Cisco Unified Web and E-Mail Interaction Manager Supervisor's Guide

For Unified Contact Center Enterprise

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Preface

Welcome to Cisco® Interaction Manager™, multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A unified suite of the industry's best applications for web and email interaction management, it is the backbone of many innovative contact center and customer service helpdesk organizations.

Cisco Interaction Manager includes a common platform and one or both of the following applications:

- Cisco Unified Web Interaction Manager (Unified WIM)
- Cisco Unified E-Mail Interaction Manager (Unified EIM)

About This Guide

Cisco Unified Web and E-Mail Interaction Manager Supervisor's Guide introduces you to the supervision tasks that can be performed in the application. It introduces the Supervision Console and helps you understand how to use it to accomplish your agent and queue monitoring tasks. The guide also talks about additional supervision tasks, like reviewing content of outbound emails, monitoring chat activities, etc., that are done from the Agent Console.

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
Italic	Emphasis. Or the title of a published document.
Bold	Labels of items on the user interface, such as buttons, boxes, and lists. Or text that must be typed by the user.
`Monospace`	The name of a file or folder, a database table column or value, or a command.
Variable	User-specific text; varies from one user or installation to another.

Document conventions

Other Learning Resources

Various learning tools are available within the product, as well as on the product CD and our web site. You can also request formal end-user or technical training.

Online Help

The product includes topic-based as well as context-sensitive help.

Use	To view
Help button	Topics in *Cisco Unified Web and E-Mail Interaction Manager Help*; the Help button appears in the console toolbar on every screen.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Online help options

Document Set

The Cisco Unified Web and E-Mail Interaction Manager documentation is available in the `Documents` folder on the product CD. The latest versions of all Cisco documentation can be found online at http://www.cisco.com

- All Unified EIM documentation can be found online at http://www.cisco.com/en/US/products/ps7236/tsd_products_support_series_home.html
- All Unified WIM documentation can be found online at http://www.cisco.com/en/US/products/ps7233/tsd_products_support_series_home.html
- In particular, Release Notes for these products can be found at http://www.cisco.com/en/US/products/ps7236/prod_release_notes_list.html
- For general access to Cisco Voice and Unified Communications documentation, go to http://www.cisco.com/en/US/products/sw/voicesw/tsd_products_support_category_home.html

The document set contains the following guides:

- *Cisco Unified Web and E-Mail Interaction Manager Hardware and System Software Specification*
- *Cisco Unified Web and E-Mail Interaction Manager Installation Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*

User guides for agents and supervisors

- *Cisco Unified Web and E-Mail Interaction Manager Agent's Guide*
- *Cisco Unified Web and E-Mail Interaction Manager Supervisor's Guide*

User guides for Knowledge Base managers and authors

- *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author's Guide*

User guides for administrators

- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Routing and Workflows*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Chat and Collaboration Resources*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Email Resources*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Offers Console*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Data Adapters*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Reports Console*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to System Console*
- *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Tools Console*

1 Console Basics

A highly specialized workspace for supervisors, the Supervision Console lets you create real-time monitors to observe queues, user groups, and individual users. Additional supervision tasks, like reviewing content of outbound emails, monitoring chat activities, etc. are done from the Agent Console.

Key Terms and Concepts

Supervision Console

In the Supervision Console you can create monitors to observe the functioning of three types of business objects in the system: Queues, User groups, and Users.

Monitors

A monitor provides various perspectives on the information it tracks by presenting it in the form of tables, as well as pie and bar charts.

While setting up a monitor you can:

- Configure it to run automatically, manually, or automatically whenever you are logged in to the system.
- Select the objects and their attributes that you want monitored.
- Create messages and alerts that are sent to specified recipients when certain conditions are met.

Note: The process of monitoring queues, user groups, and users mapped to Unified CCE objects is the same as monitoring regular Unified EIM and WIM objects. The attributes available for monitoring are the ones managed through Unified EIM and WIM.

Related User Roles

All users, including supervisors, are created in the Administration Console. Two roles are provided for supervisors:

- **Supervisor**
- **Supervisor (Read Only)**

In this section we list the actions that users who are assigned these roles are allowed to perform. Permissions to perform allowed actions on specific objects are administered for each user. To learn more about managing users, see *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

Supervisor Role

The following table lists the actions that are part of the default Supervisor role that are required to perform various supervisor tasks in the Agent Console, Supervision Console, and Reports Console.

Object	Actions permitted
System Resource	View Agent, View Reports, View Supervision **Note:** These actions provide access to the Agent Console, Reports Console, and Supervision Console
Report	Create, Delete, View, Run, Edit, Schedule **Note:** With these actions, users can manage reports from the Reports Console.
Monitor	Create Edit, Delete, Run **Note:** With these actions, users can manage monitors from the Supervision Console.
Activities	Create, Print, Edit Subject, Pin, Complete, Edit, Transfer Activities, Unpin, Add Greetings, Add Header, Add Attachment, Add Folder, Add Signature, Assign Classification **Additional actions available only in standalone installations:** Pull Activities, Pick Activities.
Case	Edit, Print, Close Case, Change Case, Create Case
Categories	View
Chat	Complete Chat Activity, Leave Chat Activity, Transfer Chat Activities, Monitor Chat Activity **Additional actions available only in standalone installations:** Pull Chat Activities **Note:** The following action enables the supervisor to monitor chats from the **My Monitor** node in the Agent Console: Monitor Chat Activity
Customer	View Association, Create Association, Edit Association, Delete Contact Person, Delete Contact Details, Delete Association, Edit Contact Details, Edit Contact Person, Change Customer, View, Edit, Delete, Create, Create Contact Details, Create Contact Person
Email	Resubmit supervised email, Reject emails for supervision, Accept emails for supervision Send Email, Send and Complete Email, Edit Reply To field, Edit Reply Type, Edit From field, Edit CC field, Edit BCC field, Edit To field **Note:** The following actions enable the supervisor to review outbound email activities (page 27): Resubmit supervised email, Reject emails for supervision, Accept emails for supervision
Email Attachment	Delete, Restore
Filter Folder	Create, Delete, Share Inbox Folder
KB Folder	View Folder, View Personal Folder, Suggest Article, Delete Notes, Create Agent Personal Folders, Add Notes, Manage Personal Folders
Macros	View
Notes	View, Add, Delete
Personal Dictionary	Personal Dictionary
Product Catalog	View
Resolution	View

Object	Actions permitted
Routing Queue	View, Transfer Activities **Additional actions available only in standalone installations:** Pull Activities
Saved Search	Edit, Create, Delete
Text Editor	Edit HTML source in reply pane, Edit HTML source for articles
Usage links	View, Execute
Users	View, Transfer Activities **Additional actions available only in standalone installations:** Pull Activities
Note: The following actions are part of the Supervisor role but can be used only if the “View Administration” action is explicitly added to the Supervisor role.	
Alias	Create, View, Edit, Delete
Blocked Address	Create, View, Edit, Delete
Blocked File Extension	Create, View, Edit, Delete
Delivery Exceptions	Create, View, Edit, Delete
Chat Entry Point	Create, View, Edit, Delete
Chat Template Set (Not in use)	Create, View, Edit, Delete

Actions allowed by the Supervisor role

Supervisor (Read Only) Role

Object	Actions permitted
Activities	Print
Case	Print
Categories	View
Chat	Monitor Chat Activity
Customer	View Association, View
Filter Folder	Create, Delete
KB Folder	View Folder, View Personal Folder, Suggest Article
Macros	View
Monitor	Create Edit, Delete, Run
Notes	View
Product Catalog	View
Report	View, Run
Resolution	View
Routing Queue	View
System Resource	View Agent, View Reports, View Supervision
Text Editor	Edit HTML source in reply pane, Edit HTML source for articles
Usage links	View, Execute
Users	View

Actions allowed by the Supervisor (Read Only) role

Related Settings

Make sure that the following partition and department level settings are configure properly. For details about these settings, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

Settings at the Partition Level

There is one partition level setting that is configured for all departments in the partition. This setting can be configured only by the partition administrator. The setting is:

- Data capturing interval

Settings at the Department Level

There are six department level settings that can be configured for each department in the partition. These settings can be configured by administrators of individual departments. The settings are:

- Refresh interval (seconds)
- Number of activities to be monitored for service level
- Chat - SLA threshold interval (in seconds)
- Chat - Daily service level sample set definition
- Chat - My Monitor - Activity refresh interval (seconds)
- Chat - My Monitor - Max join load

Elements of the User Interface

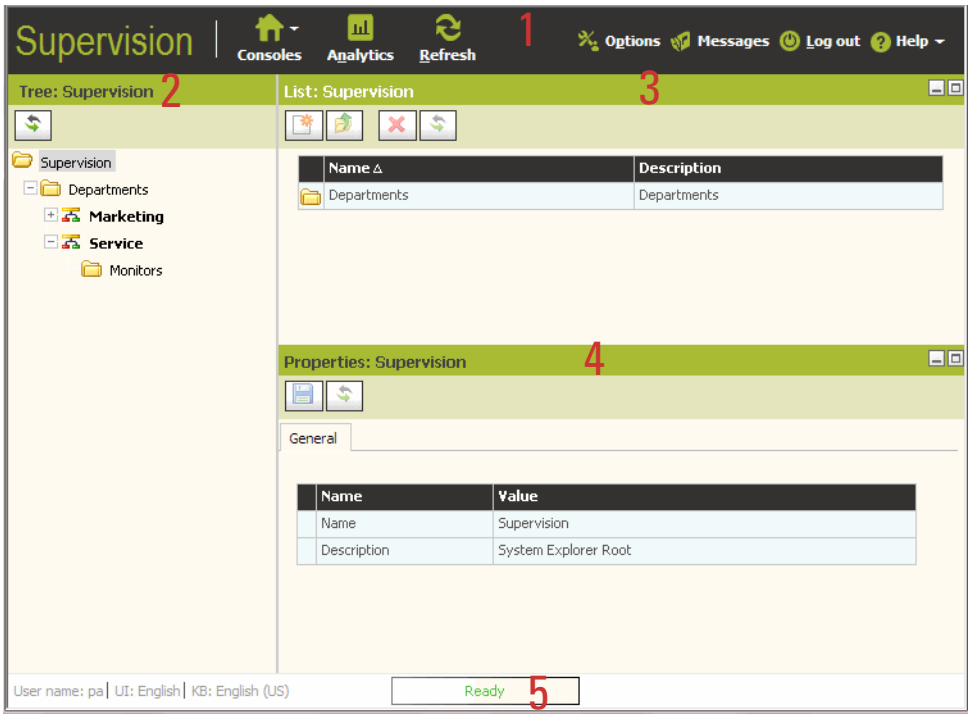
This section introduces you to the Supervision Console. To view the elements of the Agent Console, see the *Cisco Unified Web and E-Mail Interaction Manager Agent's Guide.*

To get to know the console user interface better, let us begin by dividing it into five functional areas:

1. **Console toolbar:** The main toolbar of the console appears at the top of the screen. It allows you to access some frequent commands with a single click.
2. **Tree pane:** The Tree pane displays a list of departments in the system and monitors in each department. From the Supervision tree, you can select a department and configure monitors to monitor users and queues in the department.

   To expand all first and second level nodes with a single click, shift + click the plus [+] button next to the topmost node. The contents of all first and second level nodes are displayed in the Tree pane.
3. **List pane:** The display on the List pane depends on selections made in the Tree pane. For example, if you select a department in the Tree pane, the List pane displays the list of monitors in that department.
4. **Properties pane:** The Properties pane displays properties of the item selected in the List pane. For example, if you select a monitor in the List pane, the Properties pane displays associated properties of that monitor, such as objects, attributes, and notifications. You can create monitors from the Properties pane and run them to supervise users, user groups, and queues in the system.
5. **Status bar:** The status bar is present at the bottom of every screen. It displays the following information:
   - The user name with which the user has logged in the system.
   - The language currently in use.

- The status of the system (**Loading, Ready,** etcetera).



Elements of the console user interface

2 Monitors

About Monitors

Supervision Console monitors enable you to observe the functioning of three types of business objects in the system:

1. Queues
2. User groups
3. Users

   For each business object, you can select a number of attributes for monitoring. Monitors display real time information, which is automatically refreshed every 30 seconds.

> Note: The process of monitoring queues, user groups, and users mapped to Unified CCE objects is the same as monitoring regular Unified EIM and WIM objects. The attributes available for monitoring are the ones administered through Unified EIM and WIM.

Monitors are applicable to both standalone and integrated systems. In integrated systems, the following exceptions exist:

- Monitors do not support integrated user groups that are mapped to Unified CCE IPTA skill groups.
- Monitors do not detect integrated agent availability. All integrated users are considered available based on the availability checkbox in the Agent Console being selected, and the agent's concurrent task volume being within permissible limits, the second of which can only be detected within Unified CCE.

Queue Attributes

You can monitor the following attributes of a queue.

- **Queue ID:** The unique ID assigned to the queue, usually a number.
- **Queue name:** Name of the queue.
- **Queue status:** Status of the queue. The status of the queue can be Active or Inactive.
- **Users - Number logged in:** Number of agents who are currently logged into the application and can be assigned activities from the queue. These are the agents who have pull permission on the queue and agents to whom email activities can be assigned or transferred from the queue.

Chat activity attributes:

- **Chat - Current service level (%):** Number of serviced sessions currently in progress, which were picked up before the threshold setting configured for the department / Total number of serviced sessions currently in progress * 100.
- **Chat - Daily service level (%):** Chats answered before service level setting / sample set of chats completed on the day, till that point of time * 100
- **Chat - Number in progress:** Number of chat activities assigned to agents and are being worked on (Status: Assigned- In Progress).
- **Chat - Number not started:** Number of chat activities assigned to agents, but on which work has not yet started (Status: Assigned - New).

- **Chat - number of agents available:** Number of agents who are logged in and 'Available', who can either be assigned chat activities from the queue or can pull activities from the queue, and whose Chat - User max load setting is not exceeded.
- **Chat - Number unassigned:** Number of unassigned chat activities in the queue (Status: Assignment - Ready for Internal assignment).
- **Chat - Oldest in progress:** Age of the oldest chat activity in the queue - where the activity has been assigned and been worked upon (activity status 'Assigned-In Progress'). If your calender is set in business hours it does not effect this column.
- **Chat - Oldest not assigned:** Age of the oldest chat activity in the queue, where the activity has not been assigned (activity status 'Assignment-Ready for Internal assignment') If your calender is set in business hours it does not effect this column.
- **Chat - Oldest not started:** Age of the oldest chat activity in the queue, where the activity has been assigned but has not been worked on (Status: 'Assigned-New'). If your calender is set in business hours it does not effect this column.

Email activity attributes:

- **Email - Number in progress:** Number of email activities assigned to agents and being worked on (Status: Assigned- In Progress).
- **Email - Number in wrapup:** Number of email activities assigned to agents and being wrapped up (Status: Assigned- Wrap Up).
- **Email - Number not started:** Number of email activities assigned to agents, but on which work has not yet started (Status: Assigned - New).
- **Email - Number unassigned:** Number of unassigned email activities in the queue. (Status: Assigned - Ready for Internal assignment)
- **Email - Oldest not started [hhh:mm]:** Age of the oldest email activity in the queue, where the activity has been assigned but has not been worked on (Status: Assigned - New). Age = Current date - created on date.

Important: **Age is not calculated in business hours.**

- **Email - Service Level:** This is calculated by using two configured items: sample size and response time limit. It indicates the percentage of emails for which response was sent before the time limit elapsed. (This does not include auto-acknowledgments).

Task attributes:

- **Task - Number in progress:** Number of tasks assigned to agents and being worked on (status as assigned; substatus as in progress).
- **Task - Number in wrapup:** Number of tasks assigned to agents and being wrapped up (status as assigned; substatus as wrap up).
- **Task - Number not started:** Number of tasks assigned to agents, but on which work has not yet started (status as assigned; substatus as not started).
- **Task - Number unassigned:** Number of unassigned tasks in the queue.
- **Task - Oldest not started [hhh:mm]:** Age of the oldest task activity in the queue, where the activity has been assigned but has not been worked on (Status: Assigned - New). Age = Current date - created on date.

> **Important: Age is not calculated in business hours**

The monitor window shows this information in the form of tables, bar charts, and pie charts.

The bar chart for queues is available only when the following attributes are selected for monitoring:

- Queue name
- Users - Number logged in
- Email - Service level
- Email - Oldest not started

The pie charts for queues are available only when the following attributes are selected for monitoring:

- Queue name
- Email - Number in progress
- Email - Number in wrapup
- Email - Number unassigned
- Email - Number not started

User Group Attributes

You can monitor the following attributes of a user group.

- **User group name:** Name of the user group.
- **User group ID:** The unique ID assigned to the user group, usually a number.

Chat activity attributes:

- **Chat - Assigned and in progress:** Number of chat activities assigned to the agents of the group and which are being worked on (Status: Assigned - In progress).
- **Chat - Assigned but not started:** Number of chat activities assigned to the agents of the group, but on which work has not yet started (Status: Assigned - New).
- **Chat - Available agents:** Number of agents logged in and available to handle chats.

Email activity attributes:

- **Email - Assigned and in progress:** Number of email activities assigned to the agents in the group and being worked on (status as assigned; substatus as in progress).
- **Email - Assigned but not started:** Number of email activities assigned to the agents in the group, but on which work has not yet started (status as assigned; substatus as not started).
- **Email - Assigned but pending:** Number of email activities assigned to the group, but on which work is pending (status as assigned; substatus as pending).
- **Email - Number of users available:** Number of group members logged in and available to handle emails.

The monitor window shows this information in the form of tables and bar charts. The bar chart for user groups is available only when the **Email - Number of users available** attribute is selected for monitoring.

User Attributes

You can monitor the following attributes of a user.

- **User name:** Name of the user.
- **User ID:** The unique ID assigned to the user, usually a number.
- **User status:** Status of the user, whether the user is logged in or not.
- **First Name:** First name of the user to be monitored.
- **Last Name:** Last name of the user to be monitored.

Chat activity attributes:

- **Chat- Available to handle:** Is the agent available to handle chats: **Yes** or **No**.
- **Chat - Number in progress:** Number of chat activities assigned to agent and being worked on (Status: 'Assigned - In Progress'),
- **Chat - Number not started:** Number of chat activities assigned to agents, but on which work has not yet started (Status: ‘Assigned - New’).
- **Chat - Oldest in progress:** Age of the oldest open chat activity assigned to the agent and been worked upon (activity status 'Assigned-In Progress') If your calender is set in business hours it does not effect this column.
- **Chat - Oldest not started:** Age of the oldest open chat activity assigned to the agent but has not been worked on. (Status: 'Assigned-New') If your calender is set in business hours it does not effect this column.

Email activity attributes:

- **Email - Available to handle:** Is the agent available to handle emails: **Yes** or **No.**
- **Email - Number in progress:** Number of email activities assigned to this agent, which the agent is working on (Status: 'Assigned-In Progress').
- **Email - Number not started:** Number of email activities assigned to this agent, on which the agent has not yet started work (status: Assigned - New).
- **Email - Oldest in progress:** Age of the oldest email on which the agent is working (Status: Assigned-In Progress).
- **Email - Oldest not started:** Age of the oldest email on which the agent has not yet started work (Status: Assigned-New).

Task attributes:

- **Task - Available to handle:** Is the agent available to handle tasks: **Yes** or **No.**
- **Task - Number in progress:** Number of tasks assigned to this agent, which the agent is working on (Status: Assigned - In progress).
- **Task - Number not started:** Number of tasks assigned to this agent, on which the agent has not yet started work (Status: Assigned - New).
- **Task - Oldest in progress:** Age of the oldest task on which the agent is working (Status: Assigned - In progress).
- **Task - Oldest in wrapup:** Age of the oldest task on which the agent is wrapping up work (Status: Assigned - Wrap up).

- **Task - Oldest not started:** Age of the oldest task on which the agent has not yet started work (Status: Assigned - New).

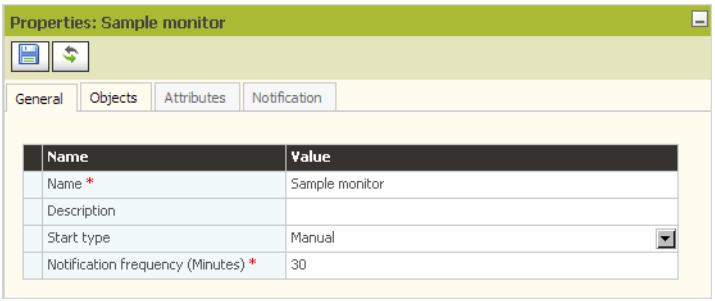
The monitor window shows this information in the form of tables and bar charts. The bar chart for users is available only when one of the following attributes are selected for monitoring along with the **User name** attribute:

- Email - Available to handle
- Email - Number in progress
- Email - Number not started

Configuring Monitors

To create a monitor:

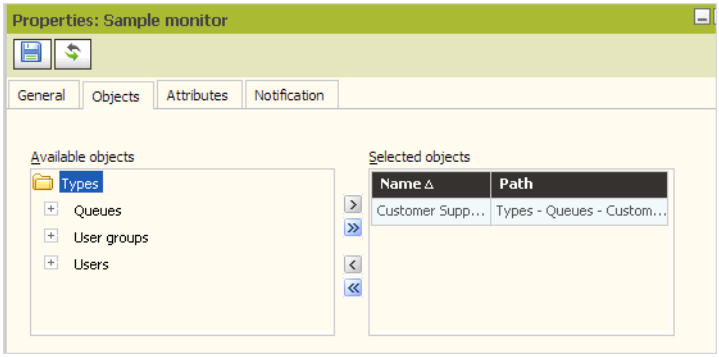
1. In the Tree pane, browse to **Supervision > Departments >** *Your department* **> Monitors.**
2. In the List pane toolbar, click the **New** button. The Properties pane refreshes to show the attributes of the new monitor.
3. In the Properties pane, on the General tab, provide the following details.
   - **Name:** Type a name for the monitor. This is required information.
   - **Description:** Provide a brief description.
   - **Start type:** From the dropdown list, select a start type for the monitor. The following three options are available.
     - **Automatic:** Monitor runs automatically and if notification conditions are met, sends alerts automatically at a fixed time interval, irrespective of whether the user, who created the monitor, is logged in or not. The default value of the time interval when alerts are sent is 60,000 milliseconds and can be set or modified at the respective back-end table. This setting cannot be set or modified from the UI.
     - **Manual:** Monitor has to started manually by the user who created the monitor.
     - **On log in:** The monitor starts automatically once the user who created the monitor logs in. And if the notifications conditions configured for the monitor are met the alerts are sent automatically.
   - **Notification frequency (Minutes):** Specify the time interval at which notifications should be sent when a condition specified in the monitor is met. The default value is set to 30 minutes.



Set general properties

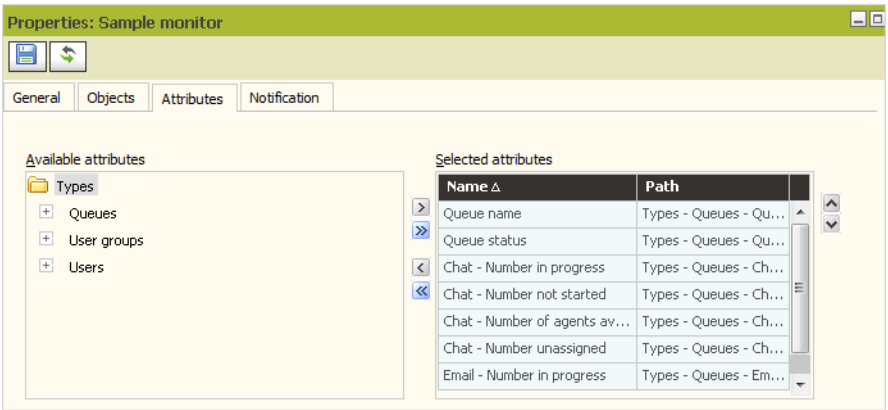
4. Next, go to the Objects tab and select objects to be monitored. Select from users, user groups, and queues. Once you select objects, the Attributes tab is enabled.

> **Important:** **The attribute tab is enabled only after you select the objects to be monitored.**



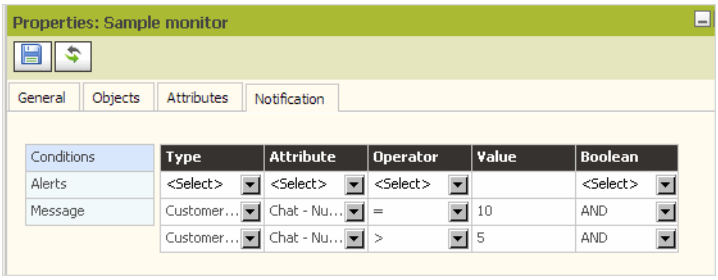
Select objects for monitoring

5. Next, go to the Attributes tab and select the attributes of the objects to be monitor. For detailed description of these objects, see "About Monitors" on page 17.



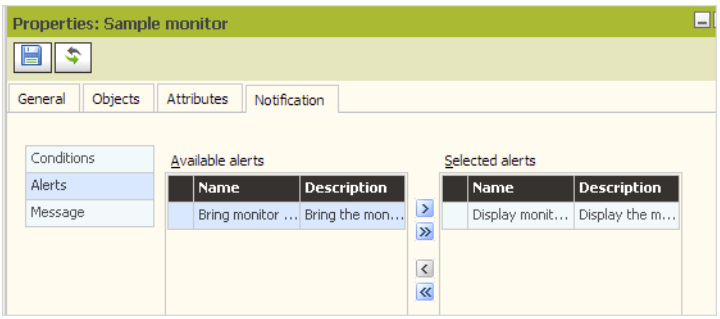
Specify attributes for monitoring

6. Click the **Save** button. The Notification tab is enabled when you save the monitor.
7. On the Notification tab, in the Conditions section, specify conditions for raising alerts and sending notifications. Only objects and attributes that you have selected are displayed. Once you specify the condition, the Alerts and Message sections are enabled.



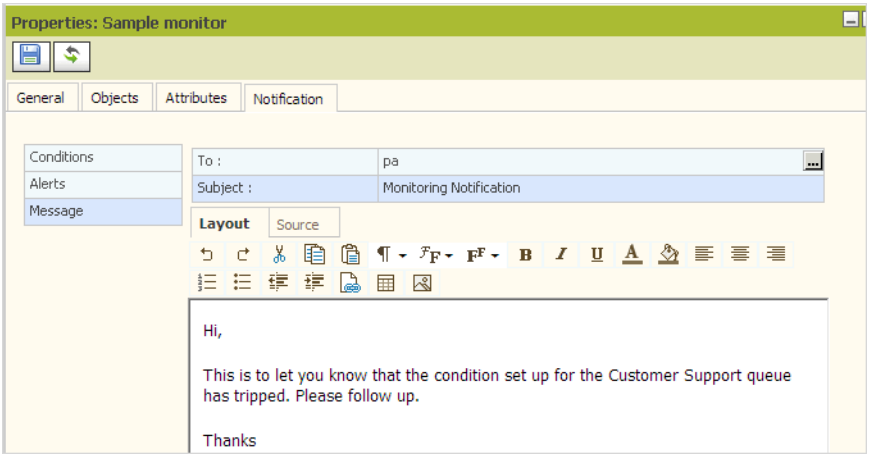
Create conditions

8. Next, in the Alerts section, configure how you want the monitor to be presented when an alert condition is met. Choose from one of the following:
   - Display monitor window
   - Bring monitor window to the front



Choose alerts

9. Lastly, on the Notification tab, in the Messages section, set up internal messages or emails to be sent when an alert condition is met. Specify the following:
   - The users to whom you want to send a message. You can send messages to internal user accounts or external email addresses.
   - The subject of the message.
   - The content of the message.



Create a custom message

10. Click the **Save** button.

Deleting Monitors

Delete the monitor if you don't want to use it any more.

To delete a monitor:

1. In the Tree pane, browse to **Supervision > Departments >** *Your department* **> Monitors.**
2. In the List pane, select the monitor you want to delete.
3. In the List pane toolbar, click the **Delete** button.

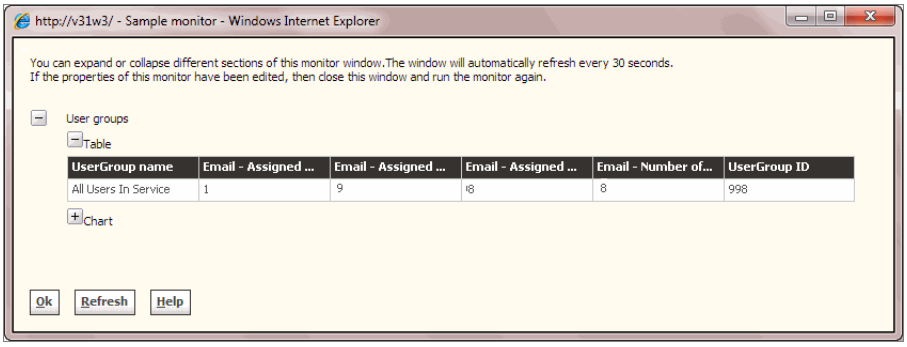
Starting Monitors

You can configure the monitor to keep running automatically all the time, or you can configure them to run automatically every time you log in to the application. If you don't want to run the monitors automatically, start them manually whenever you need them.

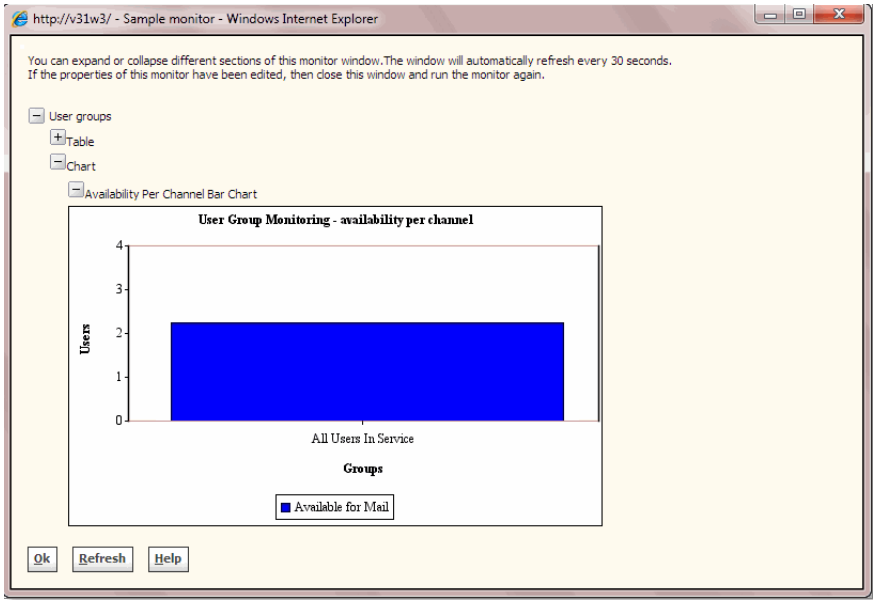
To start a monitor:

1. In the Tree pane, browse to **Supervision > Departments >** *Your department* **> Monitors.**
2. In the List pane, select the monitor you want to start.
3. In the List pane toolbar, click the **Start** button.

   The monitor appears in a new window. View the information in table or chart format or both. The display is refreshed after every 30 seconds.



A table in a monitor



A bar chart in a monitor

3 Activity Monitors

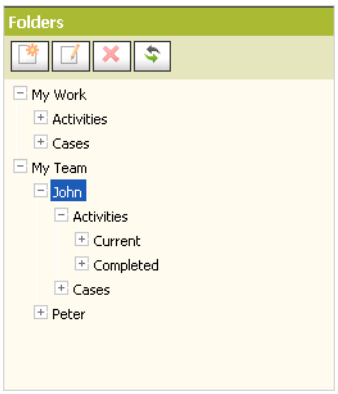
While the monitoring in the Supervision Console allows the supervisor to get an overview of the workload and service level adherence of various queues and users, the monitoring from the Agent Console allows you to review on-going work of the agent. As a manager of a team, you get a read-only view of the inbox of the agents that report to you. You may also receive some special emails that need to be reviewed to check the quality of outgoing emails. And, you can monitor chats, and join the chat sessions, if required.

Reviewing Team Work

As the manager of your team, you get a read-only view of the inbox of the agents who report to you. The agents inboxes can be viewed from the My Team folder of the inbox. You can view the open and completed activities and cases in the agent's inbox. This enables you to track the performance of the agents working on activities.

To review the team's work:

1. In the Inbox Folder pane, browse to the **My Team** folder.
2. Select the agent whose inbox you want to see.
3. Browse to the **Activities > Current** and **Completed** folders to view the activities assigned to the agent and the activities completed by the agent.
4. Browse to the **Cases > Open** and **Closed** folders to view the open cases assigned to the agent and the cases closed by the agent.



View the team's inboxes

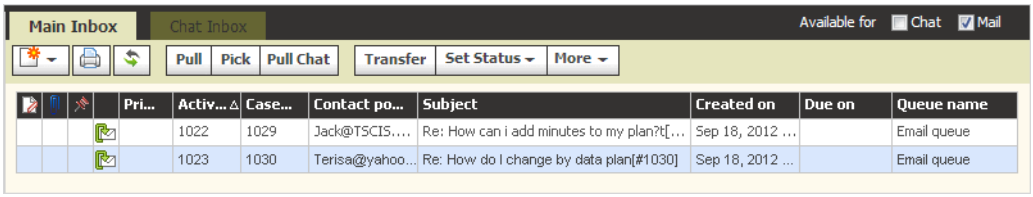
Reviewing Outbound Email Activities

You may be a supervisor whose responsibilities include reviewing the content of outgoing emails. The system allows administrators to create an outbound workflow to facilitate this, in the form of a supervisory loop. Email activities can be processed through this workflow before they are sent out of the system.

When an agent for whom this workflow has been configured clicks the **Send** or **Send and Complete** button, the reply, based on conditions, is sent to a queue from where you can pull the activity.

You can accept the reply, thus sending the email to the customer, or reject it, returning it to the original agent for revision. Reviewers can edit replies, modify attachments and provide feedback to the agent as part of this process.

In the Main Inbox, activities that are part of the supervisory loop are identified with the **Supervisory activity** icon. Supervisors who can accept and reject emails see a new type of activity in their inbox with this icon. The Reason for last action column displays the following value: Assigned for supervision.



Supervisory activity in inbox

Accepting Email Activities

To accept an activity:

1. Select the activity in the inbox.
2. In the Reply pane toolbar, click the **Accept** button.

   The reply is sent out of the system. Depending on the action performed by the initial agent (**Send** or **Send and Complete**), the activity may be completed when you accept the reply.

   As a supervisor of the activity, you can modify the text, or the attachments, and these changes are reflected in the reply that is sent to the customer. It is recommended that if you do make changes, you reject the reply and send it back to the agent for re-submission. This ensures that the agent receives appropriate feedback and is able to improve the quality of out going emails.

Rejecting Email Activities

To reject an activity:

1. Select the activity in the inbox.
2. Attach a note by clicking the **Notes** button. In some panes, **Notes** is available as an option in the **More** button.
3. In the Reply pane toolbar, click the **Reject** button.

   The reply is not sent out of the system, and a new activity is sent back to the agent. The activity is tagged as a supervisory activity in the agent's inbox.

Monitoring Chats

About Chat Monitors

The chat monitoring feature, available to users with the appropriate permission, helps supervisors or managers to review how well agents handle chat interactions and view the quality of the responses they send. You can either monitor each agent individually or monitor selective queues and the chats coming through them. You can even provide guidance and assistance by joining the chat sessions.

While the monitoring in the Supervision Console allows the supervisor to get an overview of the workload and service level adherence of various queues and users, the monitoring from the Agent Console allows you to review on-going chat sessions and join them, if required. Users who are assigned the action, Monitor Chat Activity, can monitor chats from the **My Monitor** node in the Agent Console. You can monitor all the users and queues that you have been given permission to view.

In the **Monitor** folder, you can view the following attributes of the chats.

1. **Screen name**: The screen name of the agent handling the chat.
2. **Queue name:** The name of the queue from which the chat came to the agent.
3. **Activity ID:** The activity ID of the chat.
4. **Customer name**: The name of the customer.
5. **Activity duration:** The duration of the chat.
6. **Substatus:** The substatus of the chat.
7. **Notes:** If there is a note added to the activity, a Note icon is shown in the list pane.
8. **Join indicators:** Two distinct icons, Joined and Not Joined, are used to indicate if you have joined the chat or not.

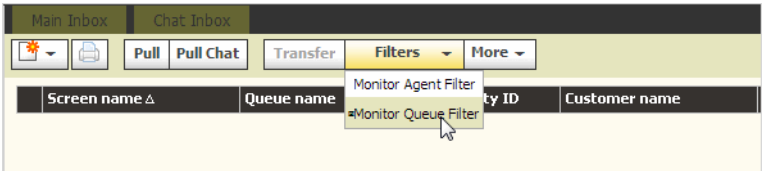
Monitoring Chats

To monitor a chat:

1. In the **Folders** tree pane, browse to **My work > Activities > My Monitor**.

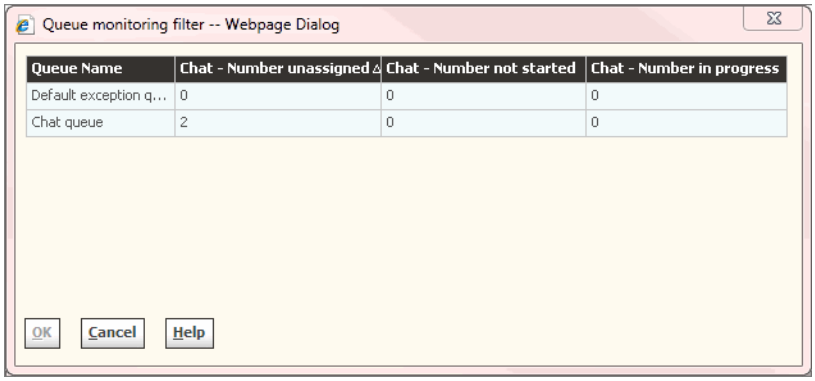
   Important: **You can only monitor queues and users that you have been given permission to view.**

2. In the list pane toolbar, from the **Filters** multi-button, select if you want to monitor queues or agents.



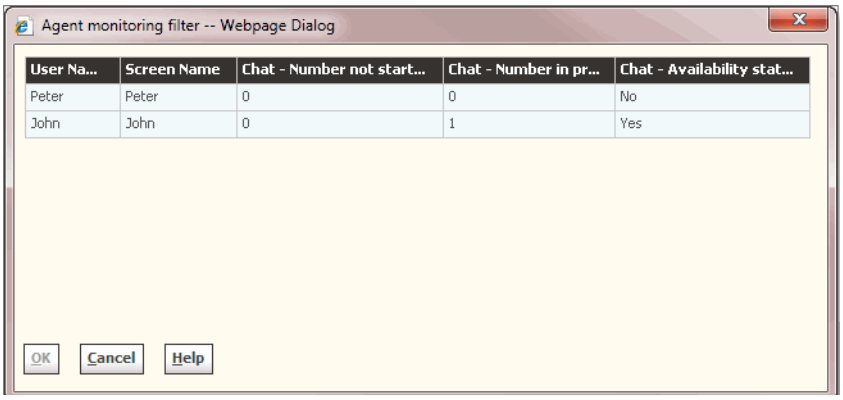
Select an object for monitoring

3. If you select the **Monitor Queue Filter** option, the Queue monitoring filter window opens and from here you can select the queue you want to monitor. Before selecting the queue you can view the number of activities in the queue that are unassigned, not started, and are in progress.



Select a queue for monitoring

4. If you select the **Monitor Agent Filter** option, the Agent monitoring filter window opens and from here you can select the agent you want to monitor. Before selecting the agent you can view the agent's screen name, if he has made himself available for handling chats, number of chats that are in progress, and number of chats on which he hasn't started working yet.



Select an agent for monitoring

If you have selected a user for monitoring, then in the List pane you can view the chats assigned to the user. And if you have selected a queue, then you can view the chats coming through the queue.

5. In the list pane, select the activity you want to monitor. The transcript of the chat appears in the Chat pane. The transcript in the Chat pane is refreshed automatically at specific time intervals.

   When you select a chat activity for monitoring, the Information pane is disabled and only the **Join** button in the Chat pane is enabled. You can silently monitor chat activities without joining them. If you wish to participate in an ongoing session, you can join the chat easily.

6. To join the chat, click the **Join** button in the Chat pane toolbar. The number of chat activities that you can join as a supervisor is determined by a setting configured by your administrator. For Blended collaboration type activities, you can join the chat portion of the interaction, but not the telephone conversation.

Important: **When you join a chat, no system message is sent to the agent or the customer to inform them that you have joined.**

Once you join a chat, the **Join** button is disabled, and all other buttons in the Chat pane are enabled. The Information pane is also enabled. The web page being viewed by the agent appears in the Page Push section of the Information pane. You can now send messages and web pages to the customer.

7. You can join a chat only after the agent to whom the chat is assigned has started chatting with the customer. You can also join chat sessions at the point at which the agent has left the chat session as long as the customer has not exited the chat. You can transfer, complete, or leave chat activities. To rejoin a chat, click the **Join** button.