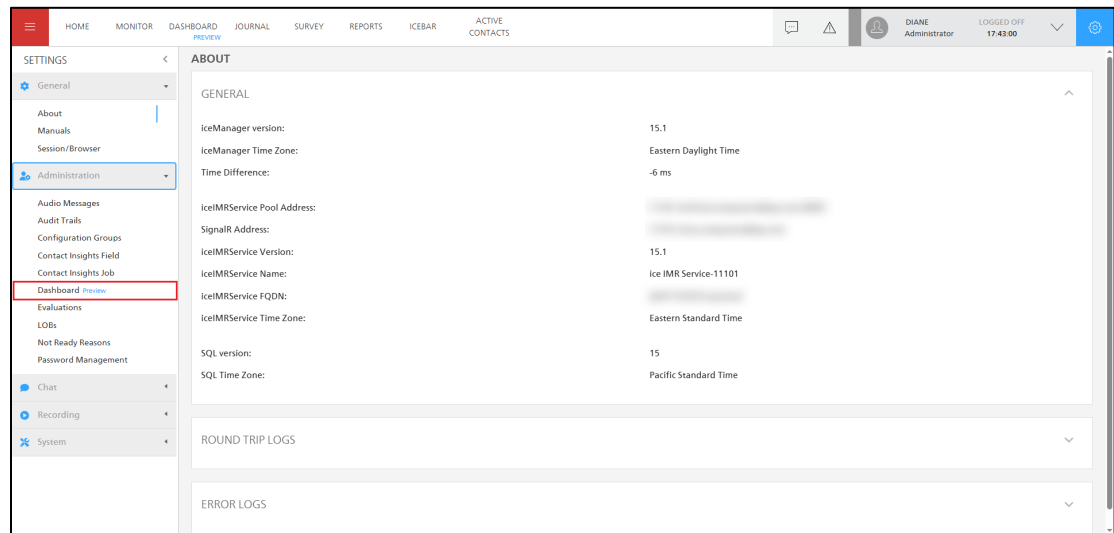
Dashboards can be added and edited by switch administrators and above. A dashboard is made up of dashboard components, which each represent a single statistic for the switch. A dashboard configuration is a JSON document that should be editable by an administrator in iceManager. Dashboards are created as named entities in iceManager settings, and are assigned to users in config groups. Dashboards can be viewed at the Dashboard tab.

**Note:** The dashboards can be deep-linked, however access adheres to the permissions assigned in the Configuration Groups. Users looking to view dashboards must first be given the correct permissions. Dashboard components support iceManager's themes (light, dark, contrast).

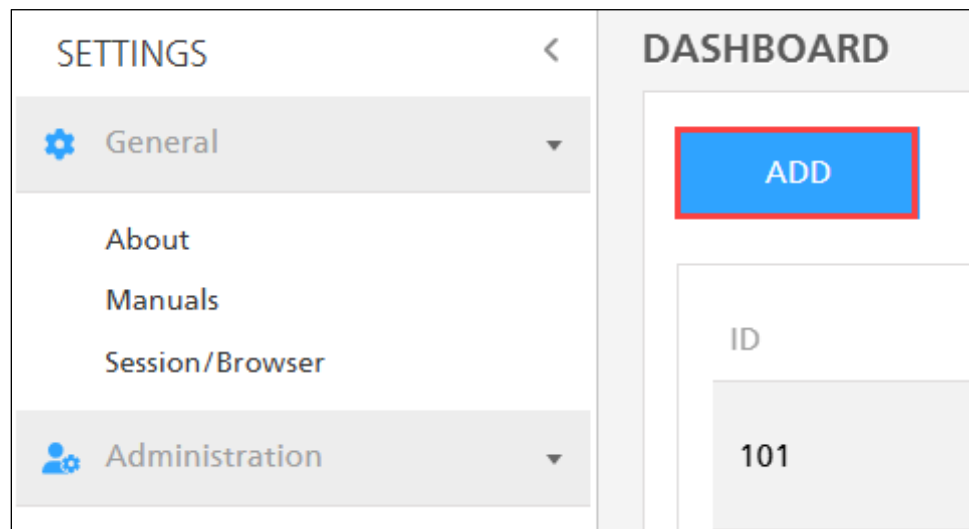
## Create a Dashboard

To build a new dashboard, follow the steps below:

1. Under the Administration tab on the iceManager Settings page, click Dashboard.



2. Click the Add button to add a new dashboard.



The new dashboard form will open.

3. Configure a unique name and short name for the dashboard. The name will appear on the dashboard tab and will be used to identify the correct dashboard to be displayed.

|            |       |
|------------|-------|
| Name       | Diane |
| Short Name | DRV   |

The short name field has a maximum of 3 characters and will appear when the Sidebar Panel of the dashboard has been collapsed.

4. In the description field, add a description of the dashboard.

|             |  |
|-------------|--|
| Description | Number of Contacts Offered in Q6000 and Q6002 Over the Last 7 Days |
|-------------|--|

The description will display on the Dashboard Settings page.

| DASHBOARD |   |        |
|-----------|---|--------|
| ID        | Name  | Action |
| 100       | Diane (DRV)<br>Number of Contacts Offered in Q6000 and Q6002 Over the Last 7 Days |        |

5. Configure the height and width of the dashboard canvas in pixels.

|        |      |
|--------|------|
| Height | 1080 |
| Width  | 1920 |

**Note:** Each of the subsequent components on the dashboard are set by absolute position.

The default values are 1080 for Height and 1920 for Width.

Dashboards are laid out with a canvas paradigm, so they are not reactive to browser size. If the viewport is too small, scroll bars will be shown.

6. Enable or disable the *Include in Dashboard Rotation* checkbox. If enabled, you can set the dashboard rotation interval in seconds. The dashboard rotation interval allows you to display multiple dashboards in a rotating manner. Multiple dashboards are supported per user, but a dashboard takes up the full client space of iceManager. Each dashboard included in the rotation will be displayed for the duration specified in the dashboard rotation interval.

|                                       |                                     |
|---------------------------------------|-------------------------------------|
| Include in Dashboard Rotation         | <input checked="" type="checkbox"/> |
| Dashboard Rotation Interval (seconds) | 60                                  |

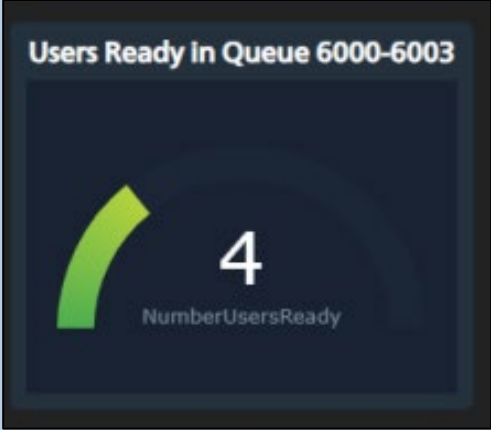
**Note:** The default value for the Dashboard Rotation Interval (seconds) is 60.

You can input a max of 6 digits in the Dashboard Rotation Interval field. If you input a number higher than 6 digits and save your changes, the value will default to 999999.

7. Remember, a dashboard configuration is a JSON document. The editor below allows you to create and edit your JSON document. You may also generate an example graph JSON template using the tool below. Once you have generated the template, modify the JSON objects for the stat you wish to display.
8. In the Example Graph JSON Template, select the type of component that you will configure. The available options are: Gauge, Pie Graph, Single Value, Bar Graph, and Line Graph.

| EXAMPLE GRAPH JSON TEMPLATE |
|-----------------------------|
| Line Graph                  |
| Gauge                       |
| Pie Graph                   |
| Single Value                |
| Bar Graph                   |
| Line Graph                  |

The table below describes the following graph options:

| Type of Graph | Details  |
|---------------|--|
| Gauge         | <p>A control that shows a single value between a minimum and maximum range.</p>  <p>A gauge has the following additional properties:</p> <ul style="list-style-type: none"> <li>• <b>MinValue / MaxValue:</b> The minimum / maximum value for the gauge. Note that these can be absolute values, or relative based on the type of stat (e.g. NumberUsersAssigned for a queue).</li> <li>• <b>Needle (optional):</b> This displays a needle instead of the actual value.</li> <li>• <b>Fills (optional):</b> An array of colours to fill the gauge with. For example, to set the gauge as red from 0% to 25%, and green from 25% and up, set the fills property to: <ul style="list-style-type: none"> <li>[[ color: 'red', stop: 25], { color: 'green'}],</li> </ul> </li> </ul> |

## Type of Graph

### Details

- FillMode (optional): The colour change will be 'discrete' or 'continuous' if there are multiple colours.

This example displays a gauge showing queue GOS:

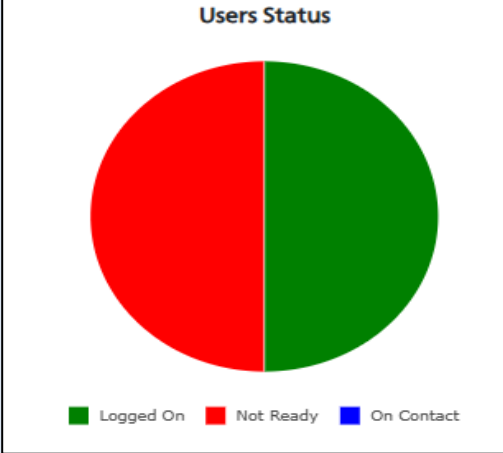
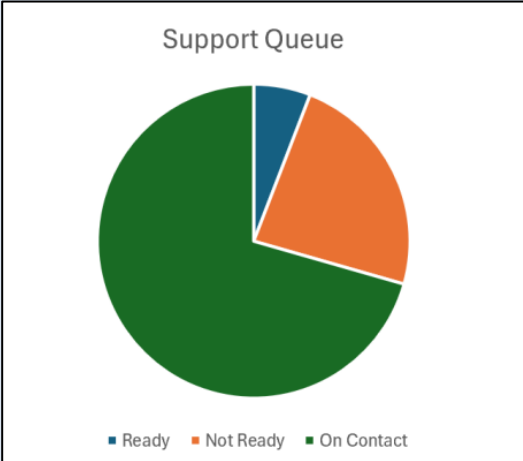
```
gauge:
  statType: queue,
  statID: [6000],
  source: "GradeOfService",
  minValue: 0,
  maxValue: 100,
  needle: true,
  fills: [
    { color: "rgb(255, 0, 123)", stop: 25},
    { color: "yellow", stop: 55},
    { color: "#00ff77"}
  ],
  fillMode: "continuous",
  updateFrequency: 10000,
  title: "Support GOS",
  hoverText: "Proportion of calls handled less than the target ASA"
```

The following example shows a gauge of the number of contacts abandoned vs offered:

```
gauge:
  statType: queue,
  statID: [6000],
  source: "NumberContactsAbandoned",
  minValue: 0,
  maxValue: "NumberContactsOffered"
```

The following example also shows the number of contacts abandoned vs offered but for yesterday:

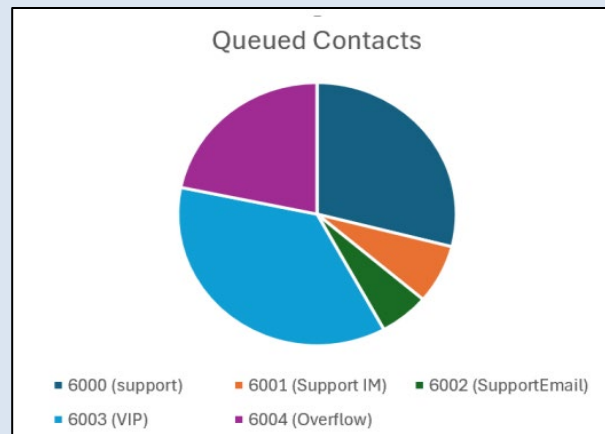
```
gauge:
  statType: queue,
  statID: [6000],
  source: "NumberContactsAbandoned",
  minValue: 0,
  maxValue: "NumberContactsOffered",
  timeResolution: "Day",
  timeOffsets: [-1]
```

| Type of Graph | Details  |   |           |   |           |   |            |   |       |   |           |   |            |
|---------------|--|---|-----------|---|-----------|---|------------|---|-------|---|-----------|---|------------|
| Pie Graph     | <p data-bbox="475 369 1321 409">A chart that shows multiple data points as a proportion of a total.</p> <div data-bbox="480 415 980 865"><p data-bbox="675 415 808 441">Users Status</p><table border="1" data-bbox="545 814 938 840"><tr><td>■</td><td>Logged On</td></tr><tr><td>■</td><td>Not Ready</td></tr><tr><td>■</td><td>On Contact</td></tr></table></div> <p data-bbox="475 915 1321 989">The extent of a pie chart is the sum of the values it shows, not necessarily the number of users assigned to a queue for example.</p> <p data-bbox="475 1037 1338 1110">This next example shows the number of users ready, not ready, and on contact in a queue:</p> <div data-bbox="480 1119 1362 1320"><pre data-bbox="500 1144 1263 1297">pie:   statType: queue,   statID: [6000],   source: ["NumberUsersReady", "NumberUsersNotReady", "NumberUsersOnContact"]   legend: ["Ready", "Not Ready", "On Contact"],   title: "Support Queue"</pre></div> <div data-bbox="480 1365 1000 1822"><p data-bbox="639 1390 821 1415">Support Queue</p><table border="1" data-bbox="581 1789 886 1814"><tr><td>■</td><td>Ready</td></tr><tr><td>■</td><td>Not Ready</td></tr><tr><td>■</td><td>On Contact</td></tr></table></div> | ■ | Logged On | ■ | Not Ready | ■ | On Contact | ■ | Ready | ■ | Not Ready | ■ | On Contact |
| ■             | Logged On  |   |           |   |           |   |            |   |       |   |           |   |            |
| ■             | Not Ready  |   |           |   |           |   |            |   |       |   |           |   |            |
| ■             | On Contact   |   |           |   |           |   |            |   |       |   |           |   |            |
| ■             | Ready  |   |           |   |           |   |            |   |       |   |           |   |            |
| ■             | Not Ready  |   |           |   |           |   |            |   |       |   |           |   |            |
| ■             | On Contact   |   |           |   |           |   |            |   |       |   |           |   |            |

**Type of Graph****Details**

The following example shows the contacts in queue for a user's assigned queues.

```
pie:
  statType: queue,
  statID: ["%ASSIGNED%"],
  source: "NumberContactsQueued",
  title: "Queued Contacts"
```



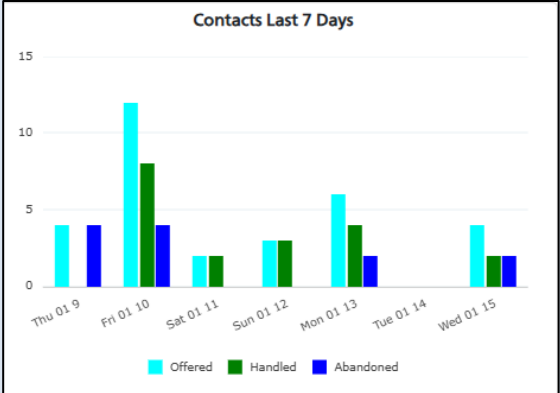
**Note:** The legend displayed is implicit and uses the queue ID and short name.

**Single Value**

A number or text value.



A single value component has the following additional properties:

| Type of Graph    | Details  |         |           |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
|------------------|--|---------|-----------|---------|-----------|----------|---|---|---|-----------|----|---|---|-----------|---|---|---|-----------|---|---|---|-----------|---|---|---|-----------|---|---|---|-----------|---|---|---|
|                  | <ul style="list-style-type: none"> <li>valueFontSize: the displayed value's font size in px, must be greater than 0.</li> </ul> <p>Supports the following sources:</p> <ul style="list-style-type: none"> <li>QueueID for queue stat type</li> <li>UserID for agent stat type</li> <li>TeamID for team stat type</li> </ul> <p>The following example shows a value for the number of users in not ready for all queues a supervisor is associated with:</p> <pre>singleValue:   statType: queue,   statID: ["%ASSIGNED%"],   source: "NumberUsersNotReady"</pre> <p>The following example shows the longest contact in queue over 2 hours (8 intervals):</p> <pre>singleValue:   statType: queue,   statID: ["6000,6002-6004"],   source: LongestQueuedTime,   timeResolution: "8",   timeOffsets: [-1],   title: "Support Longest queued last 2h"</pre> |         |           |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| <b>Bar Graph</b> | <p>A graph that shows multiple values over two axes.</p>  <table border="1"> <caption>Contacts Last 7 Days</caption> <thead> <tr> <th>Date</th> <th>Offered</th> <th>Handled</th> <th>Abandoned</th> </tr> </thead> <tbody> <tr> <td>Thu 01 9</td> <td>4</td> <td>4</td> <td>4</td> </tr> <tr> <td>Fri 01 10</td> <td>12</td> <td>8</td> <td>4</td> </tr> <tr> <td>Sat 01 11</td> <td>2</td> <td>2</td> <td>2</td> </tr> <tr> <td>Sun 01 12</td> <td>3</td> <td>3</td> <td>3</td> </tr> <tr> <td>Mon 01 13</td> <td>6</td> <td>4</td> <td>2</td> </tr> <tr> <td>Tue 01 14</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>Wed 01 15</td> <td>4</td> <td>2</td> <td>2</td> </tr> </tbody> </table>   | Date    | Offered   | Handled | Abandoned | Thu 01 9 | 4 | 4 | 4 | Fri 01 10 | 12 | 8 | 4 | Sat 01 11 | 2 | 2 | 2 | Sun 01 12 | 3 | 3 | 3 | Mon 01 13 | 6 | 4 | 2 | Tue 01 14 | 0 | 0 | 0 | Wed 01 15 | 4 | 2 | 2 |
| Date             | Offered  | Handled | Abandoned |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| Thu 01 9         | 4  | 4       | 4         |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| Fri 01 10        | 12   | 8       | 4         |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| Sat 01 11        | 2  | 2       | 2         |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| Sun 01 12        | 3  | 3       | 3         |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| Mon 01 13        | 6  | 4       | 2         |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| Tue 01 14        | 0  | 0       | 0         |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |
| Wed 01 15        | 4  | 2       | 2         |         |           |          |   |   |   |           |    |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |           |   |   |   |

## Type of Graph

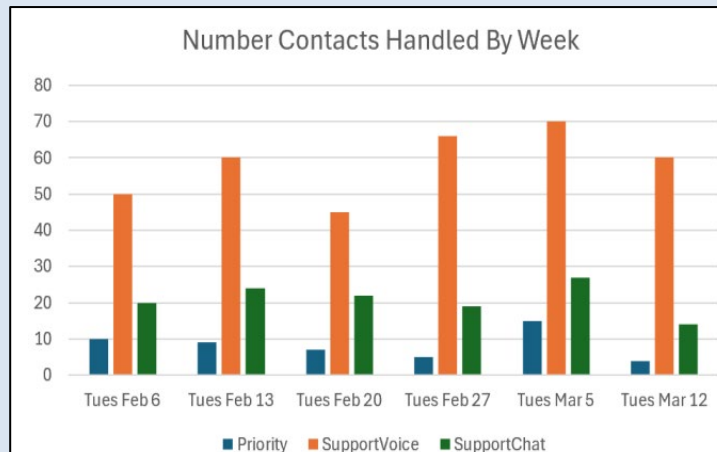
### Details

The TimeResolution setting determines whether the bins are intervals, days, weeks, months, or years. The time series labels depend on the TimeResolution parameter:

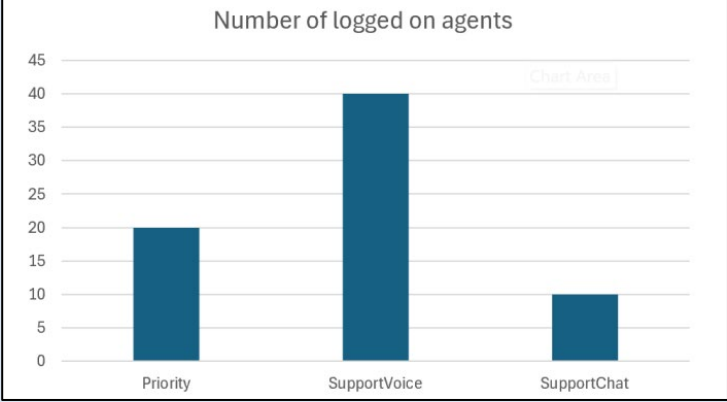

- Interval: time is labelled with the start time of the bin (for example, 11:00 AM)
- Day: time is labelled with the day, month, date (for example, Tues Mar 12)
- Week: time is labelled with the month, date of the start of week (for example, Mar 11)
- Month: time is labelled with month, year of the start of the month (for example, Mar 2024)
- Year: time is labelled with the year (for example, 2024)

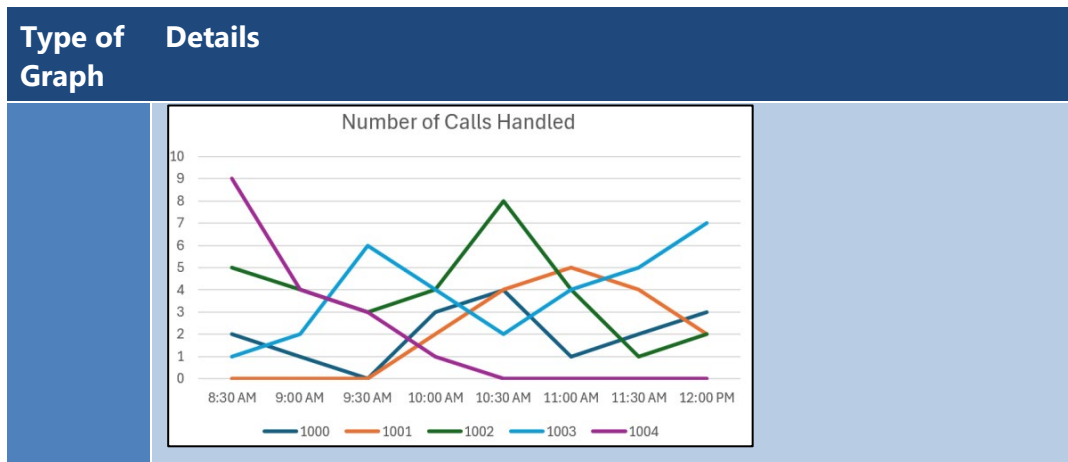
This example displays the number of calls handled in selected queues by week:

```
barGraph:
  statType: queue,
  statID: ["6000", "6001,6002", "6003-6010"],
  source: "NumberContactsHandledInThisQueue",
  legend: ["Priority", "SupportVoice", "SupportChat"],
  timeResolution: "Day",
  timeOffsets: [-42, -35, -28, -21, -14, -7],
  title: "Number contacts handled"
```

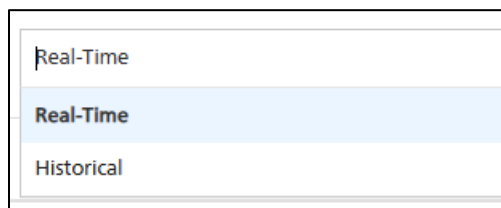


A bar graph can also display the number of agents logged in per queue:

| Type of Graph  | Details  |          |                  |          |    |              |    |             |    |
|--|--|----------|------------------|----------|----|--------------|----|-------------|----|
|  | <pre data-bbox="496 394 959 533">barGraph:   statType: queue,   statID: ["6000", "6001,6002", "6003-6010"],   source: NumberAgentsLoggedOn,   legend: ["Priority", "SupportVoice", "SupportChat"],   title: "Number of logged on agents"</pre>  <table border="1" data-bbox="480 583 1203 982"> <caption>Number of logged on agents</caption> <thead> <tr> <th>Category</th> <th>Number of Agents</th> </tr> </thead> <tbody> <tr> <td>Priority</td> <td>20</td> </tr> <tr> <td>SupportVoice</td> <td>40</td> </tr> <tr> <td>SupportChat</td> <td>10</td> </tr> </tbody> </table>  | Category | Number of Agents | Priority | 20 | SupportVoice | 40 | SupportChat | 10 |
| Category   | Number of Agents   |          |                  |          |    |              |    |             |    |
| Priority   | 20   |          |                  |          |    |              |    |             |    |
| SupportVoice   | 40   |          |                  |          |    |              |    |             |    |
| SupportChat  | 10   |          |                  |          |    |              |    |             |    |
| <p data-bbox="331 1024 418 1092"><b>Line Graph</b></p> | <p data-bbox="477 1024 1208 1054">A graph that uses lines to connect individual data points.</p>  <p data-bbox="477 1394 1240 1423">Line graphs support the same configuration values as bar graphs.</p> <p data-bbox="477 1478 1370 1541">This example shows the number of contacts handled for a list of agents over the previous 4 hours in 30 minute blocks:</p> <pre data-bbox="496 1591 1040 1793">lineGraph:   statType: agent,   statID: ["1000", "1001", "1002", "1003", "1004"],   source: "CallsHandled",   legend: ["1000", "1001", "1002", "1003", "1004"],   timeResolution: "2",   timeOffsets: [-8,-7,-6,-5,-4,-3,-2,-1],   title: "Number of calls handled"</pre> |          |                  |          |    |              |    |             |    |




9. In the Example Graph JSON Template, click the drop-down list to select if you would like Real-Time data or Historical data to be presented on your dashboard.



10. Click the Clone button beside the graph that you have selected.

EXAMPLE GRAPH JSON TEMPLATE

Line Graph Real-Time

Line Graph 

```
{
  "componentId": "1",
  "title": "Number of calls handled",
  "hoverText": "Number of Contacts",
  "footerText": null,
  "type": "lineGraph",
  "source": [
    "CallsHandled"
  ],
  "statType": "agent",
  "statID": [
    "1000",
    "1001",
    "1002",
    "1003"
  ],
  "legend": [
    {
      "label": "1000",
      "colour": "cyan"
    },
    {
      "label": "1001",
      "colour": "rgb(220, 20, 60)"
    },
    {
      "label": "1002",
      "colour": "#7FFF00"
    },
    {
      "label": "1003",
      "colour": "#FFD700"
    }
  ],
  "width": 960,
  "height": 450,
  "origin": [
    0,
    0
  ],
}
```

**Note:** The Clone button allows you to copy this default template onto your clipboard.

11. In the Graph Json component box, paste the copied component within the array '[' ]'. When creating the components, make sure that they are well-formed JSON Objects within an Array.

```

Graph Json
1- [{"
2  "componentId": "1",
3  "title": "Number of calls handled",
4  "hoverText": "Number of Contacts",
5  "footerText": null,
6  "type": "lineGraph",
7  "source": [
8    "CallsHandled"
9  ],
10 "statType": "agent",
11 "statID": [
12   "1000",
13   "1001",
14   "1002",
15   "1003"
16 ],
17 "legend": [
18   {
19     "label": "1000",
20     "colour": "cyan"
21   },
22   {
23     "label": "1001",
24     "colour": "rgb(220, 20, 60)"
25   },
26   {
27     "label": "1002",
28     "colour": "#7FFF00"
29   },
30   {
31     "label": "1003",
32     "colour": "#FFD700"
33   }
34 ],
35 "width": 960,
36 "height": 450,
37 "origin": [
38   0,
39   0
40 ],
41 "updateFrequency": 5000
42 }
43 ]

```

- Configure the dashboard properties based on the stats that you want to see. These settings apply to most dashboard components. For a full list of stats, please refer to Appendix C: Dashboard Statistics.

The table below describes the available dashboard properties:

| Dashboard Property  | Details   |
|---------------------|---|
| <b>Component ID</b> | A unique identifier for the component.  |
| <b>Title</b>        | The title displayed at the top of the component.                                    |
| <b>Hover Text</b>   | Tooltip text displayed when the component is hovered. If null, no tooltip is shown. |

| Dashboard Property | Details  |
|--------------------|--|
| Footer Text        | Optional text to display at the bottom of the component.   |
| Type               | Displays what type of component it is.<br>Options are: Gauge, Pie Graph, Single Value, Bar Graph, and Line Graph.  |
| Stat type          | The stat type for the component.<br>Will be one of Queue (0), Agent(1), or Team(2).  |
| Stat ID            | <p>The IDs the component represents.<br/>The ID can be an array of one or more values.<br/><b>Note:</b> Not all combinations make sense for all stat types.</p> <p>Stat IDs can be:</p> <ul style="list-style-type: none"> <li>• A single queue, agent, team ID (e.g. 1000, 6000)</li> <li>• A range of IDs (e.g. 1000-1010)</li> <li>• A list of IDs (e.g. 1000,1001,1010)</li> <li>• A combination of the above (e.g. 1000, 1002-1009, 1010)</li> <li>• The special value %ASSIGNED%. Interpretation depends on the Type: <ul style="list-style-type: none"> <li>○ All assigned queues for an agent</li> <li>○ All assigned Teams for an agent</li> <li>○ All agents a Team lead or Supervisor has access to for agent stats</li> </ul> </li> <li>• The special value %ACTIVE%. Interpretation depends on the Type: <ul style="list-style-type: none"> <li>○ All logged in queues for an agent</li> <li>○ All assigned Teams for an agent</li> <li>○ All agents a Team lead or Supervisor has access to and are logged in for agent stats</li> </ul> </li> </ul> |

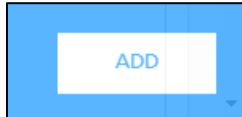
| Dashboard Property     | Details   |
|------------------------|---|
|                        | <ul style="list-style-type: none"> <li>• The special value %SELF%. Interpretation depends on the type: <ul style="list-style-type: none"> <li>○ The active agent for an agent</li> <li>○ No meaning for queue/team</li> </ul> </li> <li>• The specials values will be aggregated for gauge and single value components</li> </ul> |
| <b>Legend</b>          | An array of labels for data series. They must have the same number of items as the StatID array. Optionally, custom colours can be specified for each series. (e.g. [{"label": "Agent 1", "colour": "red"}, {"label": "Agent 2", "colour": "green"}])   |
| <b>Source</b>          | The list of stat sources for the component. Matches the name of one or more of the queue, team, or agent stat values in monitor, and documented in Appendix C: Dashboard Statistics. Certain controls support multiple values.  |
| <b>UpdateFrequency</b> | For a component that updates in real-time, the redraw frequency. The minimum and default value is 5000 ms.  |
| <b>Width</b>           | The width in pixels of the component<br>.   |
| <b>Height</b>          | The height in pixels of the component.  |
| <b>Origin</b>          | The x/y origin in pixels of the component on the canvas<br>.  |
| <b>TimeResolution</b>  | The size of the bins for historical data. Numeric values represent a number of intervals to aggregate. TimeResolution also supports the special strings "Day", "Week", "Month", "Year". The presence of this setting implies historical time-series data.   |

| Dashboard Property | Details  |
|--------------------|--|
| TimeOffsets        | Array of integers that represents the number of historical datapoints to use in the component. Concrete examples are shown in examples of components that use this. Single value arrays are used for single offsets. |

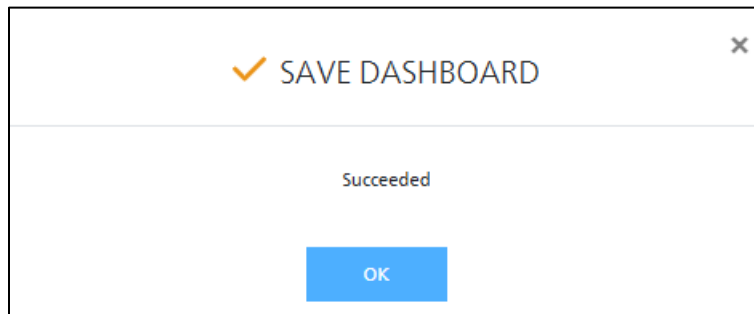
For example, if you wanted to see the number of contacts that were offered in two of your queues over the last seven days, you can configure your JSON document to the following:

```
Graph Json ⓘ
Code
1- [{"componentId": "1",
2   "title": "Number of Contacts Offered in Q6000 and Q6002 Over the Last 7 Days",
3   "hoverText": "Number of contacts offered per day over the last 7 days",
4   "footerText": null,
5   "type": "lineGraph",
6   "source": [
7     "NumberUsersReady",
8     "NumberContactsOffered"
9   ],
10  "statType": "queue",
11  "statID": [
12    "6000,6002"
13  ],
14  "legend": [
15    {
16      "label": "6000",
17      "colour": "cyan"
18    },
19    {
20      "label": "6002",
21      "colour": "red"
22    }
23  ],
24  "width": 960,
25  "height": 450,
26  "origin": [
27    0,
28    150
29  ],
30  "timeResolution": "Day",
31  "timeOffsets": [
32    -7,
33    -6,
34    -5,
35    -4,
36    -3,
37    -2,
38    -1
39  ]
40 }
41 ]
42 ]
```

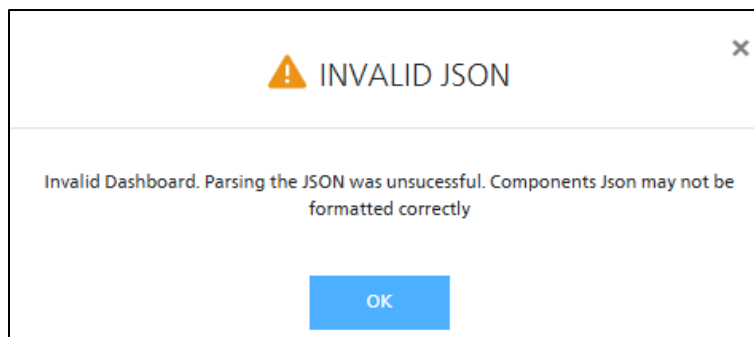
13. Click the Add button to save your changes.



The following window will open, confirming your saved changes:



If there is an invalid value in your JSON template, the following error message will display:



You will need to fix the JSON document to be able to successfully save the dashboard.

When creating the component JSON, ensure that the following are valid:

- Name, and JSON fields are populated.
- The name of the Dashboard is unique.
- The JSON component array is well formed.
- Each component object has a unique ID.
- Source should be a valid statName co-responding to the correct stat type. See Appendix C: Dashboard Statistics.
- timeOffset must be negative with a max of -1. Anything 0 and greater is not supported.
- timeResolution and updateFrequency cannot exist together. Only one of them must exist at a given time.
- updateFrequency has a min of 5000 (5 seconds).

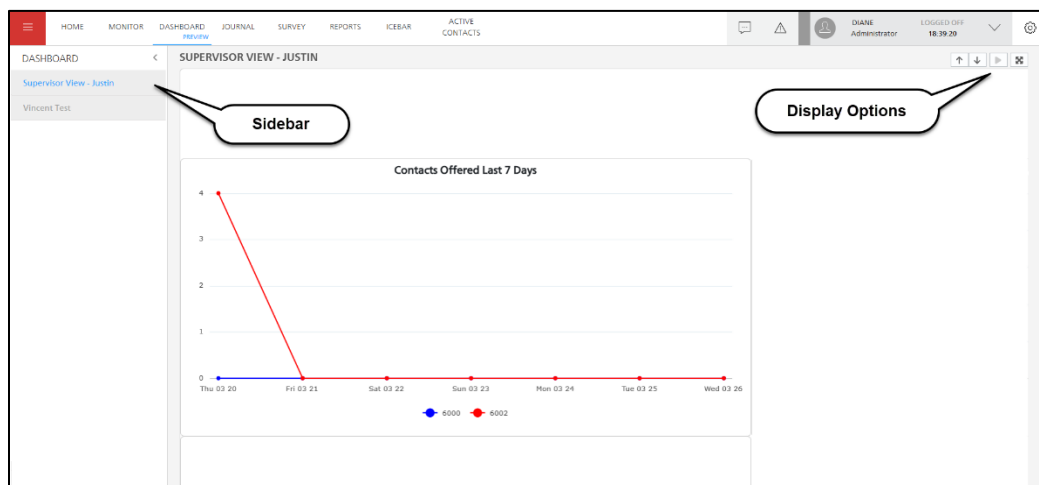
- statID can be either a numeric or "%ASSIGNED%", "%SELF%", "%ACTIVE%" (this is case sensitive).
- timeResolution can be numeric or "Day", "Week", "Month", "Year".

**Note:** By default, dashboards are automatically hidden from users. Administrators will have to enable dashboards in Configuration Groups for them to be visible on the Dashboard tab. For more information on how to enable this, please refer to Configuration Groups.

Currently, dashboards are displayed in a single language. If you would like the dashboard to be displayed in a different language, you must create a copy of the dashboard in that language.

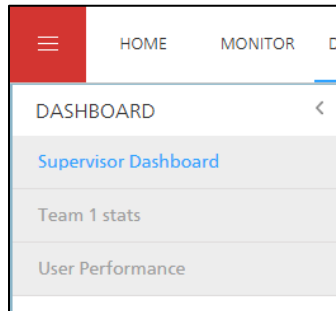
## View a Dashboard

After enabling the dashboard settings in *Configuration groups*. You will be able to see the dashboard on the Dashboard tab. Your dashboard is composed of the following components:

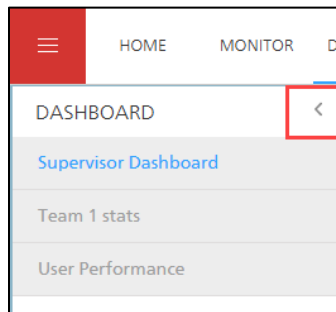


### Sidebar

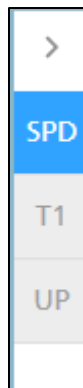
Enabled dashboards will be visible on the sidebar to view.



Similar to iceMonitor, you may expand or collapse the sidebar by clicking the *Toggle Sidebar Panel Dashboard* button.








If collapsed, your sidebar will display the short name configured for the dashboard:



### Navigation Buttons

You can use the navigation buttons in the top right corner to configure which dashboard is being displayed on your Dashboard tab.

| Button   | Description  |
|--|--|
| <b>Previous</b><br>   | Displays the previous dashboard.   |
| <b>Next</b><br>   | Displays the next dashboard.   |
| <b>Toggle Rotation</b><br><br> | <p>If toggle rotation is enabled, the button will turn blue, allowing different dashboards to rotate on the page. The rotation interval timer is set in the dashboard settings.</p> <p>If toggle rotation is disabled, the button will be grey, and will only display one dashboard.</p> |
| <b>Toggle Full Screen</b><br>   | Enters the full screen mode. To exit full screen, click the Toggle Full Screen button again or use the ESC button on your keyboard.  |

## Edit a Dashboard

A dashboard configuration is a JSON document that is editable by an administrator in iceManager Settings.

To edit a dashboard:

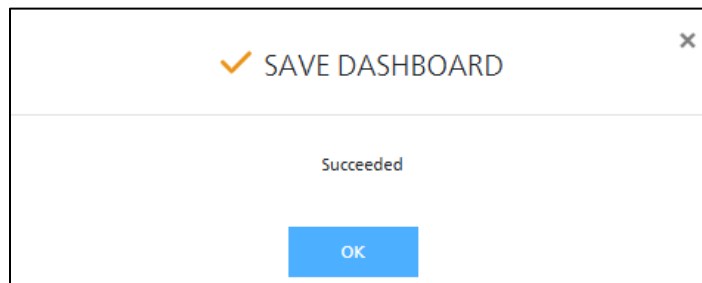
1. Click the pencil icon located in the Action column.



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

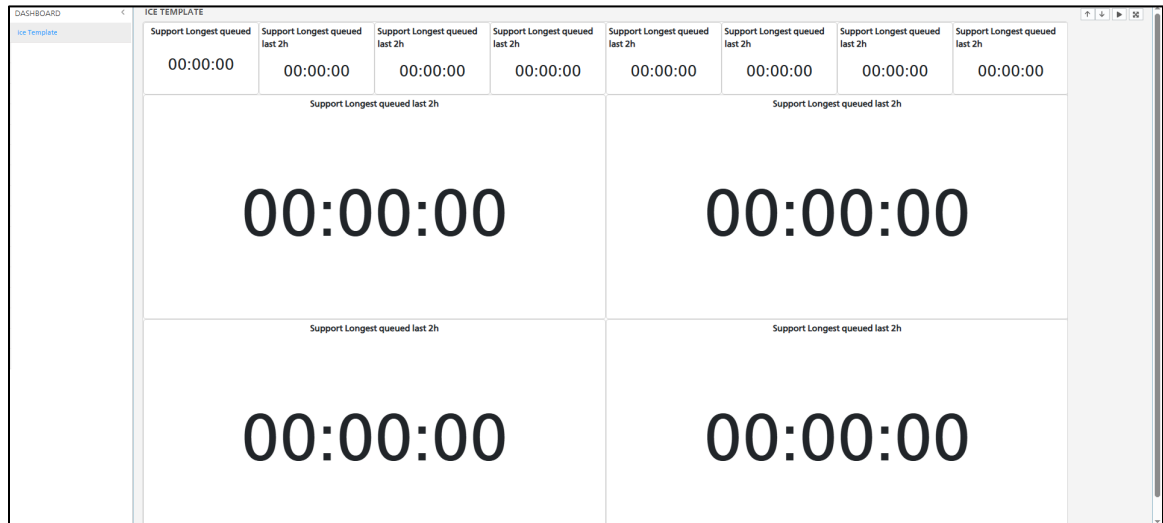


The following message will appear confirming your saved changes.



### Configuring additional components to your dashboard:

You may have up to 12 components displayed across your dashboard.



When adding additional components, you can set its location on the dashboard by configuring the width, height, and origin.

| Dashboard Template |   |   |   |   |   |   |   |
|--------------------|---|---|---|---|---|---|---|
| A                  | B | C | D | E | F | G | H |
| I                  |   |   |   | J |   |   |   |
| K                  |   |   |   | L |   |   |   |

The table below displays the properties for the components in the screenshot above:

**Note:** The properties provided below are a guide to help you understand how the components are configured across the dashboard. You may set different origin, width and height values as needed.

| Dashboard Placement | Properties  |
|---------------------|---|
| A                   | "width": 240,<br>"height": 150,<br>"origin": [<br>0,<br>0<br>],   |
| B                   | "width": 240,<br>"height": 150,<br>"origin": [<br>240,<br>0<br>], |
| C                   | "width": 240,<br>"height": 150,<br>"origin": [<br>0,<br>0<br>],   |

| Dashboard Placement | Properties   |
|---------------------|--|
|                     | 480,<br>0<br>],  |
| D                   | "width": 240,<br>"height": 150,<br>"origin": [<br>720,<br>0<br>],  |
| E                   | "width": 240,<br>"height": 150,<br>"origin": [<br>960,<br>0<br>],  |
| F                   | "width": 240,<br>"height": 150,<br>"origin": [<br>1200,<br>0<br>], |
| G                   | "width": 240,<br>"height": 150,<br>"origin": [<br>1440,<br>0       |

| Dashboard Placement | Properties  |
|---------------------|---|
|                     | ],  |
| H                   | "width": 240,<br>"height": 150,<br>"origin": [<br>1680,<br>0<br>],  |
| I                   | "width": 960,<br>"height": 465,<br>"origin": [<br>0,<br>150<br>],   |
| J                   | "width": 960,<br>"height": 465,<br>"origin": [<br>960,<br>150<br>], |
| K                   | "width": 960,<br>"height": 465,<br>"origin": [<br>0,<br>615<br>],   |
| L                   | "width": 960,   |

| Dashboard Placement | Properties  |
|---------------------|---|
|                     | <pre>"height": 465, "origin": [   960,   615 ],</pre> |

Follow the steps below to add a component to your dashboard:

1. Generate your template by selecting the options as specified in 'Creating a Dashboard'.
2. Click the clone button to copy it.
3. In the JSON editor, paste your code on a new line within the array square brackets.

```

12 "6000",
13 "6001",
14 "6002",
15 ],
16 "legend": [],
17 "updateFrequency": 5000,
18 "width": 300,
19 "height": 300,
20 "origin": [
21 600,
22 350
23 ]
24 }
25 ]
26 - [
27   {
28     "componentId": "2",
29     "title": "b. Which agent among 1201 to 1212 handled the most contacts over the last 24 hours?",
30     "type": "barGraph",
31     "source": [
32       "TotalContacts"
33     ],
34     "statType": "agent",
35     "statID": [
36       "1201",
37       "1202",
38       "1203",
39       "1204",
40       "1205",
41       "1206",
42       "1207",
43       "1208",
44       "1209",
45       "1210",
46       "1211",
47       "1212"
48     ],
49     "width": 960,
50     "height": 450,
51     "origin": [
52       0,
53       500
54     ],
55     "timeResolution": 24,
56     "timeOffsets": [
57       -1
58     ]
59   }
60 ]

```

**Note:** Ensure that your *componentID* is unique. For example, if you already have a *componentID* value that's set to 1, set the new component value to 2.

4. Ensure that all of your code is contained within the array "[ ]". For example, in the screenshot below you will see this value on line 25 that will be moved to line 58.

```
12 "6000",
13 "6001",
14 "6002"
15 ],
16 "legend": [],
17 "updateFrequency": 5000,
18 "width": 300,
19 "height": 300,
20 "origin": [
21 600,
22 350
23 ]
24 }
25 ]
26 [
27 {
28   "componentId": "2",
29   "title": "b. Which agent among 1201 to 1212 handled the most contacts over the last 24 hours?",
30   "type": "barGraph",
31   "source": [
32     "TotalContacts"
33   ],
34   "statType": "agent",
35   "statID": [
36     "1201",
37     "1202",
38     "1203",
39     "1204",
40     "1205",
41     "1206",
42     "1207",
43     "1208",
44     "1209",
45     "1210",
46     "1211",
47     "1212"
48   ],
49   "width": 960,
50   "height": 450,
51   "origin": [
52     0,
53     500
54   ],
55   "timeResolution": 24,
56   "timeOffsets": [
57     -1
58   ]
59 }
60 ]
61 ]
62 ]
63 ]
64 ]
65 ]
66 ]
67 ]
68 ]
69 ]
70 ]
71 ]
72 ]
73 ]
74 ]
75 ]
76 ]
77 ]
78 ]
79 ]
80 ]
81 ]
82 ]
83 ]
84 ]
85 ]
86 ]
87 ]
88 ]
89 ]
90 ]
91 ]
92 ]
93 ]
94 ]
95 ]
96 ]
97 ]
98 ]
99 ]
100 ]
```

Ln: 26 Col: 2

```
21 600,  
22 350  
23 ]  
24 }  
25 - {  
26     "componentId": "2",  
27     "title": "b. Which agent among 1201 to 1212 handled the most contacts over the last 24 hours?",  
28     "type": "barGraph",  
29 -     "source": [  
30         "TotalContacts"  
31     ],  
32     "statType": "agent",  
33 -     "statID": [  
34         "1201",  
35         "1202",  
36         "1203",  
37         "1204",  
38         "1205",  
39         "1206",  
40         "1207",  
41         "1208",  
42         "1209",  
43         "1210",  
44         "1211",  
45         "1212"  
46     ],  
47     "width": 960,  
48     "height": 450,  
49 -     "origin": [  
50         0,  
51         500  
52     ],  
53     "timeResolution": 24,  
54 -     "timeOffsets": [  
55         -1  
56     ]  
57 }  
58 ]
```

Ln: 58 Col: 4

5. Add a comma to '}' at the end of the first component to indicate that you are adding a new component. For example, in the screenshot below, you will notice that the new component we added starts at line 25. Therefore, we will have to add a comma to line 24 to indicate that we are starting a new component on line 25.

```
Graph Json
9  },
10 "statType": "queue",
11 "statID": [
12 "6000",
13 "6001",
14 "6002"
15 ],
16 "legend": [],
17 "updateFrequency": 5000,
18 "width": 300,
19 "height": 300,
20 "origin": [
21 600,
22 350
23 ]
24 },
25 {
26   "componentId": "2",
27   "title": "b. Which agent among 1201 to 1212 handled the most contacts over the last 24 hours?",
28   "type": "barGraph",
29   "source": [
30     "TotalContacts"
31   ],
32   "statType": "agent",
33   "statID": [
34     "1201",
35     "1202",
36     "1203",
37     "1204",
38     "1205",
39     "1206",
40     "1207",
41     "1208",
42     "1209",
43     "1210",
44     "1211",
45     "1212"
46   ],
47   "width": 960,
48   "height": 450,
49   "origin": [
```

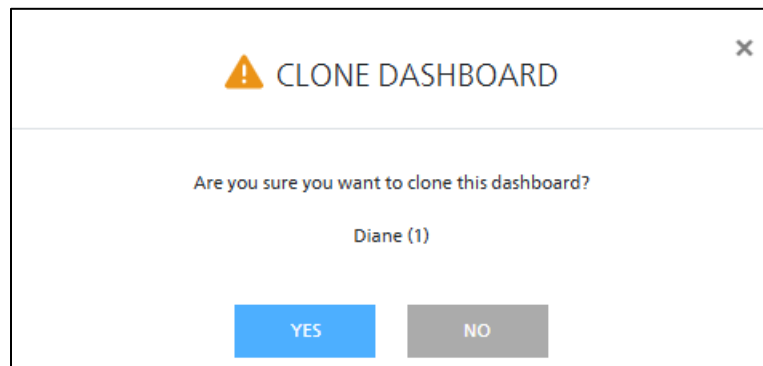
6. Click *Save* to save your changes.



## Clone a Dashboard

To clone a dashboard:

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

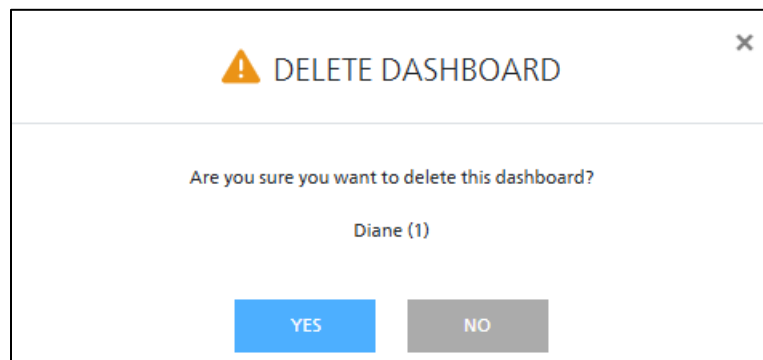


Once you click *Yes*, the cloned dashboard will be added to the list.

## Delete a Dashboard

To delete a dashboard:

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



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



## Chapter 5: 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 iceManager Journal interface. The top navigation bar includes: HOME, MONITOR, DASHBOARD, JOURNAL (selected), SURVEY, REPORTS, ICEBAR, and ACTIVE CONTACTS. The user profile shows DIANE VASQUEZ... Administrator, LOGGED OFF 17:39:07.

**SEARCH BY:**

- Interaction Type:  Voice,  Email,  Instant Message

**QUEUES:** Select queues... (dropdown)

**USERS:** Select users... (dropdown)

**DATE RANGE:** Feb 25, 2025 - Mar 26, 2025

**SEARCH CONTACTS** (button)

**RESULTS**

Drag here to set row groups

| Contact ID      | Type | Date ↓ | Duration | Sender (ANI) | Recipient (DNIS) | User Name | Queue | User Data | Server | Assigned LOBs |
|-----------------|------|--------|----------|--------------|------------------|-----------|-------|-----------|--------|---------------|
| No Rows To Show |      |        |          |              |                  |           |       |           |        |               |

**Columns:**  Contact ID,  Type,  Date,  Duration,  Sender (ANI),  Recipient (DNIS),  User Name,  Queue,  User Data,  Server,  Assigned LOBs

**Filters:** (empty)

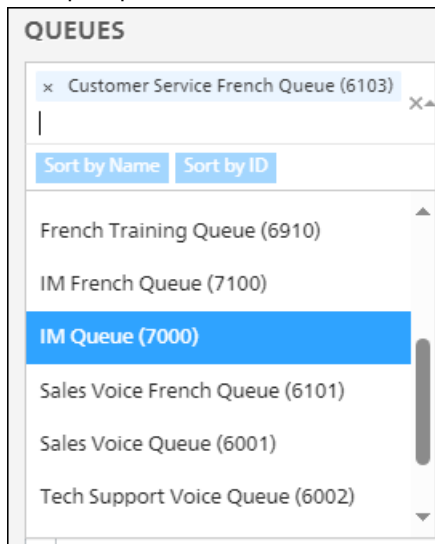
**Buttons:** UPDATE, CLEAR ALL

0 to 0 of 0 | Page 0 of 0

## Searching for an interaction

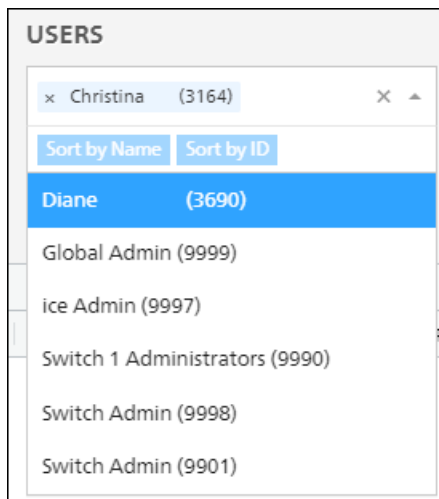
To search for an interaction, complete the following steps:

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.

**Note:** Journal does not show information about users who were presented with contacts but did not handle them. The user filter will only display contacts handled by the selected user(s).



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

The screenshot displays a date range selection interface. At the top, two calendar views are shown: the left one for 'Jan 08, 2024, 12:00 a.m.' and the right one for 'Feb 06, 2024, 11:59 p.m.'. Below each calendar are navigation arrows and month/year dropdowns. The right calendar has a blue highlight on the 6th. To the right of the calendars are preset filters: 'Today', 'Yesterday', 'Last 7 Days', 'Last 30 Days', 'This Month', and 'Last Month'. At the bottom, there are time selection fields for '12 : 00 AM' and '11 : 59 PM', and two buttons: 'SUBMIT' (blue) and 'CANCEL' (grey).

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.

The screenshot shows a search results interface. At the top, there are three filter sections: 'QUEUES' with a dropdown showing 'E-mail Queue (6004)', 'USERS' with a dropdown showing 'Select users...', and 'DATE RANGE' with a date range 'Jan 08, 2024 - Feb 06, 2024'. A 'SEARCH CONTACTS' button is to the right. Below the filters is a 'RESULTS' section with a table of search results. The table has columns for Contact ID, Type, Date, Duration, Sender (ANI), Recipient (DNIS), User Name, Queue, and User Data. Two results are shown:

| 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... |           |

At the bottom right, there is a pagination indicator: '1 to 2 of 2' and '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.<br><br><b>Note:</b> Journal does not show information about users who were presented with contacts but did not handle them.   |
| <b>Queue</b>            | Name of the queue with Queue ID.  |
| <b>User Data</b>        | This field contains information on the contact. Depending on the interaction type, different information is displayed.<br><br>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.<br><br>For email interactions, user data can be empty, or it can contain notes from the previous agent. |

| Column                  | 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>Server</b>           | The name of the server where the contact was received.   |
| <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 292 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** ℹ

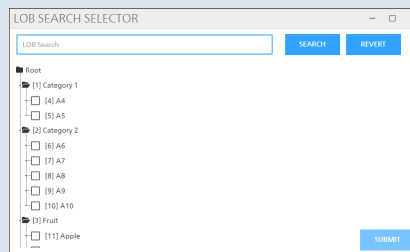
**User Event**

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.



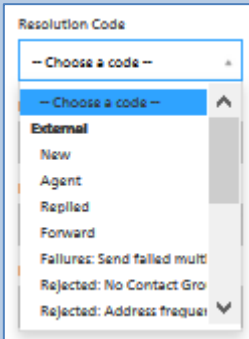
**Note:** The Journal Search – Filter LOB Codes setting in Configuration Groups determines if Journal will only show user assigned LOBs, or all LOBs including

|                               |   |
|-------------------------------|---|
|                               | deactivated LOBs and LOBs not assigned to users.  |
| <b>Contact Insights</b>       |   |
| <b>Contact Insights Field</b> | <p>Select from the drop-down list containing the available contact insights fields. This filter will return contacts that have data populated in the specified field.</p> <p><b>Note:</b> The visibility of each contact insights fields is configured in the contact insights field settings. For more information, refer to Contact Insights Field.</p> |
| <b>Contact Insights Value</b> | <p>This field is only available if a Contact Insights Field has been selected. Further filter your search results to search for a specific value in the contact insights 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.  |

| Recording                     |   |
|-------------------------------|---|
| <b>Recording Modalities</b>   | <p>Select the recording modality associated with the contact you are searching. Options that you can select are listed below:</p> <ul style="list-style-type: none"> <li>• Any</li> <li>• Voice</li> <li>• Screen Recording</li> </ul>  |
| <b>Recording Trigger</b>      | Options that you can select are listed in Appendix B: Recording Triggers on page 355.   |
| <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 such as <i>ice</i>, enter the following: "ticket number" ice.</p> <p><b>Noten:</b> When searching for multiple words or phases, the search functions as</p> |

The screenshot shows a search interface for recordings. It features a dropdown menu labeled 'Recording' with a blue play icon. Below the dropdown are three input fields:

- Recording Modalities:** A dropdown menu with the text "-- Choose a modality --" and a downward arrow.
- Recording Trigger:** A dropdown menu with the text "-- Choose a trigger --" and a downward arrow.
- Recording Initiator ID:** A text input field with the placeholder text "Enter Number".

|                              |   |
|------------------------------|---|
|                              | an AND. In the example above, the search will return results for text containing "ticket number" and 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.<br><br> |
| <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 -- ▼

☰ Miscellaneous ▼

**Resolution Code**

-- Choose a code -- ▼

**ice Servers**

-- Choose ice server -- ▼

**Attachments**

-- Choose a attachment ▼

**Attachments**

Select *has attachments* to display contacts with attachments.

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

The screenshot displays the iceManager interface with two main panels: 'RESULTS' and 'DETAILS'.

**RESULTS Panel:** A table with columns: Contact ID, Type, Date, Duration, Sender (ANI), and a rightmost column. The table contains two rows:

| Contact ID | Type  | Date               | Duration | Sender (ANI) |   |
|------------|-------|--------------------|----------|--------------|---|
| 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 Panel:** A summary view for Contact ID 6301. It includes the following information:

- 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:** (empty)
- 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 p.m. | 1000 (Received queued email) | 6004   |           |

## 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 Insights</b>        | This table shows the data generated in the contact insights fields that have been configured to display in journal.  |

| Field                               | Description  |
|-------------------------------------|--|
| <b>Contact Insights Job History</b> | This table shows the state of all contact insights 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><br/>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.



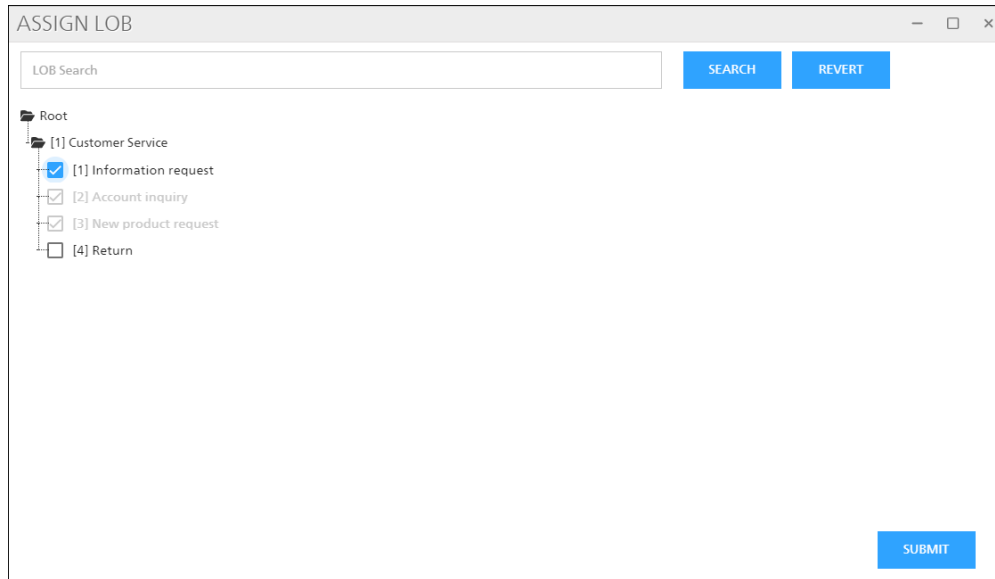
2. Select the (+) sign in the top right corner of the section to assign a new code.

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

The screenshot shows the 'ASSIGN LOB' window with a search bar and 'SEARCH' and 'REVERT' buttons. Below is a tree view of LOB codes under 'Root' and '[1] Customer Service'. The codes are: '[1] Information request' (unchecked), '[2] Account inquiry' (checked), '[3] New product request' (checked), and '[4] Return' (unchecked). A 'SUBMIT' button is located at the bottom right.

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



5. The new code has been added.

| LOBS ASSIGNED <span style="float: right;">+</span> |                     |                             |            |
|--|---------------------|-----------------------------|------------|
| ID   | Name                | Time Applied                | Applied By |
| 1  | Information request | 2024-06-20<br>1:24:21 p.m.  | 1301       |
| 2  | Account inquiry     | 2024-06-20<br>10:28:43 a.m. | 1301       |
| 3  | New product request | 2024-06-20<br>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 <span style="float: right;">+</span> |  |  |  |
|---|--|--|--|
|---|--|--|--|

## Contact Insights

### 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 an insights job, the field is displayed in its own section above the other contact insights information.


#### CONTACT AI SUMMARY

The customer called regarding an issue with their car's heating system and requested assistance from a technician to look into the problem.

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

### Contact Insights

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

| CONTACT INSIGHTS  |       |
|--|-------|
| Name   | Value |
| Contact Summary Completion Usage   | 24    |
| Contact Summary Prompt Usage   | 107   |
| Maximum Tokens limit for the summarization Job   | 15000 |

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

| CONTACT INSIGHTS                               |       |
|--|-------|
| Name   | Value |
| Contact Summary Completion Usage               | 24    |
| Contact Summary Prompt Usage                   | 107   |
| Maximum Tokens limit for the summarization Job | 15000 |

### Contact Insights Job History

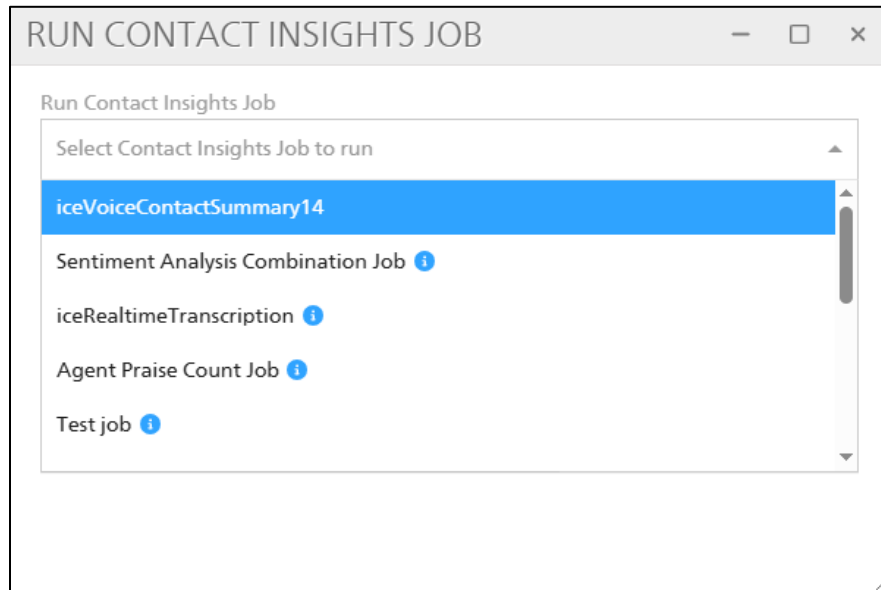
The Contact Insights Job History table displays the list of contact insights jobs that have run. The state will indicate whether the job has been created, running, completed or failed.

| CONTACT INSIGHTS JOB HISTORY |                          |          |
|------------------------------|--------------------------|----------|
| ID                           | Name                     | State    |
| 1                            | iceVoiceContactSummary14 | Complete |
| 3                            | iceRealtimeTranscription | Complete |

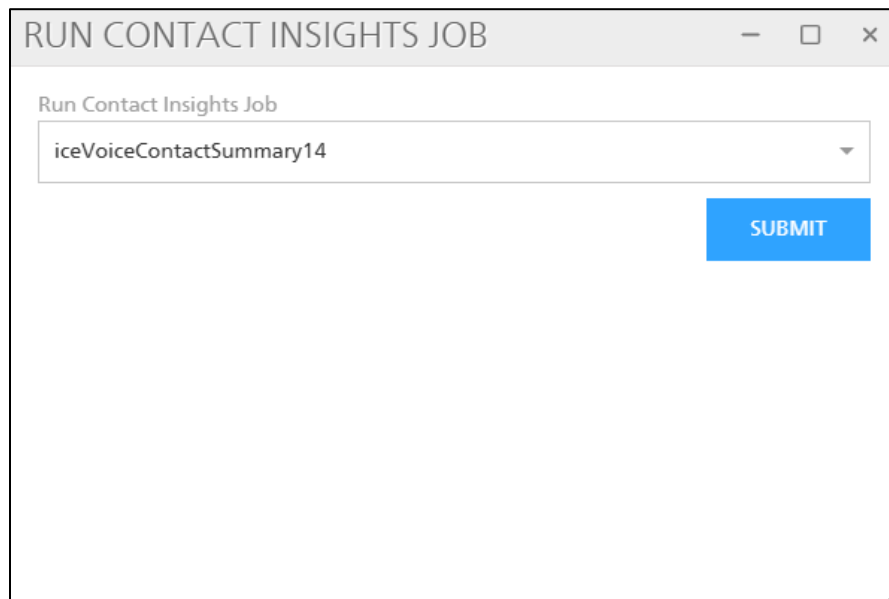
The preview button in the top right corner of the section allows you to run a contact insights job 'on demand'.

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

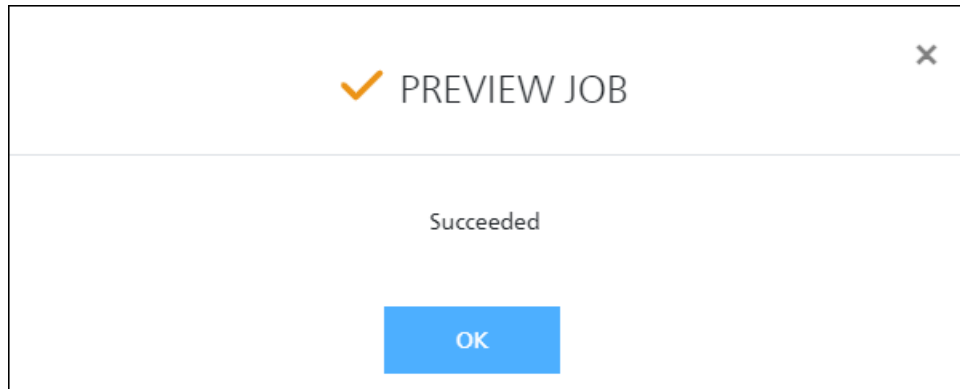
Click the preview button. A list of created contact insights jobs will appear.



Select the job you would like to run and click 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 insights field will be overwritten.

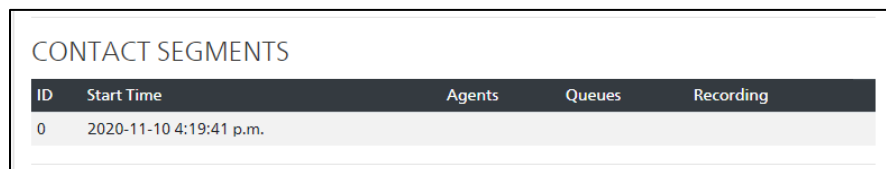
**Note:** Depending on the configured job, the job can take a few minutes to complete.

## 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.



| 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 298.




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 298.

### DETAILS



Contact ID:  
**1519**

Duration:

00:10:21

✕

---

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

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

---

Contact Modalities:

Email

Sender:

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

Receiving Address:

ice@icescape.com

Contact Group Name:

User Data:

Users:

Queues:

Email - Team 6 (7016)

Server:

( ice.computertalk.com )

---

### RESOLUTION CODE

Resolution Code:

Replied (External)

EDIT


---

### CONTACT SEGMENTS

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

---

### EMAIL




2020-11-10 04:27:16 PM

DOWNLOAD

⤴

---



2020-11-10 04:16:25 PM

DOWNLOAD

⤴

---


### EVALUATION

This contact is yet to be evaluated.

EVALUATE ▾

---

### SURVEY



AGENT FEEDBACK SURVEY

🗑

⤴

## Instant Messaging Interactions

Below is a screenshot of Details section for an instant message interaction. For more information on the information in each field, refer to Interpreting the Details Frame on page 298.

### DETAILS

Contact ID: **1470**

Duration: **00:35:51**

X

---

🕒 **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

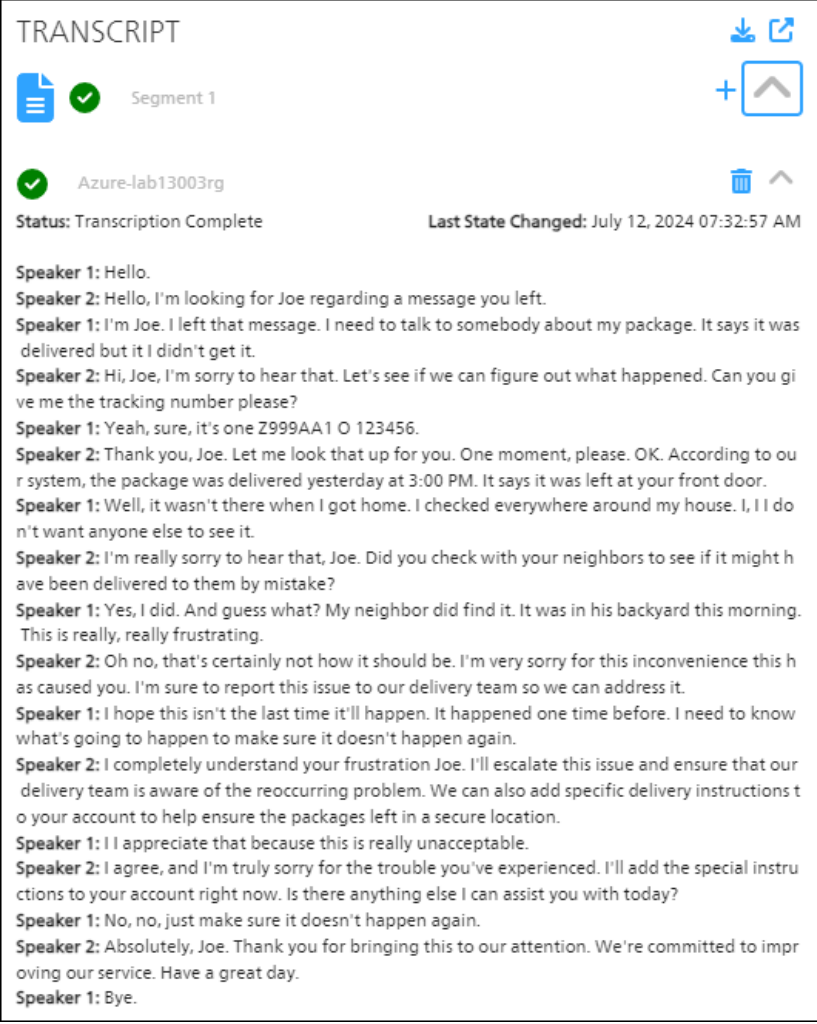
## Transcript

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.

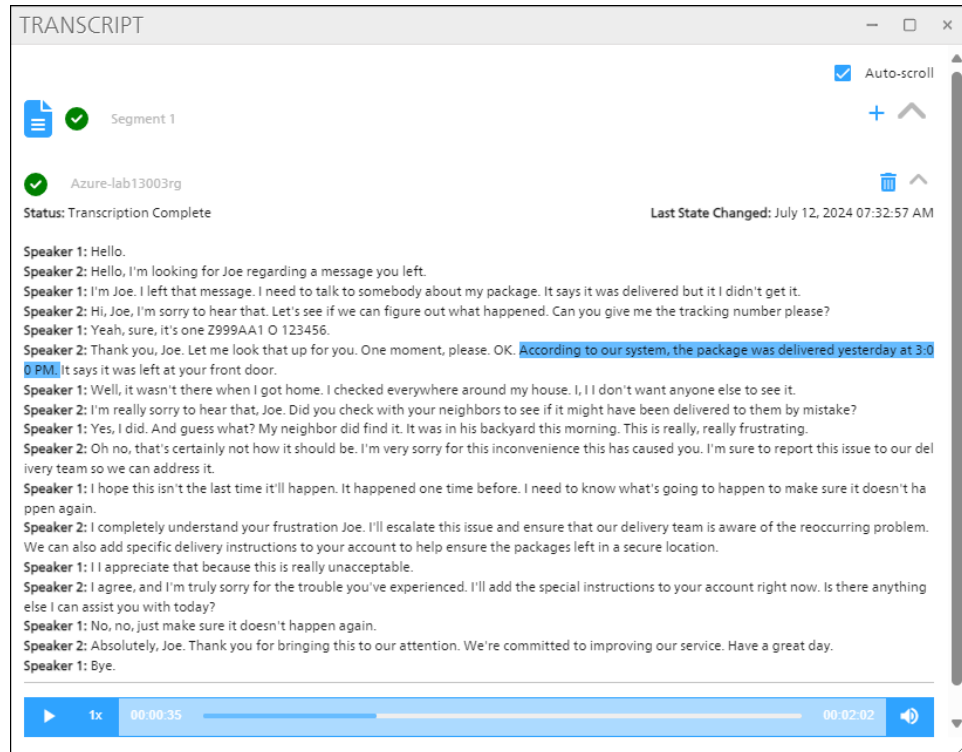
**Speaker 2:** I agree, and I'm truly sorry for the trouble you've experienced. I'll add the special instructions to your account right now. Is there anything else I can assist you with today?

**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.

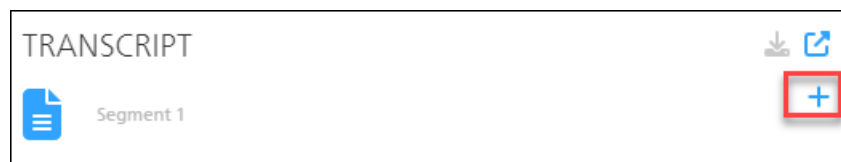


The new window consists of the transcript(s) and the audio file player. As you play the audio file, you will see the corresponding text highlighted to indicate where you are in the transcript.

Administrators have the ability to delete transcript segments.

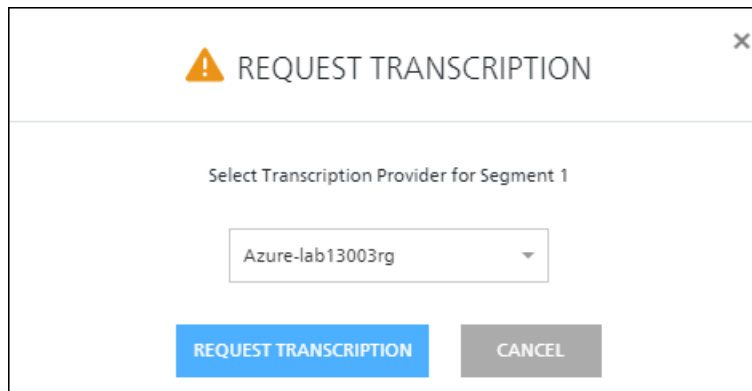
Post-call transcripts can be configured to transcribe all calls or can be scheduled to only transcribe calls that meet certain conditions. For more information, refer to Recording settings.

Transcripts can also be requested on demand for certain segments.

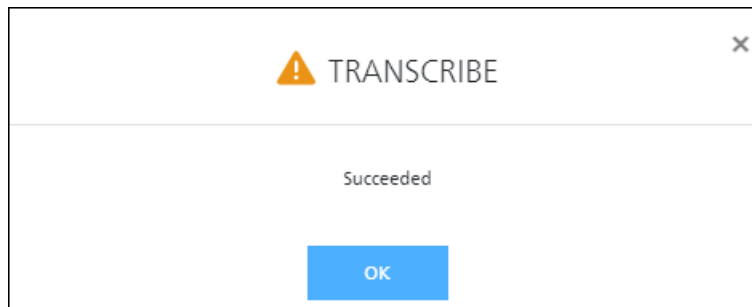


For any segments that have not been transcribed, the plus sign in the top right corner of the field allows users to request transcription.

Select the transcription provider and click *Request Transcription*.



The following window will appear.



## 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.

**EVALUATION**  
This contact is being evaluated by **WJ**  
Evaluation Started: Jun 15, 2022 04:20:28 PM  
Evaluations Form: Customer Service [1]

**INTERACTION**

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

**VOICE**

**MEDIA TRANSCRIPTS**

---

**GREETING**

**Introduction** ☆ ☆ ☆ ☆ ☆

**Friendlyness** NOT VERY FRIENDLY SOMEWHAT FRIENDLY FRIENDLY VERY FRIENDLY

**Said hello** ☆ ☆ ☆ ☆ ☆

0%

0%

0%

---

**GREETING TOTALS** 0/0 0%

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 includes sections for 'DETAILS' (Contact ID: 5295, Duration: 00:02:03, Start/End Time: Jun 15, 2022, 2:09:22 p.m. / Jun 15, 2022, 2:09:25 p.m.), 'INTERACTION' (Contact Mobiles, Sender, Receiving Address, Contact Group Name, User State, Users, Outlets, Server, Recording Trigger), and 'VOICE' (Voice Overview, Voice, Julie (1301), Sales Voice Queue (8001), IVR (1301), Bulk Trunk Incoming). The 'EVALUATION' section shows a 99% score and completion time of June 15, 2022, 04:32:38 PM. The 'GREETING' section includes 'Introduction' (5 stars, 100%), 'Freedlines' (4 stars, 100%, with a dropdown menu), and 'See hello' (5 stars, 100%). A 'GREETING TOTALS' section shows 3/3 and 100%. Each item has a 'Comment' field and a '100%' score indicator.

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

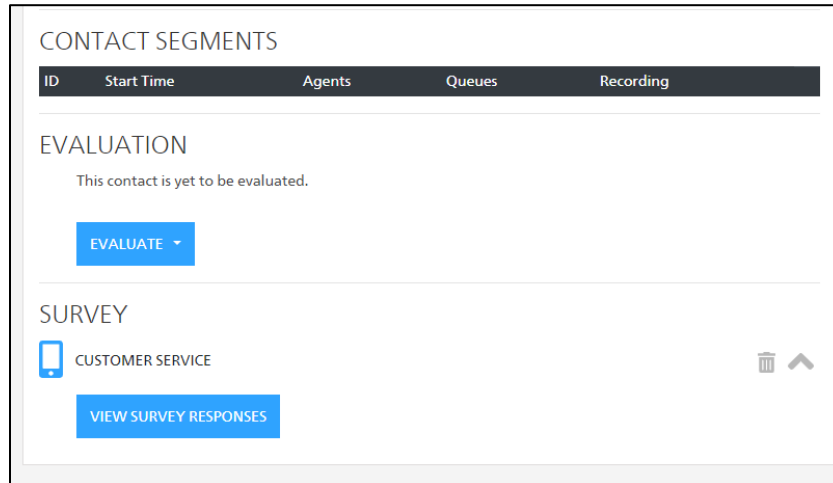
## Survey Responses

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.


## Purging Recordings

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

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

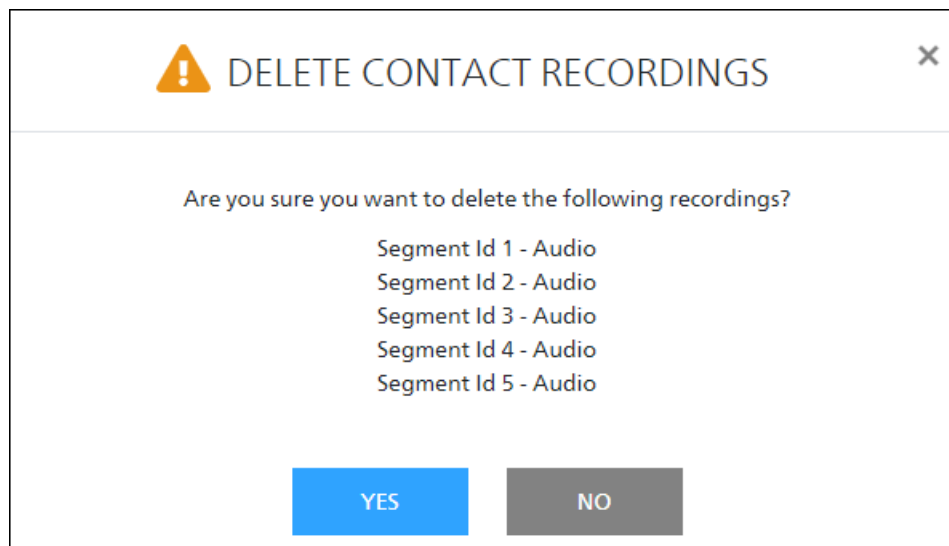
To purge a recording, click the grey arrow to open the section.

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

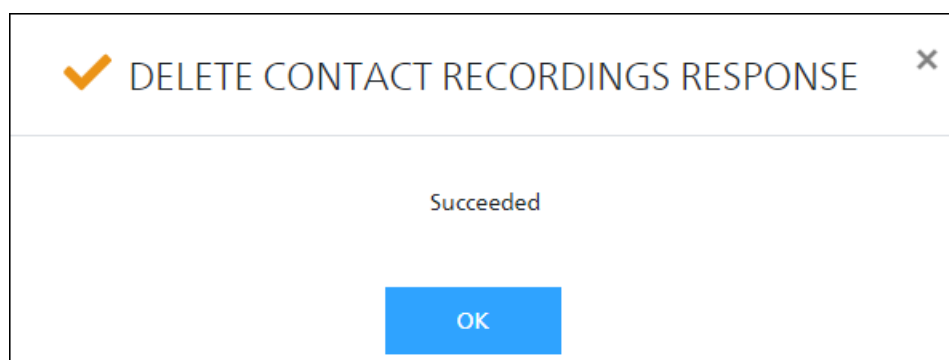
PURGING 

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

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



The recording has successfully been deleted.



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

## 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 'Select queues...', 'USERS' with a dropdown 'Select users...', and 'DATE RANGE' with a date picker set to '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, each with a checkbox. The columns listed are: 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 'Drag here to set row groups' prompt. The main table area is currently empty, displaying 'No Rows To Show'. At the bottom right of the table, there is a pagination indicator showing '0 to 0 of 0' and 'Page 0 of 0'.

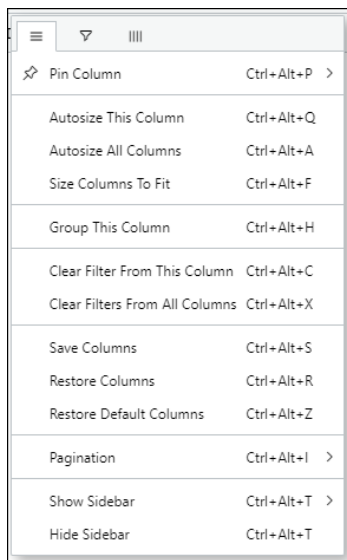
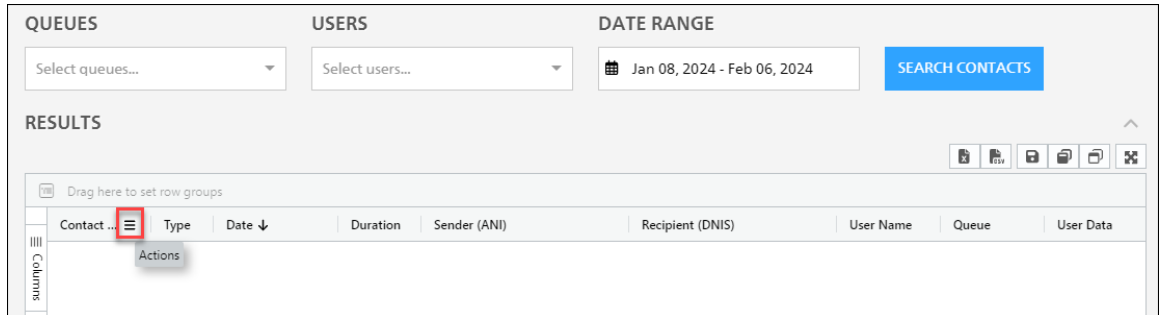
The grid will refresh with the selected columns. By default, all columns are displayed on the table.

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

## Column Headers

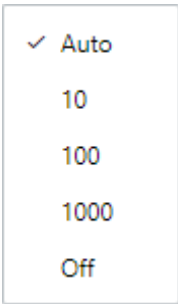
### Column Header Actions

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.<br>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>  <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 the iceManager interface for searching contacts. 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'. A blue 'SEARCH CONTACTS' button is located to the right of the date range. Below these is the 'RESULTS' section, which contains a table with columns: 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, indicating it is the focus of the section.

This close-up screenshot shows the 'Filters' panel in the iceManager interface. It features a search field at the top. Below the search field, there are several filter options, each with a checkbox: '(Select All)', 'Autodial', 'Email', 'IM', and 'Voice'. All these checkboxes are checked. At the bottom of the panel, there is a 'Reset Filter' button. The 'Columns' list is partially visible on the left side of the panel.

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.

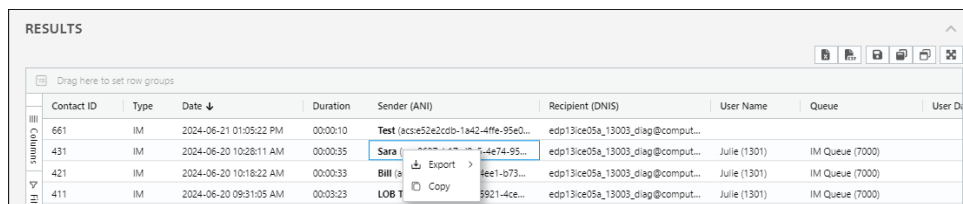


The table below provides information for each layout option.

| 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. |

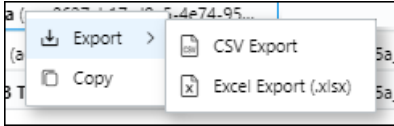
## Right-click menu options

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 (...-5921-4ce...                | 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 |              | <b>SEARCH CONTACTS</b> |                 |                |              |  |
| <b>RESULTS</b>              |            |                 |                    |                             |              |                        |                 |                |              |  |
| 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.



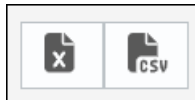
- The rows are now grouped by Type:

| Group       | Contact ID | Date ↓ | Duration | Sender (ANI) | Recipient (DNIS) | User Name | Queue | Use |
|-------------|------------|--------|----------|--------------|------------------|-----------|-------|-----|
| > 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

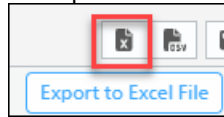
- Using the filter options, search for the interactions to be included in the export.

QUEUES: Select queues...  
 USERS: Select users...  
 DATE RANGE: Jan 08, 2024 - Feb 06, 2024  
 SEARCH CONTACTS

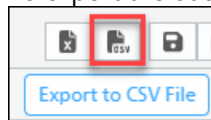
RESULTS

| 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... |

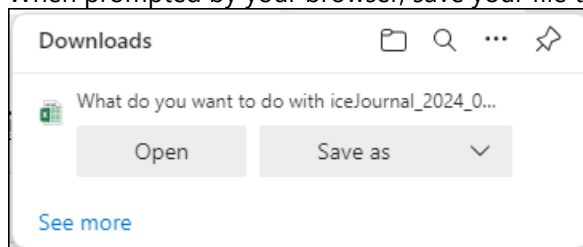
6. To export the data to an excel file, select the *Export to Excel File* button.



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



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



8. 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.cc">https://11113.cc</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.cc">https://11113.cc</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.cc">https://11113.cc</a> | 6301       | Email | 2024-01-30 01:00:11 00:05:10 |          | Diane        | ice13@ice13.com  | Default User (1000) | WATCH OUT FOR iceA                  |           | iceA   |               | Replied          |
| 5 | <a href="https://11113.cc">https://11113.cc</a> | 6151       | Email | 2024-01-22 01:24:54 00:03:11 |          | Bryan        | ice13@ice13.com  |                     | WATCH OUT FOR iceA                  |           | iceA   |               | Released         |
| 6 | <a href="https://11113.cc">https://11113.cc</a> | 5601       | Email | 2024-01-10 11:14:52 00:00:38 |          | Andrew       | ice13@ice13.com  | alin (1018)         | E-mail Queue (6C WATCH OUT FOR iceA |           | iceA   |               | Agent            |
| 7 |   |            |       |                              |          |              |                  |                     |                                     |           |        |               |                  |
| 8 |   |            |       |                              |          |              |                  |                     |                                     |           |        |               |                  |

**Note:** The CSV file export does not contain this additional column.





## Chapter 6: 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

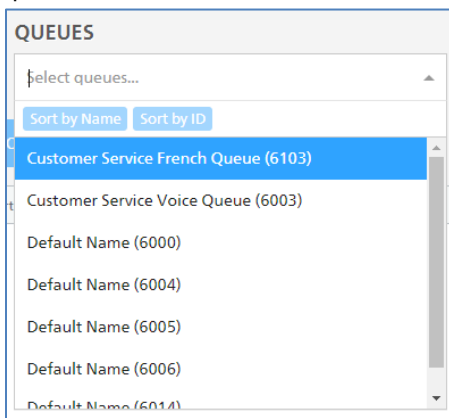
When you first click the *Active Contacts* tab, the following screen appears. Search options and results are on the right side of the screen and filters are along the left side of the screen.

The screenshot displays the 'ACTIVE CONTACTS' interface in the iceManager application. The top navigation bar includes 'MONITOR', 'JOURNAL', 'SURVEY', 'REPORTS', 'ADMINISTRATOR', 'CAMPAIGN', 'ICEBAR', and 'ACTIVE CONTACTS'. The user is logged in as 'JULIE (1301) Administrator' at '21:04:38'. The interface is divided into three main sections: 'ICE SERVERS', 'QUEUES', and 'USERS', each with a dropdown menu for selection. Below these are buttons for 'SEARCH CONTACTS', 'CLEAR', and 'UPDATE ACTIVE CONTACTS'. The main content area features a table with columns: ID, Type, Name, Address, State, Start Time, Server, Email Tracking Number, Subject, and User Data. The table is currently empty, displaying 'No Rows To Show'. On the left side, there are filter options under 'ACTIVE CONTACTS' and 'Advanced Filters'. The 'ACTIVE CONTACTS' section includes a 'Contact Type / State' dropdown and checkboxes for Voice, IM, Email, Autodial, Waiting, In Workflow, Active, and Inactive, with an 'UPDATE' button. The 'Advanced Filters' section includes input fields for 'Contact ID' (with a hint 'Enter Number'), 'Subject', and 'Start Time' (with a hint 'Pick a date-time'), and an 'UPDATE' button. A 'CLEAR ALL' button is located at the bottom left. The bottom right corner shows pagination information: '0 to 0 of 0' and 'Page 0 of 0'.

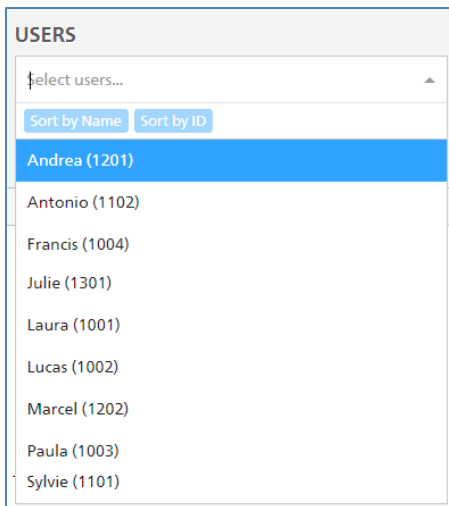
## Searching for an interaction

To search for an interaction, complete the following steps:

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



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



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

| ID     | Type  | Name     | Address                        | State | Start Time               | End Time                 | Server | Email Tracking Number | Subject |
|--------|-------|----------|--------------------------------|-------|--------------------------|--------------------------|--------|-----------------------|---------|
| > 1735 | Voice | Kathika  | 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 |        |                       |         |

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.<br><br>Waiting: in IVR, waiting for a user<br>workflow: in IVR, not waiting for user (in self-service)<br>Active: being actively handled by the user |

| Column         | Description  |
|----------------|--|
|                | <p>Inactive: still with the user, not being actively handled<br/>           Ended: interaction with contact has been completed</p> <p><b>Note:</b> Only Global Administrators can see contacts with an Ended State.</p>  |
| Start Time     | The time when the contact entered the system.  |
| End Time       | The time when the contact was released from the system.  |
| Server         | The ice server associated with the contact.  |
| Email Tracking | The Tracking ID for the email interaction.   |
| Subject        | The Subject line of an email interaction. This field is only populated for email contacts.   |
| User Data      | <p>This field contains information on the contact. Depending on the interaction type, different information is displayed.</p> <p>For voice interactions, the caller ID and the caller's responses to menu prompts may be displayed. It may also contain notes from the previous agent.</p> <p>For email interactions, user data can be empty, or it can contain notes from the previous agent.</p> <p>For instant messages, user data contains the website URL from which they entered into a chat session. It can also contain the contact's responses to menu prompts.</p> |

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

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

Voice  
 IM  
 Email  
 Autodial  


---

 Waiting  
 In Workflow  
 Active  
 Inactive  
 Ended

UPDATE

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

## Advanced Filters

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

Advanced Filters  
 Contact ID  
 Enter Number  
 Subject  
 Start Time  
 Pick a date-time  
 End Time  
 Pick a date-time  
 UPDATE  
 CLEAR ALL

## Columns Options

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

| 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.

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

| Column Heading Menu Options    |              |
|--------------------------------|--------------|
| Menu Option                    | Function     |
| 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.<br>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 the iceManager interface with three tabs: ICE SERVERS, QUEUES, and USERS. Below the tabs are three dropdown menus for selection. Below these are three buttons: SEARCH CONTACTS, CLEAR, and UPDATE ACTIVE CONTACTS. A search bar is present above the table. The table has columns: ID, Type, Name, Address, State, Start Time, End Time, Server, and Email Tracking. On the left, there is a sidebar with 'Columns' and 'Filters' sections. The 'Filters' section is expanded, showing a search bar and a list of filterable fields: ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Number, Subject, and User Data. The 'Address' filter is selected, showing a dropdown menu with 'Contains' and a text input field labeled 'Filter...'. Below the input field is a 'Reset Filter' button. The table displays four rows of contact data.

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

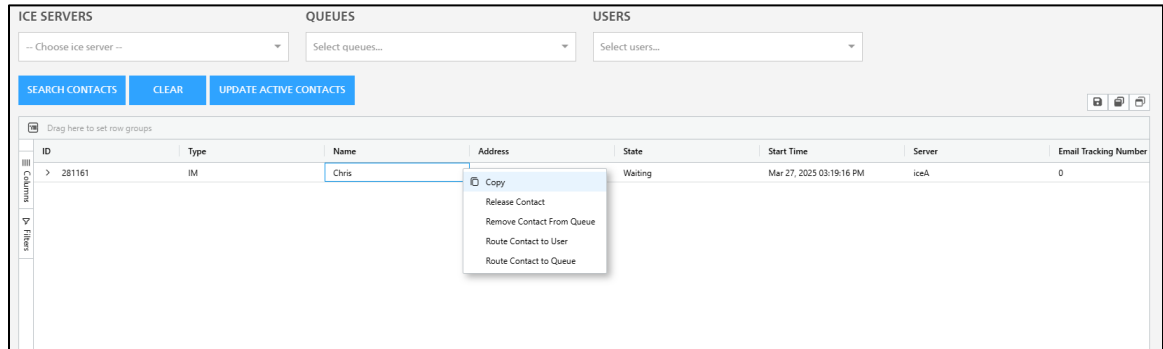
This close-up shows the 'Filters' section of the sidebar. It includes a search bar at the top. Below it are expandable sections for 'ID', 'Type', 'Name', and 'Address'. The 'Address' section is expanded, showing a dropdown menu with 'Contains' selected and a text input field labeled 'Filter...'. Below the input field is a 'Reset Filter' button. The 'State' section is also visible below.

The gallery will refresh according to the filter conditions selected.


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

## Right-click menu options

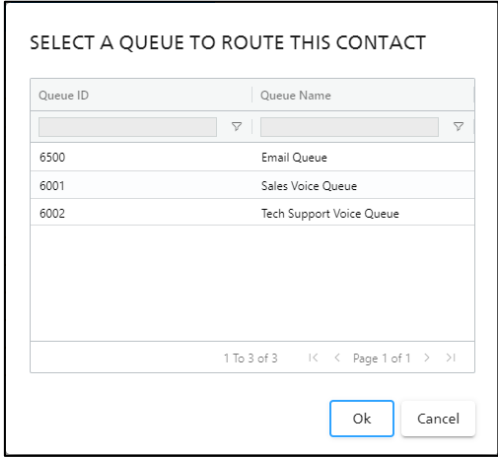
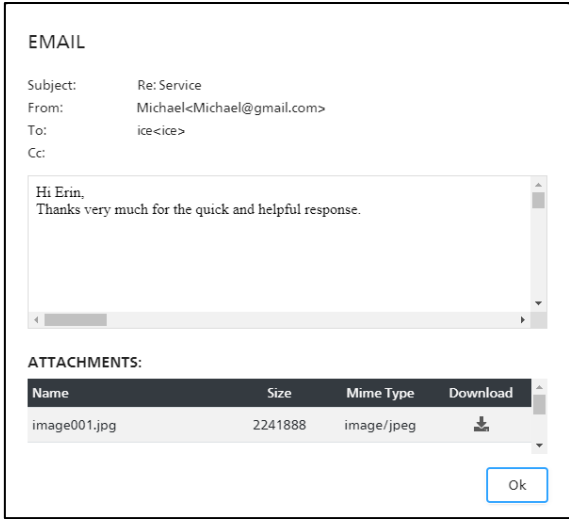
Right-click on a row in the table to perform additional tasks, such as route contacts to users from queue.



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

| Active Contacts Right-Click Menu |  |
|----------------------------------|--|
| Menu Option                      | Function   |
| <b>Copy</b>                      | Copy the selected value onto your clipboard.   |
| <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 1266 1214 1541" style="border: 1px solid black; padding: 10px; text-align: center;">  <b>ACTIVE CONTACTS</b> <span style="float: right;">×</span><br/> <hr/> <p>Are you sure you want to release contact 4333881?</p> <p><span style="background-color: #007bff; color: white; padding: 5px 15px;">YES</span> <span style="background-color: #6c757d; color: white; padding: 5px 15px;">NO</span></p> </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>  |

| <b>Active Contacts Right-Click Menu</b> |  |           |            |       |          |         |           |      |       |       |      |       |       |
|---|--|-----------|------------|-------|----------|---------|-----------|------|-------|-------|------|-------|-------|
| <b>Menu Option</b>                      | <b>Function</b>  |           |            |       |          |         |           |      |       |       |      |       |       |
|   | <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center; margin: 0;">SELECT A QUEUE TO REMOVE THIS CONTACT</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Queue ID</th> <th style="width: 70%;">Queue Name</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">7000</td> <td>IM Queue</td> </tr> </tbody> </table> <p style="text-align: center; font-size: small; margin-top: 5px;">1 To 1 of 1    &lt;&lt; &lt; Page 1 of 1 &gt; &gt;&gt;</p> <p style="text-align: right; margin-top: 5px;"> <input type="button" value="Ok"/> <input type="button" value="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 style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p style="text-align: center; margin: 0;">SELECT A USER TO ROUTE THIS CONTACT</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">ID</th> <th style="width: 55%;">Name</th> <th style="width: 30%;">State</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1004</td> <td>Francis</td> <td>Not Ready</td> </tr> <tr> <td style="text-align: center;">1001</td> <td>Laura</td> <td>Ready</td> </tr> <tr> <td style="text-align: center;">1003</td> <td>Paula</td> <td>Ready</td> </tr> </tbody> </table> <p style="text-align: center; font-size: small; margin-top: 5px;">1 To 3 of 3    &lt;&lt; &lt; Page 1 of 1 &gt; &gt;&gt;</p> <p style="text-align: right; margin-top: 5px;"> <input type="button" value="Ok"/> <input type="button" value="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   |            |            |           |             |              |                   |            |                          |
|                                  |  <p>SELECT A QUEUE TO ROUTE THIS CONTACT</p> <table border="1"> <thead> <tr> <th>Queue ID</th> <th>Queue Name</th> </tr> </thead> <tbody> <tr> <td>6500</td> <td>Email Queue</td> </tr> <tr> <td>6001</td> <td>Sales Voice Queue</td> </tr> <tr> <td>6002</td> <td>Tech Support Voice Queue</td> </tr> </tbody> </table> <p>1 To 3 of 3 &lt; &lt; Page 1 of 1 &gt; &gt;</p> <p>Ok Cancel</p>   | Queue ID   | Queue Name | 6500      | Email Queue | 6001         | Sales Voice Queue | 6002       | Tech Support Voice Queue |
| Queue ID                         | Queue Name   |            |            |           |             |              |                   |            |                          |
| 6500                             | Email Queue  |            |            |           |             |              |                   |            |                          |
| 6001                             | Sales Voice Queue  |            |            |           |             |              |                   |            |                          |
| 6002                             | Tech Support Voice Queue   |            |            |           |             |              |                   |            |                          |
| <b>View Email</b>                | <p>Select this option to view the email interaction history.</p>  <p>EMAIL</p> <p>Subject: Re: Service<br/>From: Michael&lt;Michael@gmail.com&gt;<br/>To: ice&lt;ice&gt;<br/>Cc:</p> <p>Hi Erin,<br/>Thanks very much for the quick and helpful response.</p> <p>ATTACHMENTS:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Size</th> <th>Mime Type</th> <th>Download</th> </tr> </thead> <tbody> <tr> <td>image001.jpg</td> <td>2241888</td> <td>image/jpeg</td> <td></td> </tr> </tbody> </table> <p>Ok</p> <p><b>Note:</b> This option is only available for email contacts.</p> | Name       | Size       | Mime Type | Download    | image001.jpg | 2241888           | image/jpeg |                          |
| Name                             | Size   | Mime Type  | Download   |           |             |              |                   |            |                          |
| image001.jpg                     | 2241888  | image/jpeg |            |           |             |              |                   |            |                          |




Layout Options

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

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



The table below provides information for each layout option.

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

## Row Groups

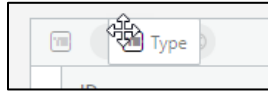
Click and drag columns to the top of the grid to categorize or group the rows in the grid.

An example of using Row Groups:

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

| Drag here to set row groups |       |               |                       |       |                         |                         |             |                       |                         |           |
|-----------------------------|-------|---------------|-----------------------|-------|-------------------------|-------------------------|-------------|-----------------------|-------------------------|-----------|
| ID                          | Type  | Name          | Address               | State | Start Time              | End Time                | Server      | Email Tracking Num... | Subject                 | User Data |
| 4220891                     | Email | ComputerTalk  | hello@computer-tal... | Ended | Dec 15, 2021 11:42:...  | Dec 16, 2021 08:05:1... | Alpha ice A | 4220901               | New form entry is su... |           |
| 4220911                     | Voice | External User | sipanonymous@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 03:33:5... | Dec 16, 2021 03:34:0... | Alpha ice A | 0                     |                         |           |
| 4220931                     | Voice | External User | sipanonymous@co...    | Ended | Dec 16, 2021 03:37:5... | Dec 16, 2021 03:38:1... | Alpha ice A | 0                     |                         |           |
| 4220941                     | Voice | External User | sipanonymous@co...    | Ended | Dec 16, 2021 03:38:5... | Dec 16, 2021 03:39:1... | 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:

A screenshot of a data grid interface. The grid has a header row with columns: Group, ID, Type, Name, Address, State, Start Time, End Time, Server, Email Tracking Num..., and Subject. The data rows are grouped by the 'Type' column. The groups are: Email (13), Voice (37), and IM (1). Each group is represented by a row with a right-pointing arrow in the 'Group' column. The grid also shows a status bar at the bottom right indicating '1 to 1 of 3' and 'Page 1 of 1'.

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



## Appendix A: Adding to Allowed Sites

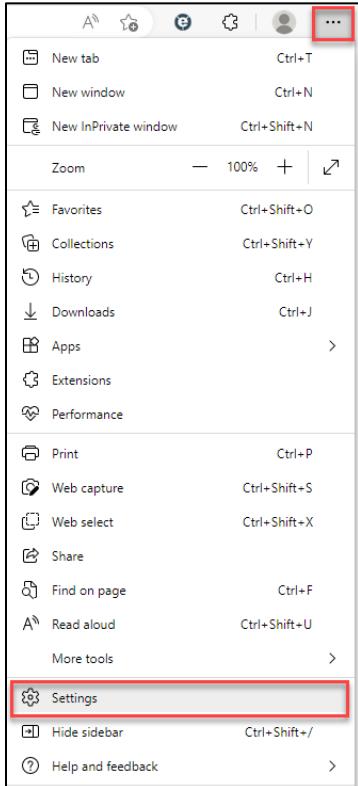
This section explains how to add iceManager to the list of allowed sites on your browser. Steps for adding allowed sites to Microsoft Edge, Google Chrome, and Firefox can be found below.

## Microsoft Edge

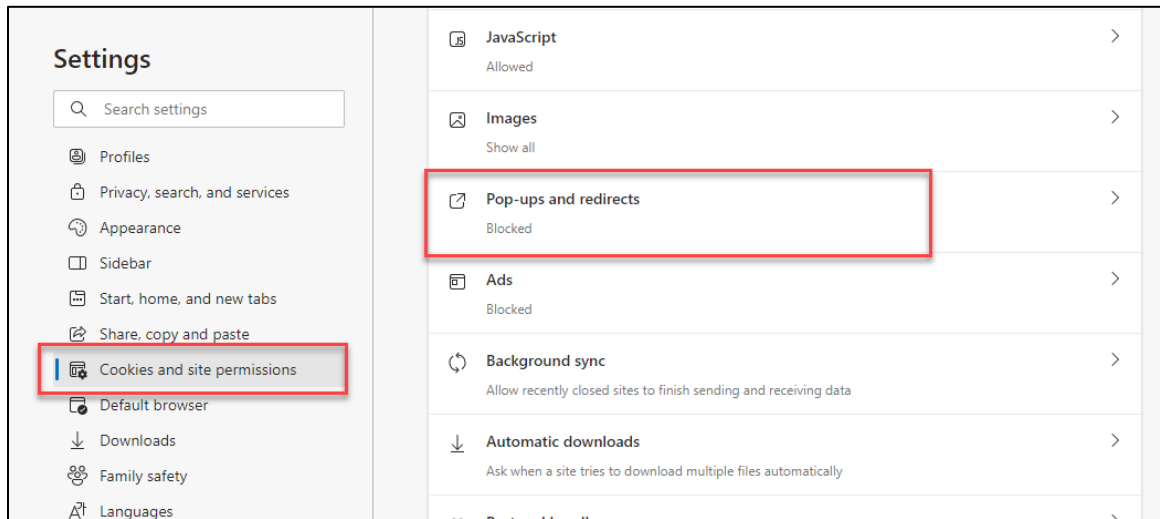
You can allow pop-up windows to open in a Web site by adding the Web site to the **Allowed sites** list.

To do this, follow these steps:

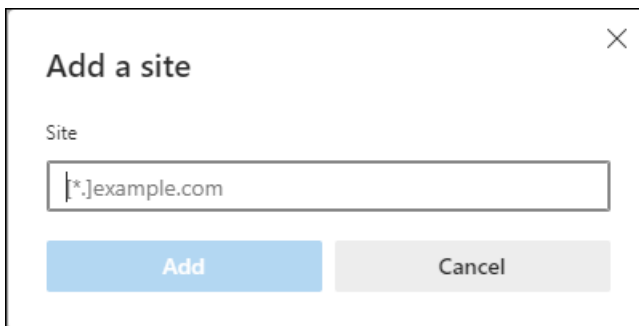
1. Open a Microsoft Edge browser window.
2. In the Menu (three dots in the top right corner), select *Settings*.



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>

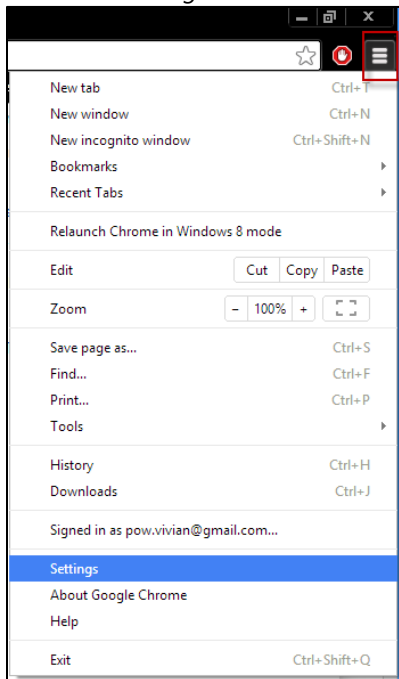
## Google Chrome

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

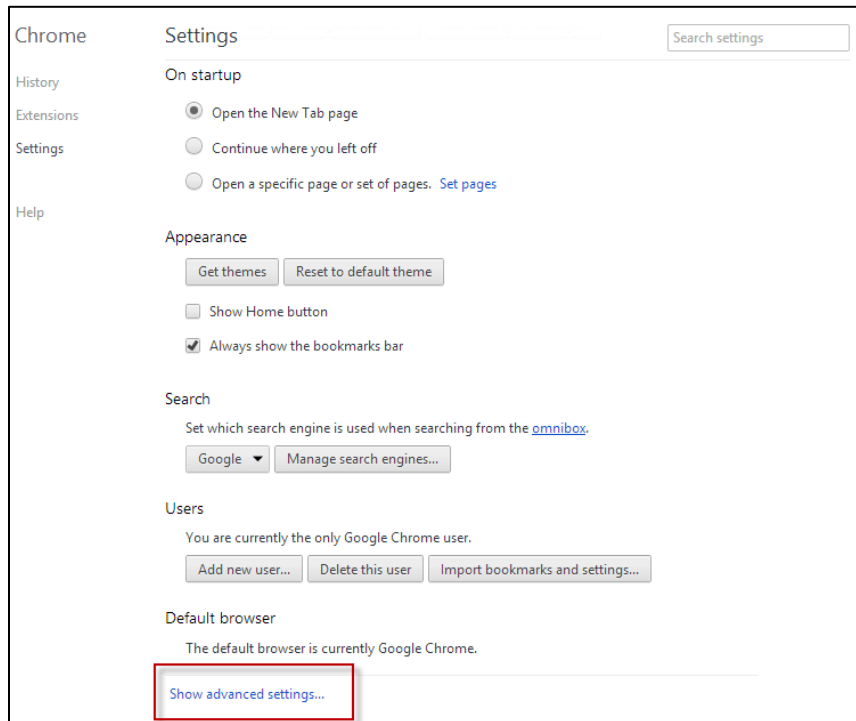
1. If pop-ups have been blocked, you'll see the  icon in the address bar. Click the icon to see a list of the blocked pop-ups.
2. Click the link for the pop-up window that you'd like to see.
3. To always see pop-ups for the site, select "Always show pop-ups from [site]." The site will be added to the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

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

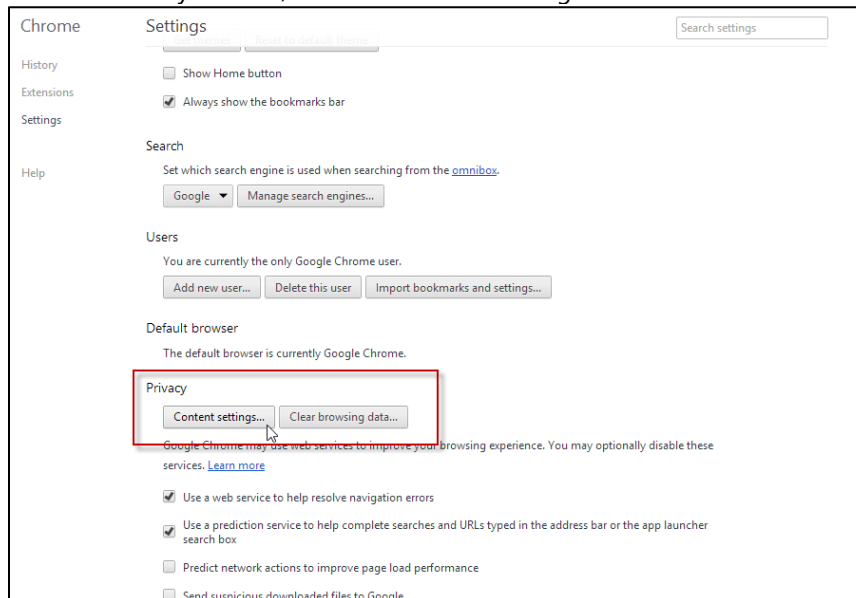
1. Click the Chrome menu  on the browser toolbar.
2. Select *Settings*.



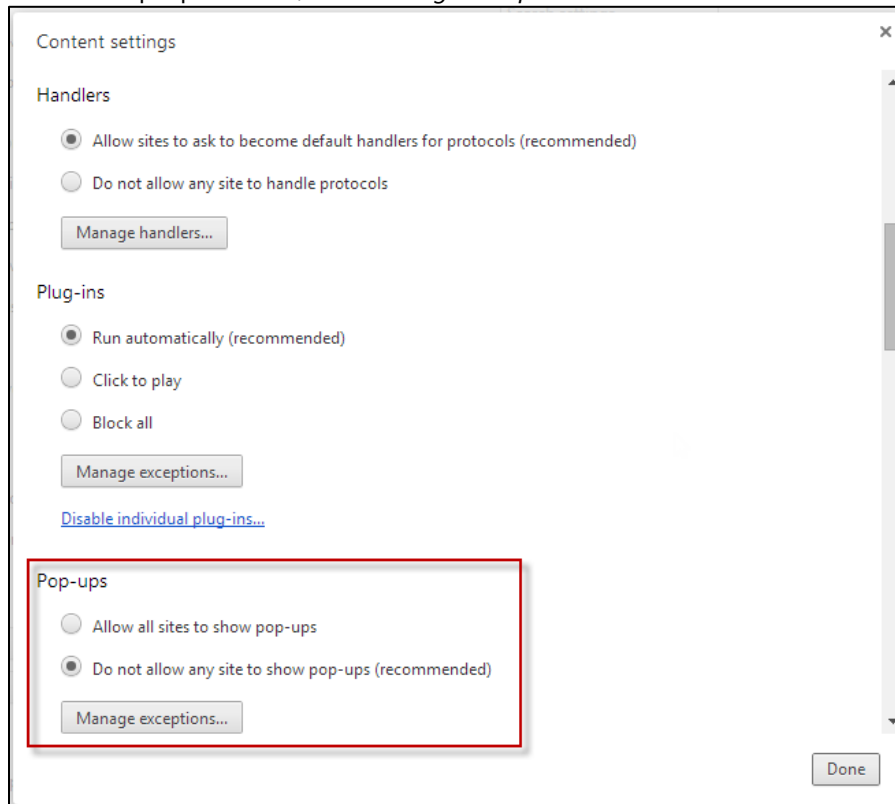
3. Click *Show advanced settings*.



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

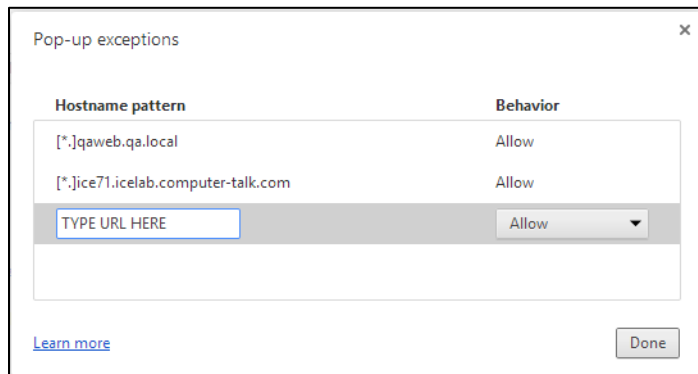


5. In the Pop-ups section, click *Manage exceptions*.



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

7. Click *Done*.




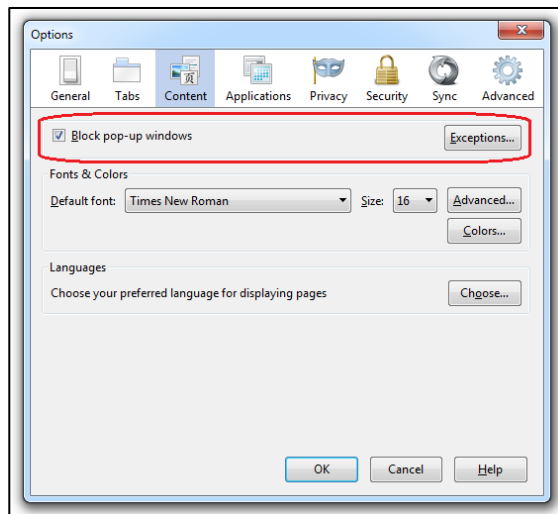
The website should no longer be blocked by the Pop-up Blocker.

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

## Firefox

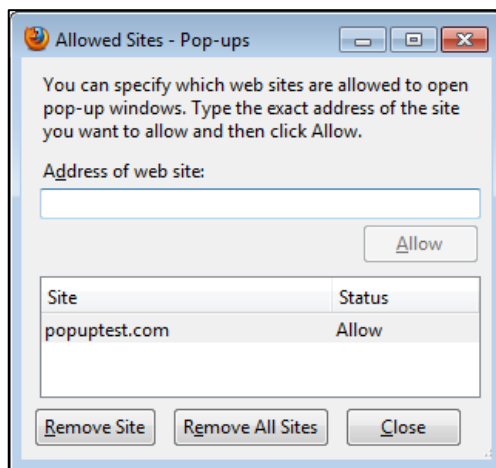
To access the pop-up blocker settings:

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. |



## Appendix C: Dashboard Statistics

The table below displays the Queue, Agent, Team, and Contact statistics you can incorporate in the Dashboard.

**Note:** The Realtime Stat values below are case sensitive.

| Queue Stats                       |  |  |
|-----------------------------------|--|--|
| Realtime Stat                     | Aggregation  | HistoricalStat(From STAT_QueueActivity_X tables)   |
| QueueID                           | -  | -  |
| Status                            | -  | -  |
| NumberUsersAssigned               | Sum values   | -  |
| NumberContactsQueued              | Sum values   | -  |
| LongestQueuedStartTime            | Largest Value  | -  |
| LongestQueuedTime                 | Largest Value  | [LongestHandledInThisQueueTime]  |
| NumberUsersLoggedOn               | Sum values   | -  |
| NumberUsersOnContact              | Sum values   | -  |
| NumberUsersReady                  | Sum values   | -  |
| NumberUsersNotReady               | Sum values   | -  |
| NumberContactsOffered             | Sum values   | [HandledInThisQueueInt1..6] + [HandledInOtherQueueQueueInt1..6] + [AbandonedInt1..6] + [Removed] |
| NumberContactsAbandoned           | Sum values   | [AbandonedInt1..6]   |
| PercentContactsAbandoned          | Sum(NumberContactsAbandoned)/Sum(NumberContactsOffered)          | [AbandonedInt1..6]/NumberContactsOffered   |
| NumberContactsHandledInThisQueue  | Sum values   | [HandledInThisQueueInt1..6]  |
| NumberContactsHandledInOtherQueue | Sum values   | [HandledInOtherQueueInt1..6]   |
| PercentHandledThisQueue           | Sum(NumberContactsHandledInThisQueue)/Sum(NumberContactsOffered) | [HandledInThisQueueInt1..6]/NumberContactsOffered  |

|                                     |  |   |
|-------------------------------------|--|---|
| PercentHandledOtherQueue            | Sum(NumberContactsHandledInOtherQueue)/Sum(NumberContactsOffered)          | [HandledInOtherQueueInt1..6]/NumberContactsOffered]   |
| AverageOfferedQueuedTime            | Sum(OfferedQueuedTime)/Sum(NumberContactsOffered)                          | OfferedQueuedTime/NumberContactsOffered   |
| AverageHandledQueuedTime            | Sum(HandledQueuedTime)/Sum(NumberContactsOffered)                          | [TotalHandledInThisQueueTime]/NumberContactsOffered]  |
| AverageAbandonedQueuedTime          | Sum(AbandonedQueuedTime)/Sum(NumberContactsAbandoned)                      | [Stat_QueueActivity_I]\[LongestAbandonedTime]   |
| EstimatedWaitTime                   | Largest Value  | -   |
| NumberContactsHandledLessThanTASA   | Sum values   | [TotalHandledLessThanTargetASA]   |
| NumberContactsHandledLessThanTASA 2 | Sum values   | [TotalHandledLessThanTargetASA2]  |
| GradeOfService                      | Sum(NumberHandledLessThanTASA)/Sum(NumberContactsOffered- ShortAbandons)   | [TotalHandledLessThanTargetASA] / (NumberContactsOffered - [TotalAbandonedLessThanThreshold])             |
| GradeOfService2                     | Sum(NumberHandledLessThanTASA 2)/Sum(NumberContactsOffered- ShortAbandons) | [TotalHandledLessThanTargetASA2] / (NumberContactsOffered- [TotalAbandonedLessThanThreshold])             |
| ShortAbandons                       | Sum values   | [TotalAbandonedLessThanThreshold]   |
| OfferedQueuedTime                   | Sum Values   | [TotalAbandonedTime] + [TotalHandledInThisQueueTime] + [TotalHandledInOtherQueueTime]+ [TotalRemovedTime] |
| HandledQueuedTime                   | Sum Values   | [TotalHandledInThisQueueTime]   |
| AbandonedQueuedTime                 | Sum Values   | [TotalAbandonedTime]  |

| Agent Stats          |             |   |
|----------------------|-------------|---|
| Realtime Stat        | Aggregation | HistoricalStat(From STAT_QueueActivity_X tables)  |
| UserID               | -           | -   |
| TotalContactDuration | Sum Values  | [TotalQueueCallTime]+[TotalDirectCallTime]+[TotalOutboundCallTime]+[TotalInternalCallTime]+[TotalQueueCallAlertingTime]+[TotalDirectCallAlertingTime]+[TotalQueueEmailTime]+[TotalOtherEmailTime]+[TotalQueueWebChatTime] |

|                            |            |  |
|----------------------------|------------|--|
|                            |            | me]+[TotalOtherWebChatTime]+[TotalQueueIMAlertingTime]+[TotalDirectIMAlertingTime]+[TotalQueueEmailAlertingTime]+[TotalDirectEmailAlertingTime]+[TotalOutboundIMTime]+[TotalInternalIMTime]+[TotalOutboundEmailTime]+[TotalInternalEmailTime]  |
| TotalContacts              | Sum Values | [QueueCallsReceived]+[DirectCallsReceived]+[OutboundCallsMade]+[InternalCallsMade]+[TransferredQueueCallsReceived]+[TransferredOtherCallsReceived]+[ConsultationQueueCallsPlaced]+[ConsultationOtherCallsPlaced]+[BlindXferQueueCallsPlaced]+[BlindXferOtherCallsPlaced]+[ConferenceQueueCallsInitiated]+[ConferenceOtherCallsInitiated]+[QueuedEmailsReceived]+[OtherEmailsReceived]+[QueuedWebChatsReceived]+[OtherWebChatsReceived] |
| TotalContactsReceived      | Sum Values | [QueueCallsReceived]+[DirectCallsReceived]+[TransferredQueueCallsReceived]+[TransferredOtherCallsReceived]+[QueuedEmailsReceived]+[OtherEmailsReceived]+[QueuedWebChatsReceived]+[OtherWebChatsReceived]+[TransferredQueueEmailsReceived]+[TransferredOtherEmailsReceived]+[TransferredQueueIMReceived]+[TransferredOtherIMReceived]   |
| TotalCallDurationFromQueue | Sum Values | [TotalQueueCallTime]   |
| TotalCallDurationDirect    | Sum Values | [TotalDirectCallTime]  |
| TotalEmailDuration         | Sum Values | [TotalQueueEmailTime]+[TotalOtherEmailTime]+[TotalOutboundEmailTime]+[TotalInternalEmailTime]  |
| TotalIMDuration            | Sum Values | [TotalOutboundIMTime]+[TotalInternalIMTime]+[TotalQueueWebChatTime]+[TotalOtherWebChatTime]  |
| TotalAlerting              | Sum Values | [TotalQueueCallAlertingTime]+[TotalDirectCallAlertingTime]+[TotalQueueIMAlertingTime]+[TotalDirectIMAlertingTime]+[TotalQueueEmailAlertingTime]+[TotalDirectEmailAlertingTime]   |
| TotalAlertingFromQueue     | Sum Values | [TotalQueueCallAlertingTime]+[TotalQueueIMAlertingTime]+[TotalQueueEmailAlertingTime]  |
| TotalAlertingDirect        | Sum Values | [TotalDirectCallAlertingTime]+[TotalDirectIMAlertingTime]+[TotalDirectEmailAlertingTime]   |
| CallsHandled               | Sum Values | [QueueCallsReceived]+[DirectCallsReceived]+[OutboundCallsMade]+[InternalCallsMade]+[TransferredQueueCallsReceived]+[Transferred  |

|                                |  |   |
|--------------------------------|--|---|
|                                |  | OtherCallsReceived]+[ConsultationQueueCallsPlaced]+[ConsultationOtherCallsPlaced]+[BlindXferQueueCallsPlaced]+[BlindXferOtherCallsPlaced]+[ConferenceQueueCallsInitiated]+[ConferenceOtherCallsInitiated] |
| CallTransfersMade              | Sum Values                                   | [ConsultXferQueueCallsCompleted]+[ConsultXferOtherCallsCompleted]+[BlindXferQueueCallsPlaced]+[BlindXferOtherCallsPlaced]   |
| CallsFromQueue                 | Sum Values                                   | [QueueCallsReceived]+[TransferredQueueCallsReceived]+[QueueCallsUnAnswered]+[QueueCallsStoppedAlerting]   |
| AnsweredQueuedCallsReceived    | Sum Values                                   | [QueueCallsReceived]+[TransferredQueueCallsReceived]  |
| TransferredQueuedCallsReceived | Sum Values                                   | [TransferredQueueCallsReceived]   |
| DirectCallsReceived            | Sum Values                                   | [DirectCallsReceived]   |
| ExternalCallsPlaced            | Sum Values                                   | [OutboundCallsMade]   |
| InternalCallsPlaced            | Sum Values                                   | [InternalCallsMade]   |
| DirectTransfersReceived        | Sum Values                                   | [TransferredOtherCallsReceived]+[TransferredOtherEmailsReceived]+[TransferredOtherIMReceived]   |
| EmailsReceived                 | Sum Values                                   | [QueuedEmailsReceived]+[OtherEmailsReceived]+[TransferredQueueEmailsReceived]+[TransferredOtherEmailsReceived]  |
| IMsReceived                    | Sum Values                                   | [TransferredQueueIMReceived]+[TransferredOtherIMReceived]+[QueuedWebChatsReceived]+[OtherWebChatsReceived]  |
| TransferredEmailsFromQueue     | Sum Values                                   | [TransferredQueueEmailsReceived]  |
| TransferredEmailsDirect        | Sum Values                                   | [TransferredOtherEmailsReceived]  |
| EmailTransfersMade             | Sum Values                                   | [QueueEmailsTransferred]+[OtherEmailsTransferred]   |
| AverageCallDuration            | Same as Historical (add values then average) | $([TotalQueueCallTime]+[TotalDirectCallTime]+[TotalOutboundCallTime]+[TotalInternalCallTime])/([QueueCallsReceived]+[DirectCallsReceived]+[OutboundCallsMade]+[InternalCallsMade])$                       |
| AverageQueuedCallDuration      | Same as Historical (add values then average) | $([TotalQueueCallTime])/([QueueCallsReceived])$   |
| AverageDirectCallDuration      | Same as Historical (add values then average) | $([TotalDirectCallTime])/([DirectCallsReceived])$   |

|                          |  |   |
|--------------------------|--|---|
| AverageEmailDuration     | Same as Historical (add values then average) | $\frac{([QueuedEmailsReceived] + [OtherEmailsReceived] + [OutboundEmailsMade] + [InternalEmailsMade])}{([TotalQueueEmailTime] + [TotalOtherEmailTime] + [TotalOutboundEmailTime] + [TotalInternalEmailTime])}$  |
| AverageIMDuration        | Same as Historical (add values then average) | $\frac{([QueuedWebChatsReceived] + [OtherWebChatsReceived] + [OutboundIMsMade] + [InternalIMsMade])}{([TotalQueueWebChatTime] + [TotalOtherWebChatTime])}$  |
| AverageWrap              | Same as Historical (add values then average) | $\frac{([TotalWrapUpTime] + [TotalIMWrapUpTime] + [TotalEmailWrapUpTime])}{([QueueCallsReceived] + [DirectCallsReceived] + [OutboundCallsMade] + [InternalCallsMade] + [TransferredQueueCallsReceived] + [TransferredOtherCallsReceived] + [ConsultationQueueCallsPlaced] + [ConsultationOtherCallsPlaced] + [BlindXferQueueCallsPlaced] + [BlindXferOtherCallsPlaced] + [ConferenceQueueCallsInitiated] + [ConferenceOtherCallsInitiated] + [QueuedEmailsReceived] + [OtherEmailsReceived] + [QueuedWebChatsReceived] + [OtherWebChatsReceived])}$ |
| AverageAlerting          | Same as Historical (add values then average) | $\frac{([TotalQueueCallAlertingTime] + [TotalDirectCallAlertingTime] + [TotalQueueIMAlertingTime] + [TotalDirectIMAlertingTime] + [TotalQueueEmailAlertingTime] + [TotalDirectEmailAlertingTime])}{([QueueCallsReceived] + [DirectCallsReceived] + [TransferredQueueCallsReceived] + [TransferredOtherCallsReceived] + [QueuedEmailsReceived] + [OtherEmailsReceived] + [QueuedWebChatsReceived] + [OtherWebChatsReceived])}$   |
| AverageAlertingFromQueue | Same as Historical (add values then average) | $\frac{([TotalQueueCallAlertingTime] + [TotalQueueIMAlertingTime] + [TotalQueueEmailAlertingTime])}{([QueueCallsReceived] + [TransferredQueueCallsReceived] + [QueuedEmailsReceived] + [QueuedWebChatsReceived])}$  |
| AverageAlertingDirect    | Same as Historical (add values then average) | $\frac{([TotalDirectCallAlertingTime] + [TotalDirectIMAlertingTime] + [TotalDirectEmailAlertingTime])}{([DirectCallsReceived] + [TransferredOtherCallsReceived] + [OtherEmailsReceived] + [OtherWebChatsReceived])}$  |

|                      |            |                      |
|----------------------|------------|----------------------|
| TotalNotReadyTime    | Sum Values | [TotalNotReadyTime]  |
| TotalReadyTime       | Sum Values | [TotalReadyTime]     |
| TotalWrapTime        | Sum Values | [TotalWrapUpTime]    |
| ExternalIMsPlaced    | Sum Values | [OutboundIMsMade]    |
| InternalIMsPlaced    | Sum Values | [InternalIMsMade]    |
| ExternalEmailsPlaced | Sum Values | [OutboundEmailsMade] |
| InternalEmailsPlaced | Sum Values | [InternalEmailsMade] |
| TotalActiveContacts  | Sum Values | -                    |

|                   |            |   |
|-------------------|------------|---|
| TotalActiveVoice  | Sum Values | - |
| TotalActiveIMs    | Sum Values | - |
| TotalActiveEmails | Sum Values | - |

|                         |            |                              |
|-------------------------|------------|------------------------------|
| TotalActiveAutodial     | Sum Values | -                            |
| TransferredIMsFromQueue | Sum Values | [TransferredQueueIMReceived] |
| TransferredIMsDirect    | Sum Values | [TransferredOtherIMReceived] |
| IMTransfersMade         | Sum Values | [BlindXferQueueIMPlaced]     |
| IMsFromQueue            | Sum Values | [QueuedWebChatsReceived]     |

|                              |            |                        |
|------------------------------|------------|------------------------|
| EmailsFromQueue              | Sum Values | [QueuedEmailsReceived] |
| AnsweredQueuedIMsReceived    | Sum Values | -                      |
| DirectIMsReceived            | Sum Values | -                      |
| AnsweredQueuedEmailsReceived | Sum Values | -                      |
| DirectEmailsReceived         | Sum Values | -                      |

| Team Stats                    |             |  |
|-------------------------------|-------------|--|
| Realtime Stat                 | Aggregation | HistoricalStat(From STAT_QueueActivity_X tables)   |
| TeamID                        | -           | -  |
| NumberUsersLoggedIn           | Sum Values  |  |
| NumberUsersAssigned           | Sum Values  |  |
| NumberUsersNotReady           | Sum Values  |  |
| NumberUsersOnContact          | Sum Values  |  |
| NumberContactHandledByMembers | Sum Values  | [QueueCallsReceived] + [DirectCallsReceived] + [OutboundCallsMade] + [InternalCallsMade] + [TransferredQueueCallsReceived] + [TransferredOtherCallsReceived] + [ConsultationQu |

|                                       |  |  |
|---------------------------------------|--|--|
|                                       |  | eueCallsPlaced]+[ConsultationOtherCallsPlaced]+[BlindXferQueueCallsPlaced]+[BlindXferOtherCallsPlaced]+[ConferenceQueueCallsInitiated]+[ConferenceOtherCallsInitiated]+[QueuedEmailsReceived]+[OtherEmailsReceived]+[QueuedWebChatsReceived]+[OtherWebChatsReceived]   |
| NumberContactReceivedHandledByMembers | Sum Values                                   | [QueueCallsReceived]+[DirectCallsReceived]+[TransferredQueueCallsReceived]+[TransferredOtherCallsReceived]+[QueuedEmailsReceived]+[OtherEmailsReceived]+[QueuedWebChatsReceived]+[OtherWebChatsReceived]+[TransferredQueueEmailsReceived]+[TransferredOtherEmailsReceived]+[TransferredQueueIMReceived]+[TransferredOtherIMReceived] |
| AverageCallDuration                   | Same as Historical (add values then average) | $([TotalQueueCallTime]+[TotalDirectCallTime]+[TotalOutboundCallTime]+[TotalInternalCallTime])/([QueueCallsReceived]+[DirectCallsReceived]+[OutboundCallsMade]+[InternalCallsMade])$  |
| AverageQueuedCallDuration             | Same as Historical (add values then average) | $([TotalQueueCallTime])/([QueueCallsReceived])$  |
| AverageCallDurationOther              | Same as Historical (add values then average) | $([TotalDirectCallTime])/([DirectCallsReceived])$  |
| AverageEmailDuration                  | Same as Historical (add values then average) | $([QueuedEmailsReceived]+[OtherEmailsReceived]+[OutboundEmailsMade]+[InternalEmailsMade])/([TotalQueueEmailTime]+[TotalOtherEmailTime]+[TotalOutboundEmailTime]+[TotalInternalEmailTime])$   |
| AverageIMDuration                     | Same as Historical (add values then average) | $([QueuedWebChatsReceived]+[OtherWebChatsReceived]+[OutboundIMsMade]+[InternalIMsMade])/([TotalQueueWebChatTime]+[TotalOtherWebChatTime])$   |

|                         |  |   |
|-------------------------|--|---|
| AverageWrapDuration     | Same as Historical (add values then average) | $\frac{([TotalWrapUpTime] + [TotalIMWrapUpTime] + [TotalEmailWrapUpTime])}{([QueueCallsReceived] + [DirectCallsReceived] + [OutboundCallsMade] + [InternalCallsMade] + [TransferredQueueCallsReceived] + [TransferredOtherCallsReceived] + [ConsultationQueueCallsPlaced] + [ConsultationOtherCallsPlaced] + [BlindTransferQueueCallsPlaced] + [BlindXferOtherCallsPlaced] + [ConferenceQueueCallsInitiated] + [ConferenceOtherCallsInitiated] + [QueuedEmailsReceived] + [OtherEmailsReceived] + [QueuedWebChatsReceived] + [OtherWebChatsReceived])}$ |
| AverageAlertingDuration | Same as Historical (add values then average) | $\frac{([TotalQueueCallAlertingTime] + [TotalDirectCallAlertingTime] + [TotalQueueIMAlertingTime] + [TotalDirectIMAlertingTime] + [TotalQueueEmailAlertingTime] + [TotalDirectEmailAlertingTime])}{([QueueCallsReceived] + [DirectCallsReceived] + [TransferredQueueCallsReceived] + [TransferredOtherCallsReceived] + [QueuedEmailsReceived] + [OtherEmailsReceived] + [QueuedWebChatsReceived] + [OtherWebChatsReceived])}$   |

| Contact Stats |             |   |
|---------------|-------------|---|
| Realtime Stat | Aggregation | HistoricalStat (From STAT_QueueActivity_X tables) |
| -             | -           | InboundCallCreatedCount                           |
| -             | -           | InboundIMCreatedCount                             |
| -             | -           | InboundEmailCreatedCount                          |
| -             | -           | InboundCallReleasedCount                          |
| -             | -           | InboundIMReleasedCount                            |
| -             | -           | InboundEmailReleasedCount                         |
| -             | -           | OutboundCallCreatedCount                          |
| -             | -           | OutboundIMCreatedCount                            |
| -             | -           | OutboundEmailCreatedCount                         |
| -             | -           | OutboundCallReleasedCount                         |
| -             | -           | OutboundIMReleasedCount                           |
| -             | -           | OutboundEmailReleasedCount                        |
| -             | -           | InboundCallRejected                               |
| -             | -           | InboundIMRejected                                 |

|   |   |                       |
|---|---|-----------------------|
| - | - | InboundEmailRejected  |
| - | - | InboundCallMax        |
| - | - | InboundCallMin        |
| - | - | OutboundCallMax       |
| - | - | OutboundCallMin       |
| - | - | InboundIMMax          |
| - | - | InboundIMMin          |
| - | - | OutboundIMMax         |
| - | - | OutboundIMMin         |
| - | - | InboundEmailMax       |
| - | - | InboundEmailMin       |
| - | - | OutboundEmailMax      |
| - | - | OutboundEmailMin      |
| - | - | InboundCallDuration   |
| - | - | OutboundCallDuration  |
| - | - | InboundIMDuration     |
| - | - | OutboundIMDuration    |
| - | - | InboundEmailDuration  |
| - | - | OutboundEmailDuration |

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