



Cisco Interaction Manager Administration Console User's Guide

Release 4.1(1)
January 2007

Corporate Headquarters

Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
<http://www.cisco.com>
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 526-4100



THE SPECIFICATIONS AND INFORMATION REGARDING THE PRODUCTS IN THIS MANUAL ARE SUBJECT TO CHANGE WITHOUT NOTICE. ALL STATEMENTS, INFORMATION, AND RECOMMENDATIONS IN THIS MANUAL ARE BELIEVED TO BE ACCURATE BUT ARE PRESENTED WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. USERS MUST TAKE FULL RESPONSIBILITY FOR THEIR APPLICATION OF ANY PRODUCTS.

THE SOFTWARE LICENSE AND LIMITED WARRANTY FOR THE ACCOMPANYING PRODUCT ARE SET FORTH IN THE INFORMATION PACKET THAT SHIPPED WITH THE PRODUCT AND ARE INCORPORATED HEREIN BY THIS REFERENCE. IF YOU ARE UNABLE TO LOCATE THE SOFTWARE LICENSE OR LIMITED WARRANTY, CONTACT YOUR CISCO REPRESENTATIVE FOR A COPY.

The Cisco implementation of TCP header compression is an adaptation of a program developed by the University of California, Berkeley (UCB) as part of UCB's public domain version of the UNIX operating system. All rights reserved. Copyright © 1981, Regents of the University of California.

NOTWITHSTANDING ANY OTHER WARRANTY HEREIN, ALL DOCUMENT FILES AND SOFTWARE OF THESE SUPPLIERS ARE PROVIDED "AS IS" WITH ALL FAULTS. CISCO AND THE ABOVE-NAMED SUPPLIERS DISCLAIM ALL WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THOSE OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT OR ARISING FROM A COURSE OF DEALING, USAGE, OR TRADE PRACTICE.

IN NO EVENT SHALL CISCO OR ITS SUPPLIERS BE LIABLE FOR ANY INDIRECT, SPECIAL, CONSEQUENTIAL, OR INCIDENTAL DAMAGES, INCLUDING, WITHOUT LIMITATION, LOST PROFITS OR LOSS OR DAMAGE TO DATA ARISING OUT OF THE USE OR INABILITY TO USE THIS MANUAL, EVEN IF CISCO OR ITS SUPPLIERS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

CCSP, CCVP, the Cisco Square Bridge logo, Follow Me Browsing, and StackWise are trademarks of Cisco Systems, Inc.; Changing the Way We Work, Live, Play, and Learn, and iQuick Study are service marks of Cisco Systems, Inc.; and Access Registrar, Aironet, ASIST, BPX, Catalyst, CCDA, CCDP, CCIE, CCIP, CCNA, CCNP, Cisco, the Cisco Certified Internetwork Expert logo, Cisco IOS, Cisco Press, Cisco Systems, Cisco Systems Capital, the Cisco Systems logo, Cisco Unity, Empowering the Internet Generation, Enterprise/Solver, EtherChannel, EtherFast, EtherSwitch, Fast Step, FormShare, GigaDrive, GigaStack, HomeLink, Internet Quotient, IOS, IP/TV, iQ Expertise, the iQ logo, iQ Net Readiness Scorecard, LightStream, Linksys, MeetingPlace, MGX, the Networkers logo, Networking Academy, Network Registrar, Packet, PIX, Post-Routing, Pre-Routing, ProConnect, RateMUX, ScriptShare, SlideCast, SMARTnet, StrataView Plus, TeleRouter, The Fastest Way to Increase Your Internet Quotient, and TransPath are registered trademarks of Cisco Systems, Inc. and/or its affiliates in the United States and certain other countries.

All other trademarks mentioned in this document or Website are the property of their respective owners. The use of the word partner does not imply a partnership relationship between Cisco and any other company. (0502R)

Any Internet Protocol (IP) addresses used in this document are not intended to be actual addresses. Any examples, command display output, and figures included in the document are shown for illustrative purposes only. Any use of actual IP addresses in illustrative content is unintentional and coincidental.

Cisco Interaction Manager Administration Console User's Guide
© 2007 Cisco Systems, Inc. All rights reserved.

Contents

Preface	8
About this guide	9
Document conventions	9
Other learning resources	10
Online help	10
Document set.	10
Chapter 1: Console basics	11
Key terms and concepts	12
Console	12
System and business areas	13
Partition.	13
Department	14
User type.	14
User levels	14
User roles	15
Standard users	15
User groups	15
Important tasks	15
Elements of the user interface.	16
Chapter 2: Partitions	17
Installing new partitions	18
Configuring settings	18
Creating user roles	18
About the Partition administrator role	19
Creating user groups	21
Creating users	22
Assigning permissions	24

Chapter 3: Departments26

- Available resources 27
 - Archive jobs 27
 - Calendars 27
 - Classifications 28
 - Dictionaries 28
 - Email infrastructure 28
 - Integration links 29
 - Macros 29
 - Products 30
 - Settings 30
 - Users 30
 - Workflows 31
- Creating departments 31
- Copying departments 32

Chapter 4: Users34

- User roles 35
 - Actions 36
 - What are the actions assigned to the default roles? 36
 - Administrator 36
 - Agent 38
 - Agent (Read Only) 39
 - Author 40
 - Supervisor 40
 - Supervisor (Read Only) 41
- Creating user roles 42
- Creating user groups 43
- Creating users 45

Chapter 5: Business calendars.....47

- Setting the time zone 48
- Daylight saving changes 49
- Creating shift labels 49

Deleting shift labels	50
Creating day labels	51
Deleting day labels	52
Creating business calendars	52
Deleting business calendars	54
Chapter 6: Email infrastructure	55
Creating aliases	56
Configuring Blocked addresses	58
Configuring blocked file extensions	58
Configuring delivery exceptions	59
Chapter 7: Chat infrastructure	60
Managing entry points	61
Creating entry points	61
Deleting entry points	63
Viewing HTML code for entry points	63
Testing entry points	63
Enabling page pushing	64
Setting up transcripts and notifications	65
Sending serviced chat transcripts	65
Sending abandoned chat transcripts	67
Setting up notifications	69
Turning off active entry points	70
Managing template sets	70
Creating template sets	71
Setting up quick links and responses in queues	76
Configuring quick links	76
Configuring quick responses	76
Mapping users to queues for routing Chats	77
Routing chats transferred from other departments	77

Chapter 8: Other resources79

- Classifications 80
 - Creating categories 80
 - Deleting categories 80
 - Creating resolution codes 81
 - Deleting resolution codes 81
- Dictionaries 81
 - Choosing a default dictionary 82
 - Creating dictionaries 82
- Macros 82
 - Creating business object macros 83
 - Creating combination macros 83
 - Deleting macros 84
- Products 84
 - Creating product catalogs 84
 - Deleting product catalogs 85

Chapter 9: Workflows86

- Creating queues 87
- Deleting queues 91
- Creating service levels 91
- Creating workflows 92
 - Workflow designer 92
 - Workflow types 94
 - Alarm workflows 94
 - General workflows 95
 - Inbound workflows 95
 - Outbound workflows 97
 - Creating any workflow 97
 - Creating an alarm workflow 97

Chapter 10: Managing archive99

- About archiving 100
 - What can you archive? 100

Archive jobs	100
Who can manage archive jobs?.....	101
Archive criteria	101
Planning the schedule of archive jobs.....	102
Job runs	102
Purging	103
Managing archive jobs	104
Creating archive jobs	104
Deleting archive jobs	106
Managing job runs	106
Viewing job runs.....	106
Stopping job runs	107
Restarting job runs	107
Purging archived data	108

Preface

- ▶ [About this guide](#)
- ▶ [Document conventions](#)
- ▶ [Other learning resources](#)

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

About this guide

Cisco Interaction Manager Administration Console User’s Guide introduces you to the Administration Console and helps you understand how to use it to set up and manage various business resources.

Document conventions

This guide uses the following typographical conventions.


Convention	Indicates
<i>Italic</i>	Emphasis, or the title of a published document.
Bold	The label of an item in the user interface, such as a field, button, or tab.
Monospace	A file name or command. Also, text that must be typed by the user.
<i>Variable</i>	User-specific text, which is supplied by the user.

Other learning resources

Various learning tools are available within the product, as well as on the product CD and our website. 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	All topics in <i>Cisco Interaction Manager Help</i> ; the Help button appears in the console toolbar on every screen, as well as on most windows.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Document set

For more information about Cisco Interaction Manager, see the following documents. They can be found in the **Documents** folder on the product CD.

- ▶ *Cisco Interaction Manager System Requirements*
- ▶ *Cisco Interaction Manager Installation Guide*
- ▶ Other Cisco Interaction Manager user's guides

1 Console basics

- ▶ [Key terms and concepts](#)
- ▶ [Important tasks](#)
- ▶ [Elements of the user interface](#)

The Administration Console is the main management console in the system. It is designed to help managers set up various business entities such as users and resources such as calendars, workflows, and email aliases.

Key terms and concepts

Console

Cisco Interaction Manager has seven user work spaces, or consoles. The consoles are part of the core Cisco Interaction Manager Platform and are present in every installation, irrespective of the number of products deployed. However, the features available in each console vary from one installation to another as they are determined by settings and the products and modules installed. Every installation has:

- ▶ One service console
 - Agent Console
- ▶ One authoring console
 - Knowledge Base Console
- ▶ Five management consoles
 - Administration Console
 - Reports Console
 - Supervision Console
 - System Console
 - Tools Console

The consoles serve a simple function—to make it easy for target users to perform their daily tasks. Each console is designed by the Cisco usability team to be a specialized work area for a specific set of interaction hub users such as agents, knowledge authors, supervisors, managers, business analysts, system administrators, and programmers.

As the consoles are completely web-based, users can access them from any machine with a web browser if they have access to:

- ▶ the Internet
- ▶ their company's Cisco Interaction Manager installation

System and business areas

Broadly speaking, the installation has two areas:

- ▶ **System area:** Used by system administrators to set up and manage system resources such as host machines and services. It has two consoles:
 - Administration Console
 - System Console

Very few users need access to this area, as it is used to perform only system administration tasks.

- ▶ **Business area:** The main part of the installation, used by business users to perform their tasks. It has all seven consoles.

Partition

A partition contains system and business resources for a completely independent business unit or client. A single Cisco Interaction Manager installation can have one or more partitions. With multiple partitions, you can use the same system in various independent business units—while the hardware and software is common, resources are stored and managed separately for each unit.

Partitions are ideal for organizations where business units (or clients, in the case of an out sourced business) do not need to share customer information or knowledge base. This is usually the case if the units serve very different customers. For example, a bank, which serves individual retail consumers as well as corporations, may want two partitions as the product offerings and customer service needs for these segments are different. Partitions can also be used for different geographies. The same bank, to continue with our example, may choose to use separate partitions for their US and China businesses because of legal and regulatory needs.

When Cisco Interaction Manager is installed, the first partition is created by the installation program. Additional partitions can be created using the Custom installation option of the installation program.

You could set up additional partitions if you:

- ▶ Want complete segregation of data between business units in your enterprise.
- ▶ Are an outsourcer or application service provider and want to serve multiple customers from a single installation.

Setting up additional partitions is not very common. If you are still not sure whether you need partitions, you probably don't need them.

Department

Each partition can have one or more departments. While partitions do not share system resources or business objects, departments within a partition share system resources and—if required—specific business resources. Departments are suited for organizations where units would like to share system resources and a few business resources such as customer information or agents. Cisco Interaction Manager has a number of tools for configuring and managing access to various resources.

When Cisco Interaction Manager is installed, the first department in the first partition is created by the installation program. This department is called `Service`. You can rename it if you like.

You can create additional departments to:

- ▶ Mirror your company's organization.
- ▶ Create units with independent business processes.
- ▶ Allow limited sharing of information between largely independent unit.

Customer information can be shared across all departments. Other resources such as agents and activities can be shared between departments. Sharing of such resources is one-directional, which means that even if Department A shares its agents with Department B, Department B could decide not to share its agents with Department A.

User type

The system lets you create various types of user accounts. Some important concepts about user management are explained here.

User levels

Users can be created at three levels:

- ▶ System level user: This user is typically the system administrator of the system who does not require any license to operate.
- ▶ Partition level user: This is the partition administrator user who uses licenses to create administrators and users in the system.
- ▶ Department level users: These are users who require licenses to perform their tasks in the system. The licenses associated with the user may also differentiate between the roles of the users.

User roles

The system lets you define roles to make it easy to manage user permissions. A role is nothing but a set of permissible actions for various business resources. An agent's role, for instance, would include actions such as "View Agent Console," "Edit customer," and "Add notes." You can assign one or more roles to a group of users or an individual user. The system contains standard roles for eight types of users. You can edit these roles or create new ones.

Standard users

Two users are created during the installation:

1. **System Administrator:** The first system user, created during installation, is a user called **System Administrator**. Assigned the System Administrator role, this user sets up system resources and creates one or more system-level users.
2. **Partition Administrator:** The first business user, created during installation, is a user called **Partition Administrator**. Assigned the Partition Administrator role, this user manages partition users and settings and creates more partition users as well as one or more department-level users to manage department resources.

User groups

User groups are a collection of users that share similar functions or roles in the system. Groups make it much easier to manage user accounts. A standard user group called **All Users in *Department Name*** is created in each department. Every new user in the department is automatically included in this group.

Important tasks

All business resources are set up and managed in Administration Console. Some important tasks performed in this console involve managing:

- ▶ Department, queue, and user settings
- ▶ User accounts
- ▶ Business calendars
- ▶ Queues, service levels, and workflows
- ▶ Email aliases (if Cisco Unified Email Interaction Manager is installed)

- ▶ Chat queues and entry points (if Cisco Unified Web Interaction Manager is installed)
- ▶ Classification categories and resolution codes
- ▶ Dictionaries
- ▶ Macros
- ▶ Archive jobs

Elements of the user interface

The console user interface consists of 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 presents the knowledge base folders as a tree list, allowing you to select the node (folder) that you wish to work in. When you select a folder, its first-level contents—subfolders and articles—are displayed in the **List** pane. In the **Tree** pane, you can cut paste or copy paste folders, delete folders which you have created, manage bookmarks and print folder contents.

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 **List** pane displays first-level contents of the folder selected in the **Tree** pane. You can view the name, description, date of creation, etc., of the displayed items. Note that you can view only those columns that the administrator has permitted for display. In this pane, you can create items or select existing ones to modify or delete them.
4. **Properties pane:** The **Properties** pane displays the contents of the folder or article selected in the **List** Pane. In this pane, you can edit the properties of the selected item.
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).

2 Partitions

- ▶ [Installing new partitions](#)
- ▶ [Configuring settings](#)
- ▶ [Creating user roles](#)
- ▶ [Creating user groups](#)
- ▶ [Creating users](#)

Before you start creating the users, first you need to create:

- ▶ User groups
- ▶ Roles

Installing new partitions

Unlike other business objects, partitions cannot be created from the Administration Console. You have to install a new partition on your server. For detailed instructions on installing a partition, refer to the *Cisco Interaction Manager Installation Guide*.

Configuring settings

Settings are used to configure the system. There are two types of settings: department and partition settings. The partition administrator can configure department settings at the partition level. The changes in these settings get reflected throughout the partition, across all departments. For more information, see *Cisco Interaction Manager Administration Console Settings User's Guide*.

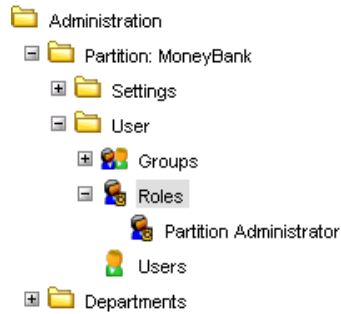
Creating user roles

User roles are a collection of actions defined by the system. You can assign one or more roles to users in the system. The system provides one default user role, that of the Partition Administrator, at the partition level. You can also create new roles for users at the partition level. User roles have a standard set of predefined actions that can be performed by users.

To create a user role:

1. Go to Administration Console when you log in as a partition administrator.
2. Click User in the partition Tree pane.

3. Go to Roles.



4. Click the New button in the List pane.
5. In the Properties pane, General tab, enter a name and description for the user role.

Name	Value
Name *	Overseer
Description	To help the administrator supervise the partition

6. Click the Relationships tab. Here you can assign Actions, Users, User groups, and User subareas from the Available list to the user role.
7. Click Save to save the newly created user role.

About the Partition administrator role

The partition level user is typically the partition administrator. The partition administrator manages the whole partition. New partition level users can be created by the partition administrator.

The partition administrators manage the partitions in the system. They can carry out various tasks such as:

- ▶ Create partition level roles, users, and user groups
- ▶ Set partition level settings
- ▶ Set department settings at partition level
- ▶ Create departments
- ▶ Create department administrators

The partition administrator assigns permissions to partition level as well as department level users to perform various tasks.

Resource Name	Actions Permitted
Administration Console	View
Supervision Console	View
Reports Console	View
System Console	View
Knowledge Base Console	View
Tools Console	View
User	Create, Own, View, Edit, Delete
User Group	Create, Own, View, Edit, Delete
Role	Create, View, Edit, Delete
Access Links	Create, View, Edit, Delete
Usage links	Create, Own, View, Edit, Delete, Execute
System Attribute Profiles	View, Edit
User Attribute Profiles	Create, View, Edit, Delete
Screen Attributes Profiles	View, Edit
Category	Create, View, Edit, Delete
Customer	Create, View, Edit, Delete, Change
Contact Person	Create, Edit, Delete
Contact Details	Create, Edit, Delete
Association	Create, View, Edit, Delete
Inbox Folder	Create, Delete
Notes	View, Delete
Resolution Codes	Create, View, Edit, Delete
Customer Associations	Create, View, Edit, Delete
Macro	Create, View, Edit, Delete
Product Catalog	Create, View, Edit, Delete
Business Objects	Create, View, Edit, Delete
Activity	Create, Edit, Complete, Pin, Print, Unpin Others, Assign Classification

Resource Name	Actions Permitted
Case	Edit, Print, Close, Unarchive
Monitors	Create, Edit, Delete, Run
Reports	Create, Delete, View, Run, Edit, Schedule
Queue	Create, Own, View, Edit, Delete
Workflow	Create, View, Edit, Delete
Settings	Create, View, Edit, Delete
Shift Label	Create, View, Edit, Delete
Day Label	Create, View, Edit, Delete
Calendar	Create, View, Edit, Delete
Dictionary	Create, View, Edit, Delete
Global Search	Create, Edit, Delete
Service Levels	Create, Read, Edit, Delete
Personal Search	Create
Alias	Create, View, Edit, Delete
Blocked Addresses	Create, View, Edit, Delete
Delivery Exceptions	Create, View, Edit, Delete
Blocked File Extensions	Create, View, Edit, Delete
Email	Send
Blocked Attachment	Restore
Incoming Attachment	Delete

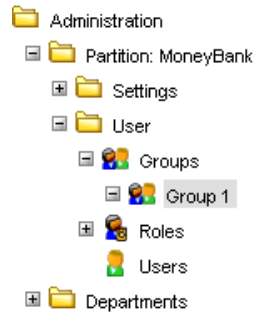
Creating user groups

As a partition administrator, you can create user groups in your partition. User groups enable you to assign similar user roles, actions and permissions to several users at once.

A user that belongs to a group automatically inherits the roles and the associated permissions that a particular group has been assigned. A user can be assigned to a group or may exist independently.

To create a user group:

1. Go to Administration Console when you log in as a partition administrator.
2. Click User in the partition Tree pane.
3. Go to Groups.



4. Click New in the List pane toolbar.
5. In the Properties pane, General tab, enter a name and description for the user group.

Name	Value
Name *	Group 1
Description	Partition level user group

6. Click the Relationships tab. Here you can assign Actions, User roles, User subroles, and Users from the Available list to the user group.
7. Click Save to enable Permissions tab.
8. Click Permissions tab. You can give permissions on the resources listed here to the user group. All these permissions will be applicable to all users belonging to this user group.
9. Click Save to save the newly created user group.

Creating users

To create a user:

1. Login to the application as a partition administrator. Go to the Administration Console.
2. In the Tree pane select, Administration > <partition name> > User > Users
3. In the List pane toolbar, click the New button.
4. In the Properties pane, Click the General tab.

5. In the General tab, click the General section.
6. In the General section, provide the following details:
 - Title
 - First name
 - Middle name
 - Last name
 - Suffix
 - User name: This is the name using which the user will login to the system. Every user in the application will have a unique user name. For example, if a user in one department has the name *Henry*, you can't have the user with the same name in another department.
 - Password:
 - User status: Select the user status. The Options are:
 - Enabled: Only enabled users can log in the system.
 - Disabled: Disabled users cannot log in to the system.
 - External assignment:
7. In the General tab, click the Business section.
8. In the Business section, provide the following business details:
 - Company
 - Division
 - Department
 - Job title
 - Email address
 - Work phone
 - Extension
 - Mobile number 1
 - Employment status
9. In the General tab, click the Personal section.
10. In the Personal section, provide the following personal details:
 - Home address
 - Home address cont.
 - Home city
 - Home state
 - Home zip code
 - Home phone

- Mobile number 2
- Secondary email address
- 11. In the General tab, click the Miscellaneous section.
- 12. In the Miscellaneous section, you can see who created the user and when was the user created. This information appears once you save the user, and it can't be edited.
- 13. In the Properties pane, Click the Relationships tab. Here you assign actions and roles to the users, and add them to user groups.
- 14. In the Relationship tab, click the User roles section.
 - From the available roles add the roles in the selected roles list. By default the Partition Administrator role is available. For details on how roles work and how to create them, see section on Roles.
- 15. In the Relationship tab, click the User groups section.
 - From the available groups add the group in selected groups list.
- 16. Click the Save button.
- 17. In the Relationship tab, click the Actions section. Here you will see that the actions associated with the role appear in the selected actions list. If you want to assign any explicit actions to the user you can do that here.
 - From the available actions add the actions in selected actions list. You can identify the explicit actions assigned to the users by looking at the Grant field in the selected actions list.
- 18. Click the Save button.

Assigning permissions

After you have created the user you need to assign permissions to them.

The following permissions can be given to the users:

- ▶ Permissions on departments:
 - Own
 - View
 - Edit
 - Administer
- ▶ Permissions on partitions
 - Own
 - View
 - Edit

- Administer
- ▶ Permissions on reports
 - View
 - Run
 - Edit
 - Delete
 - Schedule
- ▶ Permissions on users
 - Own
 - View
 - Edit
 - Delete
- ▶ Permissions on user groups
 - Own
 - View
 - Edit
 - Delete

Important: Permissions can be given only to the users and user groups who have appropriate actions assigned to them. When permissions are given to a user group, all users in that user group get those permissions automatically.

You can give permissions to the users in two ways:

- ▶ You can select each permission for each object individually.
- ▶ You can use the Select all button to give a permission on all the objects in one go.

For example: If you have to give a user View permission on all the departments, instead of selecting each department, you can select the permission, and use the Select all button to give permission to all the departments.

3 Departments

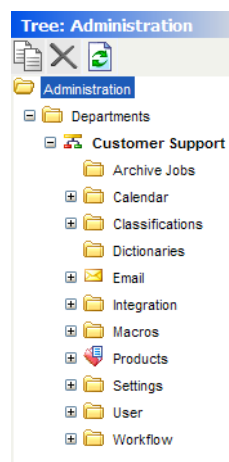
- ▶ [Available resources](#)
- ▶ [Creating departments](#)
- ▶ [Copying departments](#)

Every organization needs to form various departments to meet their requirements, and divide their workforce accordingly. Departments enable you to form a mirror of the departments in your company. The departments, and department administrators are created by the partition administrator. All departments that are created will be formed under a Partition. Following the hierarchical pattern, a partition level user will be able view all the departments under it. Whereas, a department level user can only view his own, and shared departments.

As a department administrator, you have the power to control, and manage your department. This is made possible via the resources available in each department.

Available resources

Each department has ten types of resources for use in your department. The Administration tree has an individual node for each type of resource.



The Administration Console tree

Archive jobs

Old activities can be archived by setting up scheduled or on-demand archive jobs.

Calendars

You can create a business calendar for your organization. It allows you to set up working and non working hours, and days for the employees in your department. To create your business calendar it is essential that you first create Shifts labels, and Day labels.

- ▶ **Shift labels:** According to the working hours of your company, you can organize various shifts for the agents in your department. It also allows you to create shifts for holidays, and extra working hours.
- ▶ **Day labels:** You assign time slots in Day labels, to the shifts that you have created in the Shift label. You cannot create Day labels, if you have not created Shift labels first. You need not assign any time slot to holidays.
- ▶ **Calendars:** Based on shift and day labels, you can create a business calendar for your department. You can use the day labels to form a calendar for the work days in a week. You can also specify exceptional days, such as, holidays, or an extra working day. Please note that you can have only one active calendar for each department.

Classifications

Classifications enable you to systematically categories the incoming activities, and knowledge base articles. There are two types of classifications available in this system:

- ▶ **Categories:** It enables you to categories incoming activities, using keywords or phrases. Thus, you can keep a track of all activities, and can easily find, sort, filter, or group them.
- ▶ **Resolution codes:** It enables you to categories knowledge base articles.

Dictionaries

Dictionaries refer to a list of words stored in the system for your reference. The system provides one default dictionary, on which the Spell checker application is based. Only one dictionary can be set as the default dictionary at a time. As a department administrator, you can change the default dictionary for your department as per your requirements. Users in our department can also create their own dictionaries, and save their own list of vocabulary in it.

Email infrastructure

All users in your department will require a contact point to correspond with the customers. Email enables you to create email addresses for the users in your department. It also restricts the types of emails, or attachments a user is allowed to receive or send. You can achieve this through various options available:

- ▶ **Aliases:** Aliases are email addresses that you create for the users in your department.
- ▶ **Blocked Addresses:** To avoid span mails, you can block certain email addresses.

- ▶ **Blocked File Extensions:** Many types of files can enter, or go out of your system in form of an attachment. You can block certain file extensions to stop certain types of files from either entering, going out of the system, e.g. files with.jpg extension.
- ▶ **Delivery Exceptions:** A delivery exception occurs when the system encounters problems either while receiving an email or while sending an email.

Integration links

You may need to access data from external sources, and Integration enables you to perform this function. It acts like a bridge between Cisco Interaction Manager, and external data sources. The data can be accessed through various mediums: phone, links, and data adapters.

Integration has two options available under data adapters:

- ▶ **Data Access Links:** Enables you to create links, to fetch data from external, or internal sources.
- ▶ **Data Usage Links:** Allows you to define the format in which you want to display the data fetched from external, or internal sources.

Macros

Macros are shortcuts to perform oft-repeated tasks, such as, inserting customer names in emails, etc. Macros save the response time of the customer queries. Instead of repeatedly typing the frequently used sentences, or phrases, the users can simply add the appropriate macro. When the mail reaches the customer, the macro expands into the whole text. Macros are classified as business object macros and combination macros.

You can create business object macros for:

- ▶ Activity data
- ▶ Case data
- ▶ Contact person data
- ▶ Contact point data
- ▶ Customer data
- ▶ Email address contact point data
- ▶ Phone address data
- ▶ Postal address data
- ▶ User data

- ▶ Website data

You can create combination macros with multiple definitions. That is, you can combine multiple macros within a single macro. Multiple macros can be selected from Business Objects macros to create a combination macro.

Products

Products allow you to efficiently manage, and organize the list of company's products. You can create a catalogue of all your products, and also attach files or web pages, and articles from the knowledge base. Thereby, providing more information regarding those products. This is helpful for agents, as they can use it to associate products with customers. This adds to the details of the customer, thereby enabling the agent to know and serve the customer better.

Settings

Settings are configurations, on the basis of which the installation functions. They follow a hierarchical pattern. Settings made at partition level cannot be reset at department level. Users at the department level can only make changes in the settings of the fields that are made available to them, by the partition administrator. The changes made in the department level settings will be reflected only the current department. You can also change the settings of the shared departments.

The department level allows you to make changes in the Department settings. It also allows you to create new settings group for queue and user.

Users

You can create users, and user groups for your department. You can also assign various roles to your users, depending upon the tasks that they perform. Thus, if a user is performing more than one task, you can assign more than one role to that user. There are a set of default user roles already created for you. You can also create new user roles to suit your requirements.

The various user roles available are:

- ▶ Administrator
- ▶ Agent
- ▶ Agent (Read Only)
- ▶ Author
- ▶ Supervisor

- ▶ Supervisor (Read Only)

Workflows

Workflows manage the flow of all incoming, and outgoing activities. They are rules which define the action that the system performs on all activities. You can graphically create these rules to suit the requirements of your organization, for example, assigning incoming activities to certain users, queues, or setting priority for activities that require an immediate response.

Workflows define the progression of an activity within the system. You can create a workflow to automate tasks, and ensure that the work is handled consistently and efficiently, resulting in improved business operations.

In Administration Console you can create:

- ▶ Queues: Queues are channels through which, all agents receive incoming activities. You can create queues for all users in your department. A single queue can also be shared by multiple users. Activities enter queues according to the rules specified in the workflow.
- ▶ Service levels: Some customers may be more valuable to your company than others. In order to provide good service, agents in your department need to know about the importance of every customer. For this, you can assign service levels to your customers and use them in your workflow. Service levels enable you to define the importance of a particular customer, thereby directing the agents to respond immediately to customers with high importance.
- ▶ Workflows: Allows you to create four types of workflows:
 - Alarm
 - General
 - Inbound
 - Outbound

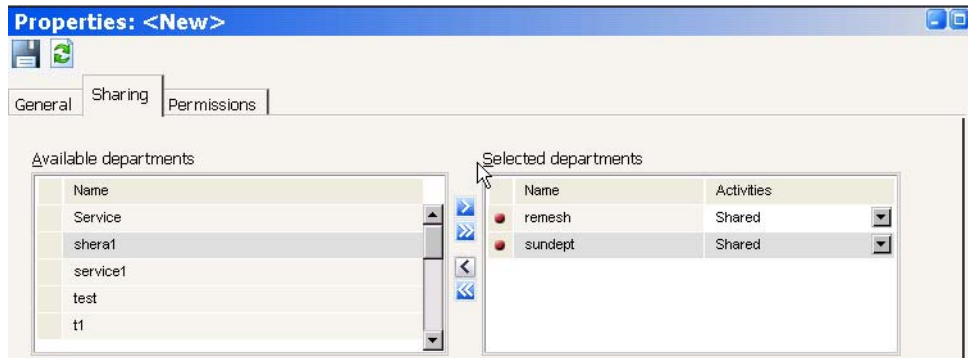
Creating departments

Only a partition administrator can create departments.

To create a department:

1. Select Departments from the Tree pane.
2. Click New in the List pane.
3. Fill in the required fields in the Properties pane, under following tabs:

- ❑ General: Allows you to give a name and a general description to your department.
- ❑ Sharing: Allows you to share the department that you are creating, with the departments that already exist.



- ❑ Permissions: Allows you to assign permission to the user, or user group to own, view, edit, and administer the department that you have created.



4. Click Save, to save the department you have created.

Copying departments

You can copy an existing department. By copying a department, you get a ready structure, and you can edit any of the resources available in the department according to your requirements. This is a time saver, and eases your task of creating multiple departments.

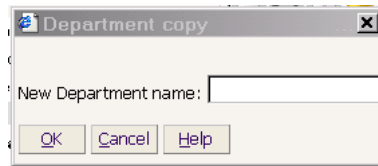
If you copy a department which is shared with another department, then the copied department will also get shared with it. For example, you copy a department A, and rename it as B. Department A is shared with Department C, then even the copied department B will be shared with department C. All objects that are copied will have the prefix 'copy' attached to them.

To copy a department:

1. Click Copy in the Tree pane toolbar.



Department Copy dialog box is displayed.



2. Fill in the required department name.
3. Click OK to create a copy of the department.

4 Users

- ▶ [User roles](#)
- ▶ [Creating user roles](#)
- ▶ [Creating user groups](#)
- ▶ [Creating users](#)

User roles

Employees working in an organization have different work profiles. The tasks that they perform are dependent on the role that they play in that organization, or the post at which they are appointed. User roles refer to the post that the employee is designated. You can create user roles as per the needs of your organization, and assign these roles to your employees. By assigning roles you are creating various posts for your employees. To ease your task, we have created six default user roles. You can use these, or if required, create your own user roles.

The six default user roles are:

- ▶ **Administrator:** The administrator is the manager of the department, and has access to the Administration console. You will find that there are two types of administrators that the system allows you to create; Partition Administrator and Department Administrator. Let us difference between these two roles. A partition administrator has to be created while installing Cisco Interaction Manager. To know more about a the role of a partition administrator, see chapter on Partitions.

A department administrator is lower in hierarchy. A department administrator is created by the partition administrator, and has the authority to create all the resources for the department he administers. For example, setting rules for incoming and outgoing activities through workflows, creating classifications, dictionaries, users, and assigning permissions to the users to perform various tasks.

- ▶ **Agent:** An agent is a person who handles customer queries, who is directly in contact with the customer. He has access to the Agent console. Agents are created by the administrator of the department.
- ▶ **Agent (Read Only):** An agent (read only) will have access to the Agent console, but he will not be able to compose replies for the customer queries. He can only view them. This role can be assigned to the trainees.
- ▶ **Author:** An author is the writer of all the articles that the agent can use as replies for the customer queries. He has access to Knowledge Base console, which is a store house for all company articles.
- ▶ **Supervisor:** A supervisor has access to the Supervision console, and creates monitors for queues and users in the department to run reports on them.
- ▶ **Supervisor (Read Only):** A supervisor (read only) can create monitors, but cannot run reports. This role can be assigned to the trainees.

Actions

When you create a user role, you need to specify the work that the person with that role can handle. Actions define this work. For example, you assign the role, agent, the actions to own, view, edit, and delete activities. Thus you can say that a role is a collection of permissible actions.

All default user roles have already been assigned certain actions. You can view these actions by clicking on any role.

What are the actions assigned to the default roles?

Now that you already know, every default role has a set of permissible actions assigned to them, you must be curious to find out what these actions are. To learn more about them look at the table given below for each default role.

Administrator

Resource Name	Actions Permitted
Administration Console	View
Supervision Console	View
Agent Console	View
Reports Console	View
System Console	View
Knowledge Base Console	View
Tools Console	View
User	Create, Own, View, Edit, Delete
Activities	Transfer, Pull
User Group	Create, Own, View, Edit, Delete
Role	Create, View, Edit, Delete
Access Links	Create, View, Edit, Delete
Usage links	Create, Own, View, Edit, Delete, Execute
System Attribute Profiles	View, Edit
User Attribute Profiles	Create, View, Edit, Delete
Screen Attributes Profiles	View, Edit

Resource Name	Actions Permitted
Category	Create, View, Edit, Delete
Customer	Create, View, Edit, Delete, Change
Contact Person	Create, Edit, Delete
Contact Details	Create, Edit, Delete
Association	Create, View, Edit, Delete
Inbox Folder	Create, Delete
Notes	View, Delete
Resolution Codes	Create, View, Edit, Delete
Customer Associations	Create, View, Edit, Delete
Macro	Create, View, Edit, Delete
Product Catalog	Create, View, Edit, Delete
Business Objects	Create, View, Edit, Delete
Activity	Create, Edit, Complete, Pin, Print, Unpin Others, Assign Classification
Case	Edit, Print, Close, Unarchive
Monitors	Create, Edit, Delete, Run
Reports	Create, Delete, View, Run, Edit, Schedule
Queue	Create, Own, View, Edit, Delete
Workflow	Create, View, Edit, Delete
Settings	Create, View, Edit, Delete
Shift Label	Create, View, Edit, Delete
Day Label	Create, View, Edit, Delete
Calendar	Create, View, Edit, Delete
Dictionary	Create, View, Edit, Delete
Global Search	Create, Edit, Delete
Service Levels	Create, Read, Edit, Delete
Personal Search	Create
Alias	Create, View, Edit, Delete
Blocked Addresses	Create, View, Edit, Delete

Resource Name	Actions Permitted
Delivery Exceptions	Create, View, Edit, Delete
Blocked File Extensions	Create, View, Edit, Delete
Email	Send
Blocked Attachment	Restore
Incoming Attachment	Delete

Agent

Resource Name	Actions Permitted
Agent Console	View
User	View
Usage links	View, Execute
Category	View
Customer	Create, View, Edit, Delete, Change
Contact Person	Create, Edit, Delete
Contact Details	Create, Edit, Delete
Association	Create, View, Edit, Delete
Inbox Folder	Create, Delete
Notes	View, Add, Delete
Resolution Codes	View
Folder	View
Article	Suggest
Personal Folders	Manage
Macro	View
Product Catalog	View
Activity	Create, Edit, Complete, Pin, Print, Unpin Others, Assign Classification
Case	Edit, Print, Close
Queue	View

Resource Name	Actions Permitted
Personal Dictionary	Create
Personal Search	Create
Email	Send
Blocked Attachment	Restore
Incoming Attachment	Delete

Agent (Read Only)

Resource Name	Actions Permitted
Agent Console	View
User	View
Usage links	View, Execute
Category	View
Customer	View
Inbox Folder	Create, Delete
Notes	View
Resolution Codes	View
Folder	View
Article	Suggest
Macro	View
Product Catalog	View
Activity	Print
Case	Print
Queue	View

Author

Resource Name	Actions Permitted
Reports Console	View
Knowledge Console	View
User	View
Category	View
Notes	View, Add, Delete
Resolution Codes	View
Folder	Create, Own, View, Edit, Delete
Article	Create, Edit, Print, Delete, Suggest
Suggestions	Manage
Personal Folders	Manage
Bookmarks	Manage
Macro	View

Supervisor

Resource Name	Actions Permitted
Supervision Console	View
Agent Console	View
Reports Console	View
User	View
Activities	Transfer, Pull
Usage links	View, Execute
Category	View
Customer	Create, View, Edit, Delete, Change
Contact Person	Create, Edit, Delete
Contact Details	Create, Edit, Delete
Association	Create, View, Edit, Delete

Resource Name	Actions Permitted
Inbox Folder	Create, Delete
Notes	View, Add, Delete
Resolution Codes	View
Folder	View
Article	Suggest
Personal Folders	Manage
Macro	View
Product Catalog	View
Activity	Create, Edit, Complete, Pin, Print, Unpin Others, Assign Classification
Case	Edit, Print, Close
Monitors	Create Edit, Delete, Run
Reports	Create, Delete, View, Run, Edit, Schedule
Queue	View
Personal Dictionary	Create
Personal Search	Create
Email	Send


Supervisor (Read Only)

Resource Names	Actions Permitted
Supervision Console	View
Agent Console	View
Reporting Console	View
User	View
Usage links	View, Execute
Customer	View
Association	View
Inbox Folder	Create, Delete

Resource Names	Actions Permitted
Notes	View
Resolution Codes	View
Folder	View
Article	Suggest
Macro	View
Product Catalog	View
Activity	Print
Case	Print
Monitor	Create, Edit, Delete, Run
Reports	View, Run
Queue	View

Creating user roles

To create a user role:

1. Go to your department < User in the Tree pane.
2. Select Roles.
3. Click  in the List pane.
4. Fill in the required fields in the Properties pane, under the following tabs.
 - ▶ General: Allows you to give a name and a general description to the user role.

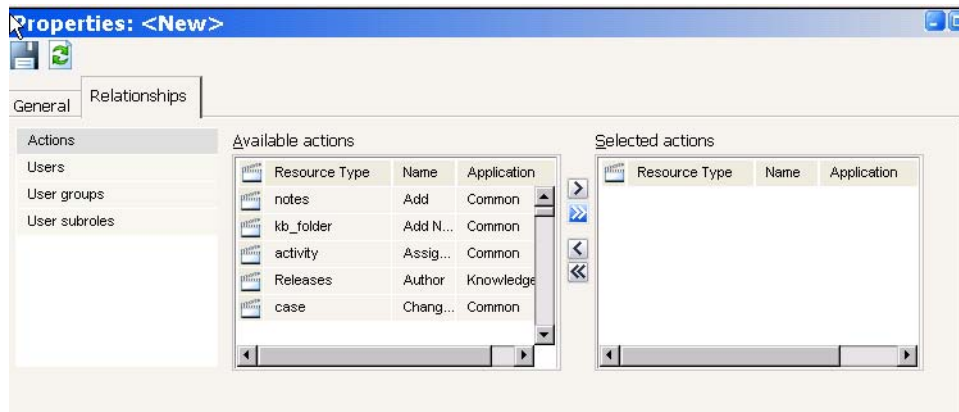


The screenshot shows a window titled "Properties: <New>". It has two tabs: "General" and "Relationships". The "General" tab is active and contains a table with the following data:

Name	Value
Name *	New user role
Description	

- ▶ Relationships:
 - Enables you to assign Actions to the roles. Actions are tasks that a user can perform.
 - Assign the role you are creating to the users, and user groups in your department.

- You can even assign subroles.



- To assign Actions, Users, User groups, and User subroles:
 - Select the required feature: Actions, Users, User groups, or User subroles.
 - Select the required action, user, user group, or subrole from the Available list, and click . To select everything in the Available list, click .

5. Click to save the role that you have created.

The role that you create is displayed in the List pane.

Similarly, you can create subroles for the user.


To create a subrole:

- Go to your department < User < Roles in the Tree pane.
- Select the required role.
- The rest of the steps are similar to creating a user role. Follow from step number 3 of creating user role.

Creating user groups

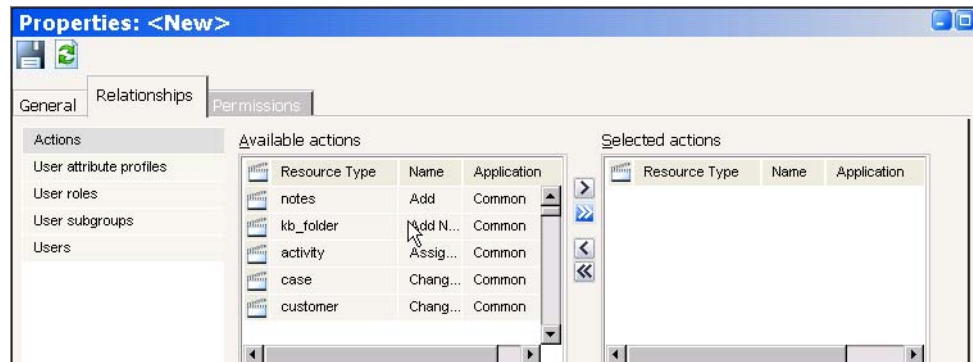
You might require a team consisting of few employees to perform a particular task. For example, you might need few agents to handle customer queries regarding your product, while few others to handle customer complains. You can create separate user groups for these teams, placing all the agents handling customer queries in one group, and all the agents handling customer complains in another. Once you have created a group, you can add, or delete users from that group, according to your requirements.

To create user groups:


1. Go to your department < User < Groups in the Tree pane.
2. Click  in the List pane.
3. Fill in the required fields under the following tabs:
 - ▶ **General:** Allows you to give a name and description to the user group.




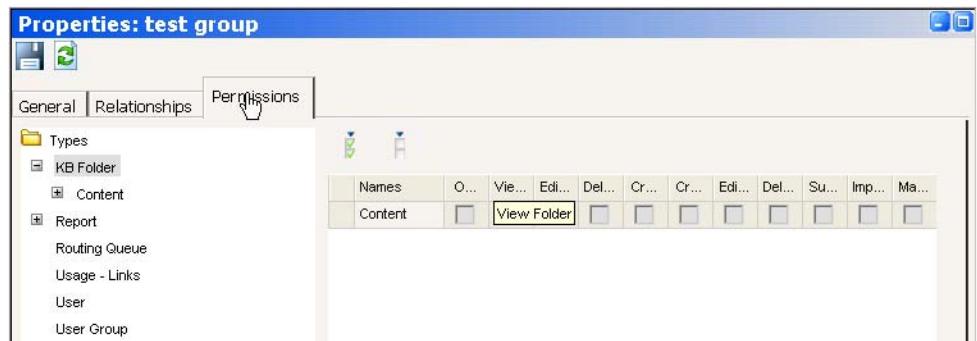
- ▶ **Relationships:** Enables you to assign:
 - Actions to the user group. Actions are tasks that a user can perform.
 - Roles to the user group.
 - Users for the group.
 - Subroles.
 - User attribute profiles that are created by the partition administrator at the



Tools console. They can also be created by a department administrator, if he has the permission. These user attribute settings get listed under Relationship tab, and you can assign this to your user group.

4. Click  to enable the Permissions tab.
 - ▶ **Permissions:** Allows you to assign permissions to the user group to have access to the queues, knowledge base articles, links, and reports, and assign users for that group.


Click  to save the permissions you have assigned the user group.




Creating users

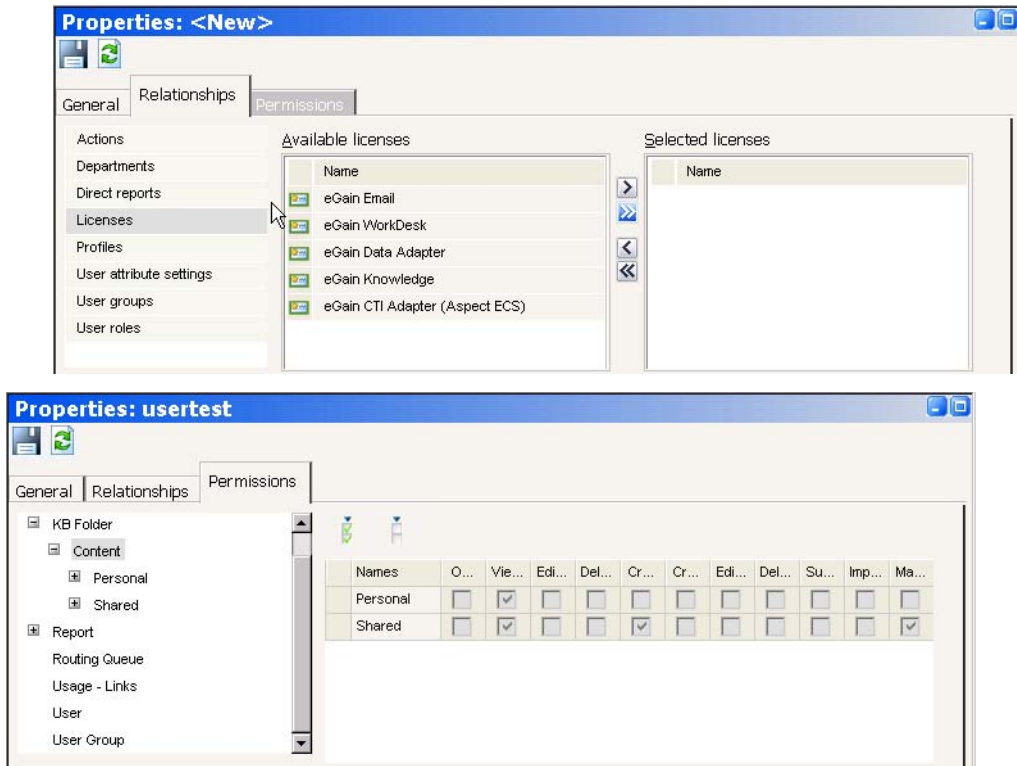
Users can be easily created in Cisco Interaction Manager. Here you create a work profile for the user, assign a group, and the tasks that the user will perform.


To create a user:

1. Go to your department < User < Users in the Tree pane.
2. Click  in the List pane.
3. Fill in the required fields under the following tabs:
 - ▶ General: Allows you to give a name and description to the type of user you are creating.

Name	Value
Title	
First name	
Middle name	
Last name	
Suffix	
User name *	
Password	
User status	Enabled

- ▶ Relationships: Allows you to create a work profile for the user. For example, the actions that would be assigned to the user, the departments that the user can have access to, the software that the user can use, its role etc.
4. Click  to enable the Permissions tab.
 - ▶ Permissions: Allows you to assign permission to the users or user group to have access to the queues, knowledge base articles, links, and reports.



5. Click  to save the permissions that you have assigned.



Business calendars

- ▶ [Setting the time zone](#)
- ▶ [Daylight saving changes](#)
- ▶ [Creating shift labels](#)
- ▶ [Creating day labels](#)
- ▶ [Creating business calendars](#)

This chapter will assist you in understanding business calendars and how to set them up according to your business requirements.

Calendars are used to map the working hours of the contact center in the application. Calendars are primarily used in:

- ▶ Setting due dates for activities routed through workflow. When activities are routed through a workflow having SLA node, due date is set according to the calendar.
- ▶ Reports: Calendars are used in reports. For example, reports like, Email volume by queue, Email age by queue, Email Volume by alias.

Important: It is not mandatory to set a calendar in a department. If not set, the system considers the agents work time as 24*7*365.

In a calendar, you set up the working and non-working time of the users. This enables the functioning of the service levels. Service levels are used for setting due dates on activities, cases, and tasks, and trigger alarms to the supervisors.

To configure a calendar you need to create the following.

- ▶ Shift labels: A shift label describes the type of shift, and whether the agents work in that shift or not. For example, you can create shift labels like:
 - Morning shift and Evening shift: When the agents work.
 - Lunch break, Holidays, and Weekends: When the agents don't work.
- ▶ Day labels: In day labels you can set the work time for each shift. Shift labels are used for creating the day labels. For example, you can create day labels like:

- Weekday

8 am to 12 pm: Morning shift

12 pm to 1 pm: Lunch break

1 pm to 5 pm: Evening shift

- Holiday

12 am to 11.59 pm: Holiday

Using the day labels, you can create the calendars.

Setting the time zone

Before you create the calendar for your department, determine in which time zone your agents work. Make sure that you select the appropriate time zone in the department setting, **Business calendar timezone**. If you configure the calendar

first, and then change the time zone setting, the start time and end time in the day labels get changed.

For example, you create a day label with the start time as 8am and end time as 4pm, and the time zone selected is (GMT -5:00) Eastern Standard Time (US and Canada). After creating the day label, you change the time zone setting to, (GMT -8:00) Pacific Standard Time (US and Canada). The day label start time changes to 5am, and end time changes to 1pm and the time zone changes to (GMT -8:00) Pacific Standard Time (US and Canada).

Important: It is recommended that you set the time zone first and then configure the calendars.

To change the time zone setting

1. In the Tree pane, browse to **Administration > Departments > Your department > Settings > Department**.
2. In the List pane, select the **Department settings group**.
3. In the Properties pane, go to the **Attributes** tab.
4. In the **Attributes** tab, select the setting, **Business calendar timezone**. And, from the available time zones, select the time zone in which your agents work.
5. Click the **Save** button.

Daylight saving changes

When the changes in the day light saving occurs, you need to make the following two changes in the calendars.

- ▶ In the department setting, **Business calendar timezone**, change the time zone.
- ▶ In the **Day labels**, in the **Times** tab, change the start times and end times for all the shifts.

Creating shift labels

A shift label describes the type of shift, and whether the agents work in that shift or not. For example, morning shift, afternoon shift, lunch break, Christmas holiday, etc. You can create the required shifts, holidays, etc., for your department. Once created, they are used in day labels.

To create a shift label

1. In the Tree pane, browse to **Administration > Departments > Your department > Calendar > Shift Labels**.
2. In the List pane toolbar, click the **New** button.

Name	Value
Name *	New shift label
Description	
Agents work this shift	Yes

The properties pane refreshes to show the properties of the new shift label.

3. In the properties pane, in the **General** tab, provide the following details.
 - **Name:** Type a name for the shift label.
 - **Description:** Type a brief description.
 - **Agents work this shift:** Specify if the agents work in this shift or not. By default **Yes** is selected. Select **No** if the agents don't work in this shift.
4. Click the **Save** button.

Deleting shift labels

Important: You cannot delete a shift label if it is used in any day label. First, remove the shift label from the day label, where it is used, and then delete the shift label.

To delete a shift label

1. In the Tree pane, browse to **Administration > Departments > Your department > Calendar > Shift Labels**.
2. In the List pane, select the shift label you want to delete.
3. In the List pane toolbar, click the **Delete** button
4. A message appears asking to confirm the deletion. Click **Yes** to delete the shift label.

Creating day labels

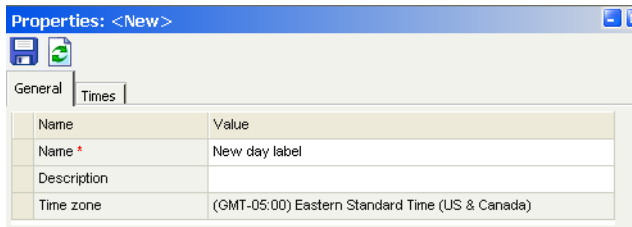
In day labels you can set the work time for each shift. For example, you can divide the 24 hours available in a day into working shifts of eight hours each. Therefore, each day would have three shifts.

Important: Before creating the day labels you need to first create the shift labels.

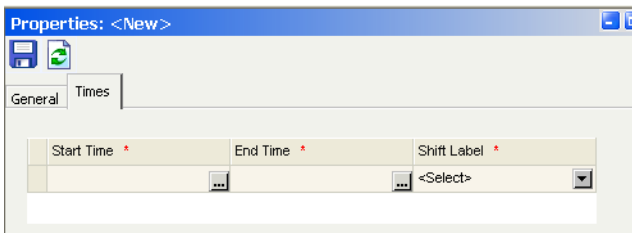
To create a day label

1. In the Tree pane, browse to **Administration > Departments > Your department > Calendar > Day Labels**.
2. In the List pane toolbar, click the **New** button.

The properties pane refreshes to show the properties of the new day label.

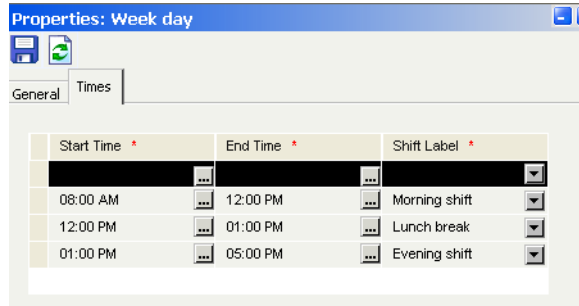


3. In the properties pane, go to the **General** tab, and provide the following details.
 - **Name:** Type a name for the day label.
 - **Description:** Type a brief description.
 - **Time zone:** It shows the time zone selected for the department. This field is disabled. If you want to change the time zone for your department, you can do it by changing the setting, **Business calendar timezone**. For details on how to change the setting, see, "Setting the time zone on page 61".
4. Next, go to the **Times** tab and provide the following details.



- **Start time:** Select the start time for the day label.
- **End time:** Select the end time for the day label.
- **Shift label:** From the dropdown select the shift label to be used.

Likewise specify the start time, end time, and shift labels for the whole day.



5. Click the **Save** button.

Deleting day labels

Important: You cannot delete a day label if it is used in any calendar. First, remove the day label from the calendar, where it is used, and then you can delete it.

To delete a day label

1. In the Tree pane, browse to **Administration > Departments > Your department > Calendar > Day Labels**.
2. In the List pane, select the day label you want to delete.
3. In the List pane toolbar, click the **Delete** button
4. A message appears asking to confirm the deletion. Click **Yes** to delete the day label.

Creating business calendars

You can create business calendars for your department. At a time, only one calendar can be active. You can set calendars for all the days of the week, and the exception days, like holidays, weekends etc.

Important: You need to create day labels before creating calendars.

To create a calendar

1. In the Tree pane, browse to **Administration > Departments > Your department > Calendar > Calendars**.
2. In the List pane toolbar, click the **New** button.

The properties pane refreshes to show the properties of the new calendar.

3. In the properties pane, go to the **General** tab, and provide the following details.

Name	Value
Name *	New calendar
Description	
Effective start date *	
Effective end date *	
Time zone	(GMT-05:00) Eastern Standard Time (US & Canada)

- **Name:** Type a name for the calendar.
- **Description:** Type a brief description.
- **Effective start date:** Select the date on which the calendar becomes active. Two calendars in a department cannot have overlapping dates. Also, the start date should be greater than the current date.
- **Effective end date:** Select the date on which the calendar becomes inactive. Two calendars in a department cannot have overlapping dates. Also, the end date should be greater than the start date.

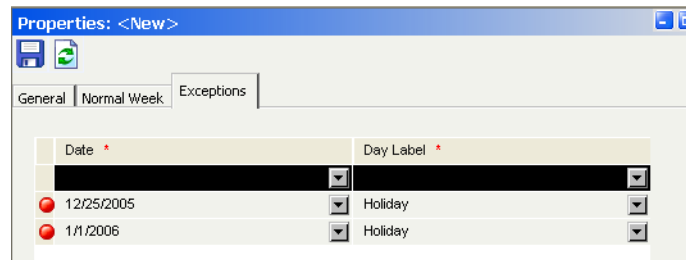
On the set end date, the calendar becomes inactive. Once a calendar becomes inactive, the system the system considers the agents work time as 24*7*365, unless some other calendar becomes active automatically.

- **Time Zone:** It shows the time zone selected for the department. This field is disabled. If you want to change the time zone for your department, you can do it by changing the setting, **Business calendar timezone**. For details on how to change the setting, see, “Setting the time zone on page 61”
4. Now go to the **Normal Week** tab, and select the day label to be used for each day of the week.

Day of Week	Day Label *
Sunday	<Select>
Monday	<Select>
Tuesday	<Select>
Wednesday	<Select>
Thursday	<Select>
Friday	<Select>
Saturday	<Select>

5. Lastly, go to the **Exceptions** tab. Here you specify the day labels to be used for exception days, like holidays, weekends etc. Select the date on which there is some exception, and then select the day label to be used for that day.

Important: The exception dates should be between the effective start date and effective end date.



6. Click the **Save** button.

Deleting business calendars

To delete a calendar

1. In the Tree pane, browse to **Administration > Departments > Your department > Calendar > Calendars**.
2. In the List pane, select the calendar you want to delete.
3. In the List pane toolbar, click the **Delete** button
4. A message appears asking to confirm the deletion. Click **Yes** to delete the calendar.



Email infrastructure

- ▶ [Creating aliases](#)
- ▶ [Configuring Blocked addresses](#)
- ▶ [Configuring blocked file extensions](#)
- ▶ [Configuring delivery exceptions](#)

This chapter will assist you in understanding how to set up aliases and other email settings as per your business requirements. You will also learn of various mechanisms that help you optimize the system to ensure efficiency.

The email folder in the Administration console comprises of four resources; Aliases, Blocked Addresses, Blocked File Extensions, and Delivery Exceptions. In this chapter you will learn what these mean and how you can use it to optimize system performance.

Creating aliases

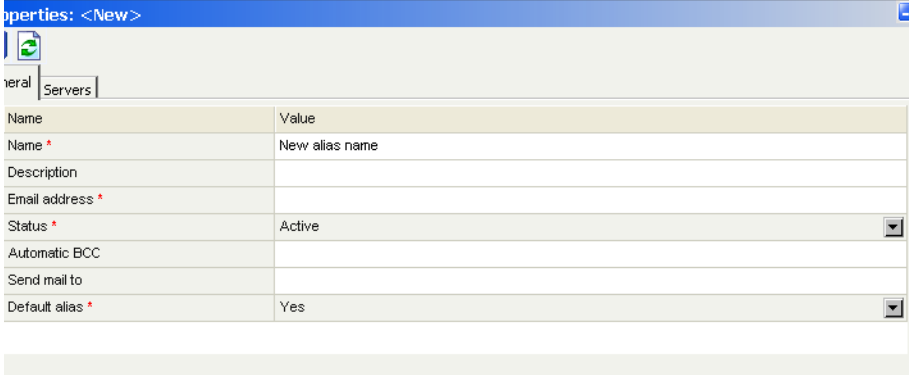
Aliases are email addresses to which customers and other correspondents send messages to your company. Aliases usually have standard names such as customerservice@yourcompany.com.

The system monitors the specified aliases and retrieves emails from these aliases when they arrive in the email server.

Aliases provide customers with a convenient method for communicating with the company. This helps in avoiding large number of email addresses that customers write to and enables you to have email addresses for specific products, services, sales, etc. You can have separate aliases for products, services, and departments. For example, a bank may decide to create separate aliases for the different kinds of services they provide such as banking accounts, home loans, car loans, mutual funds, credit cards, etc. Using aliases you can easily identify the type of customer and route the query to the concerned department. In this case, you could have aliases such as accounts@yourbank.com, loans@yourbank.com, mfunds@yourbank.com and so on.

To create an alias:

1. Select the department in which you want to create a new alias. In the Email folder, click Aliases.
2. Click the New button in the List pane toolbar.



Name	Value
Name *	New alias name
Description	
Email address *	
Status *	Active
Automatic BCC	
Send mail to	
Default alias *	Yes

3. In the Properties pane, Click the General tab.
4. In the General tab:
 - a. Name: Type the name of the alias. This is required information.
 - b. Description: Type a brief description of the alias.
 - c. Email address: Type the email address for the alias. This is required information.
 - d. Status: Select the status of the alias. The options available are:
 - Active: If set to active the application will send and pull email messages from this address.
 - Inactive: If set to inactive the application will not send and pull email messages from this address.
 - e. Automatic BCC: Type the email address to which you want to send a BCC copy of the email. You can give more than one address here.
 - f. Send mail to:
 - g. Default alias: Select Yes if you want this alias to be default alias for the department. You can edit this field only after you save the alias.

Important: A default alias should also be active and for each department only one alias can be default.

5. In the Properties pane, select the Servers tab. In the servers tab the Incoming section is selected by default.

6. In the Incoming section:

All the fields are required in this section.

- a. Server type: Select the server type you want to use. By default POP3 is selected. The options available are:
 - POP3
 - IMAP
- b. Server name: Type the name of the server.
- c. User name: Type the user name.
- d. Password: Type the password.
- e. Verify password: Re-type the password.

In the outgoing section:

- a. Server type: Select the server type you want to use. By default SMPT is selected. The options available are:
 - SMPT

- ESMTP

If you select SMTP server then go to step ii.

- b. Use SMTP when:

Configuring Blocked addresses

You can block certain email address or email domains. Any email from such a blocked address or domain is treated as spam and directly deleted or stored in a separate file. This way you can filter out all unwanted emails from the mainstream.

To configure blocked addresses:

1. Click the Blocked Addresses node in the Email folder of the respective department.
2. Click the New button in the List pane.
3. In the Properties pane, enter name, description, type, and the blocked address you want the system to check for.
Select the type from the dropdown list. The options are Email address and Domain address.
4. Click the Save button.

Configuring blocked file extensions

This is a security feature, which allows you to selectively block certain types of attachments. Most of the virus files have certain specific types of extension such as .exe, .vbs, .js, etc. Using this feature, you can block such attachment types from entering the system.

Using the settings for email attachments the system can be configured to block all attachments, block incoming and outgoing attachments, and delete or quarantine a blocked attachment.

To configure blocked file extensions:

1. Click the Blocked File Extensions node in Email folder of the respective department.
2. Click the New button in the List pane.
3. In the Properties pane, enter a name and description for the attachment you want to block and in the Blocked File Extension field enter the file extension you want the system to check for with incoming email.

4. Click the Save button.

Important: You can block only one file extension at a time. In case you want to block multiple file extensions, you will have to create as many instances.

Configuring delivery exceptions

This feature allows you to handle bounced emails. You can set up different words and phrases for email subjects and email address of incoming email. Emails will be treated as bounced if any of these words and phrases are found in the subject or email address. Each of these words or phrases can be used to classify an email as a permanent bounce back or a temporary bounce back.

A permanent bounce back indicates that an irreparable reason (such as invalid email address) caused the email to bounce back. These are permanent failure conditions and any next emails sent to such email address would always bounce back.

A temporary bounce back indicates that a temporary reason (such as out of office reply, destination server down etc.) caused the email to bounce back. These being temporary conditions, if emails are sent again, there is a chance that they may not bounce back.

Cisco Interaction Manager comes with default delivery exception instances. Should you need to create other instances of delivery exception you can easily do so.

To configure delivery exceptions:

1. Click the Delivery Exceptions node in Email folder of the respective department.
2. Click the New button in the List pane.
3. In the Properties pane:
 - Enter name and description for the delivery exception
 - Select the Type from the dropdown list
 - Enter the Phrase you want the system to check for
 - Select the type of failure from the dropdown list
4. Click the save button in the toolbar.

In each of the above cases, you need to stop and restart the email Retriever instance from the System console to update the system accordingly.

7 Chat infrastructure

- ▶ [Managing entry points](#)
- ▶ [Setting up transcripts and notifications](#)
- ▶ [Managing template sets](#)
- ▶ [Setting up quick links and responses in queues](#)

This chapter will assist you in understanding how to set up web chat infrastructure according to your business requirements.

Managing entry points

Entry points are the starting point for a customer to initiate a chat interaction. Every chat help link on a website will be mapped to an entry point. Each entry point will in turn have a queue associated with it, so that any chat activity created when the user asks for chat assistance is routed to the queue. A Default Entry Point is provided with the application and it cannot be deleted.

Important: More than one chat help link on web sites can point to the same entry point.

Creating entry points

Before creating an entry point create a queue and template set to be used for the entry point.

To create an entry point:

1. In the List pane toolbar, click the New button.
2. In the Properties pane, in the General tab provide the following details.
 - a. Name: Type a name for the entry point. This is required information.
 - b. Description: Type a brief description.
 - c. Active: Select Yes to make the entry point active. By default No is selected.

Important: For a customer to be able to chat, the entry point mapped to the chat help link should be made active, else the customer would be displayed a no service page.

- d. Customer console - Start page: This setting defines the first page which will be displayed in the customer's co-browse pane, when chat session starts. If it is left blank, the customer's co-browse pane will show the page from which chat was invoked. By default the field is blank.
 - Type a URL of the page which you want to set as the customer console start page. For example: <http://www.mycompany.com>
- e. Customer console - Finish page: This setting defines the page which will be displayed in the customer's co-browse pane, when the chat session is closed. If it is left blank, the co-browse pane will stay on the last page being browsed before the customer left the session. By default the field is blank.

- Type a URL of the page which you want to set as the customer console finish page. For example: <http://www.mycompany.com>
- f. Enable auto login: Select Yes from the if you want to enable auto login. By default No is selected.

There are two options available:

- No: If No is selected, the log-in screen will be displayed irrespective of whether customer information has already been entered or not in the source page.
- Yes: If Yes is selected, customer information is passed on to the chat link from the source page.

For example: When your customers start using your website you authenticate them by using a login page. And while going through the website if the customers click the chat help link and you want them to re-enter the same login information before beginning the chat then select No. If you do not want the customers to re-enter the login information then select Yes - in this case the information of the customer will be passed from the source page.

- g. Queue: Select a queue to which the entry point will point. This is required information.

To select a queue:

- i. Click the Assistance button.
- ii. From the Select Queue window select a queue. The queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.

Important: An active entry point cannot be mapped to an inactive queue.

- iii. Click the Ok button.

- h. Template: Select a template set you want to map to the entry point. This is required information.

To select a template:

- i. Click the Assistance button.
- ii. From the Select Template Set window, select a template set.
- iii. Click the Ok button.

- i. Agent Availability: With this option you can decide, if the agents availability is to be checked, when the customer initiate a chat session.


There are two options available:

- Required: The customer will be able to initiate a chat session only if the agents availability setting is set to Yes, i.e. the agent is available for chat. If no agent is available, the No Service message is shown to the customer.

- Not required: The customer will be able to initiate a chat session even if the agents availability setting is not set to Yes. The customer is not shown the No Service message, even if no agent is available for chat.
3. Click the Save button.

Deleting entry points

To delete an entry point:

1. Select the entry point from the List pane. You can select multiple entry points.
2. Click the Delete  button in the List pane toolbar.
3. You are prompted to confirm the deletion. Confirm the deletion.


If you attempt to delete inactive and active entry points together, the inactive entry points get deleted, and a message appears telling that the active entry points cannot be deleted.

Important: Default entry point and active entry points cannot be deleted.

Viewing HTML code for entry points

You can view the HTML code, and use it for pointing the chat help hyperlinks and buttons on your website to open chat sessions. In a web page, chat help can be invoked from either a hyperlink or from a form button, the HTML window displays code to be used for both these cases. The HTML code will change if you change the customer console mode.

To view the HTML code of an entry point:

1. Select an entry point from the List pane.
2. Click the Show HTML  button in the Properties pane toolbar.
3. Show HTML window appears. Here you can view the HTML code of the entry point.


Important: You can only view or copy the HTML. It cannot be edited or deleted.

If you are creating a new entry point and want to view its HTML, you have to first save it to enable the Show HTML button.

Testing entry points

After making an entry point you can test it immediately to see how the entry point looks like.

To test an entry point:

1. Select an entry point from ~~the~~ List pane.
2. Click the Test Entry Point  button in the Properties pane toolbar.
3. A web page opens showing how your entry point looks like.

Important: If you are creating a new entry point and want to test it, you have to save the entry point, to be able to test the entry point.

Enabling page pushing

By enabling page pushing you can allow the agents to push pages to customers.

To enable page pushing:

1. In the List pane select the entry point for which you want to change the page pushing settings.
2. In the Properties pane, go the Options tab and select the Page push section.
3. In the Page push section, provide the following details.
 - Enable page pushing from agent to customer: Enabling this option allows the agents to send the current web page in their browser area to the customer. By default Yes is selected. Select No to disable it.
 - Enable agent web collaboration in popup window: By default the web page opened using page pushing opens in the Web collaboration section of the Information pane of the Agent Console. But if you want the web page to open in a popup window, then you can do that using this option. If the agent is handling multiple chats at a time, the popup windows show the names of corresponding customers. By default No is selected. Select Yes to enable it.

Important: When you change this setting, ensure that there are no active chats going on at that moment, else it can result in errors in page pushing.

If you want you can also block the URLs that you don't want the agents to send to the customers. Or you can configure to allow a limited number of URLs for page pushing.

To use selective page pushing:

1. Select the option, web collaboration of the URLs listed below.
2. From the dropdown select the option you want to use.

The options available are:

- Do not allow: The URLs listed will not be allowed for page pushing.
 - Allow: Only the listed URLs will be allowed for page pushing.
3. In the field type the URL. Press enter and type the next URL.

Setting up transcripts and notifications

You can email the transcript of the chat to the customers if you want. Transcripts can be sent for both serviced chats and abandoned chats. Sending transcripts is very useful as once customers close the chat window they will have no record of the information that was given to them. But if they have a transcript in the email they can refer back to it in future. Also if because of some problem at the customer's end the chat closes then the customer will have information to refer to from the emailed transcript. It is recommended that on the exit page of the chat you put a message that a transcript of the chat session will be sent to the customer. It reflects good customer service.

Serviced chats: Serviced chats are those chat sessions where the agent joins the chat session at least once (activity substatus changes to 'In Progress') before the customer exits the session. Serviced chats also include the chats which were not completed successfully because of any reason.

Abandoned chats: Abandoned chats are those chat sessions where the customer exits the chat before the activity substatus changes to 'In Progress' at least once. That means the customers leave the chat before agents could attend them.

Important: In the transcript email sent, the Chat transcript will be placed between the greeting article and the signature article.

Sending serviced chat transcripts

To email transcripts of serviced chats:

1. Select an Entry Point in the List pane toolbar.
2. In the Properties pane go to the Transcript tab and go to the Serviced chats section.
3. In the Serviced chats section:
 - a. If you want to send a chat transcript select the, Send email chat transcript to the customer, option. By default *Do not email chat transcript to the customer* is selected.

Important: If you select this option all other options will be disabled.


- b. **From:** Type the email address which you want to show in the From field in the email sent to the customer. This is required information. Any reply sent by the customer, in response to the chat transcript email goes to the address specified in the 'From' field. So you can configure a standard email address such as "support@mycompany.com" as the From email address, and configure it as the alias to which customer reply-emails will be sent.

- c. To: The transcript email will be sent to the email ID provided by the customer while logging into the Chat. If the customer has not provided an email ID, then the 'Contact point' will be picked up from the existing email field for the customer of the Chat; if a customer has multiple email IDs, the last updated email ID of the customer will be considered. However, if no email ID is found at all, no transcript mail will be sent out.

Important: This field cannot be edited.

- d. Subject: Type subject of the email.
- e. Header: Select a header for the transcript email.


To select a header:

- i. Click the Assistance  button in the Header field.
- ii. Select Article window appears.
- iii. From the available headers, select the header article you want to use.
- iv. Click the Ok button.

Important: If there are no headers available go in the Knowledge Base console and create some header articles.

- f. Greeting: Select a greeting for the transcript email.


To select a greeting:

- i. Click the Assistance  button in the Greeting field.
- ii. Select Article window appears.
- iii. From the available greetings select the greeting articles you want to use.
- iv. Click OK.

Important: If there are no greetings available go in the Knowledge Base console and create some greeting articles.

- g. Signature: Select a signature for the transcript email.

To select a signature:

- i. Click the Assistance  button in the Signature field.
- ii. Select Article window appears.
- iii. From the available signatures select the signature article you want to use.
- iv. Click OK.

Important: If there are no signatures available go in the Knowledge Base console and create some signature articles.

- h. Footer: Select a footer for the transcript email.

To select a footer:

- i. Click the Assistance  button in the Footer field.

- ii. Select Article window appears.
- iii. From the available footers select the footer article you want to use.
- iv. Click OK.

Important: If there are no footers available go in the Knowledge Base console and create some footers articles.

- i. Chat transcript content: Specify what you want to include in the transcript. The options available are:
 - Include chat messages and URLs exchanged
 - Include only URLs exchanged
 - Include only chat messages exchanged

Sending abandoned chat transcripts

To email transcripts of abandoned chats:

1. Select an Entry Point in the List pane toolbar.
2. In the Properties pane select the Transcript tab.
3. In the Transcript tab, select the Abandoned chats section.
4. In the Abandoned chats section:
 - a. If you want to send a chat transcript select the, Send email chat transcript to the customer, option. If you do not want to send a chat transcript select the, Do not email chat transcript to the customer, option. By default *Do not email chat transcript to the customer* is selected.

Important: If you select this option all other options will be disabled.


- b. From: Type the email address which you want to show in the From field in the email sent to the customer. This is required information. Any reply sent by the customer, in response to the chat transcript email will go to the address specified in the 'From' field. So you can configure a standard email address such as "support@mycompany.com" as the From email address and configure it as the email alias to which customer reply emails will be sent.
- c. To: The transcript email will be sent to the email ID provided by the customer while logging into the chat. If the customer has not provided an email ID, then the 'Contact point' will be picked up from the existing email field for the customer of the Chat; if a customer has multiple email IDs, the last updated email ID of the customer will be considered. However, if no email ID is found at all, no transcript mail is sent out.

Important: This field cannot be edited.

- d. Subject: Type subject of the email.

- e. Header: Select a header for the transcript email.


To select a header:

- i. Click the Assistance  button in the Header field.
- ii. Select Article window appears.
- iii. From the available headers select the header article you want to use.
- iv. Click the OK button.

Important: If there are no headers available go in the Knowledge Base console and create some header articles.

- f. Greeting: Select a greeting for the transcript email.


To select a greeting:

- i. Click the Assistance  button in the Greeting field.
- ii. Select Article window appears.
- iii. From the available greetings select the greeting article you want to use.
- iv. Click the OK button.

Important: If there are no greetings available go in the Knowledge Base console and create some greeting articles.

- g. Signature: Select a signature for the transcript email.


To select a signature:

- i. Click the Assistance  button in the Signature field.
- ii. Select Article window appears.
- iii. From the available signature select the signature articles you want to use.
- iv. Click OK.

Important: If there are no signatures available go in the Knowledge Base console and create some signatures articles.

- h. Footer: Select a footer for the transcript email.

To select a footer:

- i. Click the Assistance  button in the Footer field.
- ii. Select Article window appears.
- iii. From the available footers select the footer article you want to use.
- iv. Click OK.

Important: If there are no footers available go to the Knowledge Base console and create some footer articles.

- i. Chat transcript content: Specify what you want to include in the transcript. The options available are:
 - Include chat messages and URLs exchanged

- Include only URLs exchanged
- Include only chat messages exchanged


Setting up notifications

Notifications are messages sent to internal users, using the messaging infrastructure. You can send a notification when a chat gets abandoned or an error occurs during a chat. Along with the notification, the transcript of the chat can also be sent. The notification can be sent to internal users as well as to external email addresses. The difference between transcript and notification is that transcript is sent to the customer with whom the chat session is held and notification is sent to internal users of the organization when a chat is abandoned or when an error occurs. You can create an entry point without selecting the option of sending transcript or notification.

To send a notification:

1. Select an Entry Point in the List pane toolbar.
2. In the Properties pane select the Notification Tab.
3. In the Notification tab, select the Conditions section.
4. In the conditions section:
 - Send notification on abandon: You can notify when a chat gets abandoned. By default No is selected. Select Yes to enable it.
 - Send notification on error: You can notify when an error occurs during the chat. By default No is selected. Select Yes to enable it.
5. In the Notification tab, select the Message section.
6. In the message section:
 - a. To: Select to whom you want to send the notifications. You can send notification to internal users and also to external email addresses. This is required information.

To add values in to field:


- i. Click the Assistance  button in the To field.
- ii. Address Book window appears.
- iii. In the address book window:

In the Recipients tab:

- From the available users and user groups, add the users and user groups in the selected recipient list.
- In the Selected recipients section you see the name of the recipient and message mode. By default, Both, is selected in the message mode. This means both email and internal message will be sent to the recipient of

the notification. There are three options available: Both, eMail and Internal.

In the External Email Address tab:

- Type the email address of the recipient.
 - Press the Enter key on the Keyboard.
- b. Subject: Type a subject for the notification to be sent.
 - c. Text Box: Type a message in the text box. You can use the text box toolbar to edit the text.
 - d. Append chat transcript at the bottom of the message: Select this option if you want to send the chat transcript with the notification.
7. Click the Save  button.

Turning off active entry points

You can temporarily turn off all the entry points for your department. This is useful when the agents are available for handling the chats for only limited hours of the day and you want that when they are not available you can turn off the entry points for the department.

To turn off active entry points:

1. In the Tree pane browse to **Department** > *Your department* > **Chat** > **Entry Points**.

The List pane shows the list of entry points.

2. In the List pane toolbar, click the **Turn off entry points** button.

All the active entry points are turned off.

3. Click the **Turn on entry points** button, to turn on the entry points.

When you click the button it turns on the active entry points.

Managing template sets


A template set comprises a set of .jsp files used for different screens displayed at the customer's end. Each entry point must be mapped to a template set and multiple entry points can use the same template set. A default template set is shipped with the application and can readily be mapped to any number of entry points

Important: The default template set cannot be deleted.


For every template set created, a directory with the same name is created in the file system. You can create a new template set and then customize the individual templates (.jsp files) for the desired look and feel.

Creating template sets

To create a new template set:

1. In the Tree pane, select Department > <Department Name > Chat > Templates.
2. Click the New  button in the List pane toolbar.
3. In the Properties pane, click the General tab.
4. In the General tab:
 - Name: Type a name for the template set. This is required information. The default value is *New template set*.
 - Description: Type a brief description for the template set.
 - Directory: Type a name for the directory. This is required information.

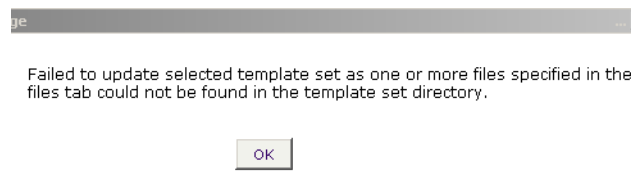
Important: A directory with this name gets created in the file system. You cannot change the directory once you click the save button.

5. Click the Save  button.

Important: The Options and Files tab are enabled only after you click the Save button.

6. Click the Files tab.

Important: The file names you give here should be present in the directory you are using for the template set. If you do not have these file names in the directory you are using for the template set an error will appear.



7. In the Files tab:
 - a. CSS file name: This is required information.
 - Type a valid CSS file name from the directory.
 - b. JSP file name - Abandon: This is information. The default value is *abandon.jsp*.

- Type a valid JSP file name from the directory.
 - c. JSP file name - Error: This is required information. The default value is *error.jsp*.
 - Type a valid JSP file name from the directory.
 - d. JSP file name - Exit: This is required information. The default value is *exit.jsp*.
 - Type a valid JSP file name from the directory.
 - e. JSP file name - Login: This is required information. The default value is *login.jsp*.
 - Type a valid JSP file name from the directory.
 - f. JSP file name - Off hours: This is required information. The default value is *offhours.jsp*.
 - Type a valid JSP file name from the directory.
 - g. JSP file name - Service: This is required information. The default value is *service.jsp*.
 - Type a valid JSP file name from the directory.
8. Click the Options tab. In the options tab you can configure the settings of the templates. For example you can decide what fields you want to show in the login page before the chat, how the messages should appear during the chat and what type of messages you want to show to the customers during off hours.
 9. In the Options tab click the General section. These settings determine how the login page will appear once the customer clicks on chat help button.
 10. In the General section:
 - a. Header - Image: The default value is header.jpg.
 - b. Body - Include required field instruction text: Specify if you want to show the required field instruction with the fields. By default Yes is selected. Select No, if you don't want to show the required field instruction text.
 - c. Display company logo: Select Yes if you want to show the Cisco logo on the various templates displayed to the users when they abandon or exit the chat.
 11. Abandon: In the Options tab click the Abandon section. Type the message you want to show to the customers when they abandon the chat.
 12. Error: In the Options tab click the Error section. Type the message you want to show to the customers when an error occurs during the chat.
 13. Exit: In the Options tab click the Exit section. Type the message you want to show to the customers when they exit the chat.

14. Log in: In the Options tab click the Log in section. With this option you can decide what login fields the customer should fill before starting the chat session. In the login section:

- a. Text to display above fields: Type the text you want to display above the fields. The default value is *To help us assist you, please enter the information below and click 'Start Chat'*.
- b. Customer attributes: Select the attributes you want the customers to fill at the time of login. By default Full name, Phone number, Email address and Subject are selected and Email address is selected as Primary key.
 - i. Object: From the drop down select an object. This is required information. The options available are:
 - Customer Data
 - Contact Point Data
 - Activity Data
 - ii. Attribute: From the drop down select the attributes corresponding to the Object. Same attribute cannot be selected twice. This is required information. The options available are:
 - For Customer Data: Full name.
 - For Contact Point Data: Email address and Phone number.
 - For Activity Data: Subject.
 - iii. Field Label: Type the name of the field as to be shown on the login page. This is required information.
 - iv. Required: Select Yes if you want to make a fields as required on the login page.
 - v. Primary Key: With this option you can decide which field is to be marked as the primary key. At least one attribute has to selected as primary key and the attribute which is selected as primary key should also be selected as Required. There are two options available:
 - Yes
 - No

Important: The attribute Subject cannot be selected as primary key.

- vi. Data validation: Using this option you can validate the information provided by the customer in the login page.
 - Click the Assistance button in the Data validation field. Define Field Validations window appears.

In the Define Field Validations window:

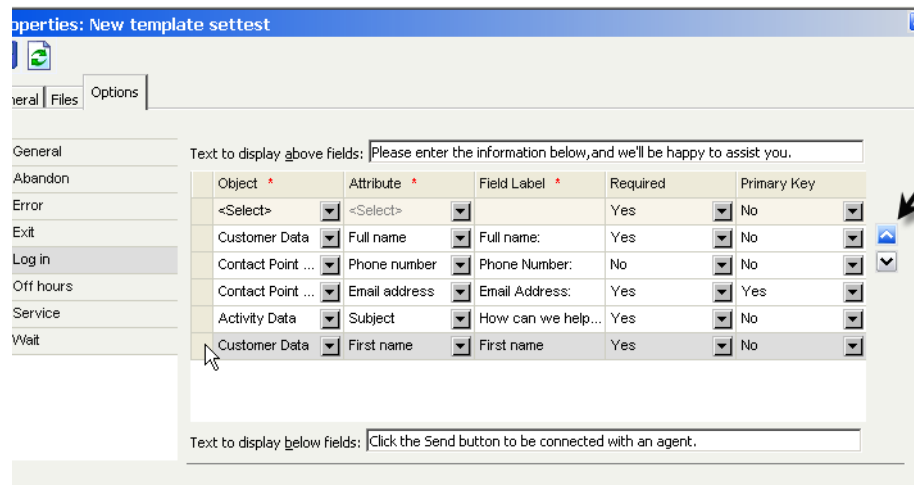
- Minimum Length: Type the number of minimum characters the customer needs to enter in the field.

- **Maximum Length:** Type the number of maximum characters the customer needs to enter in the field.
- **Validate using regular expression:** Provide the expression against which the information provided by the user is to be checked. For example for phone number field you can give an expression like, `^\s*(\?\s*\d{3}\s*)?\s*[-.]?\s*\d{3}\s*[-.]?\s*\d{4}\s*$`. And for email field, `^[0-9a-zA-Z\.\-_]+\@[0-9a-zA-Z\.\-_]+\.$`, this expression refers to a format X@Y. Z (john@mycompany.com).
- **Message for data validation:** Type the message you want to show to the customer, when the information provided by the customer does not match the validation parameters set by you.
- Click the OK button.

You can rearrange the order of the attributes as they will appear on the login page. By default the fields appear in the following order: Full name, Phone number, Email address and Subject. For example: you add the field First name to the form. By default the added fields appear in the end. But if you want the First Name field to appear below the Full name you can do that.

To rearrange the fields:

- Click on the left side of the row of the attribute you want to move. The row gets selected.



- Click the Move up or Move down button to move the attribute to the required position.
- Click the Save button.

You can also remove any attribute from the login page. For example: Phone Number is selected by default to be shown on the login page, but if you don't want to show it you can remove it from the form.

To remove an attribute:

- i. Click on the left side of the row of the attribute you want to remove. The row will get selected.

Properties: chat1

General Files Options

Text to display above fields: Please enter the information below, and we'll be happy to assist you.

Object *	Attribute *	Field Label *	Required	Primary Key
<Select>	<Select>		Yes	No
Customer Data	Full name	Full name	Yes	No
Contact Point ...	Email address	Email Address:	Yes	Yes
Contact Point ...	Phone number	Phone Number	Yes	No
Activity Data	Subject	Subject	Yes	No

Text to display below fields: Click the Send button to be connected with an agent.

ii. Press the Delete key on the keyboard. The field is removed.

iii. Click the Save button.

15. Off hours: In the Options tab click the Off hours section. Type the message you want to show to the customers during the off hours, when no online chat is available.

16. Service: In the Options tab click the Service section. With this setting you can decide how the messages will appear.

- Message transcripts: Select how you want the message transcript to appear. The default value is *Newest message at bottom - with separator*.

The options available are:

- Newest message at bottom - with separator.
- Newest message at bottom- without separator.
- Newest message at top- with separator.
- Newest message at top- without separator.


Important: The separator is a text message, Newest message, used to differentiate the latest message sent and received, from the rest of the chat transcript.

Setting up quick links and responses in queues

For each queue, you can configure the list of quick links and responses to be displayed for all chat sessions routed to the queue.


Configuring quick links

To configure the quick links:

1. In the Tree pane, select Department > <Department Name > Workflow > Queues.
2. Select the queue in the List pane.
3. In the Properties pane, click the Media tab.
4. In the Media tab, select the Chat - Quick links section.
5. In the Chat - Quick links section:
 - From the available quick links select the quick links, and add them to the selected quick links list.
6. Click the Save  button.

Configuring quick responses

To configure the quick responses:

1. In the Tree pane, select Department > <Department Name > Workflow > Queues.
2. Select the queue in the List pane.
3. In the Properties pane, click the Media tab.
4. In the Media tab, select the Chat - Quick responses section.
5. In the Chat - Quick responses section:
 - From the available quick responses select the quick responses, and add them to the selected quick responses list.
6. Click the Save  button.

Mapping users to queues for routing Chats

For each queue, you have to specify routing method to be used to push chats to agents, and select the agents to whom chats should be pushed.

1. In the Tree pane, select Department > <Department Name > Workflow > Queues.
2. In the List pane, select the queue you want to use to route the chats.
3. In the properties pane, in the General tab, specify the Chat Push-routing method you want to use. The default value is None.

The options available are:

- None: If None is selected, chats will not be pushed from the queue to any users. Users will have to explicitly pull chats from the queue to service them.
- Load balanced: If Load Balanced is selected, chats will get directly assigned to the user with the minimum number of open chat activities. In case there is a tie between two or more agents with the same number of chats, the user who has been waiting the longest since any chat was assigned to him will get priority over the others. If you select this option, you will have to select the list of users from the Relationships tab to whom the chats must be routed.

Routing chats transferred from other departments

For every department you need to configure a queue, to which all the chats transferred from other departments get routed. A department can have only one queue as the default chat transfer queue.

The first queue you create in the department, other than the pre-defined exception queue, automatically gets selected as the default chat transfer queue. You can select any queue as the default chat transfer queue.

To select a queue for routing chats transferred from other departments:

1. In the Tree pane, browse to Administration > Departments > Your department > Workflow > Queues.
2. In the List pane toolbar, select a queue.
3. In the Properties pane, go to the General tab.
4. In the field Default chat transfer queue, select Yes.

All the chats transferred from other departments get routed to this queue.

If a department already has a queue configured for routing chats transferred from other departments, then a message appears, asking to confirm that you want to change the default queue.

5. Click the Save button.

Once you save the queue, the Default chat transfer queue option becomes disabled. If you need to change the default queue you can select another queue as default and this queue gets de-selected automatically.

Other resources

- ▶ [Overview](#)
- ▶ [Classifications](#)
- ▶ [Dictionaries](#)
- ▶ [Macros](#)
- ▶ [Products](#)

This chapter will assist you in understanding the various resources within a department. You need to configure the resources to help set up the system to function, according to your business requirements.

Classifications

Classification is a systematic arrangement of resources comprising of Categories and Resolution Codes. You can create and assign classifications to incoming activities, or to knowledge base articles. Classifications are of two types:

1. Categories
2. Resolution Codes.

Categories are normally associated with incoming activities, whereas resolution codes are associated with knowledge base articles.

You can assign categories to incoming activities in two ways:

- ▶ Through the Agent Console.
- ▶ By setting rules in workflow.

Creating categories

Categories are keywords or phrases, that help you keep track of the activities. So you can easily find, sort, filter, or group them. You can use categories to keep track of different types of activities.

To create a category:

1. Click Classifications > Categories in the Tree Pane of the respective department.
2. Click New in the List Pane toolbar.
3. In the Properties Pane, enter a name and description for the category.
4. Click Save in the toolbar.

Deleting categories

To delete a category:

1. Click Classifications > Categories in the Tree Pane of the respective department.
2. In the List pane, select the category you want to delete and click Delete in the toolbar.

3. A message box asks for confirmation to delete the selected category. Click Yes to delete. Click No to cancel the delete operation. Click Help if you need to refer to the online documentation.

Creating resolution codes

You can assign Resolution Codes to knowledge base articles. Resolution codes help you to categorize and organize your knowledge base articles better.

To create a resolution code:

1. Click Classifications > Resolution Codes in the respective Department in the Tree pane.
2. Click New in the List Pane toolbar.
3. In the Properties pane, enter a name and description for the resolution code.
4. Click Save in the toolbar.

Deleting resolution codes

To delete a resolution code:

1. Click Classifications > Resolution Codes in the respective Department in the Tree pane.
2. In the List pane, select the resolution code you want to delete and click Delete in the toolbar.
3. A message box asks for confirmation to delete the selected category. Click Yes to delete. Click No to cancel the delete operation. Click Help if you need to refer to the online documentation.

Dictionaries

Dictionaries refer to a list of words stored in the system for reference. The Spell checker application in the system is based on this list of words.

For example; a user may find the dictionary of immense value to check the spellings in outgoing email.

The system provides one default dictionary on which the Spell checker is based. The system also provides dictionaries in different languages. As a department administrator, you can change the default dictionary for your department as per your

requirement. It is important to note that there can only be one default dictionary at a time in the system.

Choosing a default dictionary

To choose a default dictionary:

1. Click **Dictionaries** in the respective Department.
In the List Pane, the system provided dictionaries are displayed.
2. Select the required dictionary.
3. In the Properties pane **Default** field, choose **Yes** from the drop down list.
4. Click **Save** in the toolbar.

Creating dictionaries

You can also create your own dictionary and store words in it. You can make this the default dictionary for your department.

To create a new dictionary:

1. Click **Dictionaries** in the Tree Pane of the respective department.
2. Click **New** in the List Pane toolbar.
3. In the Properties Pane:
 - Enter a name and description for the dictionary.
 - Select a language for the dictionary.
 - Click on **Save** to enable the default field.
 - Select **Yes** in the **Default** field to make your dictionary the default dictionary of the system.
4. Click **Save**.

Macros

Macros are commands that fetch stored content. They are easy to use, and display the actual content, when expanded. Macros enable you to enter a single command to perform a series of frequently performed actions.

For example, you can define a macro to contain a greeting for email replies. Instead of typing the greeting each time, you can simply add this macro.

You can create two types of macros:

1. **Business Objects macros** - In Business Objects you can create macros for several objects. For example, Activity data, Customer data, User data, etc. You have to define an attribute to a macro from the list of system provided attributes. Please note that you can define only a single attribute for each macro.
2. **Combination macros** - In Combination Macros you can create macros with multiple descriptions. That is, you can combine multiple macros within a single macro. Multiple macros can be selected from both Business Objects and Combination macro types.

Creating business object macros

To create a business object macro:

1. Click Macros> Business Objects in the Tree Pane of the respective department.
2. Click New in the List Pane toolbar.
3. In the Properties pane, enter the macro details:
 - Name - name for the macro.
 - Description - a brief description of the macro.
 - Default Value - a value that will be treated as the default value of the macro.
 - Exception Article - select an article from the Article Selection Dialog box.
 - Definition - select the attribute that defines the macro and click OK to add the attribute.
4. Click Save in the toolbar.

Creating combination macros

To create a combination macro:

1. Click Macros> Business Objects in the Tree Pane of the respective department.
2. Click New in the List Pane toolbar.
3. In the Properties pane, enter the macro details:
 - Name - name for the macro.
 - Description - a brief description of the macro.
 - Default Value - a value that will be treated as the default value of the macro.
 - Exception Article - select an article from the Article Selection Dialog box.
 - Definition - select the attribute that defines the macro and click OK to add the attribute.

4. Click Save in the toolbar.

Deleting macros

To delete a macro:

1. Click Macros> Business Objects/Combination in the Tree Pane of the respective department.
2. Select the type of macro you want to delete.
3. In the List pane, select the macro you want to delete and click Delete button in the toolbar.
4. A message box asks for confirmation to delete the selected category. Click Yes to delete. Click No to cancel the delete operation. Click Help if you need to refer to the online documentation.

Products

You can associate products from the product catalog in the system with customers in a department.

A product catalog enables you to have a handy reference of your products within the system. You can configure the system to list your product catalogs with customized articles and attachments.

A product catalog is a complete enumeration of items (products) arranged systematically with descriptive details.

Creating product catalogs

To create a product catalog:

1. Click Products in the Tree Pane of the respective department.
2. Click New in the List Pane toolbar.
3. In the Properties pane, General tab, enter a name and description for the product catalog.
4. Click the Attributes tab to add more details about the product.
5. The Articles tab enables you to select an article from the Knowledge base.
6. The Attachments tab allows you to add attachments to the product catalog.
7. Click Save in the toolbar.

Deleting product catalogs

To delete a product catalog:

1. Click Products in the Tree Pane of the respective department.
2. In the List pane, select the product catalog you want to delete and click Delete in the toolbar.
3. A message box asks for confirmation to delete the selected category-. Click Yes to delete. Click No to cancel the delete operation. Click Help if you need to refer to the online documentation.



Workflows

- ▶ [Creating queues](#)
- ▶ [Creating service levels](#)
- ▶ [Creating workflows](#)

As an administrator, workflows are your biggest tools to assign work to the users in your department. The greatest advantage of creating workflows is that you do not have to manually assign incoming activities to your users. Your company might be getting thousand activities per day from the customers. In such a situation, it is physically impossible for you to assign every activity to the appropriate users and monitor whether the activity is handled. Workflows define the progression of an activity within the system. You can create a workflow to automate tasks, and ensure that the work is handled consistently, and efficiently, resulting in improved business operations.

Workflows manage the flow of all incoming, and outgoing activities. They are rules which define the action that the system takes on all activities. You can graphically create these rules to suit the requirements of your organization. You can assign certain types of activities to specific users, or queues. You can also set priorities for activities that require an immediate response. There are many other things that you can do with the help of workflows.

This chapter will elaborate all the tasks that you can perform with workflows. To understand the concept of workflows, you should first know the concepts of Queues and Service Levels. You can use queues and service levels to create workflows according to your requirements.

Creating queues

Queues hold incoming customer service activities such as emails and chat sessions that are waiting to be assigned to agents. A department can have any number of queues to map their business process. A single queue can hold multiple activity types like email, task, chat. The access to queues by agents are controlled by permissions. For example, a sports good company can have four types of issues coming into their system through emails, Orders, Replacements, Billing details and Shipment details. To map this process, Administrator can create four queues Orders, Replacements, Billing and Shipment in the system and using workflows route these issues to the respective queues. Using permissions, Administrator can control access of agents to work on issues in each queue. For example Shipment Agents can be given permission to work on shipment issues, but not Billing or Orders queue.

By default an exception queue is created in every department. While routing the activities if the workflow faces any error, it send the activities to the exception queue. Also, if the activities have any blocked words in them, those activities are sent to the exception queue.

Important: The exception queue cannot be deleted or made inactive. You can give the users, permissions on exception queues.

There are two methods, in which activities are routed by queues:

- Load-balanced: Activities are routed from the queue, to available agents having least number of activities in their inbox.
- Round-robin: Activities are routed from the queue, to all available agents alternatively, irrespective of the number of activities in their inbox.

To create a queue:

1. In the Administration Tree, select Departments > <your department> > Workflows > Queues.
2. Click the New button, in the List pane toolbar.
3. Select the General tab, in the Properties pane.
4. In the General tab:
 - Name: Type a name of the queue. This is required information.
 - Description: Type a brief description.
 - Active: When a queue is created, by default it is active. Select No to make it inactive. If you are using the queue in workflows or are intending to use it, it is advised that you don't make the queue inactive. If a queue is being used in the workflows and it is made inactive, no new incoming activities are routed to the queue. All the activities coming to the inactive queue are routed to the Exception queue. Also, if the queue is being used in the workflows and agents have pull and transfer permissions on the queue, they can pull and transfer activities to the inactive queues. If you want to restrict these actions, remove the pull and transfer permissions on the inactive queue.
 - Push-routing method: From the dropdown select the method you want to use. By default the option selected is None. There are three options available:
 - None: The activities don't get assigned to any agent. The activities stay in the queue, and the agents have to pull them from the queues.

Important: If you select the push-routing method for the queue as none, make sure that you give the users, pull and transfer permissions on the queue. If you don't give proper permissions on the queues, no user will be able to work on the activities coming in the queue.

- Load balanced: Activities are routed from the queue, to available agents having least number of activities in their inbox.
- Round-robin: Activities are routed from the queue, to all available agents alternatively, irrespective of the number of activities in their inbox.

Important: If you select the push-routing method as round-robin or load balanced, then you need to select the users to whom the activities are to be assigned. You can select the users in the Relationship tab.

5. Media tab: Select the Email section, in the Media tab.

For each queue, you can configure the header, footer, signature and greeting to be associated with the queue. The selected header, footer, signature and greeting are available to the agents in the Reply pane, for quick access.

Important: You can create the headers, footers, greetings and signatures articles in the Knowledge Base console.

- Greeting

To select a greeting:

- i. Click the Assistance button in the greetings field. Select Article window appears.
- ii. Select a greeting article, from the list of available greetings.

Important: Only one greeting can be associated with a queue.

- Header

To select a header:

- i. Click the Assistance button in the Headers field. Select Article window appears.
- ii. Select a header article, from the list of available headers.

Important: Only one header can be associated with a queue.

- Footer

To select a footer:

- i. Click the Assistance button in the Footer field. Select Article window appears.
- ii. Select a footer article, from the list of available footers.

Important: Only one footer can be associated with a queue.

- Signature

To select a signature:

- i. Click the Assistance button in the Signature field. Select Article window appears.
- ii. Select a signature article, from the list of available signatures.

Important: Only one signature can be associated with a queue.

- Include original message: Includes original message received from the customer, in replies sent for activities in the queue. By default this option is disabled. Select Yes to enable it.
- 6. Bookmarks tab: Bookmark the articles to be associated with the queue. The bookmarked articles are available to the agents in the Reply pane for quick access.
 - Select the articles from the available articles list, and add them to the selected articles list.
- 7. Relationships tab: Assign the users and user groups to the queue, to whom the activities are to be assigned from the queue.

Important: The Relationships tab is enabled only if, in the General tab, you have selected the Push-routing method as Round-robin or Load balanced.

- a. In the Route to users section:
 - Select the users from the available users, and add them to the selected users list.
 - In the selected users list, specify when the activities are to be routed to the users. The options available are:
 - Always: Activities are routed to agents irrespective of, if they are available to handle activities or not.
 - Only when Available: Activities are routed to agents only when they are available for handling activities.
- b. In the Route to user groups section:
 - Select the user groups from the available user groups, and add them to the selected user groups list.
 - In the selected user groups list, specify when the activities are to be routed to the users in the user group. The options available are:
 - Always: Activities are routed to agents irrespective of, if they are available to handle activities or not.
 - Only when Available: Activities are routed to agents only when they are available for handling activities.
- 8. Permissions tab: Assign permissions to the users and user groups, on the queue. Permissions can be given only to the users and user groups who have the appropriate actions assigned to them. If the actions are not assigned to the users, then the permissions options against their name appear disabled.

You can assign the following permissions to users and user groups:

- Own: To own the queue. The user who has own permission on the queue can give permissions to other users, on the queue.

- View: To view the queue.
- Edit: To edit the queue.
- Delete: To delete the queue.
- Transfer activities: To transfer activities to the queue.
- Pull activities: To pull activities from the queue.

Deleting queues

You can only delete a queue on which you have delete permissions. Also make sure that the queue you are deleting does not have any open activities stored in it.

Important: You cannot delete queues that have open activities or the queues that are being used in workflows.

To delete a queue:

1. Select the queue you want to delete. You can select multiple queues.
2. Click the Delete button in the List pane toolbar.

Important: The delete button is enabled only if you have delete permissions on the queue.

3. A message appears asking to confirm the deletion. Click Yes to delete the queue.

Creating service levels

Some customers may be more valuable to your company than others. In order to provide good service, agents in your department need to know about the importance of every customer. For this, you can assign service levels to your customers and use them in your workflows. Service levels enable you to define the importance of a particular customer, thereby directing the agents to respond immediately to customers with high importance.

The system provides you with four objects, on which you can create service levels.

To create service levels:

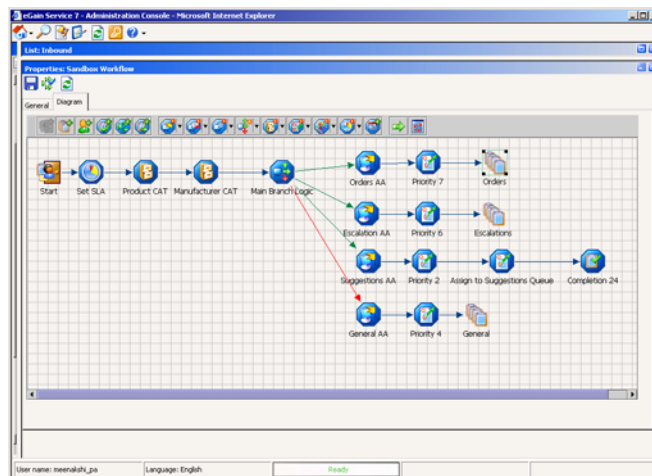
1. Go to Workflows in the Administration Console Tree pane.
2. Click Service Levels.
3. Click New in the List pane toolbar.
4. In the Properties pane, fill in the name and the description of your service level in the corresponding fields.

5. Click the Durations tab.
6. Fill in the values under Value for any, or all objects given in the Objects column.
7. Select the unit of time for your service level from the Unit column. Please note that the objects Email, Task, and Case have only two units of time that you can choose from. Those are: minutes and business hours. In case of Phone, however, you have an additional unit: seconds.
8. Click Save to create your service level.

Creating workflows

Workflow designer

The graphical workflow designer provides you with a canvas and a palette of nodes to create your workflow.



A sample workflow

Start The start node is the starting point of workflows. If you create a new inbound workflow, this node helps you specify the email alias for activities to enter the system.

The system provides a default start node configuration for:

- ▶ Alarm workflows
- ▶ General workflows
- ▶ Outbound workflows

The start nodes for these workflows are superficial. You do not need to configure them on your own.

Add Existing Queue This node helps you in adding an existing department to your workflow. With the help of this node, you can direct activities to one of available departments within your partition.



Add Existing User This node helps you in adding an existing user to your workflow. With the help of this node, you can direct activities to any one of the users in a department. You can also direct activities to foreign users in your department.



Set Completion Through this node, you can specify a rule, where an activity goes in the status Complete after it is processed by the workflow.



Add Existing Workflow You can add another workflow to further process an activity in the workflow that you create. This node helps you to do that.



Add New Auto-acknowledgement Auto-acknowledgement is an interesting feature. Through this node, you can send automatic replies to incoming activities. Auto acknowledgements are replies that the system automatically picks, according to rules specified in the workflow, and sends them to customers. You have to create such auto acknowledgements in the form of knowledge base articles in Knowledge Base Console.



Add New Auto-Reply Auto reply is another kind of auto-acknowledgement. Here, the system can pick up the knowledge base articles that you specify in the workflow, and send them as replies to activities.



Add New Auto-Suggest Auto-suggest is another kind of auto reply. It performs the same function as the two above described nodes.



Add New Branch The Branch node is an important tool for you to use while creating workflows. Its functionality is based on true-false conditions. It allows you to formulate such rules, that you can direct activities to different users or queues, based on whether the conditions are met or not.



Add New Categorization This node allows you to add an existing classification to activities. You can create classifications in the Classification folder in the Administration Console. While configuring this node, you do not need to specify the false condition.

Add New Modify Object This node also works on true-false conditions. Through this node, you can add objects such as macros or links to the activities.

Add New Create Object This node also works on true-false conditions. This node aids you in creating new objects, such as macros or links, if the conditions that you specify are met.

Add New Service Level This node helps you add service levels to activities.

Add New Custom Rule You can create your own sets of rules according to your requirements. You can add these rules through this node in your workflow.

Workflow types

There are four kinds of workflows that you can create:

- ▶ Alarm Workflows
- ▶ General Workflows
- ▶ Inbound Workflows
- ▶ Outbound Workflows.

Alarm workflows

You can configure alarm workflows to process activities in the system and perform actions such as notifications, escalations, reassignments, etc. depending on the specified conditions. Alarm workflows are typically used to provide customer service based on customer value.

Additional workflows can be configured to work on activities processed by the alarm workflows.

General workflows

This workflow applies on activities that are in the Ready for General Workflow status, mainly on tasks and other generic (custom) activity types.

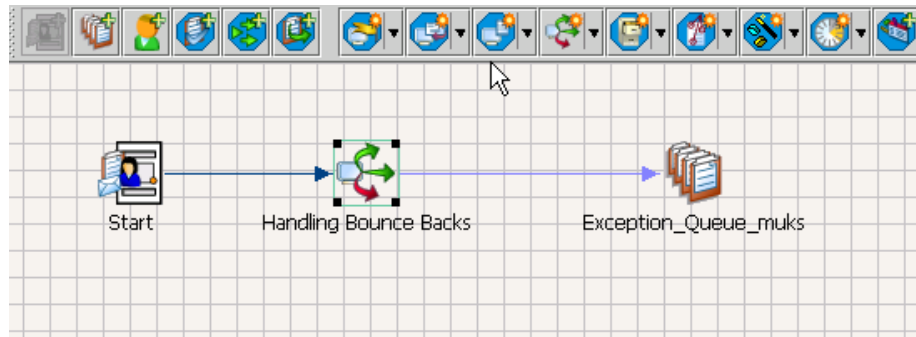
General workflows are meant to be used mainly during customization of a company's business process primarily when dealing with activities of types that do not fall into any of the normal customer interaction channels

Inbound workflows

Inbound workflows define the rules for all activities coming into the system. Inbound workflows are responsible for the transfer of activities between departments.

There are three default inbound workflows within the system. You can also create your own workflows. The three default workflows are as follow:

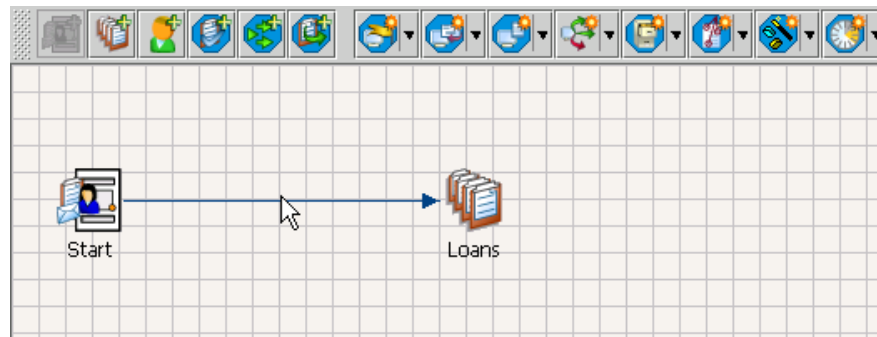
1. **Start workflow - Standard:** The activities that enter the system are processed according to the start workflow. This workflow does not look after the transfer of activities from one department to another.



The Start workflow - Standard

The system provides a blank start workflow-standard. You can fill in the values and lay the workflow according to your requirements. If you do not want to use the start workflow-standard at all, you can create a customized inbound workflow that suits your requirements.

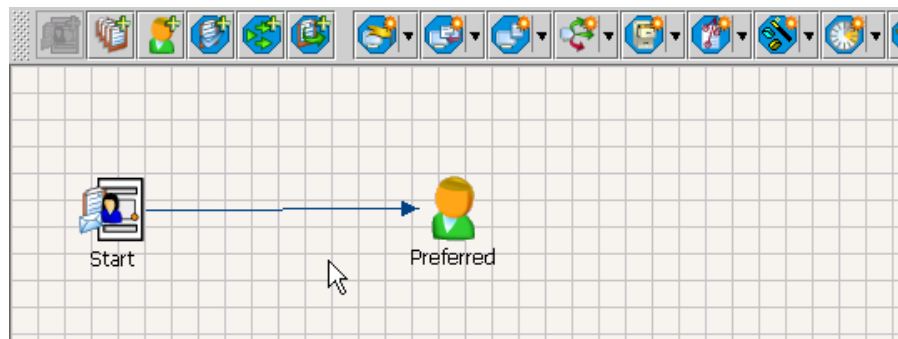
2. **Start workflow - Transfer:** This workflow is responsible for transferring activities from one department to another. You cannot transfer activities to other departments unless the transfer workflow is active.



The Start Workflow - Transfer

The system provides a blank transfer workflow. You can fill in the values and lay the workflow according to your requirements.

3. **Finish workflow:** This is the last workflow applied on an activity. You can configure it to be always the last workflow to apply to an activity. It also applies to an activity if no user-defined inbound workflow is applied to it.



The Finish Workflow

The system provides a blank finish workflow. You can fill in the values and lay the workflow according to your requirements. If you do not want to use the finish workflow at all, you can create a customized inbound workflow that suits your requirements.

Note – To apply any workflow to activities, you have to make its status **active**.

Outbound workflows

An outbound workflow identifies the set of Rules that are applied on activities that are generated when email responses are sent out manually in the system. The primary reason for outbound workflows is to have a control on the quality of outbound email responses.

Outbound workflows are applied on outbound email responses generated by a configured set of users or user groups. An aggregation of objects of same type in the system, e.g. a Group of Users. Only objects of same type can belong to a group. Group has an attribute that indicates the type of objects it aggregates. The purpose of groups is to ease the management of entities in the system. In addition to this, outbound workflows can be configured to apply on responses to activities belonging to certain queues.

However, outbound workflows are not applicable to email forwarded from the system. This workflow is applied on users, user groups, and queues.

Creating any workflow

To create any workflow:

1. Go to the required department in the Administration Console Tree Pane.
2. Go to Workflow.
3. Click Workflows.
4. Click the kind of workflow that you want to create.
5. Click New in the List pane.
6. Click General in the Properties pane.
7. Fill in the name and the description for your workflow in the corresponding fields.
8. Click the dropdown button in Active and select Yes.
9. Click Diagram.
10. Lay out the workflow with the help of the buttons on the workflow toolbar.
11. Click Validate.
12. Click Save to create your workflow.

Creating an alarm workflow

To create an alarm workflow:

1. Go to Workflows in the Administration Console Tree pane.

2. Click General in the Tree pane.
3. Click New in the List pane.
4. Click General in the Properties pane.
5. Type in the name and the description for your workflow in the corresponding fields.
6. Click the dropdown button in the Active field to select Yes.
7. Click the tab Diagram.
8. Lay out the workflow with the help of the buttons on the workflow toolbar.
9. Click Validate.
10. Click Save to create your workflow.

Managing archive

- ▶ [About archiving](#)
- ▶ [Archive jobs](#)
- ▶ [Job runs](#)
- ▶ [Purging](#)
- ▶ [Managing archive jobs](#)
- ▶ [Managing job runs](#)
- ▶ [Purging archived data](#)

About archiving

Data is stored in the active database. With time, the size of the data usually increases to a point where it begins to affect the performance of the system. Hence, it is important that data that is not in use anymore is stored somewhere other than the active database.

Archiving is a systematic process which moves the data from the active database to the archive database. Periodic archiving helps to keep the size of the active database within prescribed levels, thereby improving the performance of the system.

What can you archive?

You can archive cases and activities. However, attachments of activities are not archived.

Once archived, a case or activity cannot be “unarchived.” If a customer replies to an archived case, a new case gets created.

Archive jobs

An archive job is a process that runs automatically at a scheduled time, and archives data based on specified criteria (such as the age of the data and the queue to which it belongs). You can create multiple archive jobs in a department, but two jobs can't have overlapping schedules. For an archive job to be picked up for running, it should be in active state.

When a job is run, the archiving of the data happens in batches. Each archive job is broken into batches of 5000 cases. For example, if a job is scheduled to archive 22000 cases, it processes them in batches of 5000 cases. To archive 22000 cases, it will run four batches of 5000 cases and the fifth batch of 2000 cases. Breaking of a job into batches ensures that if an error occurs while archiving the data, or if the archive process is stopped and restarted, only a small piece of data has to be processed again.

Every batch completes archiving in two steps:

- ▶ First, it inserts the data from the active database to the archive database.
- ▶ After successfully inserting the data in the archive database, it deletes the data from the active database.

Important: For archive jobs to work, the Scheduler and Archive services should be running.

Who can manage archive jobs?

Only users with appropriate permissions can manage archive jobs.

The actions required for managing archive jobs are:

- ▶ View archive jobs: For viewing the archive folder and the archive jobs in the folder
- ▶ Edit archive jobs: For editing jobs
- ▶ Create archive jobs: For creating jobs
- ▶ Delete archive jobs: For deleting jobs
- ▶ Purge archive jobs: For deleting archived data

Partition administrators have all these actions assigned to them by default, but these actions have to be given explicitly to department administrators. Since archiving is a very sensitive process, discretion should be used while assigning archiving actions to users.

Archive criteria

While creating archive jobs, you can specify two criteria.

1. The relative age of the activities and cases to be archived: You need to specify the relative age of the cases and activities that should be picked up for archive. The age can be given in days, weeks, or months.

For example: You set the job to archive the closed cases and completed activities that were closed or completed one month before the date on which the archive job runs. It means the job will archive:

- All completed activities that belong to the cases that were closed one month before the job run.
- All completed activities that do not have any case association and were completed one month before the job run.
- All cases that were closed one month before the job run.

Important: Since activities belonging to a case can be present in multiple departments, archiving checks if the first activity of a case belongs to the department in which the job is run. If it is, only then that case and its associated activities are archived.

2. The queues to which the completed activities and closed cases belong: When you specify a queue, the job archives only the cases and activities that belong to that queue. Important things to note are:
 - If the last activity of a closed case belongs to the queue specified in the filter, then the case with all its constituent activities is archived.

- If there are activities that belongs to the queue specified in the filter, with no case association, then those activities are archived.
- If the last activity in a closed case does not belong to any queue, the case and all its constituent activities don't get archived.

Planning the schedule of archive jobs

When an archive job runs, it puts additional load on the system. To ensure that the productivity of the agents is not effected by the archive jobs running on the system, you can plan the schedule of the archive jobs in a way that they don't run at peak business hours.

While scheduling the jobs you can specify two things. They are:

- ▶ The days of the week when the archive jobs will run
- ▶ The time of the day when the jobs will run. In this you can select between two options. They are:

- Set the job to run throughout the day

For example, if your call center is closed on Saturday and Sunday, you can schedule the archive jobs to run throughout the day, on Saturday and Sunday.

- Set the job to run between specified start and end time

For example, if your call centre runs 24/7, and has less load from 10 pm to 6 am on Monday and Tuesday, then you can schedule the archive jobs to run from 10 pm to 6 am, on Monday and Tuesday.

Two active jobs in a department cannot be scheduled for the same or overlapping time. For example you cannot have a job scheduled from 4 pm to 6pm, and another job scheduled from 5 pm to 7 pm on the same day. However you can have one job scheduled from 4 pm to 6pm, and another from 6pm to 8pm on the same day.

Job runs

A job run is a record that indicates the time at which the archive job started and ended, the status of the job, whether it is running, completed, or failed, and the number of cases and activities handled by the archive job. Every time the system runs an archive job, a new job run is created. For example if an archive job is scheduled to run from Monday to Friday between 6 am and 9 am, and the job runs successfully every day, then there will be six job runs for the archive job. You can view all the job runs for an archive job in the History tab in the Properties pane.

Run By	Start Time	End Time	Status	Cases Archived	Activities Archived
system	09/26/2004 01:00 ...	09/26/2004 01:...	Archive completed	6	9
system	09/27/2004 01:00 ...	09/27/2004 01:...	Archive completed	0	0
system	09/29/2004 01:00 ...	09/29/2004 01:...	Archive completed	0	0
system	09/30/2004 01:00 ...	09/30/2004 01:...	Archive completed	0	0
system	10/02/2004 01:00 ...	10/02/2004 01:...	Archive completed	0	0
system	10/03/2004 01:00 ...	10/03/2004 01:...	Archive completed	0	0
system	10/04/2004 01:00 ...	10/04/2004 01:...	Purge started (start...	0	0
system	10/06/2004 01:00 ...	10/06/2004 01:...	Archive completed	0	0

A Job run can have one of the following status:

- ▶ Running: The archive job is running and is in progress.
- ▶ Completed: The job run was completed when:
 - The time allotted for the job to run is over
 Or
 - There is no more data left for archiving
- ▶ Failed: The job encountered some problem while archiving and couldn't run successfully.

Important: If a job fails, no other scheduled job can run in the system, till the failure of the job is resolved and the failed job is restarted manually.

The reason of failure can be one of the following.

- Network connection is down
- Application database or archive database is down
- Archive database storage is full
- Internal error in the archive process
- ▶ Stopped: The job has been stopped manually while it was running.

Purging

As the archive jobs run on the system, they keep moving the data from the active to the archive database, and the data size on the archive database increases. At sometime the need will arise to delete the archived data. Purge is a process which helps you to systematically delete the data from the archive database. Once purged, the information is lost permanently and can't be recovered. The data can be purged

job run wise and you can purge only those job runs that have completed successfully. You can't purge a job run that is in a running state or has failed because of some error. Purge also deletes the attachments associated with the activities being purged.

Important: Once you start purge it cannot be stopped, and the purged data is lost and cannot be recovered.

When a job run is purged, it can have one of the following status:

- ▶ Purge started: The job run has been queued for purge
- ▶ Purge completed: Purge completes successfully
- ▶ Purge failed: Purge fails because of some errors

Managing archive jobs

Creating archive jobs

An archive job is a process that runs automatically on scheduled time, and it archives data based on specified criteria that is the age of the data and the queue to which it belongs. You can create multiple archive jobs in a department, but two jobs can't have overlapping schedules. And for an archive job to be picked up for running it should be in active state.

After you create a job, it runs automatically on the scheduled date and time. You cannot start the job manually. However when a job starts running you can stop and restart it.

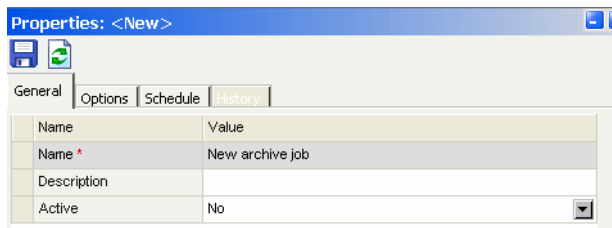
To create an archive job

1. In the Tree pane, browse to **Administration > Departments > Your department > Archive Jobs**.
2. In the List pane toolbar, click the **New** button.

Once you create an archive job, the Properties pane refreshes to show the attributes of the new job.

3. In the Properties pane, go to the **General** tab.

In this tab, specify the general details about the new job.



- **Name:** Type a name for the archive job. This is required information.
- **Description:** Type a brief description of the job.
- **Active:** By default the status of the job is not active. Select **Yes** to make it active. A job can run only when it is in active state.

4. In the Properties pane, go to the **Options** tab.

Here you set the criteria for the archive job.

- a. First go to the **Timeframe** section, and specify that when this archive job is run, archive the closed cases and completed activities that were closed or completed n days before the date on which the archive job runs.

Select the relative time frame in days, weeks or months. For example, if you want to archive the cases and activities which were completed two months before the date on which the archive job runs, then select two months.

- b. Next, go to the **Queues** section and select the queues on which the archive job is to run.

5. In the Properties pane, click the **Schedule** tab.

Here you specify the days and time when the archive job is to run.

- a. Select the days on which the archive job should run.
- b. Specify the time of the day when the archive job should run. There are two options available.
 - **Throughout the day:** For example, you can schedule the archive job to run on Saturday and Sunday throughout the day.
 - **Archive Only between the specified start and end time:** For example, you can schedule the archive job to run on Saturday and Sunday from 8pm to 11 pm.
- c. Select the duration for which you want to schedule the archive job.

6. Click the **Save** button.

Important: The History tab is enabled only after you save the job.

In the **History** tab you can view the list of job runs. If you are creating a new job, the list will be empty. You can also stop, restart, and purge the job runs from the **History** tab. For more details, see sections on...

Deleting archive jobs

Important: A job cannot be deleted if it has job runs that haven't been purged. Before you can delete the archive job, you have to purge the data archived by that job.

To delete an archive job

1. In the Tree pane, browse to **Administration > Departments > Your department > Archive Jobs**.
2. In the List pane, select the archive job you want to delete.
3. In the List pane toolbar, click the **Delete** button.

Important: The Delete button is enabled only if you have the action assigned to delete archive jobs.

4. A message appears asking to confirm the deletion. Click **Yes** to delete the job.

Managing job runs

Viewing job runs

Every time the archive job runs a record is created indicating the start and end time of the job, if the job is in running state, if it completed successfully or it failed, and the number of cases and activities archived by that job. Each record is called a Job run, and all the job runs for an archive job can be viewed from the History tab.

To view a job run

1. In the Tree pane, browse to **Administration > Departments > Your department > Archive Jobs**.
2. In the List pane, select an archive job.
3. In the Properties pane, go to **History** tab.

Here you see a list of job runs. You can see the following details about the job run.

- Start time: The time when the job run started
- End time: The time when the job run ended
- Status: The status can be running, completed, or failed
- Cases archived: The number of cases archived
- Activities archived: The number of activities archived

Stopping job runs

Important: A job can be stopped only if it is in a running state.

To stop a job

1. In the Tree pane, browse to **Administration > Departments > *Your department*** > **Archive Jobs**.
2. In the List pane, select an archive job.
3. In the Properties pane, go to the **History** tab and select the job run you want to stop.
4. Click the **Stop** button.

Restarting job runs

You will need to restart a job if:

- ▶ You stopped the job manually: If you are restarting the job within its scheduled time, it will run till the end of the schedule. If the restart happens outside the scheduled time, then it will only complete the batch it was archiving at the time you stopped the job.
- ▶ The job failed while running: In case of a failure, if the job is restarted within the scheduled time, it runs till the end of the schedule. And, if the restart happens outside the schedule time, it will only complete the batch it was archiving at the time of failure.

Important: If a job run fails and its schedule expires, such a job run can also be restarted. On restart it will only complete the batch it was archiving at the time of failure.

To restart a job

1. In the Tree pane, browse to **Administration > Departments > *Your department*** > **Archive Jobs**.
2. In the List pane, select an archive job.
3. In the Properties pane, go to the **History** tab and select the job run you want to restart.
4. Click the **Restart** button.

Purging archived data

As the archive jobs run on the system, they keep moving the data from the active to the archive database, and the data size on the archive database increases. At sometime the need will arise to delete the archived data. Purge is a process which helps you to systematically delete the data from the archive database. Once purged, the information is lost permanently and can't be recovered. The data can be purged job run wise, and you can purge only those job runs that have completed successfully. You can't purge a job run that is in a running state or has failed because of some error. Purge also deletes the attachments associated with the activities being purged.

Important: Once you set up a job run for purge it cannot be stopped, and the purged data is lost and cannot be recovered.

When a job run is purged, it can have one of the following status.

- Purge started: The job run has been queued for purge
- Purge completed: Purge has completed successfully
- Purge failed: Purge failed because of some errors

Important: Purge of the archived data does not start immediately. The data is purged at the purge interval defined at the time of installing the application and it cannot be changed.

To purge archived data

1. In the Tree pane, browse to **Administration > Departments > Your department > Archive Jobs**.
2. In the List pane, select an archive job.
3. In the Properties pane, go to the **History** tab.
 - Select the job run you want to purge and click the **Purge** button.

The status of the job run changes to Purge started, and it shows the name of the user who started the purge and the time at which the purge started.