



## **Cisco Unified Web and E-Mail Interaction Manager Agent Console User's Guide**

**For Unified Contact Center Enterprise and Hosted and Unified ICM**

Release 4.2(5)  
October 2008

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*Cisco Unified Web and E-Mail Interaction Manager Agent Console User's Guide: For Unified Contact Center Enterprise and Hosted and Unified ICM*  
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# 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 unified suite of the industry's best applications for web and email interaction management, it is the backbone of many innovative contact center and customer service helpdesk organizations.

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

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

## About this guide

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*Cisco Unified Web and E-Mail Interaction Manager Agent Console User's Guide* introduces you to the Agent Console and helps you understand how to use it to handle customer queries and respond to them effectively and efficiently.

This guide is for installations that are integrated with Cisco Unified Contact Center Enterprise (Unified CCE).

## Document conventions

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This guide uses the following typographical conventions.

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


*Document conventions*

## Other learning resources

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

## Online help

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

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

*Online help options*

## Document set

The Cisco Unified Web and E-Mail Interaction Manager documentation is available in the **Documents** folder on the product CD. It includes the following documents:

- ▶ *Cisco Unified Web and E-Mail Interaction Manager System Requirements*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Installation Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administration Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administration Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Reports Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Supervision Console User's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Tools Console User's Guide*

The latest versions of all Cisco documentation can be found online at <http://www.cisco.com>

- ▶ All Unified EIM documentation can be found online at [http://www.cisco.com/en/US/products/ps7236/tsd\\_products\\_support\\_series\\_home.html](http://www.cisco.com/en/US/products/ps7236/tsd_products_support_series_home.html)
- ▶ All Unified WIM documentation can be found online at [http://www.cisco.com/en/US/products/ps7233/tsd\\_products\\_support\\_series\\_home.html](http://www.cisco.com/en/US/products/ps7233/tsd_products_support_series_home.html)

- ▶ In particular, Release Notes for these products can be found at [http://www.cisco.com/en/US/products/ps7236/prod\\_release\\_notes\\_list.html](http://www.cisco.com/en/US/products/ps7236/prod_release_notes_list.html)
- ▶ For general access to Cisco Voice and Unified Communications documentation, go to [http://www.cisco.com/en/US/products/sw/voicesw/tsd\\_products\\_support\\_category\\_home.html](http://www.cisco.com/en/US/products/sw/voicesw/tsd_products_support_category_home.html)

# 1 Basics

- ▶ [Logging in](#)
- ▶ [Preferences and settings](#)
- ▶ [Managing your availability](#)
- ▶ [About pulling activities](#)
- ▶ [About pinning activities](#)
- ▶ [Transferring activities](#)
- ▶ [About reviewing outbound emails](#)
- ▶ [Managing new activity notifications](#)

# Logging in

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## To log in to the business partition from your browser window:

1. Ensure that you configure your browser by following the instructions in the *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*.
2. Type the URL provided by your system administrator in the browser. The URL is typically in the following format: `http://Web_Server/Partition_Virtual_Directory` where *Web\_Server* is your web server and *Partition\_Virtual\_Directory* is the virtual directory created for the business partition.
3. In the Login window, type your user name and password. Click the **Log In** button.

## To log in to the business partition using Cisco Agent Desktop:

Cisco Interaction Manager integrates with the lower pane of the Cisco Agent Desktop. As an agent, you can configure a task button to launch external applications and use it to log into Unified WIM and Unified EIM.

# Preferences and settings

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## About preferences

Most settings are configured by administrators for the business partition or for each department. The administrator may allow users to configure certain settings as individual preferences. In the preferences section, you can change your password, certain settings, personal dictionary attributes, and pull preferences for activities.



**Important:** Any preferences that are changed, take effect with the next login. If you want the changed preferences to take effect immediately, log out of the system and log in again.

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## Changing settings

If you have the permissions, you can change the following settings for your inbox.

1. **Chat - Inbox sort column:** Use this setting to define the field (column name) by which the list in the Chat Inbox should be sorted. The options available are – Shortcut key (default value), Activity ID, Case ID, When Created, Customer name, Subject, Activity sub status, and Queue name. This setting does not affect the sorting in My Searches or My Monitor folders.



**Important:** If you specify a column name that is not part of your inbox list, or if there is a tie between two activities with the same value for the sorting column, the inbox is then sorted by the shortcut key.

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2. **Chat - Inbox sort order:** Use this setting to define the sort order of the list in the Chat Inbox. The options available are – Ascending and Descending (default value). This setting does not affect the sorting in My Searches and My Monitor folders.

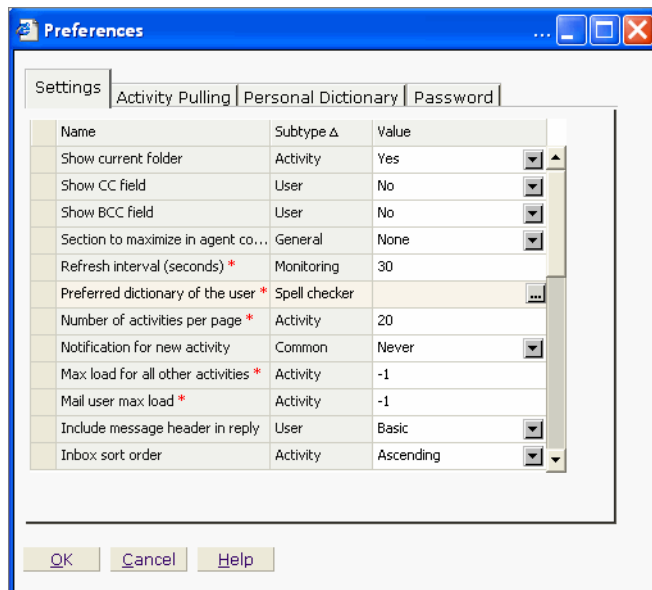
3. **Inbox sort column:** Use this setting to define the field (column name) by which the list in the Activities and Cases folders should be sorted by default. The options available are – Activity ID (default value), Activity Priority, Case ID, Contact point, Department name, Subject, When created, Activity type, and Activity sub status. This setting does not affect the sorting in the My Searches folder.
4. **Inbox sort order:** Use this setting to define the sort order of the list in the Activities and Cases folders in your inbox. The options available are – Ascending and Descending (default value). This setting does not affect the sorting in the My Searches folder.
5. **Mail user max load:** The number of activities, of the type email, that a user can work upon is limited. Hence, the system checks the current load of the user before assigning more emails. Through this setting, you can set the maximum number of email activities that can be assigned to you. This setting is used by workflow to identify whether an activity should be assigned to you. This setting is not checked when you pull activities from queues or other users. It will be checked when other users transfer activities to you. All open mails in your inbox will qualify for this setting. It can take any value. The default value is -1. A value of –1 denotes that there is no limit to the number of emails that can be assigned. This setting is not valid for agents who are mapped to Unified CCE users.
6. **Max load for all other activities:** The system can check the current load of the user before assigning more activities of a type other than Mail. Through the Max load for all other activities setting you can set the maximum number of activities (of type other than Mail) that you can be assigned. This setting is used by workflow to identify whether an activity can be assigned to you. This setting will not be checked when you pull activities or other users transfer activities to this user. It can take any value. The default value is -1. A value of –1 denotes that infinite number of activities can be assigned. This setting is not valid for agents who are mapped to Unified CCE users.
7. **Number of activities per page:** The number of activities that can be displayed on the UI at a time, is based on a pagination model. Each page displays a certain number of records. With this setting, you can decide the number of activities to be displayed on one page. It is to be noted that two other settings, the Inbox sort column and Inbox sort order also influence the activities that are displayed. The default number of activities displayed on a page is 20.
8. **Activity type for autopushback:** You can define which activities should be pushed back from your inbox when you log out. This setting is valid for both standalone and mapped users. The options available are:
  - None: No activities will be pushed back to the queues.
  - New activities only: Only the activities with the sub-status **New** are pushed back to the queues (default value).
  - Both new and incomplete activities – All the activities will be pushed back to the queues.
9. **Expiry time for autopushback (minutes):** You can define a time period after which activities should be pushed back from your inbox to queues. This time period begins when you log out of the system. Activities will remain in your inbox for this period of time after you log out of the system. The value for this setting is in minutes. The default value is 30.
10. **Notification for new activity:** Use this setting to define when email notifications of new activities should be sent to you. The options available are:
  - Never: No email notification about new activities are sent (default value).
  - When Logged In: Email notifications are sent to your email ID when you are logged into the application.
  - When not Logged in: Email notifications are sent to your email address when you are not logged into the application.

- Always: Email notifications are sent every time a new activity is assigned, irrespective of whether you are logged in to the application or not.
11. **Agent inbox preference:** Use this setting to define whether you want to view the chat inbox or the email inbox when you log in to the Agent console. The options available are – Chat (default value) and Email.
  12. **Customer history view:** Use this setting to define the format in which you want to view the customer history. The options available are – Snapshot View (default value) and Tree View.
  13. **Refresh interval (seconds):** The monitor windows in the Supervision Console have to be refreshed periodically to update them with real time data from the monitor tables. Use this setting to define how often the monitoring windows should be refreshed automatically. This setting takes value in seconds. The default value is 30.
  14. **Auto blockcheck:** With this setting you can choose to let the spell checker automatically check for blocked words. Blocked words are configured in the Administrator console in the Dictionaries node. They can also be defined in the Personal Dictionary preferences of a user. If this setting is enabled, emails that contain blocked words are not sent until the blocked words have been deleted or modified. Since the Auto block check works through the Auto spell check, enabling the Auto block check means that the spell checker is automatically invoked before an email is sent out.
  15. **Auto spellcheck:** Enable this setting to automatically invoke the spellcheck functionality before an email is sent out of the application.
  16. **Ignore web addresses and file names:** This setting helps you to enable the spell checker to ignore internet addresses and file names. The options available are:
    - Yes: The words are ignored.
    - No: The words are not ignored and are displayed in the spelling checker for correction (default value).
  17. **Ignore words in caps:** With this setting, you can choose to let the spell checker ignore words in all uppercase letters. The options available are:
    - Yes: The words are ignored.
    - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
  18. **Ignore words with digits mixed:** This setting allows you to let the spell checker ignore words that have mixed digits. For instance, name123@yahoo.com. The options available are:
    - Yes: The words are ignored.
    - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
  19. **Ignore words with numbers:** This setting allows you to let the spell checker ignore words with numbers. The options available are:
    - Yes: The words are ignored.
    - No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
  20. **Ignore words with unusual mixtures:** With this setting, you can choose to let the spell checker ignore words with unusual mixture of upper and lower case letters. For instance, myFirstWord. The options available are:
    - Yes: The words are ignored.

- No: The words are not ignored and are displayed in the spelling checker with options for correction (default value).
21. **Preferred dictionary of the user:** With this setting, you can choose the dictionary for the spell checker to consider. The options available are - English (US) Dictionary, English (UK) Dictionary, German Dictionary, Spanish Dictionary, French Dictionary, Portuguese Dictionary, Dutch Dictionary, Italian Dictionary, Norwegian (Bokmaal) Dictionary, Finnish Dictionary, Swedish Dictionary, Danish Dictionary.
  22. **Default editor:** In this setting, you can choose the default editor for composing replies. The options available are – HTML editor and Plain text editor (default value).
  23. **Include message header in reply:** An email contains header information that details the Sender’s email address, Subject, Time of sending the mail, machine name, protocol type, client name etc. Use this setting to define the amount of header information that should be included in the reply. The options available are:
    - None: No header information is displayed in the Reply pane and hence included in the reply.
    - Basic: Only basic header information is displayed in the Reply pane and hence included in the reply. (default value).
    - Complete: The complete header information is displayed in the Reply pane.
  24. **Show BCC fields:** With this setting, you can select to view the BCC field in the Reply pane. The options available are – Yes and No (default value).
  25. **Show CC field:** With this setting, you can select to view the CC field in the Reply pane. The options available are – Yes and No (default value).

### To change settings:

1. In the Agent Console toolbar, click the **Preferences**  button.
2. In the **Preferences** window, go to the **Settings** tab, and change the settings.



*Configure settings*


3. After changing the settings, click the **OK** button.

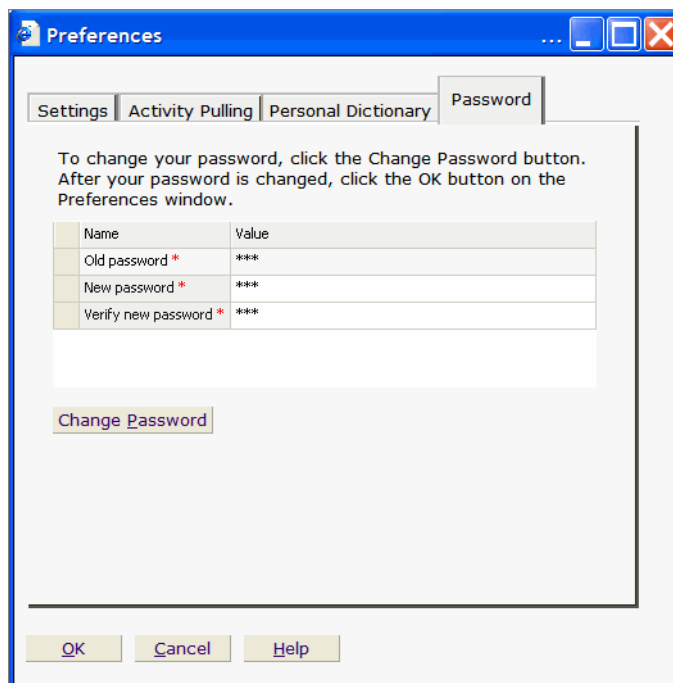
## Changing your password



**Important:** Only standalone Unified WIM and EIM agents should change their password through the Agent Console. Authentication information for agents who are mapped to Unified CCE users is managed through Unified CCE. Mapped agents should not attempt to change their password from the Preferences section in the Agent console.

### To change your password:

1. In the Agent Console toolbar, click the **Preferences**  button.
2. In the Preferences window, go to the Password tab.
3. On the Password tab, first provide the old password. Then, provide the new password and verify the new password. Click the **Change Password** button.



Name	Value
Old password *	***
New password *	***
Verify new password *	***


*Change your password*

## Updating your personal dictionary

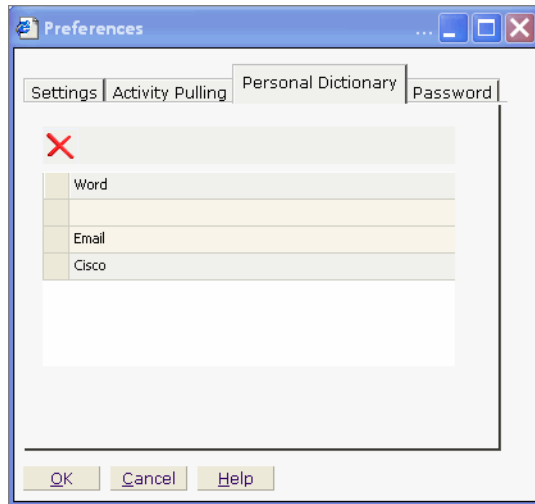
You can add words to your personal dictionary. There can be some words which are used in your organization that are not part of the regular dictionary. You can add such words to your personal dictionary, so that every time you run the spell-checker these words are ignored by the spell-checker.

## Adding words to your personal dictionary

### To add words to your personal dictionary:

1. In the Agent Console toolbar, click the **Preferences**  button.

2. In the Preferences window, go to the Personal Dictionary tab.
3. On the Personal Dictionary tab, type the word you want to add to your personal dictionary and press ENTER.





*Add words to the personal dictionary*

4. Click the **OK** button.

## Deleting words from your personal dictionary

### To delete words from your personal dictionary:

1. In the Agent Console toolbar, click the **Preferences**  button.
2. In the Preferences window, on the Personal Dictionary tab, select the word you want to delete and click the **Delete**  button.

## Changing your preferences for pulling activities

Standalone agents can pull activities from queues and can set preferences that affect activity pulling. You can specify the queues from which you want to pull activities, which activities to pull and how many activities to pull at a time. Note that stand alone agents cannot pull activities from mapped queues or mapped agents.




In the activities to pull first, there are five options available:

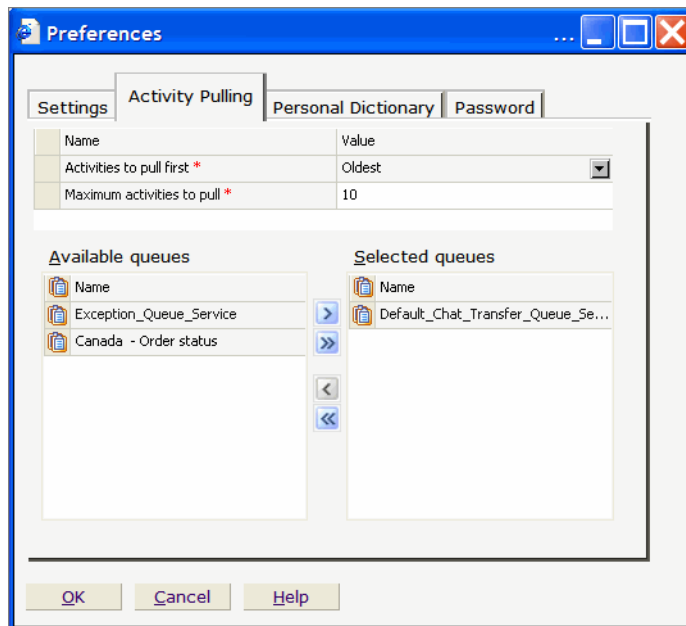
- **Most overdue:** Activities that are late and are already overdue.
- **Due soonest:** Activities that are not late, but are due the soonest.
- **Highest priority:** Activities that are marked with the highest priority.
- **Newest:** Activities that have the most recent creation date and time.
- **Oldest:** Activities that have the oldest creation date and time.



**Important:** You can change your preferences for pulling activities only if you have the permission to change your preferences.

## To set your preferences for pulling activities:

1. In the Agent Console toolbar, click the **Preferences**  button.
2. In the Preferences window, go to the Activity Pulling tab and provide the following details.
  - **Activity to pull first:** From the dropdown list select the type of activities to pull. The options available are – due latest, due soonest, highest priority, newest, and oldest.
  - **Maximum activities to pull:** Specify the number of activities you want to pull each time you click the **Pull Next**  button or the **Pull Next Chat**  button.
  - From the list of queues select the queues from which you want to pull the activities.



*Set preferences for pulling activities*

3. Click the **OK** button.


## Managing your availability



**Important:** This feature is for use by standalone Unified EIM and both standalone and mapped Unified WIM agents. Availability for mapped Unified EIM agents is managed through Unified CCE. Mapped Unified WIM agents should set their availability using this feature to have chat activities routed to them.


If you are working on some activity and you think that you won't be able to handle any other incoming activities at that time, you can change your availability settings. This ensures that no new activities are assigned to you by the system. If anyone is transferring an activity to you, they too will know that you are unavailable to handle any new activities. This makes sure that if an activity needs immediate handling, it is not transferred to an unavailable agent. You can change your availability setting for all activities or individually for different types of activities.

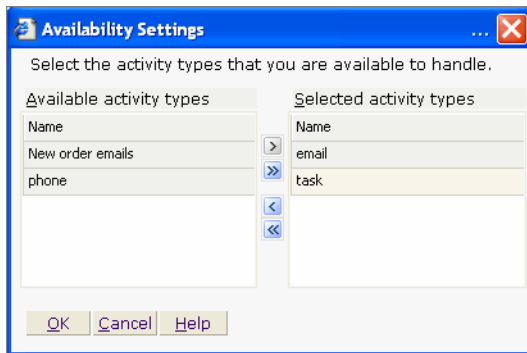
You can change your availability settings in two ways:

- ▶ If you want to change the settings for individual types of activities, use the **Availability settings**  button. For example, you want to show yourself available for email activity type but unavailable for phone activity type, you can use this option.
- ▶ If you are busy with some critical activity and can't handle any new activity for some time, you can change your availability setting by using the available option on the List pane toolbar. This is useful when you have to make yourself unavailable for a short time.

## Configuring availability setting

### To configure your availability setting:

1. Go to the Main Inbox.
2. In the Inbox pane toolbar, click the **Availability settings**  button.
3. In the Availability Settings window, select the activities types for which you want to make yourself available. Click the **OK** button.



*Configure your availability setting*

## Making yourself available

### In the main inbox

#### To make yourself available in the main inbox:

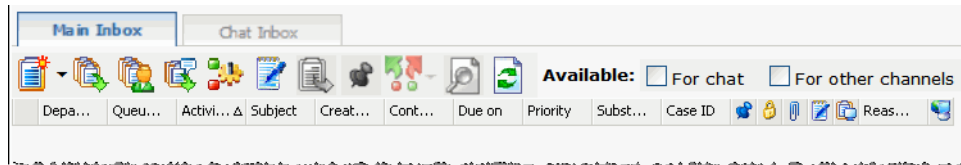
1. In the Inbox toolbar, make yourself available for handling activities from other channels except chat.
    - When you make yourself available, it will restore your settings configured using the **Availability setting** option.
    - When you make yourself unavailable, it will ignore your settings configured by using the **Availability setting** option and will show you unavailable for all activities and tasks.
- For Example, using your availability settings, you have made yourself available for email type activities.
- When you make yourself unavailable, it will ignore your settings configured for individual activity types and you will be shown unavailable for all types of activities.

- When you make yourself available, your availability setting will be restored i.e. you will be shown available for email type of activities only and not for other types of activities.



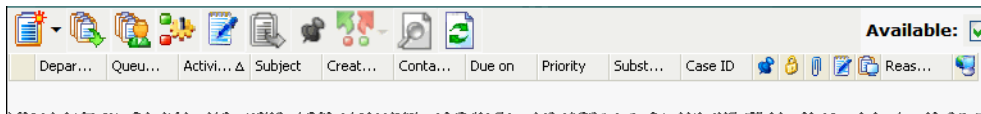
**Important:** When you log in to the Agent Console, you are logged in with the same availability settings you were working with at the time of log out.

If you have Email and Chat licenses then the following availability options are displayed:



*Make yourself available in the main inbox*


If you have only the Email license then the following availability options are displayed:



*Make yourself available for email activities*

## About pulling activities

Activities can be pulled in three ways:


- ▶ You can pull selective activities from users and queues.
- ▶ You can set your pull preferences for queues, and every time you click the **Pull next**  button the activities will get assigned to you based on your set preferences. To set your pull preferences, see [“Changing your preferences for pulling activities” on page 19](#).
- ▶ You can also search for specific activities and pull them from the Search window.

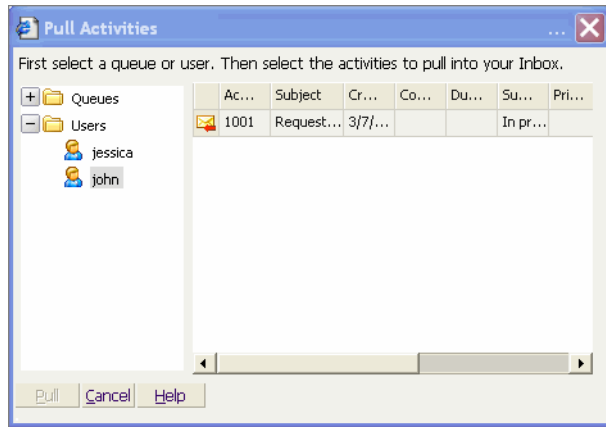
### Important things to note about permissions to pull or transfer activities

1. You have the ability to pull activities only if the Pull Activities action is assigned to you.
2. You can pull activities from the queues and users on which you have pull permission.
3. Activities that are locked or pinned by other users, cannot be pulled. However, if the Unpin action is assigned to you, you can pull activities pinned by other users.
4. Mapped agents (other than a mapped agent with the default administrator role) cannot pull activities.
5. A mapped agent with the default administrator role can be given permission to pull activities from mapped queues and the Exception queue, but not any other standalone queue.
6. Mapped agents can be given permission to transfer activities, but only to mapped queues.
7. Standalone agents cannot be given permission to pull activities from, or transfer activities to mapped agents or mapped queues.

8. Standalone agents can be given permission to pull activities from and transfer activities to both standalone queues and standalone agents.

### To pull selected activities from users or queues:

1. In the Inbox pane toolbar, click the **Pull activities**  button.
2. In the Pull Activities window, do the following.
  - Select the queue or user from whom you want to pull activities.
  - From the list of activities, select the activities you want to pull and click the **Pull** button. The activities get assigned to you.




*Pull activities from users and queues*


### To pull activities using preference settings:



**Important:** Make sure you set your pull preferences first before pulling the activities.

3. In the Inbox pane toolbar click the **Pull next**  button.
4. According to the pulling preferences set, the activities are pulled and assigned to you. If there are no activities that meet the pull criteria you are notified that no activities were pulled.

### To pull a specific activity:

1. Go to the Search window and search for the activity.
2. From the Results pane, select the activity and click the **Pull**  button. The activity gets assigned to you.

## About pinning activities


Activities can be pinned to indicate that you wish to work on a particular activity and don't want it to get pushed back automatically to queues, or pulled by other users. You can pin activities only if you have the Pin action assigned. A pinned activity can be pulled by users who have the Unpin action assigned to them


## Pinning activities

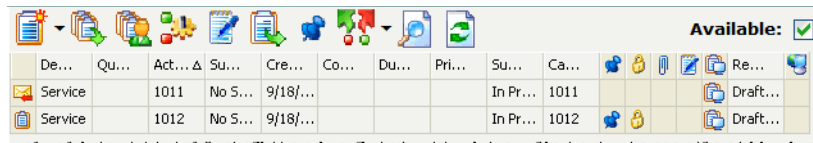


**Important:** Mapped agents are also allowed to pin activities.

### To pin an activity:

1. In the Inbox pane, select the activity you want to pin.
2. In the Inbox pane toolbar, click the **Toggle Pin**  button.


A **Pin**  icon appears in the Inbox List pane indicating that the activity is pinned.



*A sample pinned activity*

## Unpinning activities

### To unpin an activity:

1. Select the pinned activity from the Inbox pane.
2. In the Inbox pane toolbar, click the toggle **Pin**  button. The activity is unpinned.

## Transferring activities

Activities can be transferred to users, queues, or departments. Before transferring activities, you can check the number of emails in a queue. For users, you can check if they are logged in and available to handle emails and tasks, and the number of emails and tasks that are assigned to them. If the administrator has disabled the user accounts then those users do not show in the list of users available for receiving transferred activities.

While transferring activities, you can change their priority and add notes to them. When an activity is transferred from one user to another, the owner of the case does not change.



**Important:** You can transfer activities only if you have the Transfer action. You can transfer activities to only those queues, users, or departments for which you have been granted transfer permissions.

Activities can be transferred to:


- ▶ Departments
- ▶ Queues
- ▶ Users

## Important things to note about permissions to pull or transfer activities

1. Mapped agents (other than a mapped agent with the default administrator role) cannot pull activities.
2. A mapped agent with the default administrator role can be given permission to pull activities from mapped queues and the Exception queue, but not any other standalone queue.
3. Mapped agents can be given permission to transfer activities, but only to mapped queues.
4. Standalone agents cannot be given permission to pull activities from, or transfer activities to mapped agents or mapped queues.
5. Standalone agents can be given permission to pull activities from and transfer activities to both standalone queues and standalone agents.

## Transferring activities

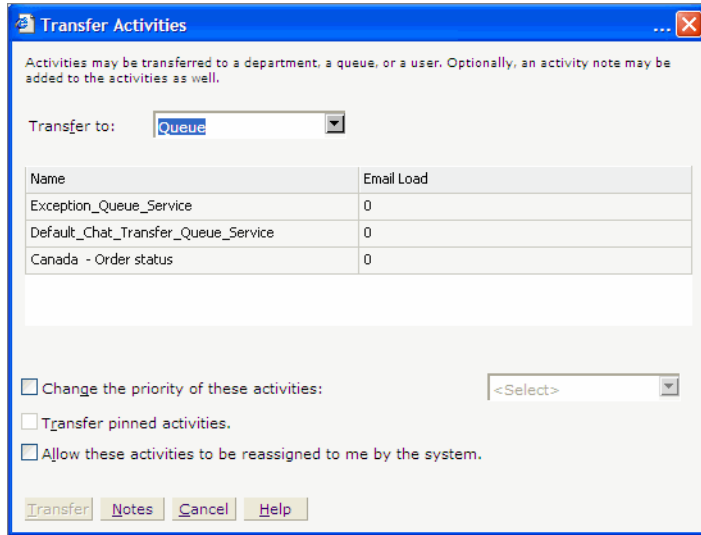
### To transfer an activity:

1. In the Inbox select the activity you want to transfer.
2. In the Reply pane or Inbox pane toolbar, click the **Transfer**  button.
3. In the Transfer Activities windows, set the following:
  - In the **Transfer to** field, from the dropdown list, select user, queue, or department.
  - From the list of available users, queues, or departments, select the one to which you want to transfer the activity. In the Transfer Activities window, the queue from which the activity was assigned to you is tagged with the text "Original" and shows on top of the list.

Before transferring the activity you can change the priority of the activity and can add notes to the activity.

- Select the **Change the priority of these activities** option to change the priority of the activity, and from the dropdown list select the priority of the activity.
- Select the **Transfer pinned activities** option to unpin the activity before transferring it. This option is enabled, only when you are transferring a pinned activity.
- Select the **Allow these activities to be re-assigned to me by the system** option, if you want the activity to be re-assigned to you by the system.
- Click the **Add Note** button to add a note to the activity. In the Add Note window that appears, add the note and click the **Add** button.

Click the **Transfer** button to transfer the activity.




*Transfer activities to users, queues, or departments*

## About reviewing outbound emails

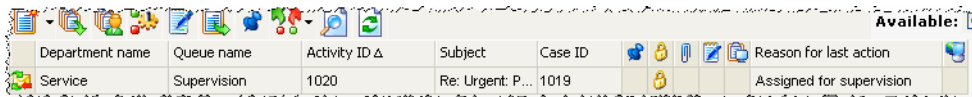
Email activities can be processed through an Outbound workflow to allow supervisors to review the content of outgoing emails. The workflow creates a supervisory loop through which replies are processed before they are sent out of the system.

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

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

Activities that are part of the supervisory loop are identified with a special icon in the Inbox: 

Agents who can accept and reject emails see a new type of activity in their inbox. The Reason for last action column displays the following value: Assigned for Supervision.



Department name	Queue name	Activity ID Δ	Subject	Case ID	Reason for last action	Available:
Service	Supervision	1020	Re: Urgent: P...	1019	Assigned for supervision	<input checked="" type="checkbox"/>

*Supervisory activity in Inbox*

Details about working with emails assigned for supervision are discussed in the [Emails](#) chapter.

# Managing new activity notifications

---

The system gives you the option to view each new activity as it is assigned to you. When a new activity is assigned while you are working on an activity, a message is shown to notify that a new activity is assigned to you. You can choose to view the new activity right then or at a later time.



**Important:** This feature is available to standalone agents for all activities.

---

## To manage a new activity notification:

- ▶ When a new message appears notifying that a new activity is assigned:
  - Click the **Now** button to view the activity. The new activity is selected in the List pane and you can view its details. If you have any unsaved content in the activity you were working on earlier, you are notified to save the changes.
  - Click the **Later** button, to continue working on the current activity.



New activity has been assigned to you. Please Select 'Now' if you want to see this activity now. Please Select 'Later' if you want to see this activity later.

Now

Later

*Manage the new activity notification*

# 2

# Search for information

- ▶ [About searches](#)
- ▶ [Creating search criteria](#)
- ▶ [Managing search folders in Inbox pane](#)
- ▶ [Deleting search criteria](#)
- ▶ [Saving search criteria](#)
- ▶ [Running saved searches](#)
- ▶ [Stopping searches](#)
- ▶ [Creating a search from saved searches](#)
- ▶ [Locating items in the console](#)
- ▶ [Exporting search results](#)
- ▶ [Printing search results](#)

The easiest way to locate an item such as activities, cases, customers, and knowledge base articles is to search for it. In this chapter, we look at different ways in which you could search for information in the Agent Console.

## About searches

Search is a very useful feature in the Agent Console. Use this feature to search for customers, cases, and activities. You can search for all types of activities: email, chat, task

## Creating search criteria

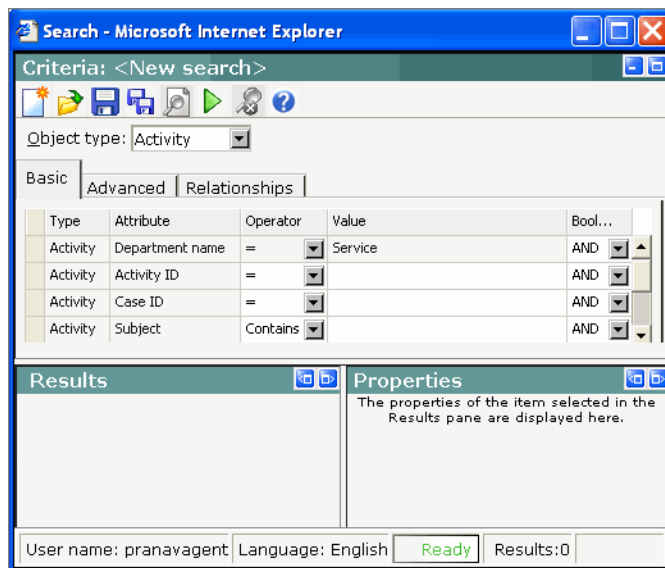
By default one global search is created in the system, and it cannot be deleted. In addition to it, you can create more searches.

You can search for special characters such as umlauts characters (Ö, ü, ï), : "" etc. You can use the following special characters (\$ & \* ^ % \_ ( ) # ") to specify your search criteria, if you are using the Exactly operator.

You can search for activities based on their Classifications from the Advanced tab.


### To create a search criteria:

1. In the Agent Console toolbar, click the **Search**  button.




*Create a new search*

2. In the Search window, go to the Criteria pane toolbar and click the **New** button.
3. From the **Object type** list select the object you want to search.  
The Criteria pane refreshes to display the list of attributes available for search.
4. Now, in the Basic tab specify the search criteria.

5. Next, go to the Advanced tab and specify additional search criteria options. An advanced search narrows down the scope of search and you get only the most relevant results.
6. Lastly, go to the Relationships tab and define the criteria that are related to classifications and attachments. This further narrows down the scope of search.
7. Click the **Run**  button to run the search.

You can view the results of the search in the Results pane. From the Results pane, you can export search results, and locate activities, cases, and customers in the Agent Console.

In the Results pane you can view and add notes to activities using the **Notes**  button

## Managing search folders in Inbox pane

This section describes the following:

- ▶ [“About search folders” on page 30](#)
- ▶ [“Creating search folders” on page 31](#)
- ▶ [“Deleting search folders” on page 33](#)
- ▶ [“Editing search folders” on page 33](#)

### About search folders

Search folders allow you to quickly locate activities and cases that match certain criteria. From the Inbox pane, you can create search folders that specify the required criteria -- with redefined attributes for related objects. Search folders can be created for activities and cases. You can also set up search folders in such a way that the system prompts you for the value of an object before running the search.

To create, edit, delete, or share folders, your administrator should have assigned the required actions:

- If you have been given the **Filter folder - Create** action, you can create and edit folders created by you or folders shared with you by other users.
- If you have been given the **Filter folder - Delete** action, you can delete folders created by you or the folders shared with you by other users.
- If you have been given the **Filter folder - Share Inbox Folder** action, you can share a folder that you created with other users. You can also share or unshare folders that are created by other users and are shared with you.

There are multiple ways in which you can set up search folders to suit your needs.

- ▶ To always look at all activities assigned to a particular user, type the name of that agent in the **Value** field of the **Assigned to** attribute while creating the search folder.

Everytime you click on this search folder, a search is run and all activities assigned to that agent are listed in the List pane.

- ▶ If you want to look at all activities assigned to a user, but want to be able to choose a different user each you conduct a search, type `~ ~ p r o m p t` in the value field of the **Assigned to** attribute while creating the search folder.

Everytime you click on this search folder, a window is opened, prompting you to enter the name of a user. When you enter the name, a search is run and all activities assigned to that user are listed in the List pane.

- ▶ If you want to look at all activities, assigned to a user and the priority of those activities is set to 1, type `~~prompt` in the value field of the **Assigned to** attribute, and select 1 in the **Activity priority** field.

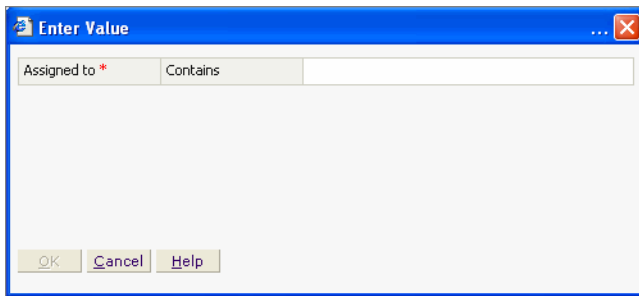
Everytime you click on this search folder, a window is opened, prompting you to enter the name of a user. When you enter the name a search is run and all activities assigned to that agent and having their priority set to 1, are listed in the List pane.

You can select multiple attributes and use the **AND** and **OR** operators to specify the search criteria for the folder. If you use the **AND** operator, fields are presented as required fields.

For example, if you set the condition to be

- Assigned to Contains `~~prompt` **AND**
- Activity priority = 1

Then, everytime you click on this search folder, the following search window is presented:




*Sample Search window*

You are prompted to provide a value for the **Assigned to** field. When you enter a user name and click **Ok**, all the activities that are assigned to that user, and have a priority of 1, are displayed in the List pane. Here both fields are required fields since the **AND** operator is used.

## Creating search folders

### To create a search folder:

1. In the Inbox pane do one of the following:
  - If you want to create a search folder for activities, go to **My Work > Activities > My Searches**.
  - If you want to create a search folder for cases, go to **My Work > Cases > My Searches**.
2. In the Inbox pane toolbar, click the **New folder**  button.

For activities, the following window is displayed.

*Create search folder for activities*

Folder name:

Folder description:

Object type: Activity

Basic | Advanced | Relationships

Type	Attribute	Operator	Value	Boolean
Activity	Department name	Contains	<input type="text"/>	AND
Activity	Activity ID	=	<input type="text"/>	AND
Activity	Case ID	=	<input type="text"/>	AND
Activity	Subject	Contains	<input type="text"/>	AND
Activity	Assigned to	Contains	<input type="text"/>	AND
Activity	Created on	=	<input type="text"/>	AND
Activity	Activity priority	=	<input type="text"/>	AND
Activity	Queue name	Contains	<input type="text"/>	AND

Make this folder visible to all agents.

OK Cancel Help

For cases the following window is displayed:

*Create search folder for cases*

Folder name:

Folder description:

Object type: Case

Basic | Advanced | Relationships

Type	Attribute	Operator	Value	Boolean
Case	Case ID	=	<input type="text"/>	AND
Case	Case status	=	<input type="text"/>	AND
Case	Customer name	Contains	<input type="text"/>	AND
Case	Owner	Contains	<input type="text"/>	AND
Case	Severity	=	<input type="text"/>	AND

Make this folder visible to all agents.

OK Cancel Help

3. In the New folder window, provide the following information:


- **Folder name:** Name of the search folder.
- **Folder description:** Description of the search folder.

4. In the Basic, Advanced, or Relationships tab select the attributes and in the Value fields type a value for the attribute, or type `~~prompt` to be prompted for a value each time you run the search.
5. To share this search folder with other agents, select the **Make this Folder visible to all agents** option. This option is disabled if the **Filter folder - Share Inbox Folder** action is not assigned to you. Once you share the folder with other users, and if the other users have Share Inbox Folder action then they can edit or delete the shared folder.
6. Click **OK** to save the search folder.
7. After you click the **OK** button, depending on how you have set up the search, the result is displayed. If you have entered a value in the value field then the search result is displayed in the List pane or you have entered `~~prompt` in the value field then you are prompted to enter a value to conduct the search.

## Deleting search folders

You need to have been assigned the **Filter folder - Delete** action, to be able to delete folders.

### To delete a search folder:


1. In the Inbox pane, do one of the following:
  - If you want to delete a search for activities, go to **My Work > Activities > My Searches**.
  - If you want to delete a search for cases, go to **My Work > Cases > My Searches**.
2. From the My Searches folder, select the search folder you want to delete.
3. In the Inbox pane toolbar, click the **Delete**  button.

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

## Editing search folders

You can reset the search criteria of the search folders. Along with editing the folders created by you, you can also edit folders shared by other users. You need to have the **Filter folder - Create** action assigned to you to edit the search folders.

### To edit a search folder:

1. In the Inbox pane, do one of the following:
  - If you want to edit a search for activities, go to **My Work > Activities > My Searches**.
  - If you want to edit a search for cases, go to **My Work > Cases > My Searches**.
2. From the My Searches folder, select the search you want to edit.
3. In the Inbox pane toolbar, click the **Properties**  button.
4. From the search window, edit the properties of the search folder from the Basic, Advanced, and Relationships tab. See [“Creating search folders” on page 31](#) for more information.
5. Click the **OK** button to save the changes.

## Deleting search criteria

---

Delete the search criteria that are no longer needed.

### To delete a search criteria:


1. Select the search criteria in the Open Search, Save Search, or Save Search As window.
2. Press the **Delete** key on the keyboard.
3. A message appears asking to confirm the deletion. Click **Yes** to delete the search.

## Saving search criteria

---

You can save the search criteria that you use most commonly. This helps you save time, as you can open the saved search criteria and run them quickly.

### To save a search criteria:



1. First, create a search.
2. To save the search, click the **Save**  button in the Search window toolbar.
3. In the Save Search window, provide the following details.
  - **Search name:** Type a name for the search criteria. Use a name that adequately represents the search attributes.
  - **Search type:** From the dropdown list, select the type of search. The options available are:
    - **Global Searches:** A global search is available to all users.
    - **Personal Searches:** A personal search is available only to the user who creates it.
  - Click the **Save** button to save the search criteria.


## Running saved searches

---

You can access saved searches anytime, by locating and opening them.

### To open a saved search:

1. In the Agent Console toolbar, click the **Search**  button.
2. In the Search window toolbar, click the **Open**  button.
3. In the Open Search window, select the search that you want to open and click the **Open** button.


The search criteria is displayed in the Search window. Now you can run the search.
4. Click the **Run**  button to run the search.

## Stopping searches

---

You may want to stop a running search for multiple reasons such as to edit search parameters, limit search results, and so on.

### To stop a search:


- ▶ In the Search window toolbar, click the **Stop**  button.

## Creating a search from saved searches

---

You can also create new searches from already saved searches. For example, you have a saved search and you make changes to it. Now you want to keep the old search, and also want to save the new one. Or, if there is a search saved as a global search and you want to save it as personal search or vice versa.

### To create a search from a saved search:


1. First, open a saved search.
2. Click the **Save as**  button in the Search window toolbar.
3. In the Save Search As window, provide the following details.
  - **Search name:** Type a name for the search. Use a name that adequately represents the search attributes.
  - **Search type:** Select the type of search from the dropdown list. There are two options available.
    - **Global Searches:** A global search is available to all the users.
    - **Personal Searches:** A personal search is available only to the user who creates it.
  - Click the **Save** button.

## Locating items in the console

---

After you have run the search and get some search results, you can easily locate the items returned by the search in the Agent Console with a click of a button. You are automatically taken to the exact case, activity, article, or customer in the Agent Console.

### To locate an item in the console:


1. After you run the search, from the Results pane select the item you want to locate in the console.
2. In the Results pane toolbar, click the **Locate in console**  button. You are taken to the exact location of the item in the console.

## Exporting search results

---

You can save a local copy of the search results on your computer. Once you save the results on your local machine or network, you do not have to be logged in to the console to access the search results. The results are saved in EXCEL format.

### To export the search results:


1. After you run the search, in the Results pane toolbar, click the **Export search results**  button. A message appears asking, if you want to open or save the search results. Click the **Save** button.
2. A message appears asking where you want to save the results. Select the location where you want to save the results. The results are saved in EXCEL format.

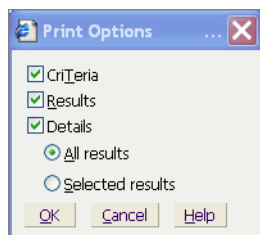
## Printing search results

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Print search results for using it to circulate important data amongst other members or else in a presentation. With printed search data handy, you do not have to log in to the console to access the same information all the time.

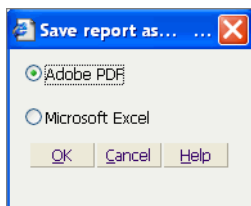
### To print search results:

1. After you run the search click the **Print Preview**  button in the Criteria pane toolbar.
2. In the Print Options window, from the available options select what you want to print. The options available are – **Criteria**, **Results**, and **Details**. And, specify if you want to print all the results, or selected results only. Click the **OK** button.



*Configure print options*

3. Print window appears. It shows the details of all the items selected for printing. In the window, click the **Save As**  button. In the Save As window, select the format in which you want to save the search results. The options available are Adobe Acrobat PDF and Microsoft Excel. Click the **OK** button.



*Select a format for printing search results*

# Information pane

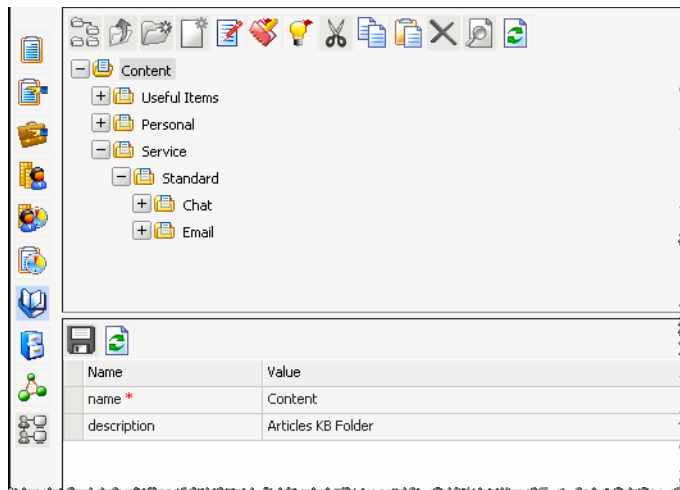
- ▶ [About the Information pane](#)

## About the Information pane

From the Information pane you can view the information about cases, activities, and customers. You can also view articles in the Knowledge Base section. The system consists of 11 predefined information pane sections. Out of them, eight are available to all agents and three are available to only the agents with specific licenses.

- ▶ The following sections are available to all agents.
  - Activity Body
  - Activity Details
  - Case Details
  - Customer
  - Customer History
  - Audit
  - Knowledge Base
  - Classification
- ▶ The Links section is available to only the agents with the Data Adapter license.
- ▶ The following sections are available only to the agents with the Unified WIMlicense.
  - Web Collaboration
  - Screen Capture

The order and number of these sections can be different based on how your administrator has configured the system. Also, there can be custom sections available.



*A sample Information pane*

From the Information pane, you can view details of the following business objects.

- ▶ Activity body and details
- ▶ Audit information of activities
- ▶ Case details
- ▶ Customer information and customer history

You can also do the following:

1. Change priority of activities
2. Change severity of cases
3. Change due date of activities and cases
4. Create new cases and change cases of activities
5. Close cases
6. Print cases and activities details
7. Change preferred agent of customer
8. Change contact details of customer
9. Create new customers and change the customer associated with an activity
10. Delete customers
11. Change customer details

## Shortcuts for Information pane section toolbar

Your administrator can assign shortcut keys to different sections of the Information pane toolbar. You can toggle between the different sections by using the following shortcut keys.

- ▶ CTRL + SHIFT + one of the following FUNCTION keys:
  - F2
  - F3
  - F4
  - F6
  - F7
  - F8
  - F9
  - F10
  - F11
  - F12

# 4 Cases

- ▶ [About cases](#)
- ▶ [Viewing case information](#)
- ▶ [Printing case information](#)
- ▶ [Changing due date of cases](#)
- ▶ [Changing solution description of cases](#)
- ▶ [Changing severity](#)
- ▶ [Transferring cases](#)
- ▶ [Closing cases](#)
- ▶ [More about cases and activities](#)

## About cases

---

A case is used to group activities related to the same issue. It can contain activities of various channels such as email, chat, phone, and tasks.

A case can be in the open or closed state. If the case contains open activities, then the status of the case remains open. A case is closed, if the case holds activities that are completed. A closed case can be reopened by rules.


A case assists in the following:

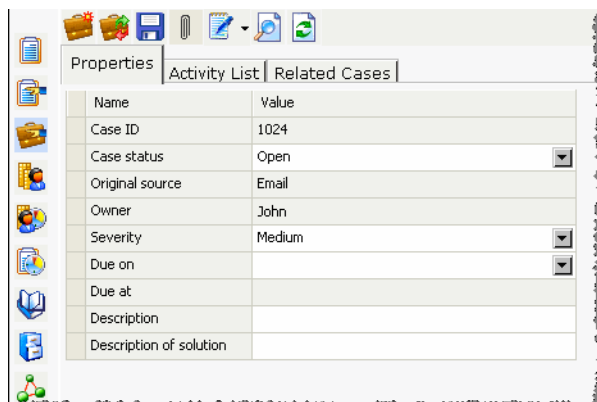
- ▶ Maintain records of all customer activities.
- ▶ Hold together different channels of activities such as email, chat, phone, and tasks into one single entity in the form of a case.
- ▶ Provide information about the customer and related activities to the agent servicing the customer.
- ▶ Tracks service request by a customer with a company across multiple activities.

## Viewing case information

---

**To view the case information:**

1. In the Information pane, go to the Case Details  section.
2. In the Case Details section, view the properties of the case, the list of activities associated with the case, and related cases, if there are any.





*View case details*

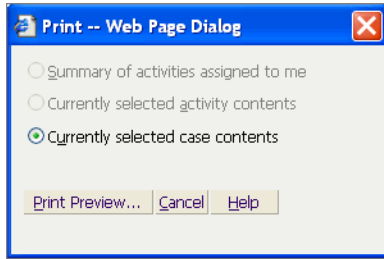
## Printing case information

---


**To print case information:**

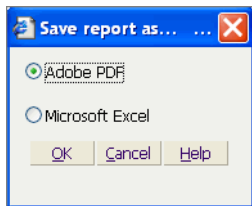
1. In the Information pane, go to the Case Details  section.
2. In the Case Details section, click the **Print**  button.

3. The Print window opens. The **Currently selected case contents** option is selected. Click the **Print Preview** button.



*Configure print options*

4. The Case Content window opens. It shows the details of the case and activities contained in the case. Click the **Save As**  button.
5. In the Save As window, select the format in which you want to save the contents of the folder. The options available are **Adobe Acrobat PDF** and **Microsoft Excel**. Click the **OK** button.




*Select a format for saving case information*

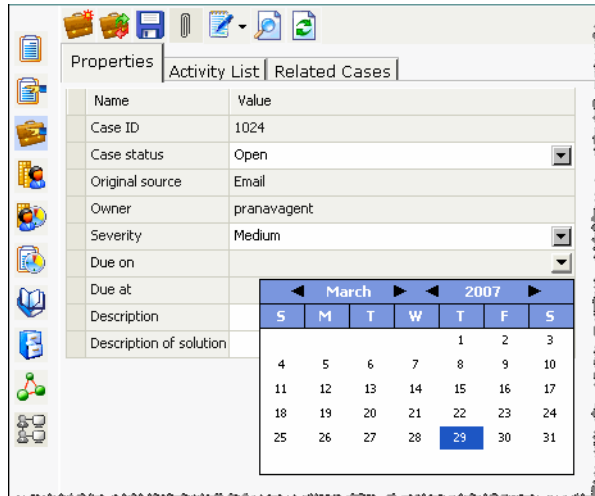
A copy of the case details is saved on the location you selected. You can print as many hard copies as you want.

## Changing due date of cases


---

### To change the due date:

1. In the Information pane, go to the Case Details  section.
2. In the Case Details section, in the **Due on** field, click the dropdown button. From the calendar select a date. You can also type the date in the field, in the format dd/mm/yyyy.





*Set due date for a case*

3. In the **Due at** field, specify the time when the case is due.
4. Click the **Save**  button.


## Changing solution description of cases

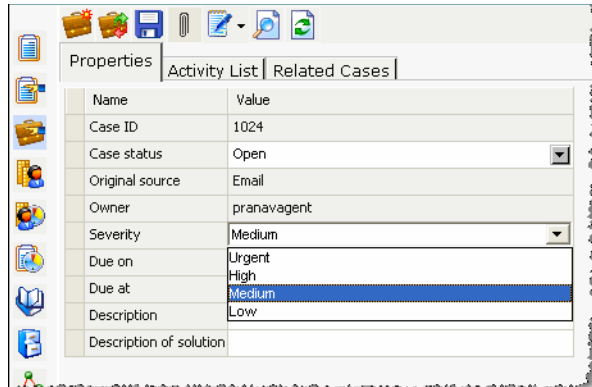
### To change the solution description:

1. In the Information pane section toolbar, go to the Case Details  section.
2. In the Case Details section, in the **Description of solution** field, provide a brief description of the solution of the case.
3. Click the **Save**  button.

## Changing severity

### To change the severity of a case:

1. In the Information pane, go to the Case Details  section.
2. In the Case Details section, in the **Severity** field, select the severity of the case. You can set the severity level as low, medium, high, or urgent.





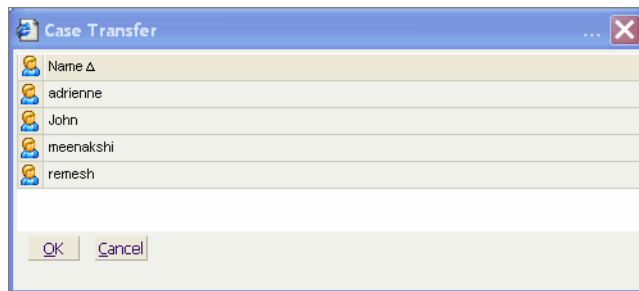
*Change severity of a case*

3. Click the **Save**  button.


## Transferring cases

### To transfer a case:

1. In the Information pane, go to the Case Details  section.
2. In the Case Details section, in the **Owner** field, click the **Assistance**  button.




*Select a user*

3. In the Case Transfer window, from the list of users, select the user to whom you want to transfer the case. By default, the owner of a case is the person to whom the new case (and its first activity) was first assigned. For all Unified CCE (integrated) activities, the owner field is not updated by the application.
4. Click the **Save**  button.

## Closing cases

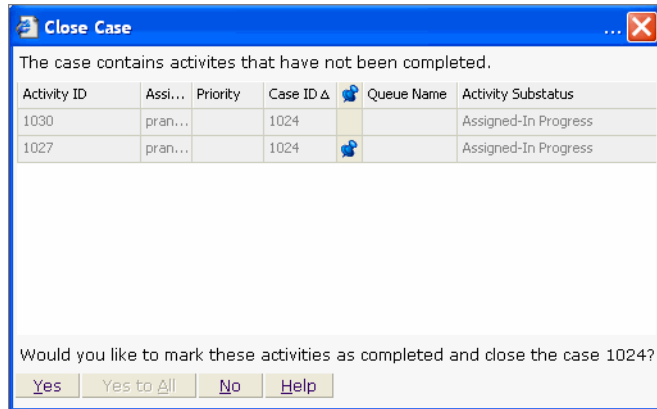
### To close a case:

1. In the Information pane, go to the Case Details  section.
2. In the Case Details section, in the **Case status** field select **Closed**.

3. Click the **Save**  button.

If the case has any activities that are not completed, a Close Case window appears.

4. In the Close Case window click the **Yes** button to complete the activity and close the case.



Click **Yes** to complete the activities and close the case

## More about cases and activities

In addition to the tasks listed in this chapter, you can also create new cases and change the case associated with an activity.

### Can cases be reopened?

A case is reopened automatically, if an agent creates a new activity using a closed case number. A case can also be configured to reopen automatically when a customer sends an email with the closed case number in the subject. You cannot reopen cases manually.

### Can a case be created without an activity?

No. A case has at least one activity associated with it.



# Activities

- ▶ [About activities](#)
- ▶ [Viewing activity information](#)
- ▶ [Printing activity information](#)
- ▶ [Changing priority of activities](#)
- ▶ [Changing due date of activities](#)
- ▶ [Creating case for activities](#)
- ▶ [Changing case of activity](#)
- ▶ [Completing activities](#)

# About activities

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A task or any interaction with a customer is an activity. Interactions can be of various types—emails, chats, or even custom-defined activities.

Activities related to the same issue can be grouped into a case. A case can contain activities of various channels.

The state of an activity is either current or completed. As long as the issue is unresolved, the activity remains in the current state. When the issue is resolved, the activity state is completed.

## Types of activities:


1. Email
2. Chat
3. Task

# Viewing activity information

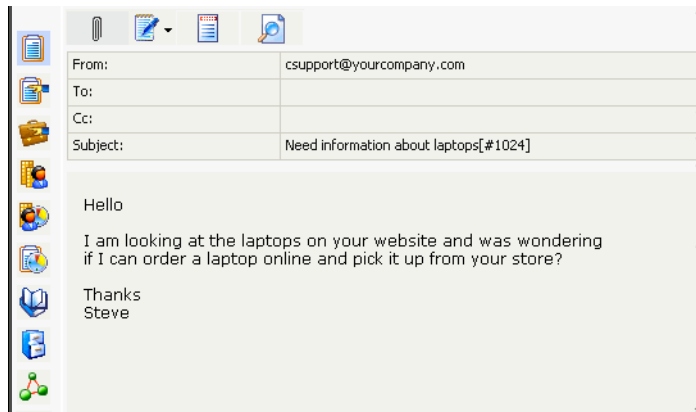
---

## Viewing activity body

### To view the activity body:

- ▶ In the Information pane, go to the Activity Body  section.


In the Activity Body section, view the body of the activity.

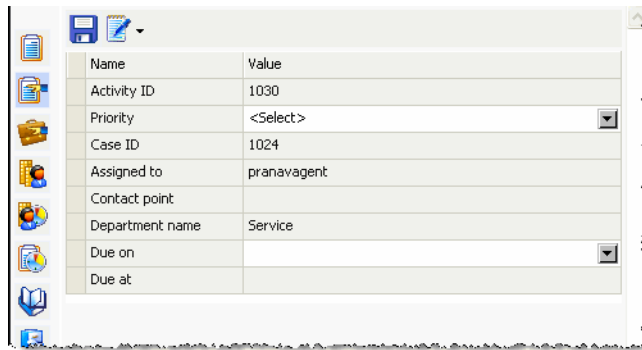


*View the activity body*

## Viewing activity details

### To view the activity details:

- ▶ In the Information pane, go to the Activity Details  section. Here, view the details of the activity and change the priority and due date of the activity.



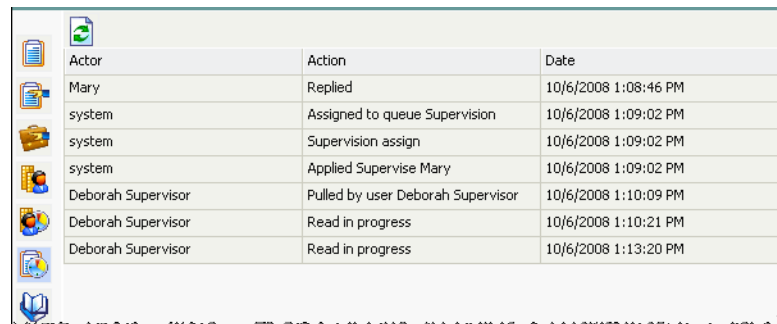
*View activity details*

## Viewing audit information

The audit of an activity shows every single action that has occurred on an activity. It gives complete information from the moment the activity was created to where the activity is at present. Supervisory activities are also included in the audit information.

### To view the audit information:

- ▶ In the Information pane, go to the Audit  section. Here you can view the audit information.





Actor	Action	Date
Mary	Replied	10/6/2008 1:08:46 PM
system	Assigned to queue Supervision	10/6/2008 1:09:02 PM
system	Supervision assign	10/6/2008 1:09:02 PM
system	Applied Supervise Mary	10/6/2008 1:09:02 PM
Deborah Supervisor	Pulled by user Deborah Supervisor	10/6/2008 1:10:09 PM
Deborah Supervisor	Read in progress	10/6/2008 1:10:21 PM
Deborah Supervisor	Read in progress	10/6/2008 1:13:20 PM

*View audit details*

## Printing activity information

### To print the activity information:

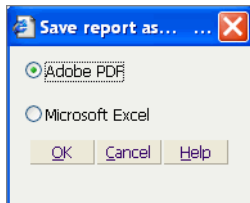
1. In the Information pane, go to the Activity Body  section.
2. In the Activity Body section, click the **Print**  button.

3. The Print window opens. The **Currently selected activity contents** option is selected. Click the **Print Preview** button.



*Configure print options*

4. The Activity Content window opens. It shows the details of the activity selected for printing. Click the **Save As** button.
5. In the Save As window, select the format in which you want to save the contents of the activity. The options available are **Adobe Acrobat PDF** and **Microsoft Excel**. Click the **OK** button. A copy of the activity details is saved on the location you selected. You can print as many hard copies as you want.



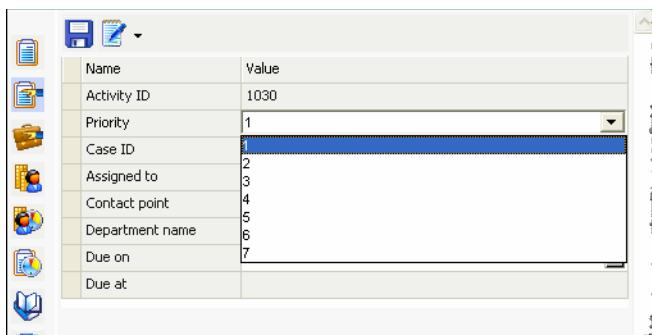
*Select a format for saving the activity information*

## Changing priority of activities

For activities, you can set a priority from 1 to 7.

### To change the priority:

1. In the Information pane, go to the Activity Details section.
2. In the Activity Details section, go to the **Priority** field and from the dropdown list select the priority of the activity.




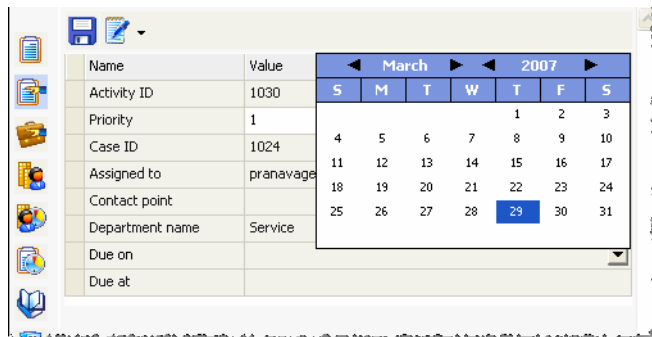
*Set a priority of the activity*

3. Click the **Save**  button.


## Changing due date of activities

### To change the due date:

1. In the Information pane, go to the Activity Details  section.
2. In the Activity Details section, in the **Due on** field, click the dropdown button. From the calendar select a date. You can also type the date in the field, in the format dd/mm/yyyy.





*Set a due date for the activity*


3. In the **Due at** field, specify the time when the activity is due.
4. Click the **Save**  button.

## Creating case for activities

### To create a case:

1. In the Inbox pane, select the activity for which you want to create a case.
2. In the Information pane, go to the Case Details  section.
3. In the Information pane toolbar, click the **Create case**  button.




The Case Details section refreshes to show the details of the case.

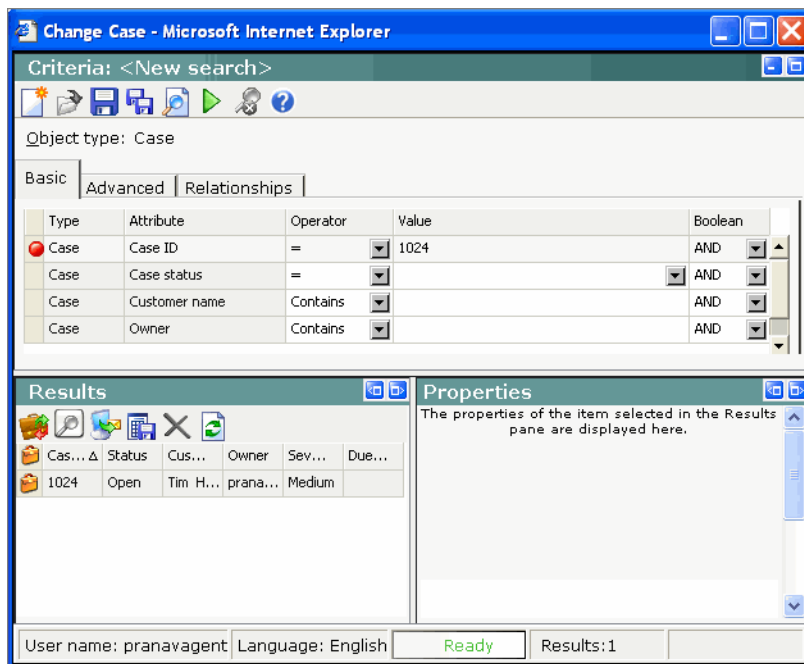
4. You can change the severity, due date, due time, and the solution description of the case.
5. After making the changes, in the Information pane toolbar, click the **Save**  button.

A new case ID is created for the case and it is assigned to the activity.

# Changing case of activity

## To change the case:

1. In the Inbox pane select the activity for which you want to change the case.
2. In the Information pane, go to the Case Details  section.
3. In the Information pane toolbar, click the **Change case**  button.
4. In the Change Case window, search for the case.
5. From the Results pane, select the case and click the **Change case**  button.



*Change the case of the activity*

# Completing activities

- ▶ For more information about completing an Email activity, refer to the [Completing activities](#) section on [page 63](#) in the [Emails](#) chapter.
- ▶ For more information about completing a Chat activity, refer to [Ending chat sessions on page 67](#) in the [Chats](#) chapter.

# 6 Customers

- ▶ [About customers](#)
- ▶ [Viewing customer information](#)
- ▶ [Changing customer details](#)
- ▶ [Changing the preferred agent](#)
- ▶ [Changing contact details of customers](#)
- ▶ [Creating customers](#)

## About customers

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Customers are classified as follows:


- ▶ Individual
- ▶ Corporate
- ▶ Group

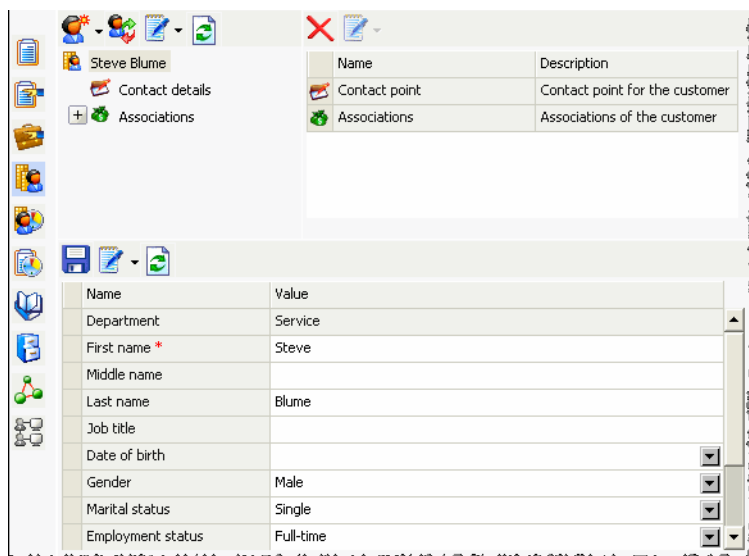
## Viewing customer information

---

### Viewing customer details

**To view the customer details:**

1. In the Information pane, go to the Customer  section.
2. In the Customer section, you can view the customer details such as name, date of birth, gender etc.




*View the customer details*

## Changing customer details

---

**To change the customer details:**

1. In the Information pane, go to the Customer  section.
2. In the Customer section, change the customer details. You can change the customer attributes like customer name, job title, marital status, employment status etc.



3. Click the **Save**  button.

## Changing the preferred agent

---

The preferred agent setting can be used by workflow to assign subsequent activities from the customer to a specific agent. This setting is valid for both standalone and mapped agents.

### To change the preferred agent:

1. In the Information pane, go to the Customer  section.
2. In the Customer section, in the **Preferred agent** field, click the **Assistance**  button.
3. In the Preferred Agent window, from the list of agents, select the preferred agent of the customer and click the **OK** button.




*Select a preferred agent*

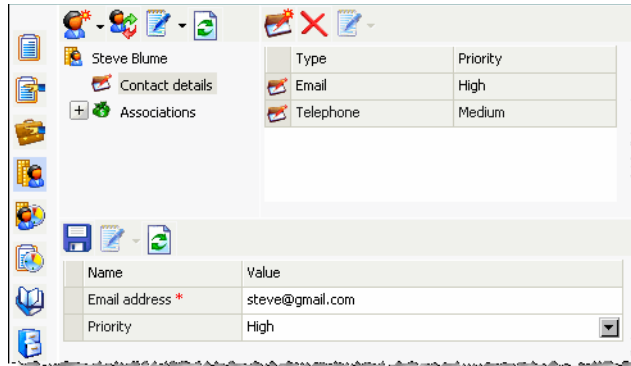
4. Click the **Save**  button.

## Changing contact details of customers





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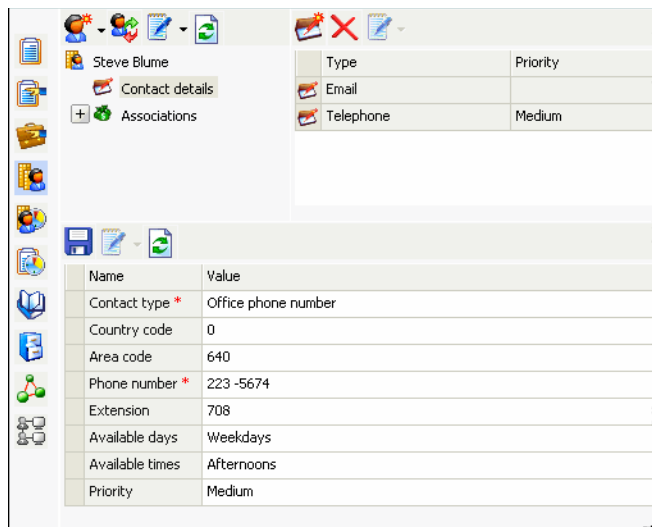
### To change the contact details of a customer:

1. In the Information pane, go to the Customer  section.
2. In the Customer section, browses to the **Contact Details** node.  
You can view the contact information of the customer.



*View contact details of a customer*



3. To edit the contact information select the contact point from the list and edit it. Click the **Save**  button.
4. To delete the contact information, select the contact point you want to delete and click the **Delete**  button in the Information pane toolbar.
5. To create a new contact point click the **New**  button in the Information pane toolbar. Select the contact point type you want to create, provide the details and click the **Save**  button.




*Create a new contact point*

## Creating customers

### To create a customer:

1. In the Information pane, go to the Customer  section.
2. In the Information pane toolbar, click the arrow in the **New Customer**  button. From the list displayed select the type of customer you want to create. The options available are, group, individual, and corporate customer.
3. The Information pane refreshes to show the details of the type of customer you select.

4. Provide the details of the customer and click the **Save**  button.
5. Next, create the contact information of the customer. You can provide the phone number, email address, and postal address of the customer.
6. For corporate and group customers you need to create a contact person.

# 7 Tasks

- ▶ [Assigning tasks](#)
- ▶ [Completing tasks](#)

Tasks are created by agents and supervisors for tracking internal work, such as follow-up actions resulting from an email or chat interaction with a customer.

When a new task is created by default it is assigned to the creator. Tasks can be assigned to:

1. **User:** You can assign tasks to users on whom you have assign permissions.
2. **Queue:** You can assign the tasks to queues on which you have assign permissions
3. **System:** If you are not sure to which queue or user to assign the task or you do not have permission to assign to any of them then you can assign the task to the system. Then the system reassigns the task to the queue or user who is appropriate for handling the task. All agents have permission to assign a task to the system.



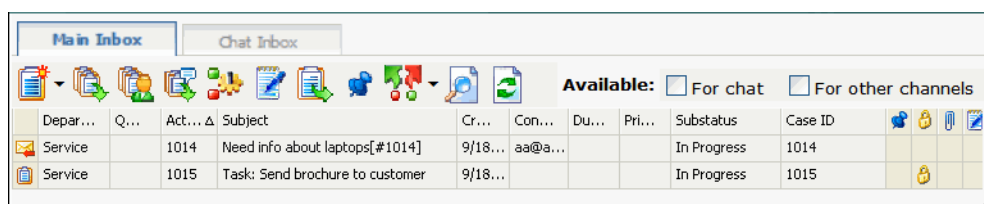
**Important:** Agents who are mapped to users in Unified CCE cannot create tasks or have tasks assigned to them. They can, however be assigned tasks that are created by the workflow engine.

## Assigning tasks

An agent can assign tasks to queues or users only if they have permission to do so.

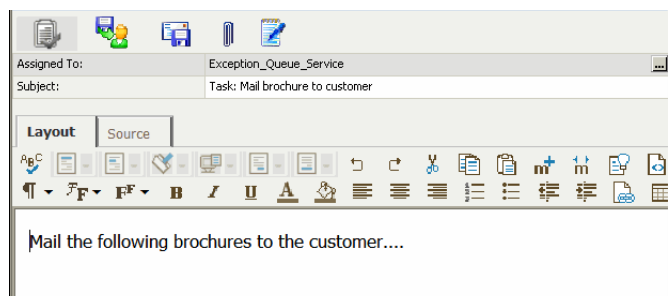
### To assign a task:

1. Create an activity with the **Activity type** as **Task**.
2. Select a task type activity from the inbox.
3. A task activity shows in the Main Inbox List pane.






*View the task in the List pane*

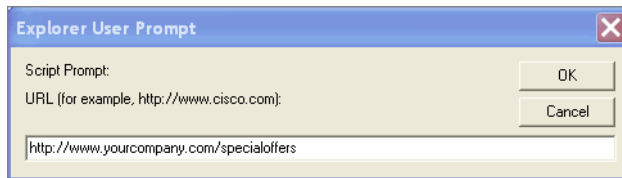
4. In the Task pane, view the details of the task.



*A sample task*



5. Type a subject and content of the message you want to send.

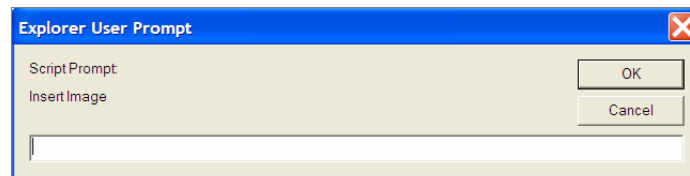
- a. In the Text box toolbar, click the **Switch to HTML editor**  button, to select the content type of the task. By default HTML editor is selected. The Source tab displays the HTML source code of the content displayed in the Layout tab. Click the **Switch to Plain editor**  button to change from HTML editor to Plain editor. Once you switch to the plain editor, Source tab becomes unavailable and any formatting done in the existing content is lost.
- b. Next, type the content of the task in the text box of the Layout sub-tab. Here you can use the various formatting tools available to format the content of the task. You can also add hyperlinks to the HTML type tasks.
- c. To add hyperlinks to the task content, click the **Insert Hyperlink**  button in the Text box toolbar and in the Explorer User Prompt window, type the hyperlink you want to add.







*Type the web address*

After creating the content, you can run the spell-checker on the content.

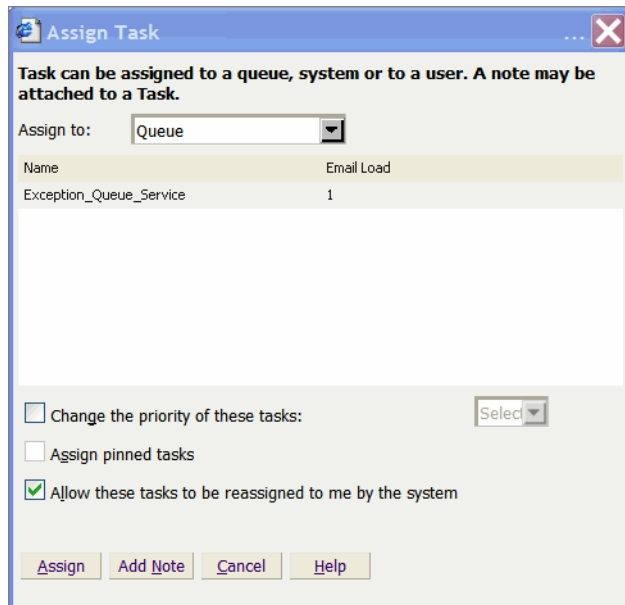
- d. To run the spell-checker, in the Text box toolbar, click the **Spell Check**  button.
- e. To insert an image from an external location, click the **Insert image**  button and provide the URL in the Explorer User Prompt window. The images should be stored at a location that is accessible to external user. If the image is removed from this external resource or the address is changed, the inserted image will no longer be visible. Instead, a red X or a placeholder may appear in its place.



*Type the URL of the image*


- f. To insert a table, click the **Insert table**  button and specify the dimensions and properties of the table.
6. Attach files to the task by using the **Attachment**  button.
  7. Add, view, or delete notes from the task by using the **Notes**  button.
  8. When you create a new task activity it is assigned to you. If you want to assign the activity to another user, queue, or system, in the **Assigned To** field, click the **Assistance**  button. In the Assign Task window, provide the following details.
    - **Assign to:** You can assign the task to Queue, System or User on whom you have permissions to assign tasks. From the dropdown list select to whom you want to assign the task.
    - **Change priority of these tasks:** You can change the priority of the task before assigning it. Select the option if you want to change the priority of the task. From the dropdown list select the priority of the task.
    - **Assign pinned tasks:** You can assign pinned tasks. The option is enabled only if you are assigning a pinned task. Select the option if you want to assign pinned tasks.

- **Allow these tasks to be re-assigned to me by the system:** If you are assigning a task to a queue, you can decide if you want the task to be re-assigned to you or not. This option is selected by default and is available only when you are assigning a task to a queue. Select the option if you want the activity to be re-assigned to you.
- **Add note:** You can add a note to the task before assigning it.
- Click the **Assign** button.



*Assign task to user, queue, or system*

The **Assigned To** field in the reply pane now shows the name of the person, queue, or system to whom you are assigning the task.


9. In the Task pane toolbar, click the **Assign to**  button.

## Completing tasks


Once you have done what ever was required to complete the task assigned, you must mark the activity as completed. Once you change the substatus of the activity as completed the activity goes in the **Completed** folder in the inbox. You can mark the task completed in two ways.

### To complete a task:

You can mark the task completed in two ways.

- ▶ In the Inbox pane toolbar, click the arrow in the **Change status**  button. From the list displayed select the status as **Complete**.

Or

- ▶ Click the **Completed**  button. The activity substatus will change to **Done** and it will move to the **Completed** folder in the Inbox.

# 8 Emails

- ▶ [Working with emails](#)


# Working with emails

## Viewing emails

Email activities are displayed in the Main Inbox. Depending on the settings, you may be able to view the content of the incoming email in the text box in the Reply pane, or in the Information pane, Activity Body page.

### To view an email:


1. In the Inbox, select the activity by clicking on it.

The Reply pane and the Information pane refresh to display the contents of the email activity. You may need to click the Activity body  button to view the content in the Information pane.


## Replying to emails


You can compose replies for emails or tasks that are assigned to you, and compose new outgoing emails from the Reply pane in the Agent Console. Before beginning to work on your reply, make sure you have selected the correct activity in the Main Inbox.

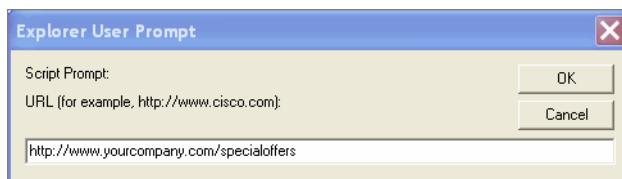
### To compose a reply:

1. In the Reply pane, go to the Layout tab.
  - a. To create your reply using the rich text editor, click the **Switch to HTML editor**  button, in the text box toolbar. For activities that originate with an incoming email, the HTML editor is selected by default. For all other activities (tasks, activities created within the system), the plain text editor is selected.

When you switch to the HTML editor mode, if you have been assigned the required action, a new tab - Source - becomes available. You can use this to view and edit the HTML source of the content displayed in the Layout tab.


To change from the HTML editor to a plain editor, click the **Switch to Plain text editor**  button. Any formatting done to the existing content is lost and the Source tab becomes unavailable.


- b. Type the content of the reply in the text box. Here you can use the various formatting tools to format the content of the reply. You can also add hyperlinks to HTML type replies.
- c. To add hyperlinks, click the **Insert Hyperlink**  button in the Text box toolbar and in the Explorer User Prompt window, type the hyperlink you want to add.

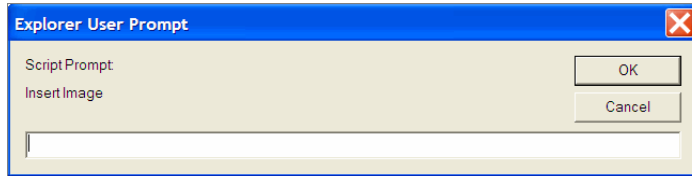


*Type the web address*




After creating the content, run the spell-checker on the content.

- d. To run the spell-checker, from the Text box toolbar, click the **Spell Check**  button.

- e. To insert an image from an external location, click the **Insert image**  button and provide the URL in the Explorer User Prompt window. The images should be stored at a location that is accessible to an external user. If the image is removed from this external resource or the address is changed, the inserted image will no longer be visible. Instead, a red X or a placeholder may appear in its place.




*Type the URL of the image*

- f. To insert a table, click the **Insert table**  button and specify the dimensions and properties of the table.
2. Attach files to the reply by using the **Attachment**  button.
3. Add, view, or delete notes to the reply by using the **Notes**  button.
4. Click **Send**, **Send and Complete** or **Save draft** button depending on what you want to do with the composed reply.

## Sending replies

Send is used to send an email.


### To send an email:

- ▶ In the Reply pane toolbar, click the **Send**  button.

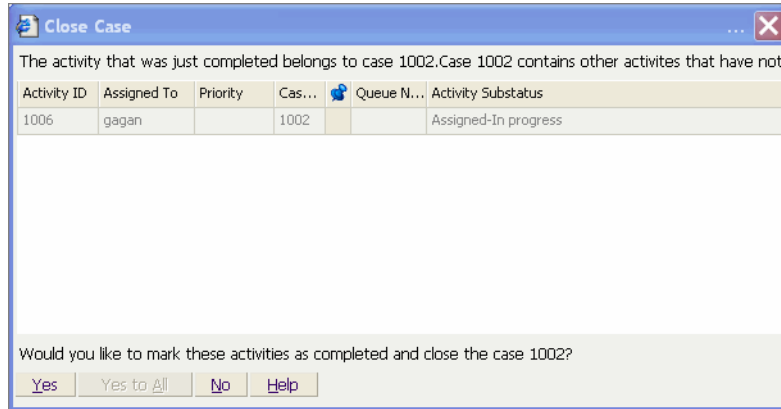
## Completing activities

You can use this option if you have completed the activity assigned to you and no email is to be sent to the customer.

### To complete an activity:

- ▶ In the Reply pane toolbar, click the **Complete**  button.

If there are other open activities that belong to the same case, you are prompted to complete those activities and close the case.




*Complete activity and close case*

## Sending and completing activities


To send your reply and complete the activity with a single click, use the **Send and Complete** button. The reply is sent out and the state of the activity is set to **Complete**.

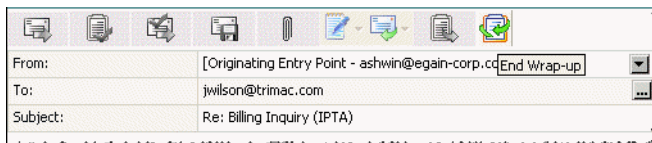
If the **wrap-up activity** action is assigned to you, the activity is not get completed when you click the **Send and Complete** button. The activity goes into wrap-up mode and your mode also changes to wrap-up until you complete wrap-up activities.

### To send and complete an activity:

1. In the Reply pane toolbar, click the **Send and complete**  button. It sends the reply and sets the state of the activity to **Complete**.

If the wrap-up activity action is assigned to you, the activity is not completed when you click the **Send and Complete** button. The activity goes into wrap-up mode and your mode changes to wrap-up.

2. After completing wrap-up tasks, click the **End Wrap-up**  button to complete the activity. When you end wrap-up, your mode is set to available and the next activity is assigned to you.




*Ending wrap-up*

## Resubmitting an activity

If an activity was rejected by a supervisor, as part of the Outbound Email Review workflow, you may need to modify your reply and resubmit it.

### To resubmit an activity:

1. In the Reply pane toolbar, click the **Resubmit**  button. It sends the reply back to the supervisor for review.

If the supervisor accept the reply, it is sent to the customer. If your original action was a **Send and Complete**, the activity is closed, If your original action was **Send**, the reply is sent, but the activity is not closed.

## Saving drafts

You may wish to save a draft of your message in the reply pane without sending the reply or completing the activity. The application allows you to save a draft of your reply



**Important:** If you edit the contents of the text box, and go to another activity without saving a draft, you will lose your changes.


Always save a draft:

1. After making changes to a reply.
2. After attaching a file.
3. Before transferring an activity.

You do not need to save a draft:

1. After adding a note to an activity.
2. Just before clicking the **Send**, **Send and complete** or **Complete** buttons.

### To save a draft:

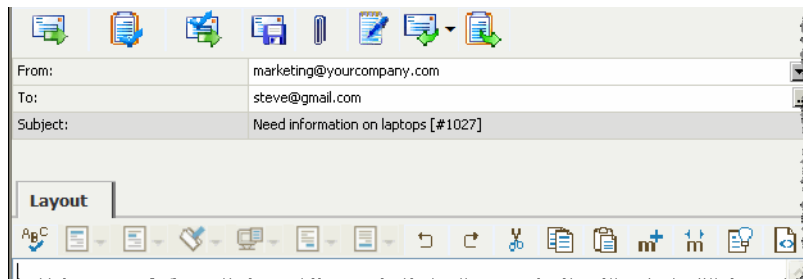
- ▶ In the Reply pane toolbar, click the **Save draft**  button.

## Editing From field

The from field contains the address which will be shown in the from line when the mail is received by the customer. By default the field shows the originating entry point address, but you may wish to change this under certain circumstances.


### To change the from email address:

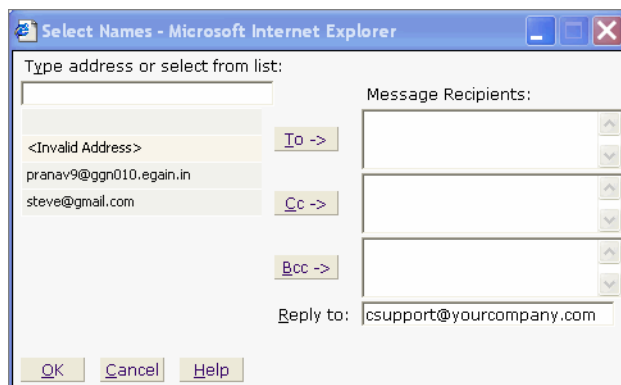
1. Type or select the address that you want to show in the from field of your reply email to the customer.



*Change the From email address*

If you do not want the reply from the customer to come to the address specified in the **From** field and want it to go to a different address, you can specify a reply to field.

2. Click the **Assistance**  button in the **To** field.
3. In the Select Names window, in the **Reply to** field, type the email address to which a reply email from the customer should be addressed. By default the field shows the address selected in the **From** field. For example: You give a different address in the **From** field and a different address for **Reply to**. When the customer receives the email the **From** line will show the address you gave in the **From** field. When the customer replies to the email the **To** field will show the address you gave in **Reply to** field and the reply will go to this address.




*Provide an address in the Reply to field*

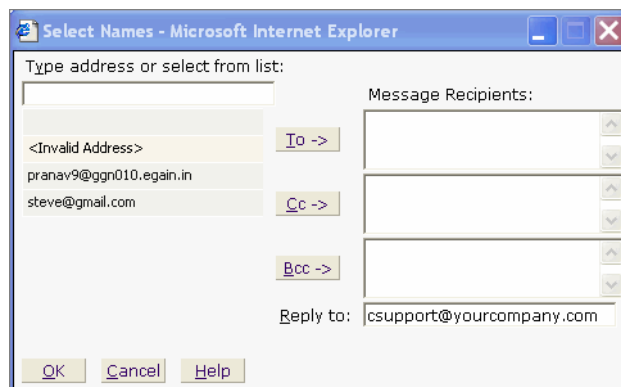
## Editing To, BCC, and CC field

When you are replying to an email the To field will show the email address from which the email came. If you are sending an outbound email the To field shows the address given while creating the activity.

### To add addresses in To, BCC, or CC field:

If you know the email addresses to which you have to send the email you can type them in the To, BCC or CC field. By default the reply pane has only To field. You can add the CC and BCC field by changing your preferences. For details, see [“Preferences and settings” on page 14](#). If you want to use the address book, then follow the following steps:

1. Click the **Assistance**  button in the **To** field. Select Names window appears.



*Specify the To, CC, and BCC addresses*

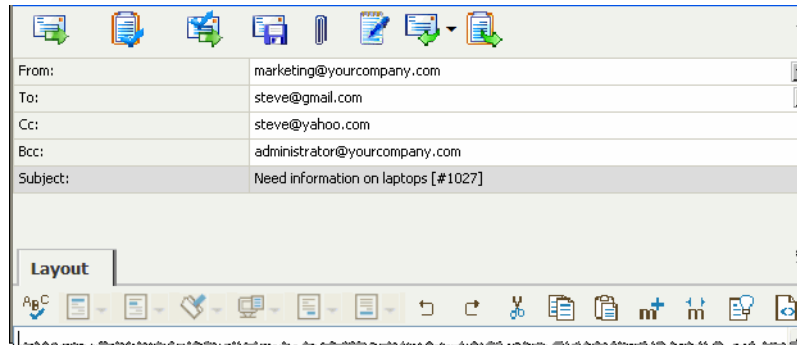
2. In the Select Names window, do the following.

g. **Type address or select from list:** The addresses in the list are arranged in alphabetic order. You can scroll through the list to locate addresses or type in a partial address to quickly access addresses. For example: Type the letter M in the text field to locate email addresses which start with the letter “M”. From the list of addresses displayed, select the address you need.

h. Click the **To**, **CC**, or **BCC** button to add the address to the appropriate field.

i. Click the **OK** button.

If the email address in the To field is different from the email address given in the contact point of the customer, you are notified about the discrepancy.



*A sample Reply pane*

## Editing the Subject


The subject field of the email indicates what the email is about. If the activity belongs to a case, it also contains the Case Id to which the activity belongs. When you send an email to the customer the system automatically adds the Case id to the subject of the email. It is recommended that you use a subject that is concise and informative.

### To edit the subject:


- ▶ Type the subject in the subject field.

## Accepting and rejecting activities

You may be a supervisor whose responsibilities include reviewing the content of outgoing emails. The system allows administrators to create an outbound workflow to facilitate this in the form of a supervisory loop.

Activities that are part of the supervisory loop are marked with the Supervisory activity icon:  .

### To accept an activity:


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

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

As a supervisor of the activity, you can modify the text, or the attachments, and these changes are reflected in the reply that is sent to the customer. It is recommended that if you do make changes, you reject the reply

and send it back to the agent for re-submission. This ensures that the agent receives appropriate feedback and is able to improve the quality of out going emails.

**To reject an activity:**

1. Select the activity in the Inbox.
2. Attach a note by clicking the **Notes**  button.
3. In the Reply pane toolbar, click the **Reject** button.

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



# Chats

- ▶ [Chat basics](#)
- ▶ [Conducting chat sessions](#)
- ▶ [Viewing chat activity information](#)
- ▶ [Chat monitors](#)

# Chat basics

Chat allows you to service online customer requests in real time. A customer clicks on a link or button on a web page to initiate a chat session. Clicking this button or link takes the customer to an entry point (a page) from which the customer can chat with an agent. An agent responds to a customer’s query from the agent console.

During a chat activity, along with exchanging text messages, an agent can send web pages to a customer. In systems that have advanced collaboration capabilities, the agent can also share pages and cobrowse multiple pages on a website.

## Chat activity indicator for standalone agents

When a new chat activity is assigned to you, and you are in the main inbox, the Chat Inbox button will blink in red.

If you are in the main inbox, and a chat session is in progress, and the customer sends a new message, the Chat Inbox indicator will blink in red.

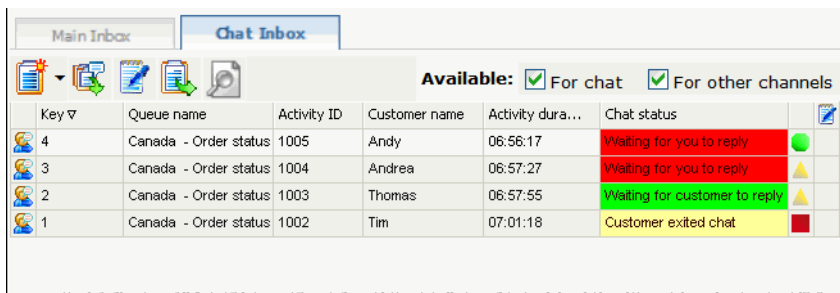


*New chat activity indicator*

If a new chat comes in to the queue from which you can pull activities, and you are working on another application on your machine, the Agent console window will pop to the front.

## Chat status

You can see the status of all the open chat activities in the List pane. The chat status is indicated using both descriptive text and color coding.



Key	Queue name	Activity ID	Customer name	Activity dura...	Chat status
4	Canada - Order status	1005	Andy	06:56:17	Waiting for you to reply
3	Canada - Order status	1004	Andrea	06:57:27	Waiting for you to reply
2	Canada - Order status	1003	Thomas	06:57:55	Waiting for customer to reply
1	Canada - Order status	1002	Tim	07:01:18	Customer exited chat

*View chat status*

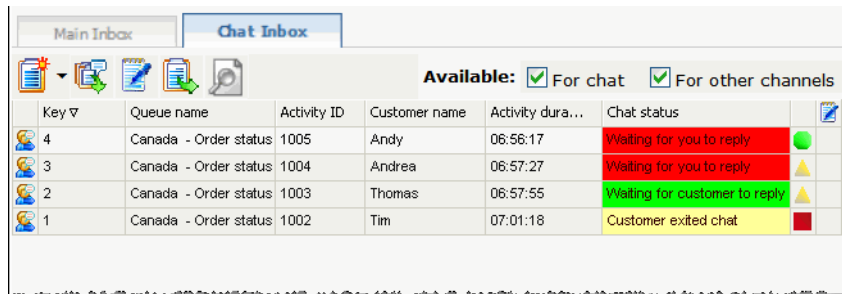
The status of a chat can be one of the following:

- **Waiting for you to reply:** This means the last message was sent by the customer to the agent. This is the default chat status when a new chat activity comes in to the inbox. This status is shown in red color.
- **Waiting for customer to reply:** This means the last message was sent by the agent to the customer. This status is shown in green color.

- **Customer not connected:** This means that the customer has been disconnected from the system without actually ending the chat. This can be caused by a network error or due to a problem with the browser.
- **Customer exited chat:** This means that the customer has exited the chat. This status is shown in off-white color.

## Customer connection status

In the chat inbox list pane, you can see the connection status of each customer.



Key ▾	Queue name	Activity ID	Customer name	Activity dura...	Chat status
4	Canada - Order status	1005	Andy	06:56:17	Waiting for you to reply
3	Canada - Order status	1004	Andrea	06:57:27	Waiting for you to reply
2	Canada - Order status	1003	Thomas	06:57:55	Waiting for customer to reply
1	Canada - Order status	1002	Tim	07:01:18	Customer exited chat

*View customer connection status*

The customer connection status can be one of the following.

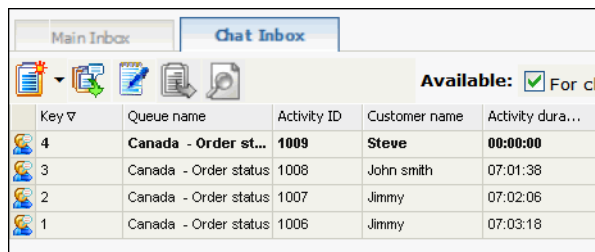
- **Fast, connected:** The customer is connected and the connection is fast. This is shown using a green circle.
- **Slow, but still connected:** The customer is connected but the connection is slow. This is shown using a yellow triangle.
- **Not connected:** The customer is not connected. This is shown using a red square.

## Shortcuts for multiple chats

A number from one to nine is assigned as a key to every chat activity that arrives in the agent's inbox. The lowest available number is assigned to the new chat activity that comes in the inbox. Once a value is assigned to a chat activity it does not change until the activity is completed. Once the activity is completed, the key is freed and is assigned to the next chat coming in to the inbox. The keys can be used to quickly toggle between chat activities present in the inbox.



**Important:** Shortcut keys are assigned only to chat activities, but not to any other type of activity.



Key ▾	Queue name	Activity ID	Customer name	Activity dura...
4	Canada - Order st...	1009	Steve	00:00:00
3	Canada - Order status	1008	John smith	07:01:38
2	Canada - Order status	1007	Jimmy	07:02:06
1	Canada - Order status	1006	Jimmy	07:03:18

*View keys assigned to chats*

## An example of how keys are assigned

A chat activity 1001 comes in an empty chat inbox and is assigned the key 1. While chatting, another chat activity 1002 comes in the chat inbox and is assigned the key 2. An email activity 1003 comes in; it is not assigned any shortcut key. The agent completes chat activity 1002, and the shortcut key 2 becomes available for assignment. A chat activity 1004 comes in the chat inbox, it is assigned the shortcut key 2.



**Important:** For shortcut Keys you will not be able to use numbers from the Numeric pad because pressing the shift key overrides the Numeric lock.

## Toggleing between inboxes

The Agent Console has two inboxes. One is the chat inbox that shows the chat activities and the other is the main inbox that shows all other activities. You can easily toggle between the two inboxes using a shortcut.

### To toggle between the inboxes:

- ▶ Use the shortcut key SHIFT+CTRL+SPACE to switch from one inbox to the other.

# Conducting chat sessions

## Making yourself available

For the system to be able to assign chat activities to you, you should make yourself available in the chat inbox. You can change your availability status, irrespective of the inbox you are in. Even if you are in the main inbox you can change your availability for chat activities.

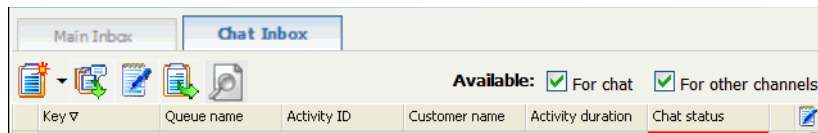
You can change this setting only if you have the permission to do so. If you make yourself unavailable you can still pull chat activities from the queues from which you are allowed to pull activities. If your administrator has not given you the permission to change the availability setting, then you become available for handling chat activities as soon as you log in to the Agent Console and become unavailable when you log out.



**Important:** If you have the permission to change your availability setting, you have to make yourself available for chat every time you log in to the Agent Console.


### To make yourself available in the chat inbox:

1. In the Inbox toolbar, make yourself available for handling chats.



*Change your availability*


## Pulling chats

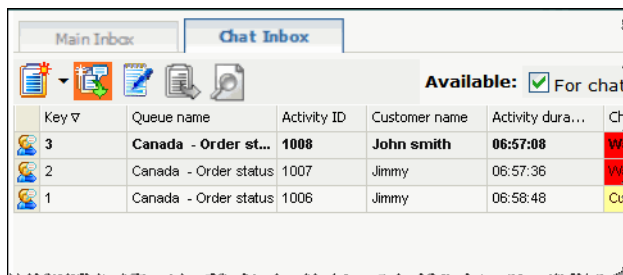
You can pull chats from the queues if you have the required pull permissions and if you have been assigned the action required to pull chat activities. When a chat activity comes in to the queue the **Pull Next Chat**  button blinks red. When you click the button while it is still blinking, a chat is assigned to you. You can pull chat activities even when you are in the main inbox. If you pull chat activities from the main inbox, you are taken to the pulled chat activity in the chat inbox to begin working on it. If you are in the chat inbox and are working on a chat activity and you pull a new chat activity, the new chat activity comes into your inbox but your focus is not shifted to the pulled activity. You can continue to work on your original chat activity.



**Important:** Only Standalone agents with the default administrator role can pull chat activities.

### To pull chat activities:

- ▶ In the Inbox List pane toolbar, click the **Pull Next Chat**  button when it is blinking red. One activity, usually the one with the maximum waiting time, gets pulled in to your inbox.



Key ▾	Queue name	Activity ID	Customer name	Activity dura...	Ch
3	Canada - Order st...	1008	John smith	06:57:08	WA
2	Canada - Order status	1007	Jimmy	06:57:36	WA
1	Canada - Order status	1006	Jimmy	06:58:48	Cu

*Click the Pull next button*

## Moving between chats

### To move between chats:

- ▶ Use the shortcut **SHIFT + CTRL + Key** (1 to 9) to toggle between chat activities.

For example: If you have selected a chat activity with key 1 and you want to go to activity with key 2 use the shortcut:

- **SHIFT + CTRL + 2**

And, to go back to activity with key 1 use the shortcut:


- **SHIFT + CTRL + 1**

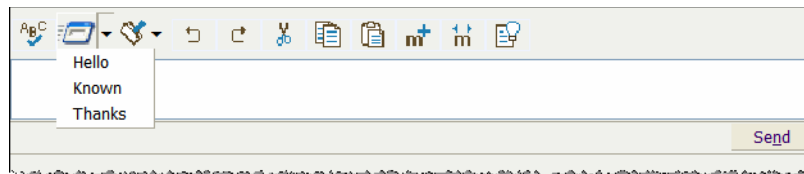
## Sending text messages to the customer

### To send text messages to the customer:

1. In the Chat pane in the **Text box** type the message you want to send to the customer.


If your administrator has configured quick responses for the common messages used in chat, then you can use them to quickly send a page to the customer.

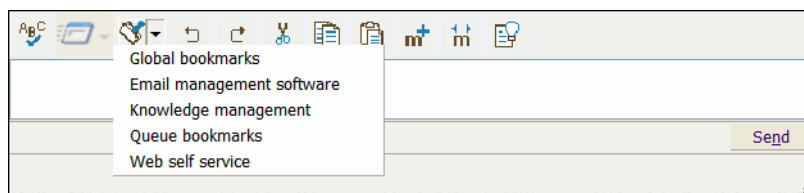
2. To use the quick responses, in the Text box toolbar, click the arrow in the **Quick responses**  button. From the list of quick responses select the one you want to use. The text of the quick response appears in the Text box. Review it and make any changes, if required. Click the **Send** button or press the Enter key to send the message to the customer.



*Select a quick response*




Like quick responses, you can also use bookmarks to quickly send messages from the knowledge base to your customers.

3. To use the bookmarks, in the **Text box** toolbar click the arrow in the **Bookmarks**  button. From the list of bookmarked articles select the one you want to use. The text of the article appears in the **Text box**. Review it and make any changes, if required. Click the **Send** button or press the Enter key to send the message to the customer.



*Select a bookmarked article*

Before sending the message to the customer you can also do a spell check.


4. To run a spell check, click the **Spell check**  button in the Text box toolbar. If your administrator has configured auto spell check then every time you send a message the spell checker runs automatically. If block check is configured, then your message is checked for any blocked words. If the message contains any blocked words you are prompted to delete those words before sending the message to the customer.
5. In the Text box toolbar, click the **Add macro**  button to add macro. The Select Macro window appears. From the window select the macro you want to use in the message sent to the customer. If you want to expand the macro, click the **Expand macro**  button.

If you know the name of the macro, in the text box, type the macro name preceded by three single opening quotes (''). Press the space key on the keyboard. The macro expands to its original form displaying the complete content. To prevent the macro from expanding right away, type the macro name with only two single opening quotes. The macro is expanded only when the message is sent.

## Sending web pages to customers


During a chat session you can send web pages to customers. You can send web pages only for those chats that come through the entry points for which your administrator has enabled page pushing.

### To send a web page to the customer:

1. In the Information pane, go to the Web Collaboration  section.

2. In the Web Collaboration toolbar, in the **Address** box, type the URL of the page you want to send to the customer.


If your administrator has configured any quick links, you can use them to quickly send the web page to the customer.

3. In the Web Collaboration toolbar click the arrow next to the **Quick links**  button. From the drop down select the URL of the page you want to view.



Select a URL

The page is displayed in the Web collaboration section of the Information pane. If the web collaboration is configured in the pop-up mode, the web page opens in the pop-up window.

4. In the Web Collaboration toolbar, click the **Send page to customer**  button. The customer receives this page and views its contents.
5. To send another page, repeat steps 2-4.

If the administrator has blocked any web pages then you can't send them to the customer. The blocked pages don't get pushed to the customer but you can view them in your view port.


## Ending chat sessions

### Transferring chats

#### Things to note

1. Chats can be transferred to users, queues, and departments.
2. Chats can be transferred only to the users who are available for handling chats.
3. Only one chat activity can be transferred at a time.
4. Chats cannot be transferred to agents who have reached their Chat - User Max Load.
5. Only open chat activities where the customer has not left the chat session can be transferred.
6. Standalone agents can transfer chats only to standalone agents and standalone queues.

#### To transfer a chat:

1. In the chat inbox select the chat you want to transfer.
2. In the Chat pane or Inbox pane toolbar click the **Transfer**  button.
3. In the Transfer Activities windows, select if you want to transfer the chat to another agent, queue, or a department. From the list of available agents, queues, or departments select the one to which you want to transfer the chat and click the **Transfer** button.

## Completing chats

After servicing the customer you can either leave the chat or complete it. When you click the **Complete** button, the activity gets completed and shows in the **Completed** folder of the inbox.


If the wrap-up activity action is assigned to you, the activity is not completed when you click the **Complete** button. The activity goes into wrap-up mode and your mode also changes to wrap-up until you complete wrap-up activities.

When an agent completes a chat activity, the customer's chat window is closed. If the administrator has set up an end page, that page is loaded in the customer view port when the agent ends the chat session.


The finish page can be of three types:

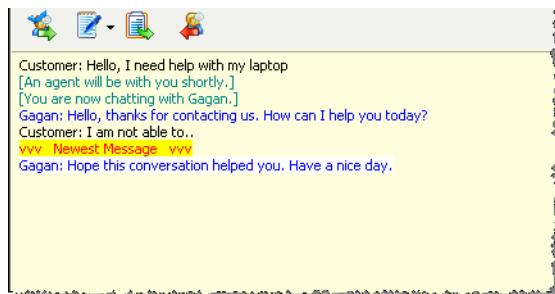
- ▶ Last page browsed
- ▶ Referrer page
- ▶ Pre-configured URL

### To complete a chat:

- ▶ Click the **Complete**  button in the Chat pane toolbar. When you complete the chat the customer is shown the exit template and a list of URLs sent to him, if any.

If the wrap-up activity action is assigned to you, the activity will not get completed when you click the **Complete** button. The activity goes into wrap-up mode and your mode changes to wrap-up.

- ▶ After completing wrap-up tasks, click the **End Wrap-up**  button to complete the activity. When you end wrap-up, your mode is set to available and the next activity is assigned to you.




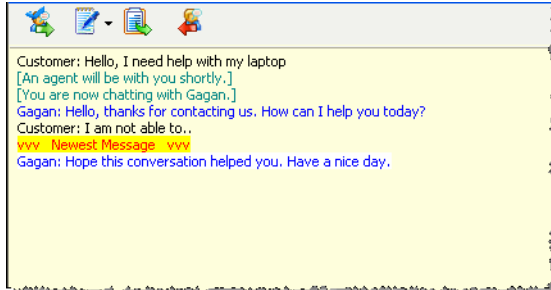
*Click the **Complete** button*

## Leaving chats

After servicing the customer you can either leave the chat or complete it. When you click the **Leave** button, the activity is removed from your chat inbox but it gets completed only when the customer closes the chat session.

### To leave a chat:

- ▶ Click the **Leave**  button in the Chat pane toolbar. When you leave the chat a message is shown to the customer that the agent has left the chat.




Click the **Leave** button

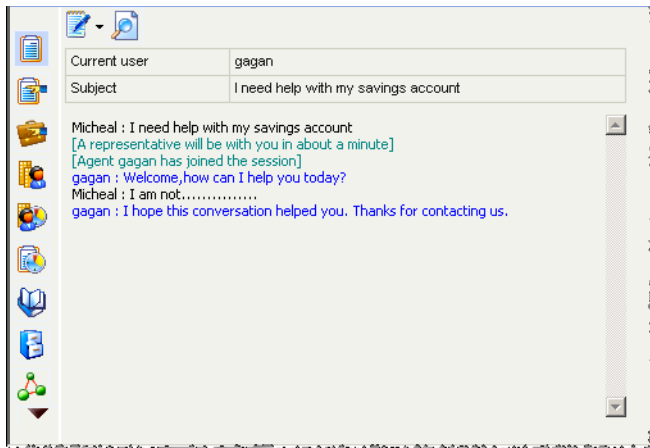
## Viewing chat activity information

### Viewing activity body

The activity body shows the transcript of the chat. You can view the activity body only for completed chat activities and not for chats that are in progress. The chat transcript contains the complete text of the chat as well as any attachments that were sent during the chat session.

#### To view the activity body:

- ▶ In the Information pane, go to the Activity Body  section.



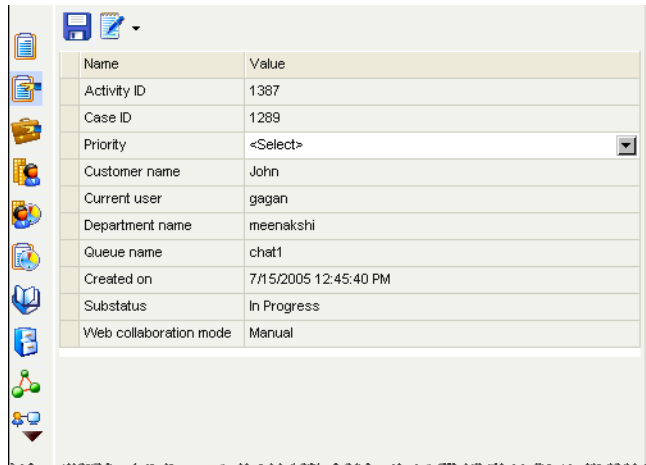
View chat transcript

The activity body shows the following details:

- **Current user:** The name of the agent who serviced the chat.
- **Subject:** The subject of the chat session, made up of the first message sent by the customer.
- **Text of the chat transcript:** The complete chat transcript.

## Viewing activity details


You can view the details of chat activities from the Activities Details section of the Information pane. You can view the case ID, activity ID, queue name, and certain more details about the activity. From here you can also change the priority of the activity. Depending on what your administrator has configured for the department, you may not see all the fields described here.



Name	Value
Activity ID	1387
Case ID	1289
Priority	<Select>
Customer name	John
Current user	gagan
Department name	meenakshi
Queue name	chat1
Created on	7/15/2005 12:45:40 PM
Substatus	In Progress
Web collaboration mode	Manual

*View chat details*

### To view the activity details:

1. In the Information pane, go to the Activity Details  section. By default, the Activity Details section shows the following information.
  - **Activity ID:** The activity ID of the chat selected in the inbox.
  - **Case ID:** The case ID of the case associated with the activity. If there is no case associated with an activity, then this field is blank.
  - **Priority:** It shows the priority of the activity. By default there is no priority set for the activity. You can set the priority from one to seven. Priority of completed chat activities cannot be changed.
  - **Customer name:** The name of the customer associated with the chat activity.
  - **Current user:** The name of the agent to whom the activity is assigned.
  - **Department name:** The name of the department to which the activity belongs.
  - **Queue name:** The name of the queue from which the chat came to the agent.
  - **When created:** The date and time when the chat was created.
  - **Substatus:** The substatus of an open chat activity is **In progress**, and of a completed activity is **Done**.
  - **Web collaboration mode:** The web collaboration mode of the customer. The web collaboration mode can be **Manual**, **Basic**, **Advanced**, or **Cobrowse**.

## Viewing audit information

An Audit shows the complete life cycle of the chat activity from its creation to its completion.

The following table shows the audit details.

Actor	Action	Description
system	New incoming Chat activity	
system	New case created	
system	Activity assignment to new case	
system	Assigned to queue <i>queue name</i>	
system	Load balancing assigned to user <user name>	
<i>user name</i>	Pulled by user <i>user name</i>	
<i>user name</i>	Read in progress	
<i>user name 1</i>	Transferred from user <i>user name 1</i> to user <i>user name 2</i>	
<i>user name</i>	Transferred from user <i>user name 1</i> to queue <i>queue name</i>	
<i>user name</i>	Transferred from user <i>user name 1</i> to department <i>department name</i>	
<i>user name</i>	User <i>user name</i> joined chat activity	When a supervisor joins a chat from the My Monitor node.
<i>user name 2</i>	Transferred from user <i>user name 1</i> to queue <i>queue name</i>	When a supervisor transfers a chat activity from an agent to a queue.
<i>user name 2</i>	Transferred from user <i>user name 1</i> to user <i>user name 3</i>	When a supervisor transfers a chat activity from one agent to another agent.
Customer	Customer exited the chat	
<i>user name</i>	User <i>user name</i> left the chat	When a supervisor leaves a chat or when an agent leaves a chat.
<i>system or user name</i>	Activity completed	

[View audit details](#)

## Chat monitors

### About chat monitors

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

While the monitoring in the Supervision Console allows the supervisor to get an overview of the workload and service level adherence of various queues and users, the monitoring from the Agent Console allows you to

review on-going chat sessions and join them, if required. Users who are assigned the action, Monitor Chat Activity, can monitor chats from the **My monitor** node in the Agent console. You can monitor all the users and queues that you have been given permission to view.

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

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

## Monitoring chats

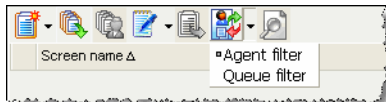
### To monitor a chat:

1. In the Inbox Tree pane, browse to **My work > Activities > My Monitor**.



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

2. In the List pane toolbar, from the **Monitoring filter**  button select if you want to monitor queues or agents.



*Select an object for monitoring*

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

Queue Name	Chat - Number unassigned	Chat - Number not started	Chat - Number in progress
Exception_Qu...	0	0	0
test queue	0	0	0
Order status	0	0	1

Select a queue for monitoring


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

User Name	Screen Name	Chat - Number not started	Chat - Number in progress	Chat - Availability status
john	John	0	0	No
meenakshi	Meenakshi	0	1	No

Select an agent for monitoring

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


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

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

- To join the chat, click the **Join** button in the Chat pane toolbar. The number of chat activities that you can join as a supervisor is determined by a setting configured by your administrator.



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

Once you join a chat, the **Join**  button is disabled, and all other buttons in the Chat pane are enabled. The Information pane is also enabled. You cannot join a chat if the agent to whom the chat is assigned has not

yet started chatting with the customer. You can also join chat sessions at the point at which the agent has left the chat session as long as the customer has not exited the chat. You can transfer, complete, or leave chat activities. You can rejoin a chat again by clicking the **Join** button again.



# 10

## Notes

- ▶ [Managing notes](#)

# Managing notes

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## About notes

Notes are a key collaborative tool for agents and customers. You can add notes to activities, cases, articles and customers. Meant for internal use, notes are used to share tips and information with other agents or supervisors.

Notes attached to articles play a very important part in the approval process. You can use them to convey any special comments to the next approvers in the approval process. Notes are useful while transferring activities from one user to another or from one department to another.

### Related user actions:

You can add, view, copy, or delete notes. Once a note is added it cannot be edited. Although the entire note is not copied, the content of a note can be copied to the clipboard for use outside the system.

There are three actions related to Notes: **View**, **Add**, and **Delete**. These actions have to be assigned to you by your administrator.


- ▶ The View action allows you to view notes and copy the content of notes.
- ▶ The Add action allows you to view and add notes and copy the content of notes.
- ▶ The Delete action allows you to view, add and delete notes and copy the content of notes

Notes can be added to different objects by using the **Notes**  button

## Adding notes

You can add notes and associate them with activities, cases, customers, etc. Notes can also be added while transferring activities to departments and users.

### To add a note:

1. In the toolbar of the pane you are working in, click the **Notes**  button.

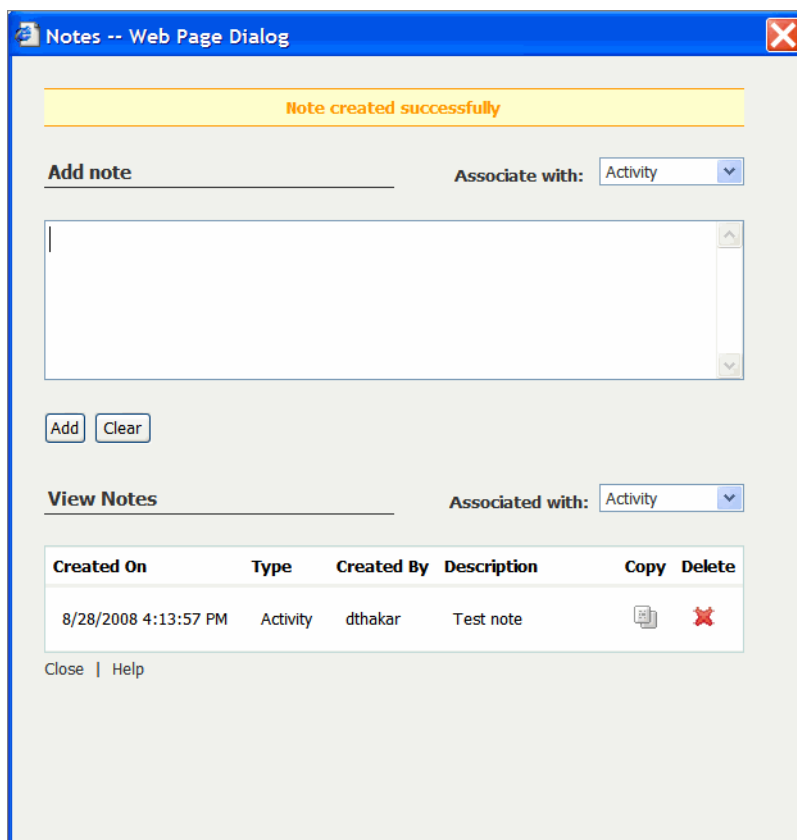
The Notes window is opened. Existing notes, are displayed in the View Notes section with the most recent notes at the top.

2. From the **Associate with** list, choose to associate the note with an Activity, Case, or Customer. Depending on the pane you are in, a combination of objects will be available to you.

The Activity option is not available when the Notes window is opened from the Case section in the Information pane. The Activity and Case options are not available when the Notes window is opened from the Customer section in the Information pane.

3. In the Add note section, type the contents of the note.
4. Click **Add** to create the note. To clear the text in the text box, click the **Clear** button.

Once the note is added, a message is displayed at the top of the Notes window.




*Add a note*

## Viewing notes

To view notes you must have either the View Notes action or the Delete Notes action assigned to you.

### To view a note:

1. In the toolbar of the pane you are working in, click the **Notes**  button.

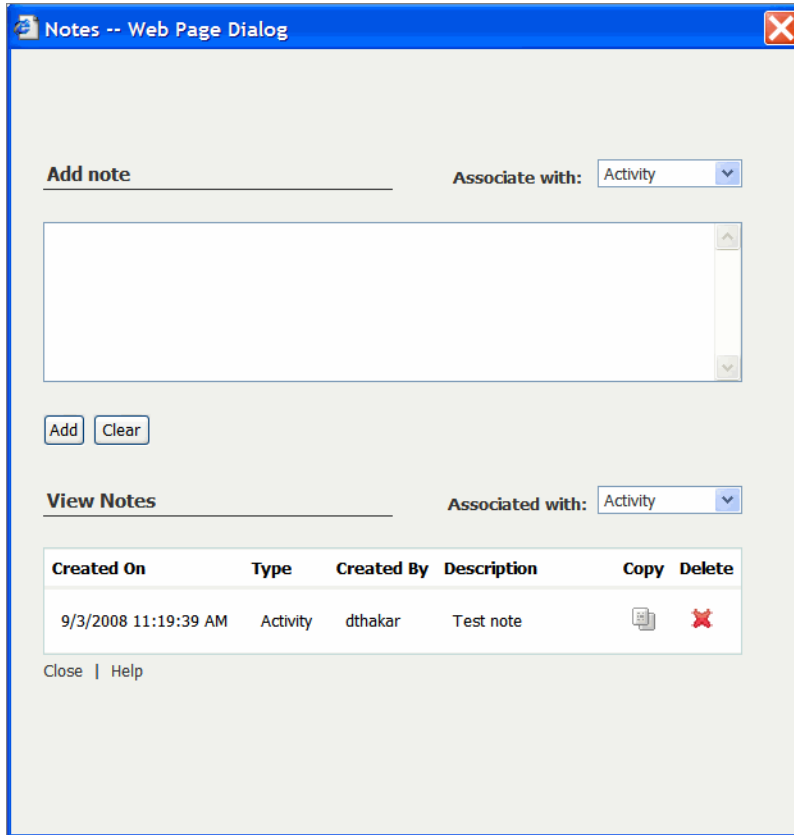
The Notes window is opened. Existing notes are displayed in the View Notes section, with the most recent notes at the top.

In the View notes section the following information is displayed:

- **Created On:** Date and time when the note was created
- **Type:** Type of object the note is associated with. It can be one of the following: Activity, Case, or Customer.
- **Created By:** The name of the user who created the note.
- **Description:** The content of the note.

Using the **Copy** and **Delete** buttons you can copy the contents of a note to the clipboard and delete a note. For more information on copying notes see [“Copying the content of a note to the clipboard” on page 87](#) and for more information on deleting notes see [“Deleting notes” on page 88](#)

2. From the **Associated with** dropdown list select the object for which you want to view the notes. You can choose to view notes associated with Activities, Cases, Customers, or All notes.





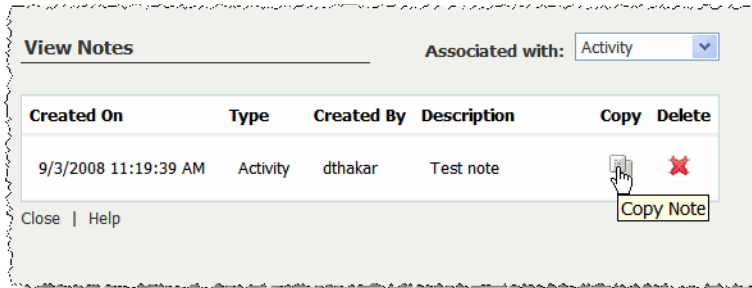
*View a note*

## Copying the content of a note to the clipboard

When you copy a note, only the content of the note is copied to the clipboard. It is meant to enable you to quickly copy the content of a note for use outside the system. Once you copy the content, you can use the Windows Ctrl-V to paste the content into an email or external document.

### To copy a note:

1. In the toolbar of the pane you are working in, click the **Notes**  button.  
The Notes window is opened and a list of existing notes is displayed in the View Notes section.
2. Locate the note you want to copy and click the **Copy**  button next to the note. The content of the note is copied to the clipboard.
3. Paste the content using the windows shortcut Ctrl+V in the desired location.

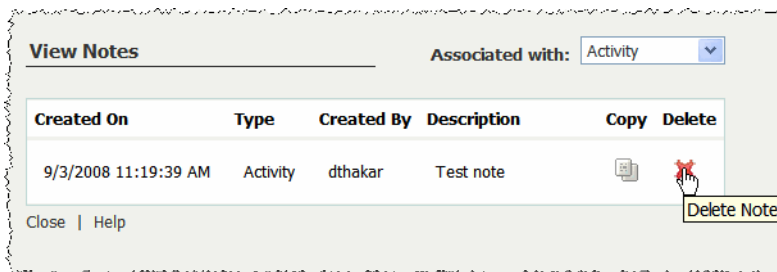


*Copy the content of a note*

## Deleting notes

### To delete a note:

1. In the toolbar, click the **Notes** button.  
The Notes window is opened and a list of existing notes is displayed in the View Notes section.
2. Locate the note you want to delete and click the **Delete** button next to the note.  
A message appears asking you to confirm the deletion.
3. Click **Yes** to delete the note.



*Delete a note*