



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

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

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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 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)

The document set contains the following guides:

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

#### **User guides for agents and supervisors**

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

#### **User guides for Knowledge Base managers and authors**

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

## **User guides for administrators**

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

# 1 Basics

- ▶ [Terms and Concepts](#)
- ▶ [Logging In](#)
- ▶ [Elements of the User Interface](#)

Cisco® Interaction Manager™ helps businesses set up multichannel customer interaction hubs to provide consistent high-quality service across all interaction channels such as email, chat, web self-service and phone.

The Agent Console is a service console and is designed specifically for use by customer service agents to handle service interactions and tasks. As an agent, this console is the only work area that you are likely to need; it provides you with all the tools and information that you need to complete activities. In this console, you can:

- ▶ View customer records and interaction history
- ▶ Manage cases
- ▶ Manage activities such as tasks, emails, chats, and phone calls
- ▶ Use and contribute to the knowledge base
- ▶ Run reports on your performance

This chapter introduces the Agent Console and the basics of working in it. This includes:

- ▶ Logging in to the system
- ▶ Getting to know the user interface
- ▶ Setting some options as a first step towards working with activities
- ▶ Managing your availability to make sure that activities are routed to you in a way that maximizes your efficiency.

Common aspects of working with activities are discussed in [“Activities” on page 54](#). Details about working with specific types of activities such as email, chat and tasks are discussed in the chapter dedicated to that activity type. See [“Tasks” on page 71](#), [“Emails” on page 76](#), and [“Chats” on page 85](#).

## Terms and Concepts

---

- ▶ **Activity:** A unit of work. It may be a task, created to track an internal work item, an interaction between a customer and an agent, or an interaction between a supervisor and an agent.
- ▶ **Case:** Used to group activities related to the same issue. Activities are tied to a case using a single identification number, the Case ID. A case can contain activities of various channels such as email, chat, phone, and tasks.
- ▶ **Chat:** A real time interaction between an agent and a customer where the participants exchange text messages. As part of a chat, agents can also share web pages with customers.

A chat activity is created for each chat session between a customer and an agent.

- ▶ **Customer:** A business object in the application that corresponds to a person who contacts the organization to purchase products and services, request support or information, or lodge complaints. There are three types of customers - Group, Corporate, and Individual.

In the Agent Console, there is a pre-defined Customer section in the Information pane that displays the customer’s name, email address, phone number, preferred agent, etc.

- ▶ **Email:** An electronic communication. There are two types of emails in the application.
  - Inbound emails: Emails received by the company from customers.
  - Outbound emails: Emails sent by agents or the system on behalf of the company to customers.

An email activity is created for each email that comes in to, or leaves, the system. Separate activities are also created for emails that go through supervisory loops that allow supervisors to review outbound email.

- ▶ **Knowledge Base (KB):** A department's common repository of predefined content. Developing a rich knowledge base enables an organization to offer consistent and effective “knowledge-powered” interactions to customers through all channels—self-service, chat, email, phone, and in-person.
- ▶ **Notes:** Brief comments added to a business object. Notes are added to activities, cases, customer profiles, and KB articles. They are meant for internal use and can be used to share tips and information with other agents or supervisors.
- ▶ **Task:** An activity created by agents and supervisors for tracking work that is internal to the organization, such as follow-up actions resulting from an email or chat interaction with a customer.

## Logging In

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### Logging In From a Browser

#### 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 the fully qualified domain name of the 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.

### Logging In From Cisco Agent Desktop

#### 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.

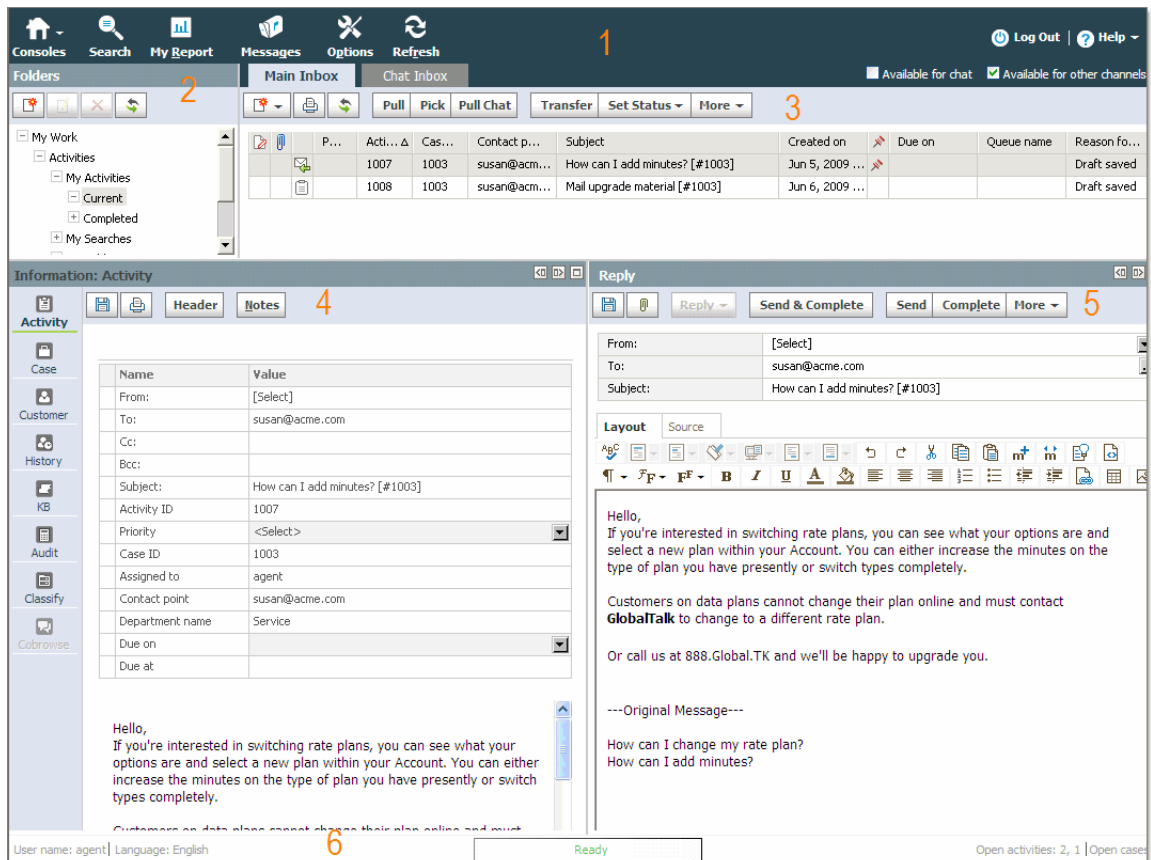


**Important:** In addition to their username and password, blended collaboration agents who are allowed to change terminals have to provide their terminal ID and password to log in to the application.

---

# Elements of the User Interface

The Agent Console screen has six elements or functional areas.











## Agent Console

1. Console toolbar.
2. Inbox Folders pane.
3. Inbox list pane, with Main Inbox and Chat Inbox tabs (visible to agents with both Email and Chat licenses).
4. Information pane.
5. Reply pane, which also becomes the Chat, Compose, and other activity composition panes.
6. Status bar.

## Console Toolbar

The Console toolbar provides access to the Search, Messages, and Options windows. It also helps you perform common tasks such as refreshing the screen display or logging out of the system. The inbox, Information, and Reply panes have their own toolbars for tasks that you would perform in these panes.

The different sections of the application that are accessed from the Console toolbar are explained here.

Use	To
	Select a particular console. This button is not displayed if you have access only to the Agent Console.
	Open the Search window. In the Search window, you can run searches to locate activities, cases, customers, contact points, contact persons, associations, and knowledge base articles.
	Open the My Report window. In the My Report window, you can run the Agent Login Summary and Agent Efficiency reports to measure your performance
	Open the Messages window. In this window, you can read messages sent to you by the system, and by other Unified EIM and Unified WIM users. You can also send messages to other users or external email addresses from here. A flashing button indicates that you have received a new message.
	Open the Options window. In this window, you can configure various settings, set up your options for pulling activities, add words to you personal dictionary, and change your password.
	Refresh the entire screen. To refresh only a specific pane, use the Refresh button on the toolbar in that pane.
	Log out of the application.
	View the online help for the Agent Console. The arrow next to the button indicates that additional options are available. Point to the button to view and select additional learning resources on the company web site.

Additionally, the following capabilities are also managed from the Console toolbar.

- ▶ Agent availability, which is discussed in detail in [“Managing Availability” on page 27](#).
- ▶ KB language, which is discussed in detail in the *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author’s Guide*.

## Inbox Pane

The inbox pane is further divided into the **Folders** tree pane on the left and the list pane, with the Main Inbox and Chat Inbox tabs on the right.

### Folders Pane





The **Folders** section consists of two main folders, **My Work** and **My Team**.

The **My Work** folder contains two folders: **Activities** and **Cases**.


- ▶ The **Activities** folder contains three additional folders: **My Activities**, **My Searches** and **My Folders**. Each of these folders may contain additional folders that have been provided by the administrator or created by you.
  - The **My Activities** folder contains folders that organize your activities by status. For example, the **Current** folder populates the inbox list with all of the activities that are assigned to you that are not completed. Similarly, the **Completed** folder populates the inbox list with all of the activities that you have completed.
  - The **My Searches** folder contains folders that organize your activities based on any search criteria you choose. After you have created a folder in the **My Searches** folder, clicking that folder in the **Folders** tree populates the inbox list with the activities that match the search criteria that are defined for the folder.
  - The **My Folders** folder contains folders that contain shortcuts to activities that are of interest you. Once you create a folder in the **My Folders** folder, you can create a shortcut in that folder by dragging and dropping an activity from the inbox list to the folder. When you do this, a shortcut to the activity is created in the folder. Deleting the shortcut to the activity does not delete the activity.
- ▶ The **Cases** folder contains three additional folders: **My Cases**, **My Searches**, and **My Folders**. Each of these folders may contain additional folders that have been provided by the administrator or created by you.
  - The **My Cases** folder contains folders that organize your cases by status. For example, the **Open** folder populates the inbox list with all of the cases that you own that are not closed. Similarly, the **Closed** folder populates the inbox list with all of the cases that you own that are closed.
  - The **My Searches** folder contains folders that organize your cases based on any search criteria you choose. After you have created a folder in the **My Searches** folder, clicking that folder in the inbox tree populates the inbox list with the cases that match the search criteria that are defined for the folder.
  - The **My Folders** folder contains folders that contain shortcuts to cases that are of interest you. Once you create a folder in the **My Folders** folder, you can create a shortcut in that folder by dragging and dropping a case from the inbox list to the folder. When you do this, a shortcut to the case is created in the folder. Deleting the shortcut to the case does not delete the case.

The **My Team** folder is visible only to managers who have a team of agents working on activities and cases. The set of folders under **My Team** enables the manager to track the performance of the agents working on activities.

The **Folders** toolbar includes the following buttons and menu items:

Use	To
 <b>New</b> button	Open the New Folder window, which enables you to create a new folder for activities, searches and cases.
 <b>Properties</b> button	Edit the properties of the selected folder. This button is enabled when a folder is selected.
 <b>Delete</b> button	Delete the selected folder. This button is enabled when a folder is selected.
 <b>Refresh</b> button	Refresh the tree




## Inbox List Pane

The inbox list displays a list of activities or cases depending on the selection made in the inbox tree. In this list, activities are further divided in to two types. Chat activities are displayed in the Chat Inbox tab, while all other activities are displayed in the Main Inbox tab. Note that The Main Inbox is not refreshed automatically when users switch to it from the Chat Inbox. Agents must click the **Refresh**  button to see any new activities in the Main Inbox.

Columns displayed in inbox list are configured by the administrator, but agents can personalize the view, the sort order of columns etc. Refer to [“The number of open cases assigned to you.” on page 23](#) for details.

Buttons displayed in the inbox list change based on the item that is selected in the **Folders** pane. For example, the buttons that are available for items in **My Activities** node are different from those available for items in the **My folders** node.

The inbox toolbar includes the following buttons.

Use	To
 <b>New</b> button	Create a new activity. Activities can be created using the New Activity wizard by selecting <b>New activity</b> from this button or using one of the following items or their shortcut keys: <ul style="list-style-type: none"> <li>▶ Outbound email for current case</li> <li>▶ Outbound email for new case</li> <li>▶ Outbound email for no case</li> </ul>
 <b>Print</b> button	Print the selected activity.
 <b>Refresh</b> button	Refresh the inbox list.
<b>Pull</b> button	Pull the next set of activities into your inbox list. The activities that get pulled are determined by selections made in the <b>Pull Options</b> tab of the <b>Options</b> window.
<b>Pick</b> button	Manually select the activities to pull into your inbox list. You may be able to select activities from a specific department, queue, or user, depending on the permissions that you have been given by the administrator.

Use	To
<b>Pull Chat</b> button	Pull the next chat activity. This button is available only if you have been assigned the Chat license and work on chat type activities.
<b>Transfer</b> button	Transfer a selected activity. You may be able to transfer the activity to another department, queue, or user, depending on the permissions that you have been given by the administrator. This button is not shown when a <b>My Folders</b> folder is selected in the inbox tree.
<b>Set Status</b> button	Change the status of the selected activity. Select from <b>Pending, In Wrap-up, In Progress, or Complete</b> . This button is not shown when a <b>My Folders</b> folder is selected in the inbox tree.
<b>More</b> button	Perform less frequently performed functions like: <ul style="list-style-type: none"> <li>▶ <b>Configure Availability:</b> Open the Availability Setting window to select the activities that you are available to handle.</li> <li>▶ <b>Notes:</b> Open the Notes window to manage internal notes that are attached to activities, cases and customers.</li> <li>▶ <b>Pin/Unpin:</b> Pin or unpin activities.</li> <li>▶ <b>Delete Reference:</b> Delete selected activity shortcuts. This item is shown in the <b>More</b> button only when a <b>My Folders</b> folder is selected in the inbox tree.</li> </ul>

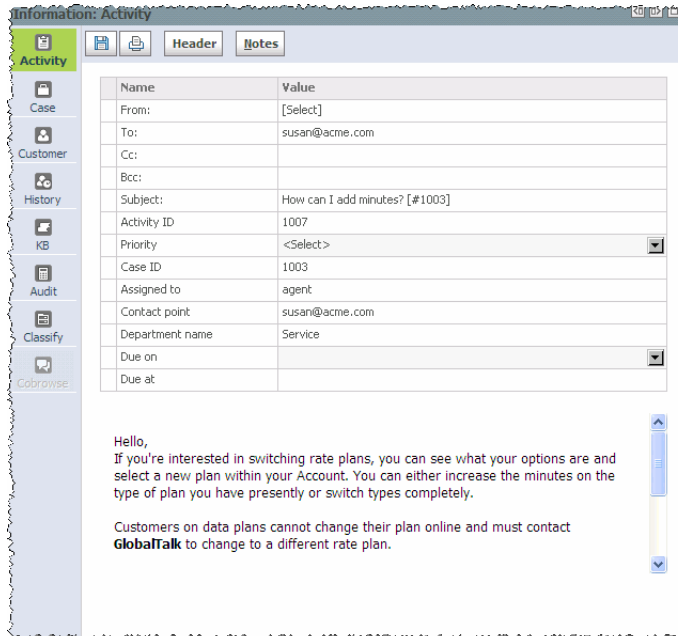
## Information Pane

The Information pane provides details about the activity selected in the inbox. In this pane, you can add new customers, generate audit reports, view and share web pages with customers, and access links to external databases. The KB section provides access to the articles in the common Knowledge Base.

The system consists of 11 predefined information pane sections. Out of them, eight are available to all agents and three are available to agents with specific licenses.

- ▶ The following sections are available to all agents.
  - Activity (details and body)
  - Case (details)
  - Customer
  - History (of customer)
  - Audit
  - KB (Knowledge Base)
  - Classify
- ▶ The Links section is available only to agents with the Data Adapter license.
- ▶ The Cobrowse section is available only to agents with the Unified WIM license.

The order and number of these sections can be different based on how your administrator has configured the system. Custom sections may also be available.



*A sample Information pane*










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

- ▶ Activity: body, details, and audit information
- ▶ Case: details
- ▶ Customer: details and 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 case and activity 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

The Information pane toolbar consists of the following buttons, but not all options may be enabled for all agents.

Use	To
 <b>Case</b> button	Get information about the case to which the selected activity belongs.
 <b>Activity</b> button	View the content of the selected activity. Attachments and headers are also displayed. Also view the field properties of the activity such as the activity ID, the case ID, the priority of the activity, and the date by which the activity should be completed.
 <b>Customer</b> button	Get details about the customer associated with the selected activity.
 <b>History</b> button	Get information about all the activities and cases associated with the customer.
 <b>Audit</b> button	Generate an audit report to know about the actions performed on the selected activity.
 <b>KB</b> button	Access articles stored in the knowledge base.
 <b>Classify</b> button	Associate classifications such as categories and resolution codes with the selected activity.
 <b>Links</b> button	Access external applications and databases.
 <b>Cobrowse</b> button	Share a web page with customers. This button is enabled only when a Chat activity is selected.

## Reply Pane

The Agent Console has a comprehensive set of tools to help you easily respond to customer queries. This pane changes based on the type of activity on which you are working. The Reply pane usually includes the following toolbar buttons.

Use	To
 <b>Save</b> button	Save a draft of the email.
 <b>Attachments</b> button	Attach a file to the reply
<b>Reply</b> menu	Select the type of reply to be sent. Reply types are Reply, Reply to all, Forward and Redirect.
<b>Send and Complete</b> button	Send and complete the activity with a single click.
<b>Send</b> button	Send the reply
<b>Complete</b> button	Complete the activity.
<b>More</b> button	Perform less frequently performed functions like: <ul style="list-style-type: none"> <li>▶ <b>Notes:</b> Add a note to an activity, case or customer.</li> <li>▶ <b>Transfer:</b> Transfer an activity to another queue or user, based on permissions.</li> </ul>

## Status Bar

The status bar at the bottom of the screen displays the following information:

- ▶ Your user name.
- ▶ The language currently in use.
- ▶ The status of the system (Loading, Ready, etcetera).
- ▶ The number of open activities assigned to you. The first number displays the number in the Main Inbox, and the second number, if present, is the number of open activities in the Chat Inbox.
- ▶ The number of open cases assigned to you.

# 2 Get Started

- ▶ [Getting Work](#)
- ▶ [Doing My Work](#)
- ▶ [Finding Information](#)
- ▶ [Communicating With Others](#)
- ▶ [Personalizing the System](#)
- ▶ [Evaluating My Work](#)

This chapter provides an overview of working in the Agent Console, and outlines the various settings and options that can be configured to improve your productivity.

## Getting Work

---

As an agent, there are different way in which work may be assigned to you. This section outlines the various ways in which work, in the form of activities, is routed to you. Depending on the types of activities you handle, like email, chat, callback, blended collaboration, etc., you may experience one or more of the routing methods outlined here.

### Overview of Routing

#### Routing Emails and Chats

Emails are retrieved from the mail server and placed into the database. Workflows act on them, creating an activity for each email, and applying the business rules configured by a system administrator. Workflows can then route the email activity either directly to an agent, or to a queue.

Chats are initiated from entry points and are routed directly to the queue associated with that entry point.

From queues, activities are routed to agents using one of the following methods:

- ▶ **Push routing:** System routes activities to agents. Activities can be load balanced between agents, or routed in a round robin fashion.
  - **Load balanced:** Activities are routed to agents who have the least number of activities in their inbox. Chat activities are load balanced among available agents.
  - **Round robin:** Activities are routed to agents in a continuous sequence, irrespective of the number of activities in their inbox. This option is not available for chat activities.
- ▶ **Pull routing:** Agents pull activities from queues based on permissions. Activities are not pushed to agents. If your system is configured to use pull routing, make sure you set up the pull options before you begin working on activities. See [“Setting Pull Options” on page 25](#).

#### Tasks

Typically, tasks are created by supervisors of agents and routed manually to other agents. The system can also be configured to automatically create tasks using workflows.

### Setting Pull Options

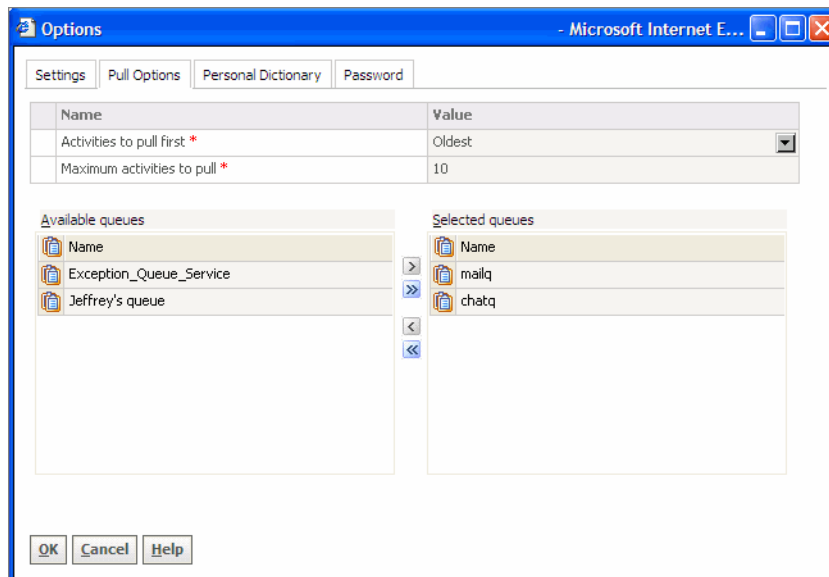
Standalone agents can pull activities from queues and can set options that affect activity pulling. You can specify the queues from which you want to pull activities, which activities to pull and how many activities to pull at a time. Pull options are set from the Options window which is launched using the Option button in the Agent Console toolbar. Note that standalone agents cannot pull activities from mapped queues or mapped agents.



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

### To set your pull options:

1. In the Agent Console toolbar, click the **Options** button.
2. In the Options window, go to the Pull Options 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 soonest:** Activities that are not late, but are due the soonest.
    - **Highest priority:** Activities that are marked with the highest priority.
    - **Most overdue:** Activities that are late and are already overdue.
    - **Newest:** Activities that have the most recent creation date and time.
    - **Oldest:** Activities that have the oldest creation date and time.
  - **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 activities to be pulled when you click the **Pull** button in the inbox toolbar.



*Set options for pulling activities*

3. Click the **OK** button.

## Managing Availability

Your administrator can configure the system in such a way that activities are routed to you only if you are available to work on them. In the Agent Console, there are two parts to managing your availability.

- ▶ Configuring your default availability settings
- ▶ Modifying the configured settings for short periods of time



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**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.

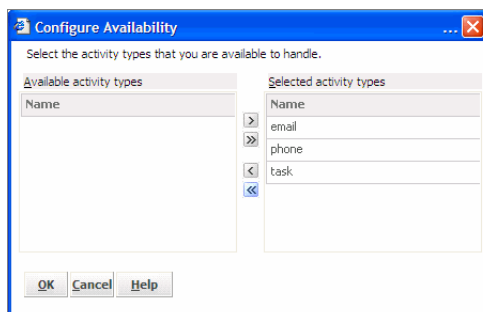
---

### Configuring Availability Settings

If you are working on an 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.

#### To configure availability settings:

1. Go to the Main Inbox.
2. In the inbox pane toolbar, point to the **More** button, and select **Configure Availability**.
3. In the Configure Availability window, select the activities types for which you want to make yourself available. Only activity types for which you have the required licenses are displayed here. Click the **OK** button.



*Configure your availability*

### Making Yourself Available in the Main Inbox

The availability options in the inbox toolbar (Available, Available for Chat, Available for other channels) work in conjunction with your default availability configuration. If you are busy and cannot handle any new activity for some time, change your availability status by unselecting the check boxes on the list pane toolbar. This is most useful when you have to make yourself unavailable for a short time. When you make yourself unavailable, the system ignores the settings configured by using the **Configure Availability** option and shows you as unavailable

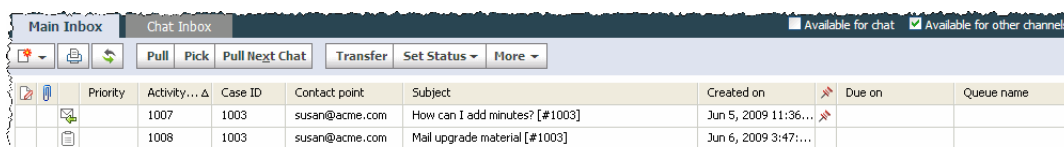
for all activities and tasks. When you make yourself available again, the system restores the availability configuration.

For example, assume that using your availability configuration, you have made yourself available for email type activities.

- When you make yourself unavailable, the system ignores the settings configured for individual activity types and you are shown as unavailable for all types of activities.
- When you make yourself available, your availability setting is restored, and you are made available for email type of activities only; not any other type of activity.

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

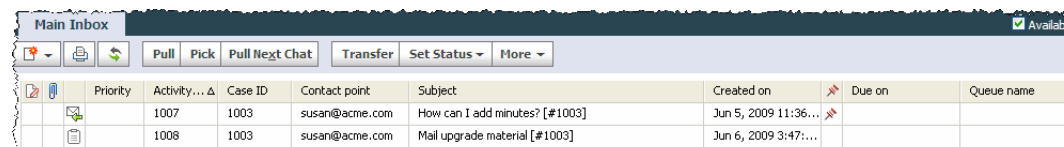
- Available for chat
- Available for other channels



*Make yourself available for activities*

If you have only the Email license then the following availability option is displayed, allowing you to indicate that you are available to work on email activities.

- Available



*Make yourself available for email activities*

### To make yourself available in the Main Inbox:

- ▶ Click the check box next to Available, Available for chat, or Available for other channels as required.



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

# Doing My Work

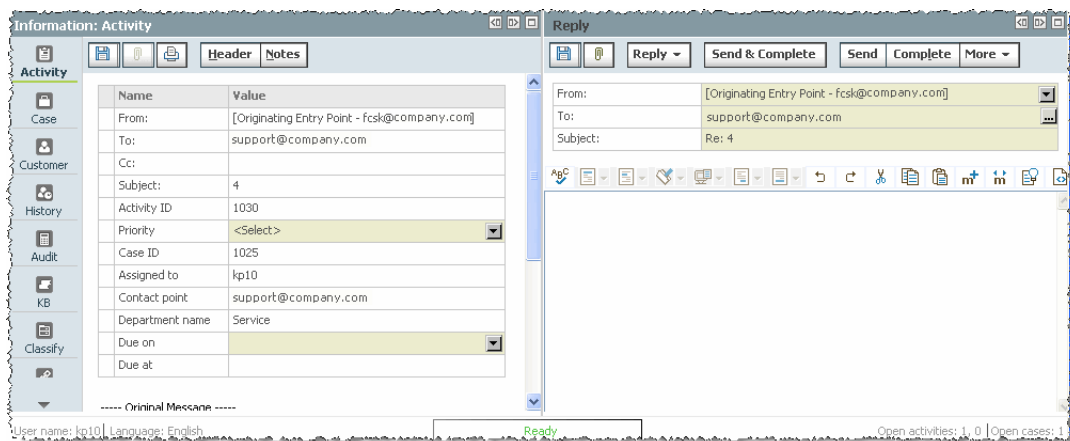
## Cases and Activities

A majority of the work you do in the Agent Console involves working with activities and cases.

- ▶ Cases are discussed in the chapter “Cases” on page 48.
- ▶ Common aspects of working with activities are discussed in “Activities” on page 54.
- ▶ Details about working with specific types of activities such as email, chat and tasks are discussed in the chapter dedicated to that activity type. See “Tasks” on page 71, “Emails” on page 76, and “Chats” on page 85.

## Resources

The application provides easy access to several resources that help you to quickly respond to emails, complete chats, and work on other types of activities. The Agent Console is designed so that most of these resources are available from the sections in the Information pane, allowing you to easily access these resources while working in the Reply pane.



*Information pane with sections*

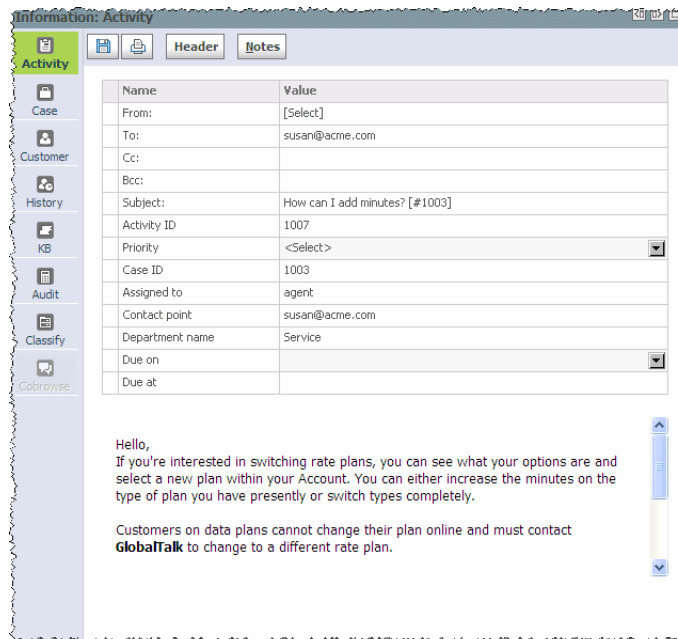
## Information Pane

The system consists of 9 predefined Information pane sections. Out of them, 7 are available to all agents and two are available to agents with specific licenses.

- ▶ The following sections are available to all agents.
  - Activity
  - Case
  - Customer
  - History

- Audit
- Knowledge Base
- Classify
- ▶ The Links section is available to only the agents with the Data Adapter license.
- ▶ The Cobrowse section is available only to agents with the Unified WIM license.

The order and number of these sections can be different based on how your administrator has configured the system. Custom sections may also be 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

Details about these resources are described in individual chapters.

## Finding Information

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The easiest way to locate objects like activities, cases, customers, and knowledge base articles is to search for them.

- ▶ Objects that are listed in the Inbox can be located quickly using the **My Search** option in the Folders pane in the inbox.
- ▶ Other objects like customers, and KB articles that are searchable, but not listed in the inbox, can be located using the **Search** button in the Console toolbar.

For details about searching for objects see [“Search for Information” on page 38](#).

## Communicating With Others

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There are two different ways of communicating with your colleagues.

- ▶ Notes are meant for internal use and are always attached to cases, activities, customers, or knowledge base articles. For more information about notes, see [“Notes” on page 96](#).
- ▶ Messages allow you to send simple text messages to other users of the system using their user name. Email addresses can be used to send messages to team members who are not users of the system. For more information about messages, see [“Messages” on page 101](#).

## Personalizing the System

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### About Options and Settings

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 options. In the Options window, you can change your password, modify settings and create personal dictionary attributes.



**Important:** Changes made to options take effect on the next login. If you want the changed options to take effect immediately, log out of the system and log in again.

---

## Configuring Settings

If you have been assigned the required 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 – Key (default value) which refers to the shortcut key, 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:** Use this setting to specify the maximum number of email activities that are assigned to you. The workflow checks the value of this setting, and the number of open activities in your inbox to identify whether a new activity should be assigned to you. This setting is also checked when other users transfer activities to you. It is not checked when you pull activities from queues or other users. All open mails in your inbox 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 to you. 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 Email. Through the Max load for all other activities setting you can set the maximum number of activities (of type other than Email) that are assigned to you. This setting is used by workflow before a new activity is assigned. This setting is not checked when you pull activities or other users transfer activities to you. 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 in the inbox 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. The default number of activities displayed on a page is 20. Note that two other settings, the Inbox sort column and Inbox sort order also influence the activities that are displayed on a page.
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 are pushed back to queues.
  - New activities only: Only activities with the sub-status **New** are pushed back to queues (default value).

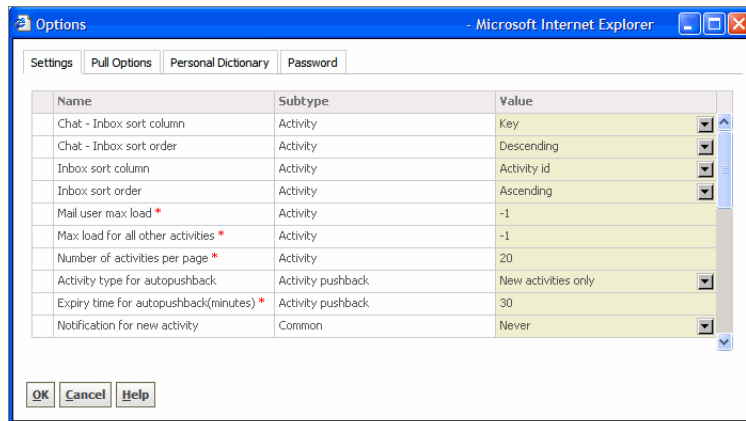
- Both new and incomplete activities: All activities in the inbox are pushed back to queues.
9. **Expiry time for autopushback (minutes):** You can define a time period after which activities should be pushed back from your inbox to queues. This time period begins when you log out of the system. Activities 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 address 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 Main Inbox when you log in to the Agent Console. The options available are – Chat (default value) and Main.
  12. **Customer history view:** Use this setting to define the format in which you want to view 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 values in seconds. The default value is 30.
  14. **Auto blockcheck:** With this setting you can choose to let the spelling 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 options 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 blockcheck works through the Auto spell check setting, enabling the Auto block check means that the spelling checker is automatically invoked before an email is sent out.
  15. **Auto spellcheck:** Enable this setting to automatically invoke the spelling checker before an email is sent out of the application.
  16. **Ignore web addresses and file names:** This setting helps you to enable the spelling 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 spelling 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 spelling 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 spelling 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 spelling 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:** Use this setting to choose the dictionary used by the spelling checker. The options available are - English (US) Dictionary, English (UK) Dictionary, German Dictionary, Spanish Dictionary, French Dictionary, Portuguese Dictionary, Brazilian Portuguese Dictionary, Dutch Dictionary, Italian Dictionary, Norwegian (Bokmaal) Dictionary, Finnish Dictionary, Swedish Dictionary, Danish Dictionary.
  22. **Default editor:** Use this setting to 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 of the email, time at which the email was sent, machine name, protocol type, client name etc. Use this setting to define the type 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 **Options** button.

2. In the Options window, go to the Settings tab, and change the settings.



*Configure settings*

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

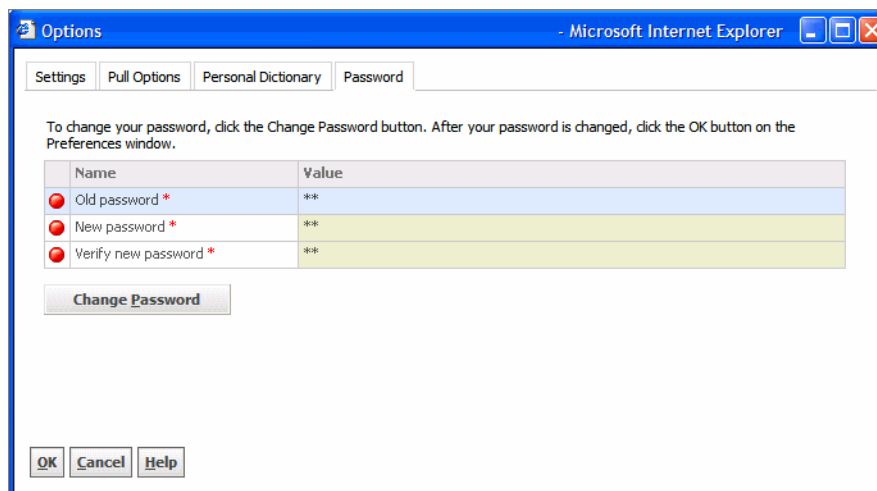
## Changing Your Password



**Important:** Only standalone 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 Options section in the Agent console.

### To change your password:

1. In the Agent Console toolbar, click the **Options** button.
2. In the Options 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.



*Change your password*

4. Click **OK** to close the window.

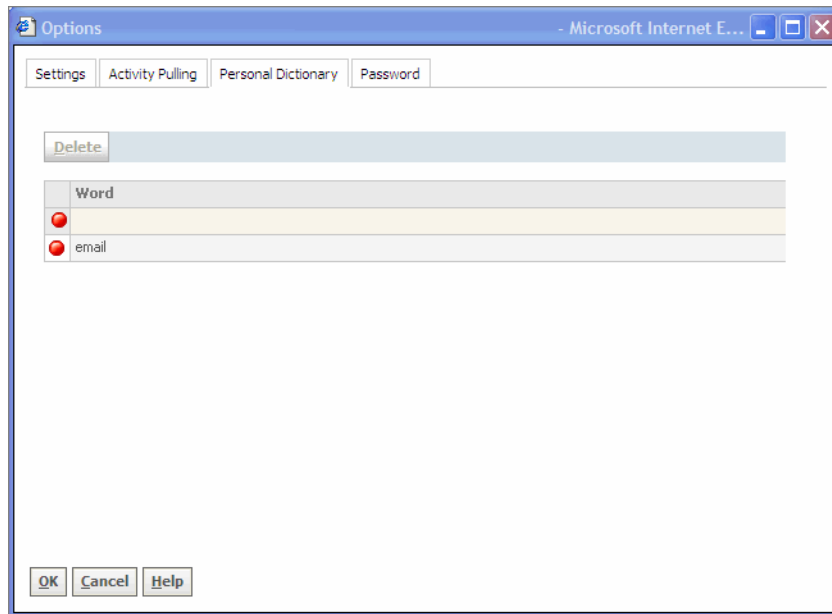
## Updating the Personal Dictionary

To prevent the spelling checker from highlighting words that are specific to your organization, but not part of a standard dictionary, you can update the personal dictionary.

### Adding Words to Personal Dictionary

**To add words to your personal dictionary:**

1. In the Agent Console toolbar, click the **Options** button.
2. In the Options window, go to the Personal Dictionary tab.
3. On the Personal Dictionary tab, click in the field below the Word column heading, 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 Personal Dictionary

**To delete words from your personal dictionary:**

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

# Evaluating My Work

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Three types of reports are available in the Agent Console to help you evaluate your performance.

- ▶ Agent Login Summary report
- ▶ Agent Efficiency report
- ▶ Agent Availability for Chat report, which is available in systems that include Unified Web Interaction Manager.

For details, see [“Reports” on page 110](#).

# Search for Information

- ▶ [About Searches](#)
- ▶ [Creating Search Criteria](#)
- ▶ [Saving Search Criteria](#)
- ▶ [Running Saved Searches](#)
- ▶ [Stopping Searches](#)
- ▶ [Creating a Search From Saved Searches](#)
- ▶ [Deleting Search Criteria](#)
- ▶ [Locating Items in the Console](#)
- ▶ [Exporting Search Results](#)
- ▶ [Printing Search Results](#)
- ▶ [Managing Search Folders in Inbox Pane](#)

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

## About Searches

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- ▶ The search feature that is available from Agent Console toolbar allows you to locate customers, cases, activities, and other objects in the system that meet certain criteria. You can also search for all types of activities: email, chat, task, callback, delayed callback, and blended collaboration. In fact, since activities of type Callback and Delayed Callback are not listed on any other pages in the Agent Console, you would use the search feature to locate all your Callback and Delayed Callback activities. etc.

To create, edit, or delete search criteria, the administrator should have assigned certain actions to your user profile.

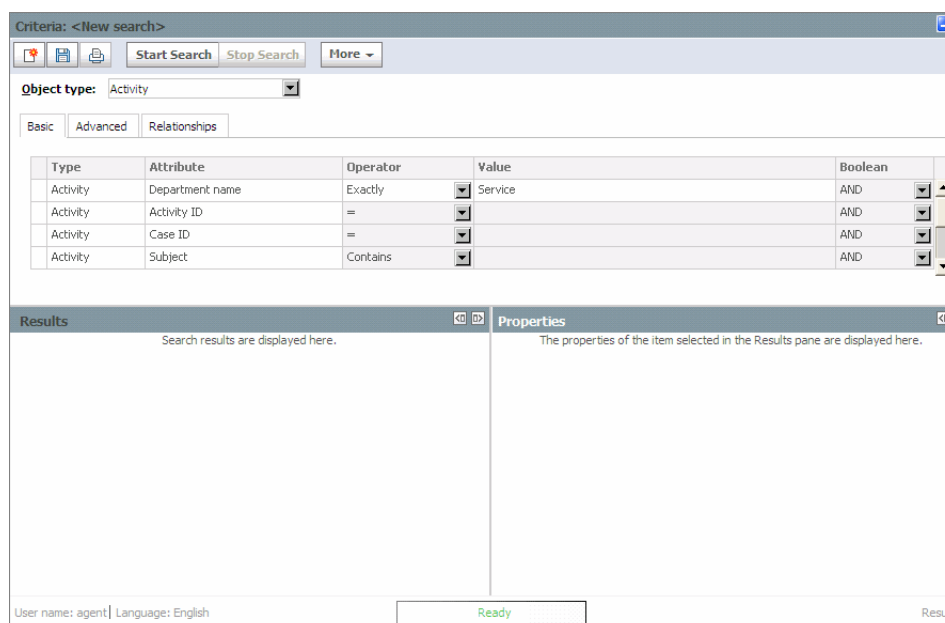
- If you are assigned the **Saved search - Create** action, you can create global searches. You do not need this action to create personal searches.
  - If you are assigned the **Saved search - Delete** action, you can delete global and personal searches.
  - If you are assigned the **Saved search - Edit** action, you can edit global searches. You do not need this action to edit personal searches.
- ▶ The My Searches option, which allows you to quickly locate activities and cases, is available from the Folders pane. For more information about the My Searches option, [See “Managing Search Folders in Inbox Pane” on page 44.](#)

# Creating Search Criteria


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

## To create search criteria:

1. In the Agent Console toolbar, click the **Search** button. A new search window opens.



*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 for which you wish to search.  
The Criteria pane refreshes to display the list of attributes available for the selected object.
4. Now, in the Basic tab specify the search criteria. You can search for special characters such as umlaut characters (Ö, ü, ï), : “” etc. If you are using the Exactly operator, you can also use the following special characters (\$ & \* ^ % \_ ( ) # ") in your 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, if required. This further narrows down the scope of search.
7. Click the **Start Search** button to begin 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.

# Saving Search Criteria

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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. Only users with the **Saved search - Create** action can create global searches. You do not need this action to create personal searches.

## To save a search criteria:

1. First, create a search by entering the search criteria that you wish to save.
2. To save the search, click the **Save**  button in the Search window toolbar. You can also use the **Save As** option from the **More** button.
3. In the Save Search window, provide the following details.
  - **Name:** Type a name for the search criteria. Use a name that adequately represents the search attributes.
  - **Type:** From the dropdown list, select the type of search. The options available are:
    - **Global Searches:** A global search is available to all users. This option is not available to agents who have not been assigned the **Saved search - Create** action.
    - **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

---

To run a saved search, you must first locate it and open it.

## To open a saved search:

1. In the Agent Console toolbar, click the **Search** button.
2. In the Search window toolbar, from the **More** button, select **Open**.
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 begin the search.
4. Click the **Start Search** button to begin 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 Search** 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. From the **More** button in the Search window toolbar, select **Save as**.
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.

## Deleting Search Criteria

---

The system allows you to delete the search criteria that are no longer needed. Only users with the **Saved search - Delete** action can delete global and personal searches.

### 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.
  - A message appears asking to confirm the deletion. Click **Yes** to delete the search.

## 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, point to the **More** button and select **Locate in Console**. You are taken to the exact location of the item in the Agent 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** 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.

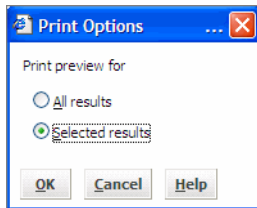
# Printing Search Results

---


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.

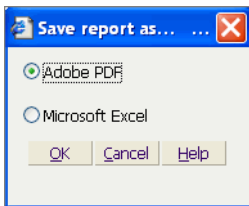
## To print search results:

1. After you run the search click the **Print**  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. The 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*

# Managing Search Folders in Inbox Pane

This section describes the following:

- ▶ [“About Search Folders” on page 44](#)
- ▶ [“Creating Search Folders” on page 45](#)
- ▶ [“Deleting Search Folders” on page 46](#)
- ▶ [“Editing Search Folders” on page 47](#)

## 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 `~~prompt` 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.

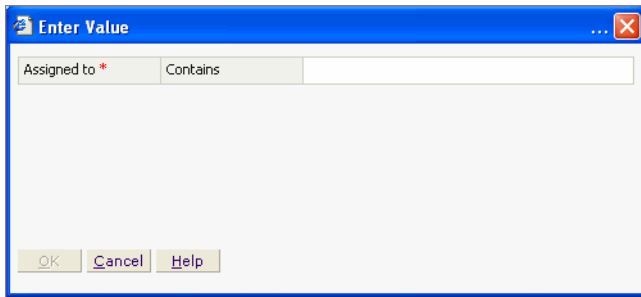
Everytime you click on this search folder, a window is opened, prompting you to enter the name of a user. When you enter the name a search is run and all activities assigned to that agent and having their priority set to 1, are listed in the list pane.

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

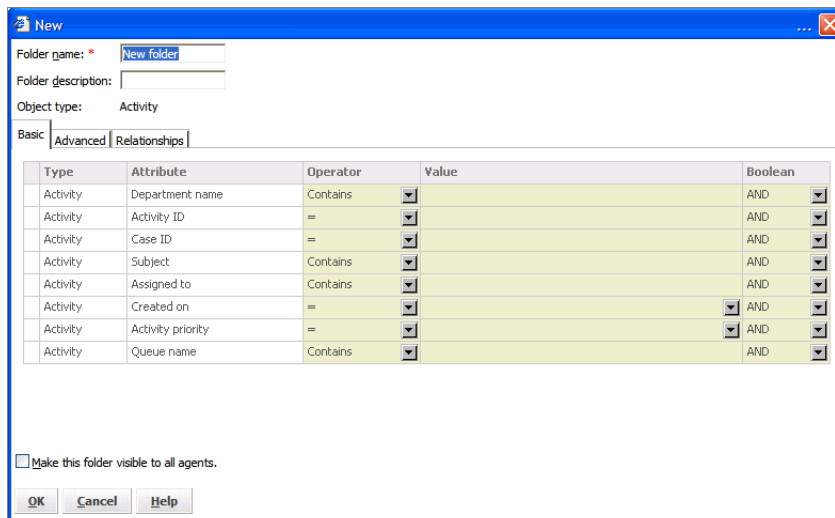
You are prompted to provide a value for the **Assigned to** field. When you enter a user name and click **Ok**, all the activities that are assigned to that user, and have a priority of 1, are displayed in the list pane. Here both fields are required fields since the AND operator is used.

## Creating Search Folders

### To create a search folder:

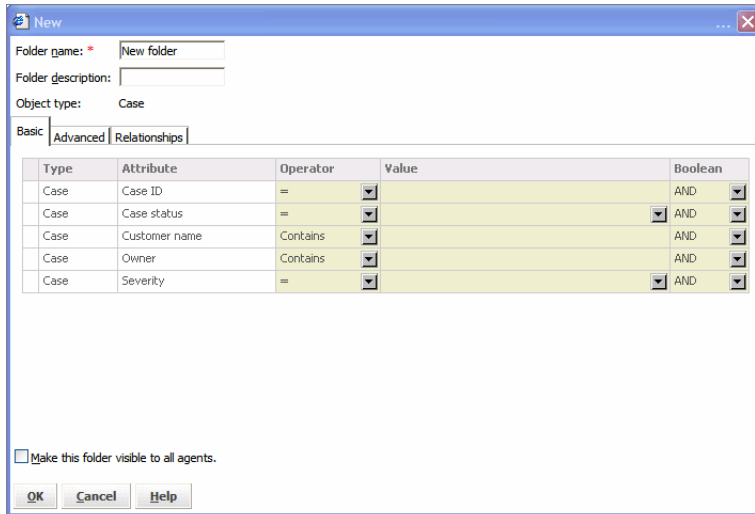
1. In the Folders pane do one of the following:
  - If you want to create a search folder for activities, go to **My Work > Activities > My Searches**.
  - If you want to create a search folder for cases, go to **My Work > Cases > My Searches**.
2. In the Folders pane toolbar, click the **New**  button.

For activities, the following window is displayed.



Create search folder for activities

For cases the following window is displayed:



*Create search folder for cases*


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.
8. You can also create a search folder in the inbox from the Results pane of the Search window. In the Results pane, click the **More** button and select **Create folder in Inbox**. A new folder, with the name reflecting the search criteria is created in the My Searches node of the inbox pane.

## Deleting Search Folders

To be able to delete folders, you must be assigned the **Filter folder - Delete** action.

### To delete a search folder:


1. In the Folders 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 Folders 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 Folders 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 Folders pane toolbar, click the **Edit**  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 45](#) for more information.
5. Click the **OK** button to save the changes.

# 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. Activities are tied to a case using a single identification number, the Case ID. A single case can contain activities of various channels such as email, chat, phone, and tasks.

A case is in one of two states: open or closed. If the case contains any open activities, then the status of the case remains open. When all the activities held within a case are completed, the case is closed.


A closed case is reopened when a new activity is associated with it. For example, if an agent creates a new activity using a closed case number, the system automatically reopens the case. It can also be reopened using the workflow. A case can be configured to reopen automatically when a customer sends an email with the closed case number in the subject line of the email. You cannot reopen cases manually.

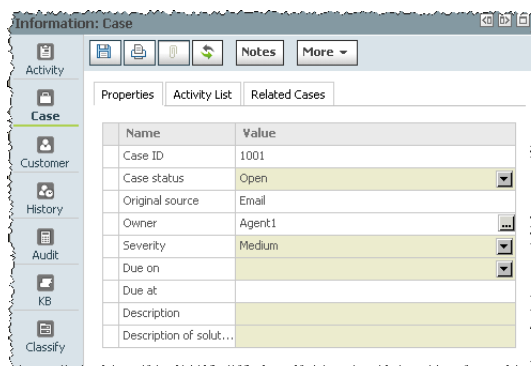
For each Callback and Delayed Callback activity, the application creates a new activity and a new case for that activity. This case is closed automatically when the application gets a message from Unified CCE that the outgoing call was placed successfully.

## Viewing Case Information

---

### To view case information:

1. In the Information pane, go to the Case  section in the Information pane.
2. In the Case 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*

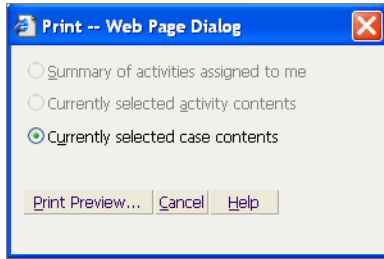
## Printing Case Information

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### To print case information:

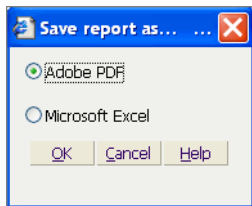
1. In the Information pane, go to the Case  section.
2. In the Case section, click the **Print**  button.

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 PDF** and **Microsoft Excel**. Click the **OK** button.



*Select a format for saving case information*

A copy of the case details is saved in the location you selected. You can print copies from here.

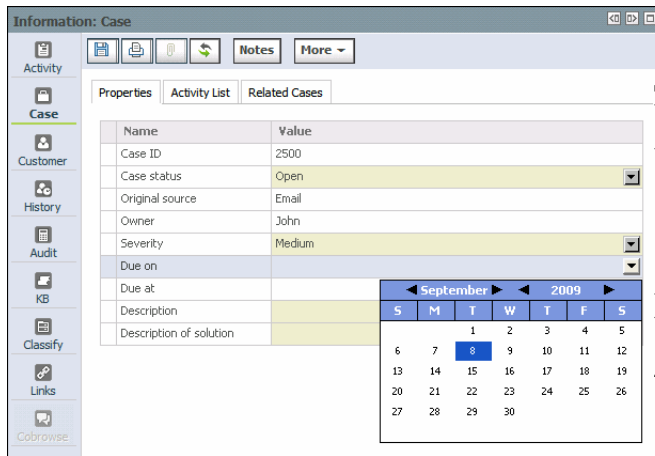
## Changing Due Date of Cases

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### To change the due date:

1. In the Information pane, go to the Case section.
2. In the Case 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:

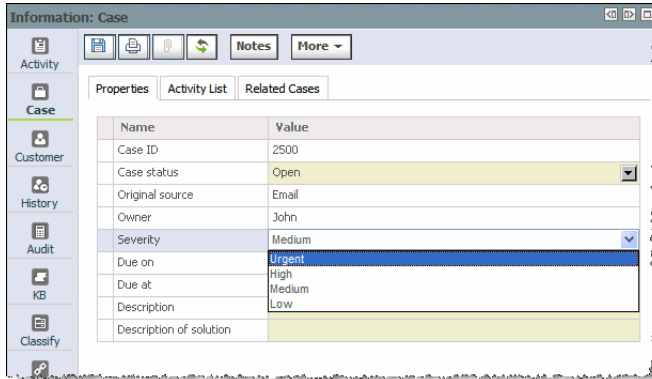
1. In the Information pane section toolbar, go to the Case  section.
2. In the Case section, in the **Description of solution** field, provide a brief description of the solution.
3. Click the **Save**  button.

## Changing Severity


### To change the severity of a case:

1. In the Information pane, go to the Case  section.
2. In the Case section, in the **Severity** field, select the severity of the case.

You can set the severity level as low, medium, high, or urgent.





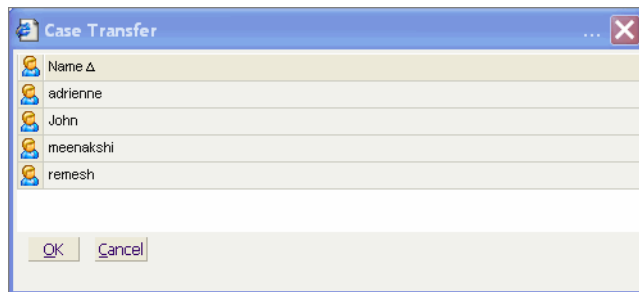
*Change severity of a case*

3. Click the Save  button.


## Transferring Cases

**To transfer a case:**

1. In the Information pane, go to the Case  section.
2. In the Case 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

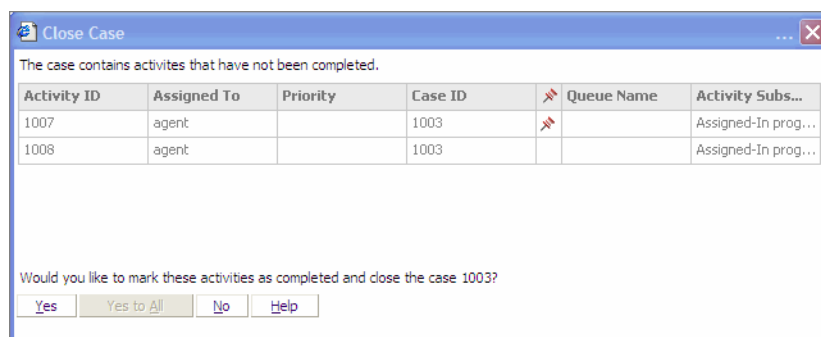
---

## To close a case:

1. In the Information pane, go to the Case  section.
2. In the Case 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 all activities assigned to you, and close the case. If there are any activities assigned to other agents, and you wish to complete all these activities, and close the case, click the **Yes to All** button.



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

## More About Cases and Activities

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In addition to the tasks listed in this chapter, you can also create new cases and change the case associated with an activity. For more information, refer to [“Creating Case for Activities” on page 63](#) and [“Changing Case of Activity” on page 64](#).



# Activities

- ▶ [About Activities](#)
- ▶ [Picking and Pulling Activities](#)
- ▶ [Pinning Activities](#)
- ▶ [Transferring Activities](#)
- ▶ [Viewing Activity Information](#)
- ▶ [Printing Activity Information](#)
- ▶ [Modifying Activity Details](#)
- ▶ [Creating Case for Activities](#)
- ▶ [Changing Case of Activity](#)
- ▶ [Completing Activities](#)

# About Activities

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An activity is a unit of work. It may be a task, created to track an internal work item, an interaction between a customer and an agent, or, in the case of a supervisory loop, an interaction between a supervisor and an agent. Interactions can be through different channels—emails, chats, or other custom-defined types. Activities related to the same issue are grouped into a case. A case can contain activities of more than one type.

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 updated to **Completed**.

## Types of activities

1. **Task:** 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. For more about working with tasks, refer to [“Tasks” on page 71](#).
2. **Email:** Email activities are created for each electronic mail communication from or to a customer. For more about working with email activities, refer to [“Emails” on page 76](#).
3. **Chat:** A chat activity is created for each real time interaction with a customer using the chat channel. For more about working with email activities, refer to [“Chats” on page 85](#).
4. **Callback:** A callback activity is created each time a chat interaction is initiated from a callback entry point, and the system successfully places a call to the customer.
5. **Delayed callback:** A delayed callback activity is created each time a chat interaction is initiated from a delayed callback entry point, and the system successfully places a call to the customer.
6. **Blended collaboration:** A blended collaboration activity is created each time a chat interaction is initiated from a blended collaboration entry point, and the system successfully initiates a chat interaction and a voice call.

For more information about chat, callback, delayed callback and blended collaboration, refer to [“Chats” on page 85](#).

## Working with Activities

All activities, irrespective of type, have certain common elements, and common methods of working with these elements. Such information is presented in this chapter. Functionality that is specific to a particular type of activity is discussed in the chapter dedicated to that activity type. For example, information about replying to emails is presented in the [Emails](#) chapter.

The majority of your work with activities that is not related to replying to emails, or interacting with a customer through another channel, is performed in the inbox list pane or the Information pane.

From the inbox, you can

- ▶ Pull activities. See [“Picking and Pulling Activities” on page 56](#).
- ▶ Pin activities. See [“Pinning Activities” on page 58](#).
- ▶ Transfer activities. See [“Transferring Activities” on page 58](#).
- ▶ Change the status of activities.

- ▶ Print activity information. See [“Printing Activity Information”](#) on page 61.

From the Information pane, you can

- ▶ View activity details including the body of the activity.
- ▶ Change the priority of an activity. See [“Changing Priority of Activities”](#) on page 62.
- ▶ Set the due date of an activity. See [“Changing Due Date of Activities”](#) on page 62.
- ▶ Create new case for an existing activity. See [“Creating Case for Activities”](#) on page 63.

## Picking and Pulling Activities

---

There are three different ways in which you can get activities in to your inbox.

- ▶ You can pick specific activities from users and queues.
- ▶ You can search for specific activities and pick them from the Results list.
- ▶ You can configure your pull options and pull activities in to the inbox.

### **Important things to note about permissions to pick, pull, or transfer activities**

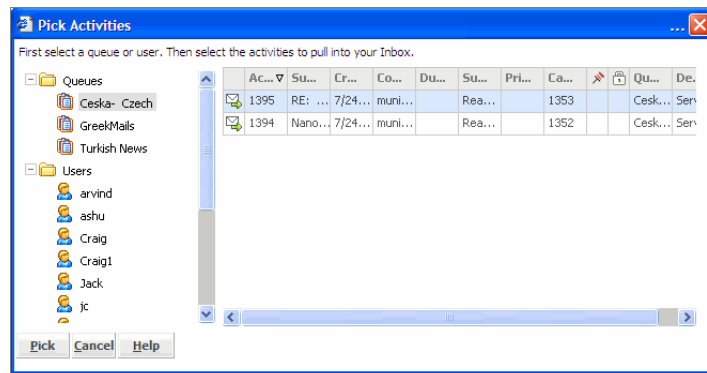
1. You can pick or pull activities only if the Pull Activities action is assigned to you.
2. You can pick activities from queues and users for which you have pull permissions.
3. By default, activities that are locked or pinned by other users cannot be pulled. However, if the Unpin action is assigned 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 pull activities from mapped queues and the Exception queue, if they have been given permission to do so. They cannot pull from 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.

## Picking Activities From Users or Queues

### **To pick selected activities from users or queues:**

1. In the Main Inbox toolbar, click the **Pick** button.
2. In the Pick Activities window, do the following.
  - Select the queue or user from where you want to get activities.

- From the list of activities, select the activities you want to get and click the **Pick** button. The activities are assigned to you, and displayed in the inbox.

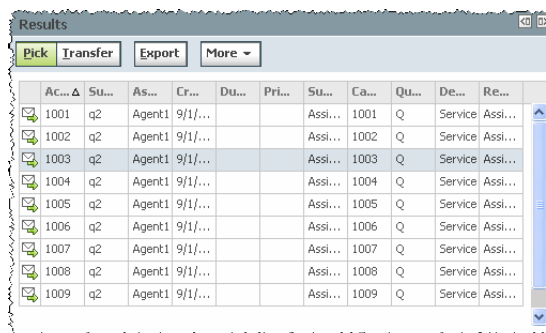


*Pick activities from users and queues*

## Picking a Specific Activity From Search Results

### To pick 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 **Pick** button. The activity is assigned to you and displayed in your inbox.



*Select activity from search results list*

## Pulling Activities Using Pull Options

- ▶ You can set your pull options for queues, and every time you click the **Pull** button, activities are assigned to you based on these options. To set your pull options, see [“Setting Pull Options” on page 25](#).

### To pull activities using options:

1. In the Main Inbox toolbar click the **Pull** button.
2. Activities are pulled and assigned to you according to the pull options set in the Options window. If there are no activities that meet the pull criteria, you are notified that no activities were pulled.

## Pinning Activities

Activities can be pinned to your inbox to indicate that you wish to continue to work on a particular activity, and do not want it to be moved to a queue or another user. Pinned activities are not pushed back automatically to queues. You can pin activities only if you have the Pin action assigned to you. A pinned activity can be pulled, but only by users who have the Unpin action assigned to them.



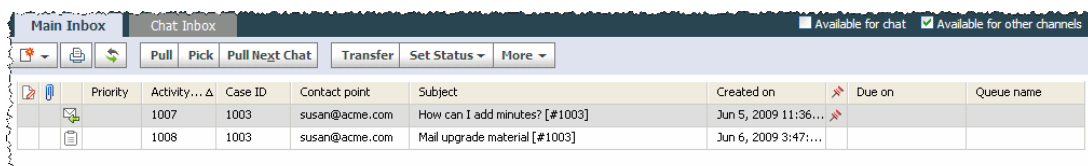
**Important:** Both standalone, and mapped agents can pin activities.

### Pinning an Activity

#### To pin an activity:

1. In the Main Inbox list pane, select the activity you want to pin.
2. In the Main Inbox toolbar, from the **More** button, select **Pin/Unpin**.

A **Pin**  icon appears in the inbox list indicating that the activity is pinned.



The screenshot shows the 'Main Inbox' interface with a toolbar containing 'Pull', 'Pick', 'Pull Next Chat', 'Transfer', 'Set Status', and 'More'. Below the toolbar is a table of activities. The first activity is pinned, indicated by a pin icon in the 'Created on' column.

Priority	Activity...	Case ID	Contact point	Subject	Created on	Due on	Queue name
		1007	1003	susan@acme.com	How can I add minutes? [#1003]	Jun 5, 2009 11:36...	
		1008	1003	susan@acme.com	Mail upgrade material [#1003]	Jun 6, 2009 3:47...	

*A sample pinned activity*

If you cannot see the **Pin** icon, contact your system administrator. The **Pinned** attribute for the **Agent Console - Inbox - Main - Activity List** screen may need to be made displayable from the Tools Console.

### Unpinning an Activity

#### To unpin an activity:

1. Select the pinned activity from the inbox list.
2. In the Main Inbox toolbar, from the **More** button, select **Pin/Unpin**. 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. Users whose accounts have been disabled by the administrator are not listed in the list of users to whom you can transfer activities. Users who have reached their maximum load are also not displayed in the list of users.

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.
6. Blended collaboration activities cannot be transferred using the Transfer button in the Agent Console. To transfer a blended collaboration activity, use the CTI desktop to transfer the voice call. This will trigger an automatic transfer of the chat portion of the blended collaboration activity.

### To transfer an activity:

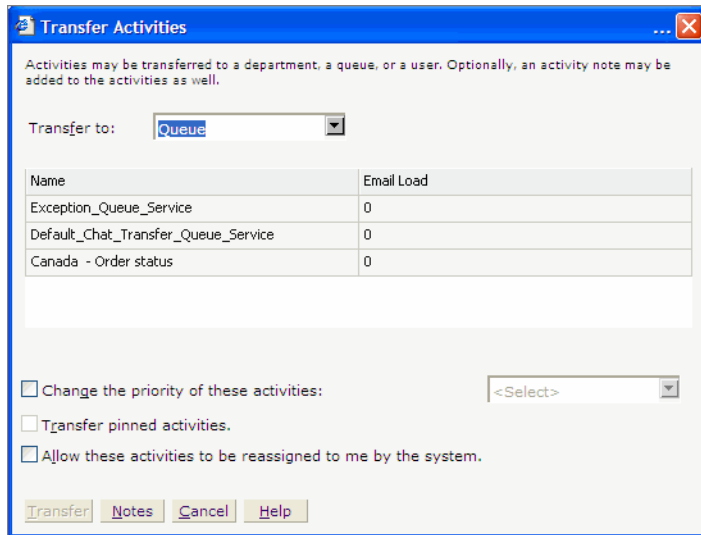
1. In the inbox, select the activity you want to transfer.
2. In the Reply pane or Inbox pane toolbar, click the **Transfer** button.
3. In the Transfer Activities windows, set the following:
  - In the **Transfer to** field, from the dropdown list, select user, queue, or department.
  - From the list 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 is displayed at the 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. You can assign a priority from 1-7, where 1 is the highest priority and 7 is the lowest priority.
- 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 **Notes** 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.




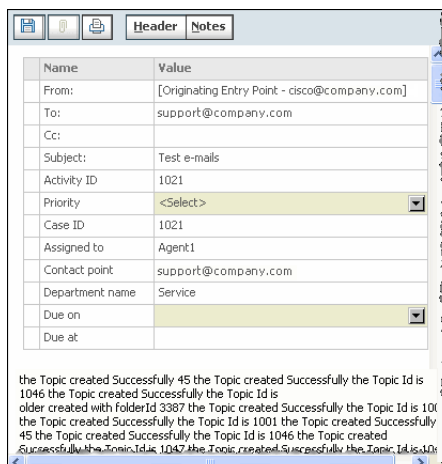
*Transfer activities to users, queues, or departments*

## Viewing Activity Information

### Viewing Activity Details and Body

#### To view the activity details and body:

- ▶ In the Information pane, go to the Activity  section. Here you can view the details of the activity and the activity body. You can also change the priority and due date of the activity.



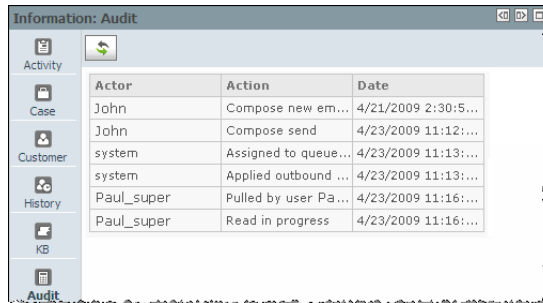
*View activity details and body*

## 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.



*View audit details*

## Printing Activity Information

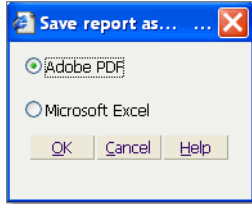
### To print the activity information:

1. In the Information pane, go to the Activity  section.
2. In the Activity 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 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

## Modifying Activity Details

### Changing Priority of Activities

For activities, you can set a priority from 1 to 7, where 1 is the highest priority and 7 is the lowest priority.

#### To change the priority:

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


Name	Value
From:	noop@test.com
To:	john@company.com
Cc:	
Bcc:	
Subject:	No Subject[#2500]
Activity ID	2989
Priority	1
Case ID	1
Assigned to	2
Contact point	3
Department name	4
Due on	5
Due at	6
	7

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  section.
2. In the Activity 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.

Name	Value
From:	noop@test.com
To:	john@company.com
Cc:	
Bcc:	
Subject:	No Subject[#2500]
Activity ID	2989
Priority	4
Case ID	2500
Assigned to	John
Contact point	john@company.com
Department name	Service
Due on	
Due at	


*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

You can manually create a case for an activity that is not associated with any case in the system.


### 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  section.
3. In the Information pane toolbar, from the **More** menu item, select **Create case**.

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

Name	Value
Case ID	
Case status	Open
Original source	
Owner	
Severity	Medium
Due on	
Due at	
Description	
Description of solution	


*Create a 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 the case is associated with the activity.

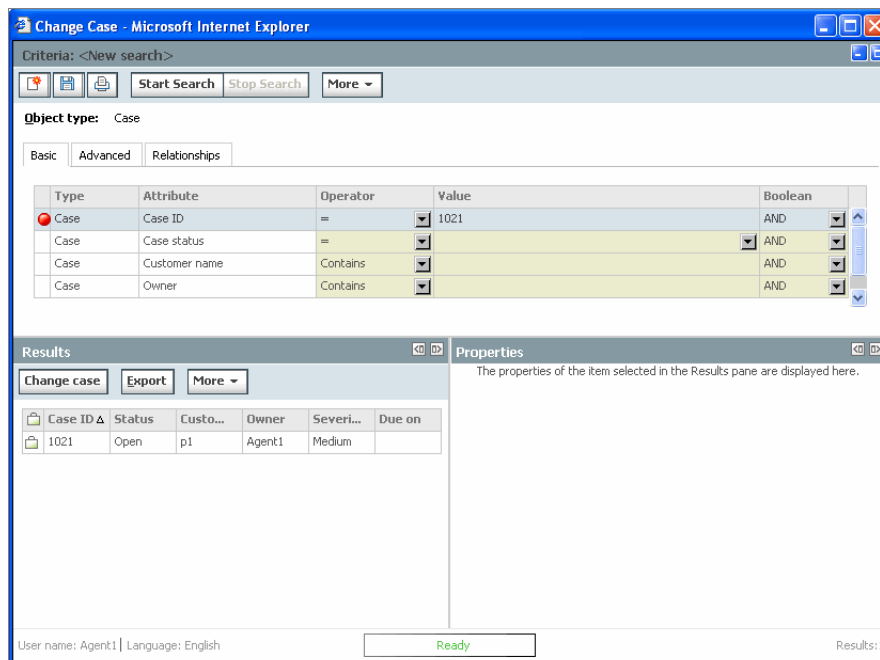
# Changing Case of Activity

The system allows you to manually change the case associated with an 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  section.
3. In the Information pane toolbar, from the **More** menu item, select **Change case**.
4. In the Change Case window, search for the case with which you wish to associated the activity.
5. From the Results pane, select the case.

Click the **Change Case** button.



*Change the case of the activity*

# 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 you that a new activity is assigned to you.



**Important:** This feature is available to standalone agents for all activities. For mapped agents, this feature is not applicable for Chat and Blended Collaboration activities as the available mapped agent is taken directly to the new chat when the new activity is assigned.

### To manage a new activity notification:

- ▶ When a new message appears notifying you that a new activity has been 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.

*Manage the new activity notification*

## Completing Activities

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- ▶ For more information about completing tasks, refer to [“Completing Tasks” on page 75](#).
- ▶ For more information about completing an Email activity, refer to [“Completing Email Activities” on page 84](#).
- ▶ For more information about completing a Chat activity, see [“Ending Chat Sessions” on page 92](#).

# 6 Customers

- ▶ [About Customers](#)
- ▶ [Viewing Customer Information](#)
- ▶ [Changing Customer Details](#)
- ▶ [Changing the Preferred Agent](#)
- ▶ [Changing Contact Details of Customers](#)
- ▶ [Creating Customers](#)

# About Customers


The customers in Agent Console are classified as follows:

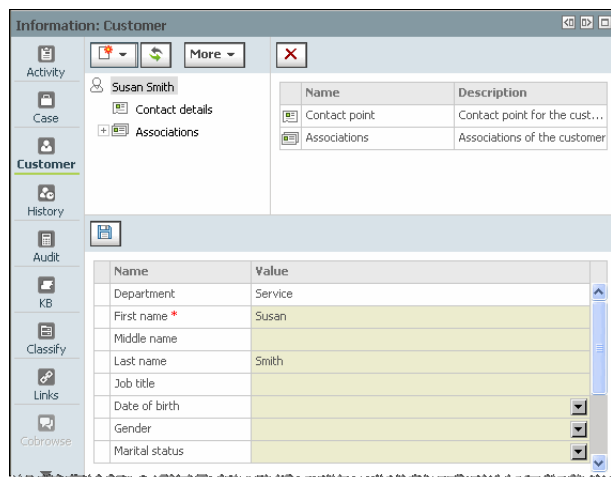
- ▶ **Individual:** Individuals who contact an organization. A customer may also be the designated contact person of a company.
- ▶ **Corporate:** A company or an organization classified as a Corporate customer.
- ▶ **Group:** Signifies a family or members belonging to a club.

## 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, level, etc.

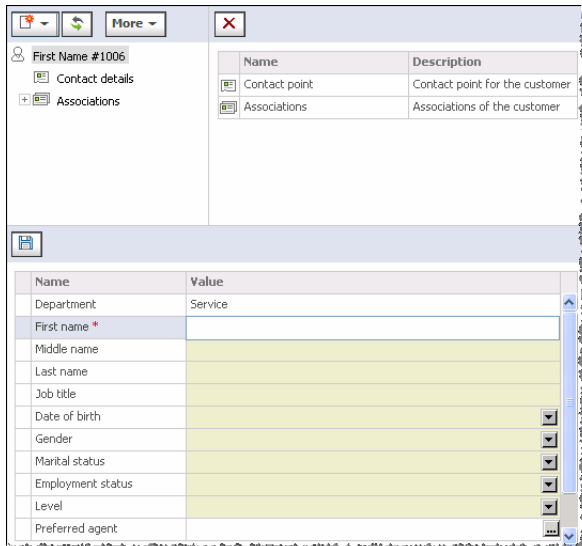


*View the customer details*

## Changing Customer Details

**To change the customer details:**

1. In the Information pane, go to the Customer  section.
2. In the Customer section, click in the field you want to change, and update the value. You can change the customer name, job title, marital status, employment status etc.





*Update customer details*

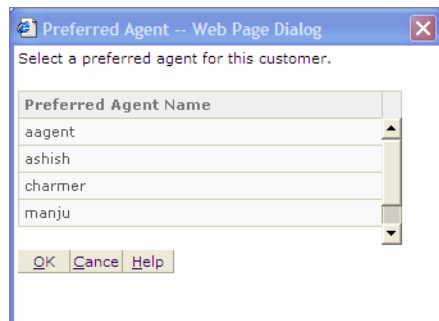
3. Click the **Save**  button.

## 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*

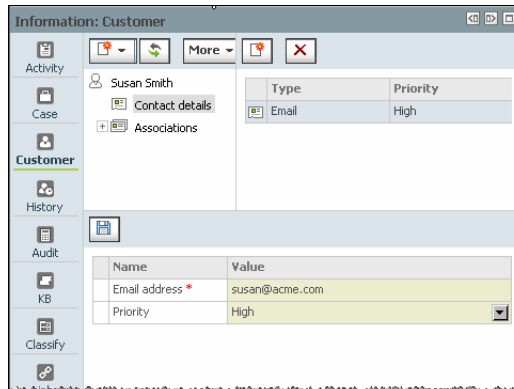
4. Click the **Save**  button.

# Changing Contact Details of Customers


## To change the contact details of a customer:



1. In the Information pane, go to the Customer  section.
2. In the Customer section, browse to the **Contact Details** node.

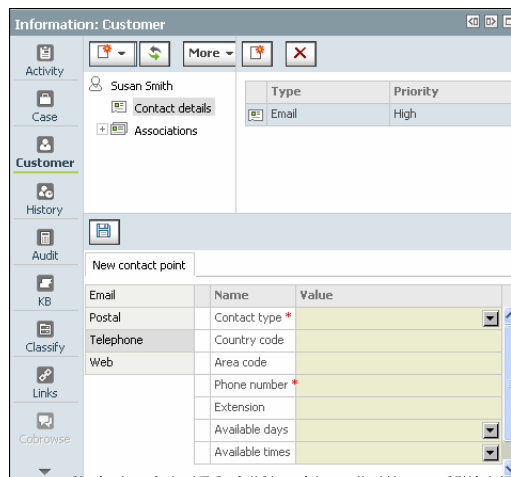
You can view the contact information of the customer.




*View contact details of a customer*

To edit the contact information, select the contact point from the list and edit it. Click the **Save**  button. Note that changing an email address in the contact point information only modifies the customer details. The **To** address associated with an activity is not updated. To change the **To** address, see [“Editing To, BCC, and CC Fields” on page 79](#).

3. To delete contact information, select the contact point you want to delete, and click the **Delete**  button in the Information pane toolbar.
4. 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.





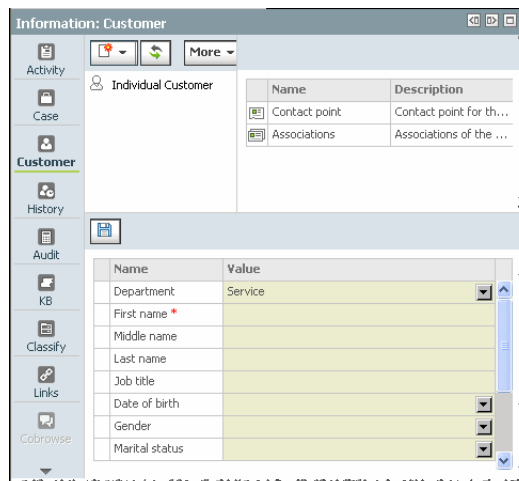
*Create a new contact point*

5. Click the **Save**  button.



# Creating Customers

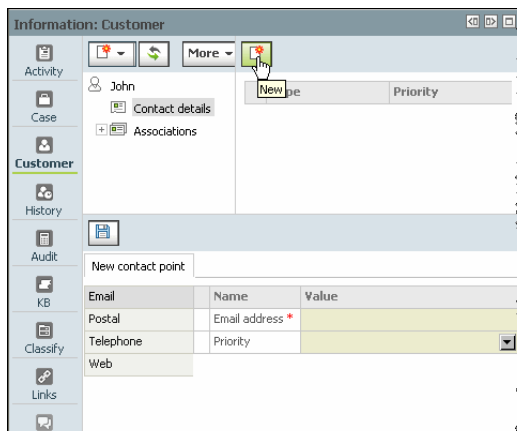
## To create a customer:

1. In the Information pane, go to the Customer  section.
2. In the Information pane toolbar, from the **New**  button, select the type of customer you want to create. The options are - Corporate, Group, and Individual customer.
3. The Information pane refreshes to show the details of the type of customer you select.



*Create new customer*

4. Provide the details of the customer and click the **Save**  button.
5. Next, to create the contact details of the customer, click the Contact details node.
6. Click the **New**  button in the list pane.



*Create contact details*

Enter the contact information, for example, the email address. You can also provide phone numbers, postal address, and web URLs of the customer. For corporate and group customers, you also need to create a contact person.

7. Click the **Save**  button.

# 7

## Tasks

- ▶ [Creating 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 of that task. Tasks can be assigned to the following.


1. **User:** You can assign tasks to all users to whom you can transfer activities. In other words, if you have permissions to transfer activities to a user, you can assign tasks to that user.
2. **Queue:** You can assign tasks only to queues to which you can transfer activities.
3. **System:** If you are not sure about which queue or user to assign a task to, or you do not have permission to assign to any of them, you can assign the task to the system. 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.

## Creating Tasks




### To create a task:

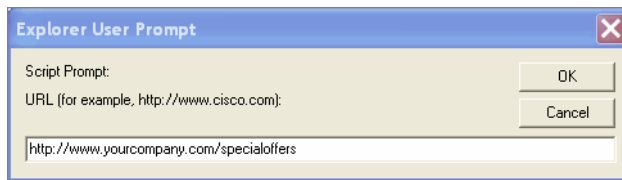
1. In the inbox pane tool bar, point to the **New Activity**  button and select **New Activity**. The New Activity window opens.
2. In the Activity type field, select **Task**. You can create a new case for the task, or search for an existing one. You can also create a new customer, or search for an existing one.

Select **Task** in Activity Type field

3. Click the **Finish** button to create the task. When you create a new task activity, it is assigned to you.
4. In the Task pane, view the details of the task.



A sample task

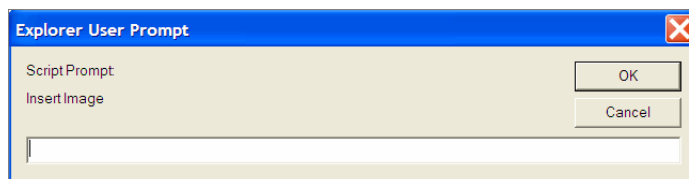
5. Type a subject and the contents of the task.
  - a. In the Text box toolbar, click the **Switch to HTML editor**  button, to set the content type of the task to HTML. The Source tab displays the HTML source code of the content displayed in the Layout tab. Click the **Switch to Plain editor**  button to change from HTML editor to Plain editor. Once you switch to the plain editor, the Source tab becomes unavailable and all formatting is lost.
  - b. Next, type the content of the task in the text box. Here you can use the various formatting tools available to format the content of the task. In the HTML editor, you can also add hyperlinks to the content.
  - 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 spelling checker on the content.

- d. To run the spelling 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. Click **Save**  to save your changes.

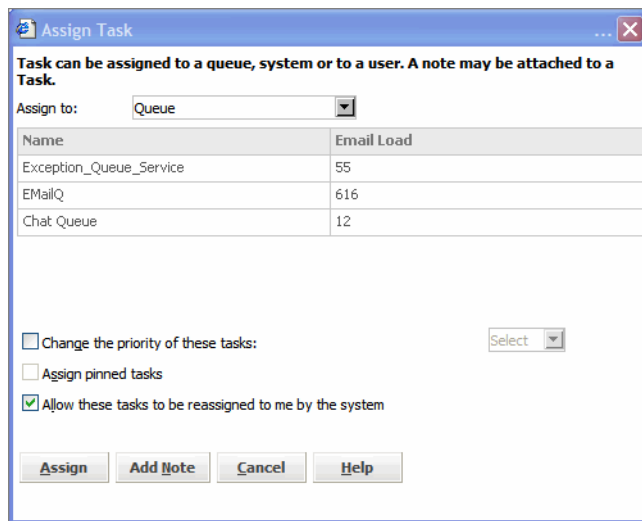
## Assigning Tasks

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

### To assign a task:

1. Create a new activity with the **Activity type** as **Task** or select an existing task activity from the inbox.

2. To assign the activity to a 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 a Queue, the System, or a User based on permissions. From the dropdown list, select one of these options. If you choose queue or user, the window refreshes and displays a list of the queues or users to whom can assign tasks. Click the name of the particular queue or user to whom you wish to assign the task.
  - **Change priority of these tasks:** You can change the priority of the task before assigning it. Select this option if you want to change the priority of the task. From the dropdown list, select the priority of the task. You can assign a priority from 1-7, where 1 is the highest priority and 7 is the lowest priority.
  - **Assign pinned tasks:** Select this option to assign pinned tasks. The option is enabled only if you are assigning a pinned task.
  - **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.

3. In the Task pane toolbar, click the **Assign** button to complete assigning the task and save your changes.

# Completing Tasks

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Once you have done what 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 Main Inbox toolbar, from the **Set status** button, select the **Complete** option.
- Or
- ▶ In the Task pane toolbar, click the **Complete** button. The activity substatus will change to **Done** and it will move to the **Completed** folder in the inbox.

# 8 Emails

- ▶ [Viewing Emails](#)
- ▶ [Replying to Emails](#)
- ▶ [Completing Email Activities](#)


# Viewing Emails


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Email activities are displayed in the Main Inbox. Depending on the way your system is configured, you may be able to view the content of the incoming email in the text box in the Reply pane, or in the Activity section of the Information pane.

## To view an email:

1. In the Main Inbox list pane, 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 Activity  in the Information pane section toolbar to view the content in the Information pane.

2. If there are any attachments, the attachment  icon is displayed in the inbox list pane. Double-click this icon to open the View Attachments window.

You can also click the **Attachment**  button in the Reply pane to open this window. From here, click the name of the file to select it, and click the **View** button to open or save the attachment. Note that the system replaces any special characters, like &\*,\$, % etc., in the file name of attachments with an underscore before it is displayed in the inbox. For example, a file named *info&feedback.doc* is renamed *info\_feedback.doc*.

# Replying to Emails

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

This section includes:

- ▶ [Choosing the Reply Type](#)
- ▶ [Editing the From and Reply to Fields](#)
- ▶ [Editing To, BCC, and CC Fields](#)
- ▶ [Editing the Subject](#)
- ▶ [Composing a Reply](#)
- ▶ [Using Articles From the Knowledge Base](#)
- ▶ [Sending Replies](#)
- ▶ [Sending Replies and Completing Activities](#)
- ▶ [Resubmitting an Activity](#)
- ▶ [Saving Drafts](#)

## Choosing the Reply Type

By default, the reply type chosen is Reply. Other available reply types are:

- ▶ Reply: Email is sent only *to* the original sender.
- ▶ Reply to all: Email is sent to all the addresses in the **To**, **CC** and **BCC** fields.
- ▶ Forward: Email is sent from the alias at which the incoming email was received to all the address entered in the **To**, **CC** and **BCC** fields.
- ▶ Redirect: Email is sent from the original sender of the email to all the addresses entered in the **To**, **CC** and **BCC** fields. Use this option only if you wish to make the email appear as if it is from the original sender, and not from the system.

Note that the reply type of an email cannot be changed once a draft of the reply is saved.

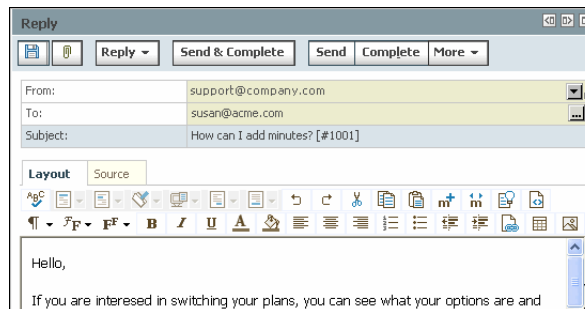
## Editing the From and Reply to Fields

The **From** field contains the address displayed in the **From** field of the email header when the mail is received by the customer. By default, this field shows the address of the email aliases at which this email was received, but you may wish to change this under certain circumstances.


This is also the address that becomes the To address when a customer replies to the email. If you do not want the reply from the customer to come to the address specified in the **From** field, but want it to go to a different address, you can specify that email address in the **Reply to** field.

### To change the From and Reply to email addresses:

1. Type or select the address that you want to use as the From address for your reply email to the customer.

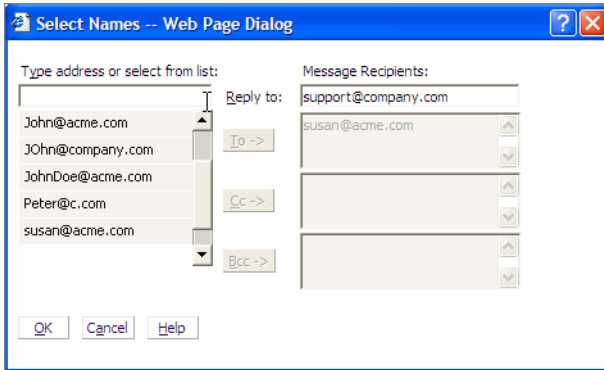


*Change the From email address*

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 sent. By default the field shows the address selected in the **From** field.

For example: You provide one address in the **From** field and a different address for the **Reply to** field. When the customer receives the email, the **From** line shows the address you entered in the **From** field.

When the customer replies to the email, the **To** field shows the address you entered in **Reply to** field, and the reply is sent to this address.



*Provide an address in the Reply to field*

## Editing To, BCC, and CC Fields

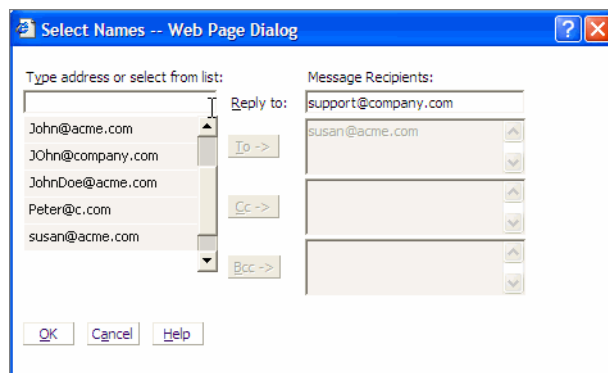
When you are replying to an email, the **To** field shows the email address from which the email was sent. If you are sending an outbound email, the **To** field shows the address provided while creating the activity.

### To edit the To, BCC, or CC fields:

If you know the email addresses to which you have to send the email, you can type them in the **To**, **BCC**, or **CC** fields. By default the Reply pane includes only the **To** field. You can add the **CC** and **BCC** fields by changing your options. For details, see [“Configuring Settings” on page 32](#).

To use the address book, complete the following steps:

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



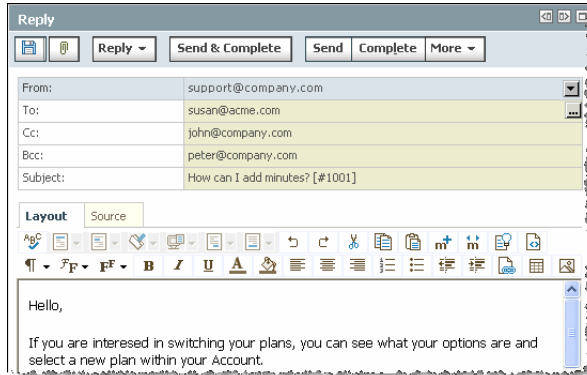
*Specify the To, CC, and BCC addresses*

2. In the Select Names window, do the following:
  - a. **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 locate a particular 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.

- b. Click the **To**, **CC**, or **BCC** button to add the address to the appropriate field.
- c. 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 and press the ENTER key.

## Composing a Reply

### To compose a reply to an email:





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, or use a KB article to compose your reply. For more information about adding a KB article, refer to [“Completing Email Activities” on page 84](#).

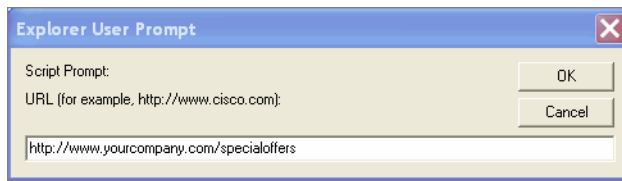
- c. Headers, Greetings, Signatures, and Footers are optional features that provide access to special KB articles for use in replies. If the activity belongs to a queue that has any such article associated with it, the text editor toolbar displays the following buttons which can be used to add the content of these articles to a reply.

Header , Greeting , Signature  and Footer .

The system may also be set up to automatically populate the reply email with the contents of the header, greeting, signature and footer.



In the text editor, you can use the various formatting tools to format the content of the reply. You can also add hyperlinks to HTML type replies.

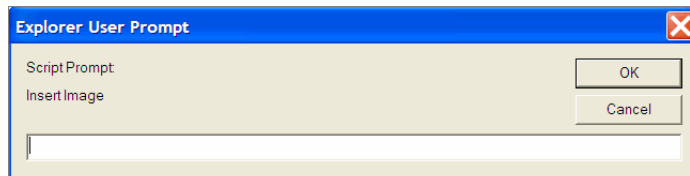
- d. To add hyperlinks, click the **Insert Hyperlink**  button in the Text box toolbar and in the Explorer User Prompt window, type the hyperlink you want to add.






*Type the web address*

After creating the content, run the spelling checker on the content.

- e. To run the spelling checker, from the Text box toolbar, click the **Spell Check**  button.
- f. 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*

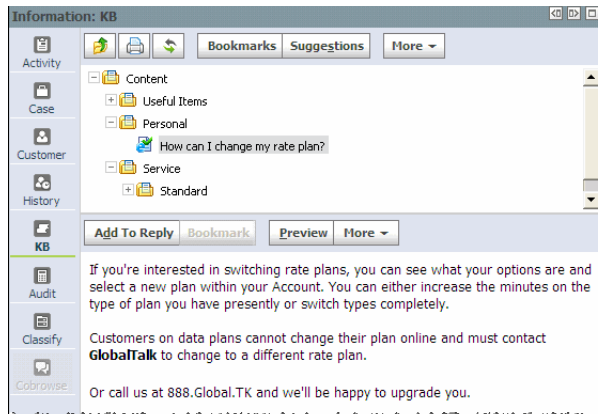
- g. To insert a table, click the **Insert table**  button and specify the dimensions and properties of the table.
2. Attach files to the reply by using the **Attachment**  button. Once you have attached the file, the pane refreshes to update the button with the number of files you have attached. Point to the button to view the names of the attachment.
  3. Add, view, or delete notes to the reply by using the **Notes** button. In some panes, **Notes** is available as an option in the **More** button.
  4. Click **Send**, **Send and Complete** or the **Save**  button depending on what you want to do with the composed reply.

## Using Articles From the Knowledge Base

You can use Knowledge Base (KB) articles to compose responses to activities. Using KB articles saves time by reducing the amount of typing required, and ensures consistency and accuracy of the content used in responses.

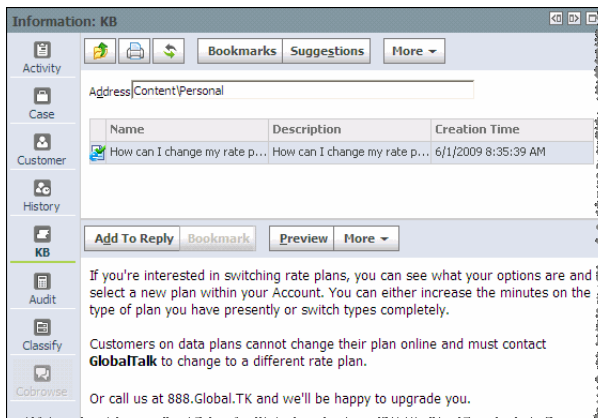
### To use articles from KB while composing a response:

1. Select an activity to display its contents in the Reply pane.
2. In the Information pane toolbar, click the KB button. The KB tree is displayed in the KB section.
3. Navigate to the required article within the tree.



*Locate KB article in KB tree*

You can also hide the tree view and see a list of articles in the KB section of the Information pane. To see a list, from the **More** button in the KB tree toolbar, select **Toggle KB View**.



*Toggle the tree and list views of the KB*

To go back to the tree view, select **Toggle KB View** again.

4. Select the article and drag and drop it in the message section of the Reply pane.
5. Alternatively you can also copy and paste the article from the KB window into the Reply pane, or click the **Add to Reply** button.

The article is inserted into the response.

## Sending Replies

The **Send** button is used to send an email.

### To send an email:

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

The reply is sent, but the activity remains open until it is completed.

## Sending Replies 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 does 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.

## 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:

- ▶ 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:

- ▶ After making changes to a reply.
- ▶ After attaching a file.
- ▶ Before transferring an activity.

You do not need to save a draft:

- ▶ After adding a note to an activity.
- ▶ Just before clicking the **Send**, **Send and Complete**, or **Complete** buttons.

### To save a draft:

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

## Completing Email Activities

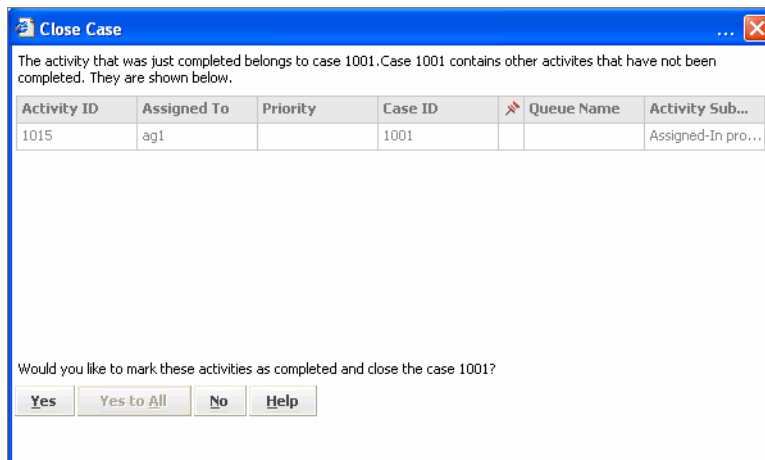
---

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*



# Chats

- ▶ [Chat Basics](#)
- ▶ [Toggling Between Inboxes](#)
- ▶ [Conducting Chat Sessions](#)
- ▶ [Viewing Chat Activity Information](#)

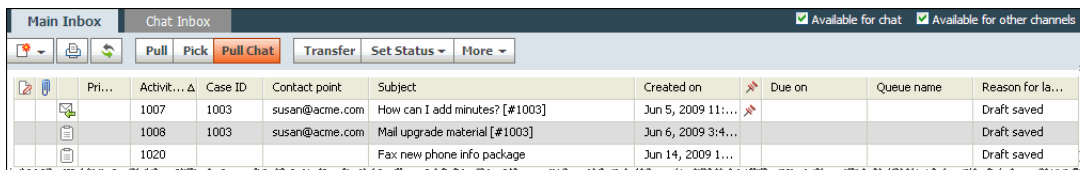
# Chat Basics

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.

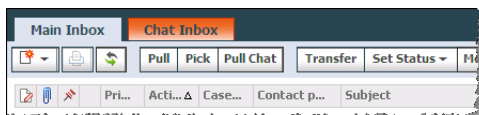
## Chat Activity Indicator for Standalone Agents

When a new chat activity is assigned to you, and you are in the Main Inbox, the **Pull Chat** button in the Chat Inbox blinks in yellow.



*New chat activity indicator*

If you are in the Main Inbox when a chat session is in progress, and the customer sends a new message, the Chat Inbox indicator blinks.



*New message indicator while working in Main Inbox*

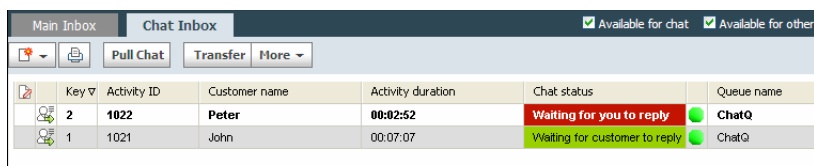
If a new chat comes in to the queue from which you can pull activities, and you are working on another application on your machine, the Agent Console window pops to the front, and the **Pull Chat** button blinks.



**Important:** A mapped agent does not see the blinking red button, but is taken directly to the chat activity when a new chat activity is assigned. If the mapped agent is in the middle of a chat session when the new activity is assigned, the activity is delivered to the Chat Inbox.

## 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.



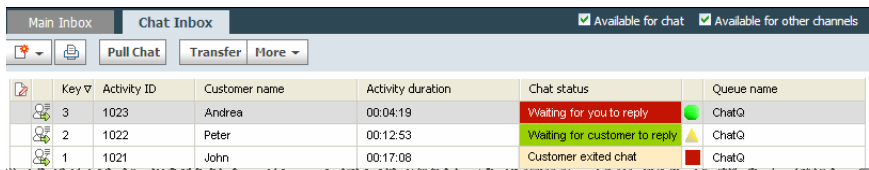
*View chat status*

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	Activity ID	Customer name	Activity duration	Chat status	Queue name
3	1023	Andrea	00:04:19	Waiting for you to reply	ChatQ
2	1022	Peter	00:12:53	Waiting for customer to reply	ChatQ
1	1021	John	00:17:08	Customer exited chat	ChatQ

*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 Chat Inbox. These keys can be used to quickly toggle between chat activities present in the 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 that comes in to the inbox.

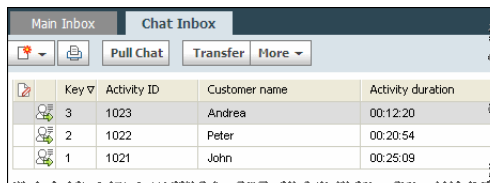
To move from one chat activity to the next, use the following keyboard shortcut: SHIFT + CTRL+ *Key* (1 to 9). For more details, see [“Moving Between Chats” on page 91](#).



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

## 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 to the chat inbox and is assigned the key 2. An email activity 1003 comes in; it is not assigned any shortcut key. When the agent completes chat activity 1002, the shortcut key 2 becomes available for assignment. A chat activity 1004 comes in the chat inbox, it is assigned the shortcut key 2.



Key	Activity ID	Customer name	Activity duration
3	1023	Andrea	00:12:20
2	1022	Peter	00:20:54
1	1021	John	00:25:09

*View keys assigned to chats*



**Important:** For shortcut keys you will not be able to use numbers from the numeric pad of your keyboard because pressing the shift key overrides the numeric lock.

## Toggling Between Inboxes

The Agent Console has two inbox tabs. 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 tabs using a shortcut.

### To toggle between the inboxes:

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



**Important:** The Main Inbox is not refreshed automatically when you switch to it from the Chat Inbox. Click the Refresh button to see any new activities in the Main Inbox.

## 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.

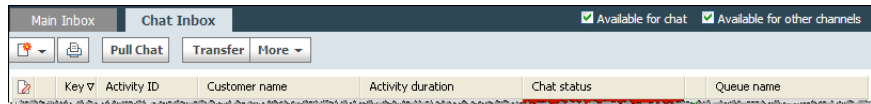
You can change this setting only if you have the permission to do so. If you make yourself unavailable you can still pull chat activities from the queues from which you are allowed to pull activities. If your administrator has not given you the permission to change the availability setting, then you 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. This is true for both standalone agents and chat agents mapped to users in Unified CCE.

### To make yourself available in the Chat Inbox:

- ▶ In the inbox toolbar, select the Available for chat check box.



*Change your availability*



**Important:** If integrated agents are not available for receiving chats, both blended collaboration, and chat activities are not assigned to them.

## Pulling Chats

You can pull chats from 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 Chat** button blinks yellow. 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.

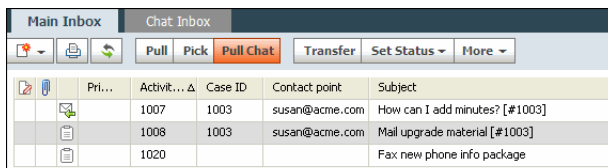
If you are in the Chat Inbox and are working on a chat activity and you pull a new chat activity, the new chat activity comes into your inbox but your focus is not shifted to the pulled activity. You can continue to work on your original chat activity.



**Important:** Only standalone agents, and integrated agents with the default administrator role, can pull chat activities.

### To pull chat activities:

- ▶ In the inbox list pane toolbar, click the **Pull Chat** button when it blinks yellow. One activity, usually the one with the maximum waiting time, gets pulled in to your inbox.




*Click the **Pull Chat** button*

# Sending Text Messages to the Customer


## To send text messages to the customer:

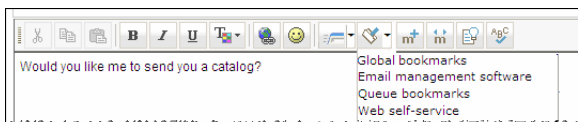
1. In the Chat pane, in the Text box, type the message you want to send to the customer.

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, from the **Quick responses**  button, select the quick response 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.


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

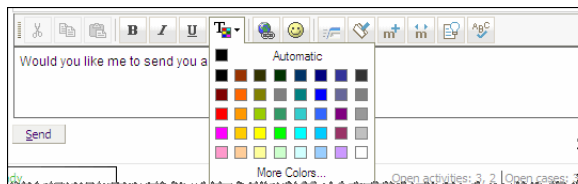
3. To use the bookmarks, in the **Text box** toolbar, from the **Bookmarks**  button, select the article you want to use. The text of the article appears in the **Text box**. Review it and make any changes, if required. Click the **Send** button or press the Enter key to send the message to the customer.




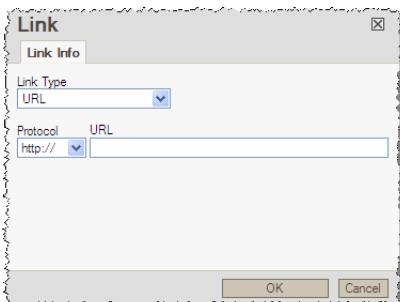
Select a bookmarked article


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

4. To change the color of the text, select the text in the text box and click the **Text color**  button. Choose the color you want.





5. To add a clickable link, click the **Add link**  button. In the Link window, from the Link Type menu, select URL. In the URL field, type in the complete URL and click OK.



6. 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 spelling 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.


7. 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 Cobrowse  section.
2. In the Cobrowse 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.

In the Cobrowse toolbar, from the **Quick Links** button, select the URL of the page you want to view.



Select a URL

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

3. In the Cobrowse toolbar, click the **Send Page** button. The customer receives this page and views its contents.
4. To send another page, repeat steps 2-4.

If the administrator has blocked any web pages then you cannot send them to the customer. The blocked pages do not get pushed to the customer, but you can view them in your view port.

## 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

## 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. Standalone agents can transfer chats only to standalone agents and standalone queues.
6. Mapped agents can transfer chats only to mapped 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:

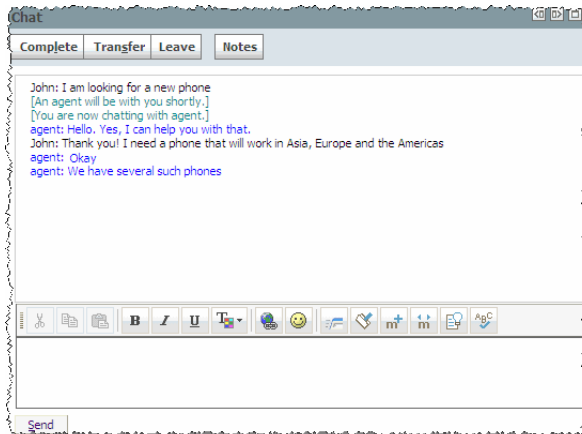
- ▶ Last page browsed
- ▶ Referrer page
- ▶ Pre-configured URL

## To complete a chat:

1. In the Chat pane toolbar, click the **Complete** button. When you complete a 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.

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.



Click the **Complete** button

## Leaving Chats

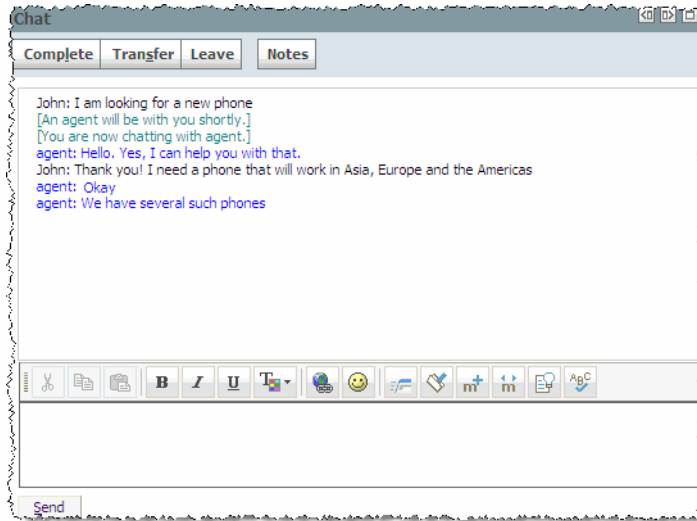
- ▶ After servicing the customer you can either leave the chat or complete it. When you click the **Leave** button, the activity is removed from your chat inbox but it gets completed only when the customer closes the chat session.



**Important:** The **Leave** button is available only if the **Leave Chat Activity** action is assigned to you. This action is not assigned by default to users who are assigned the **Agent** role.

## 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

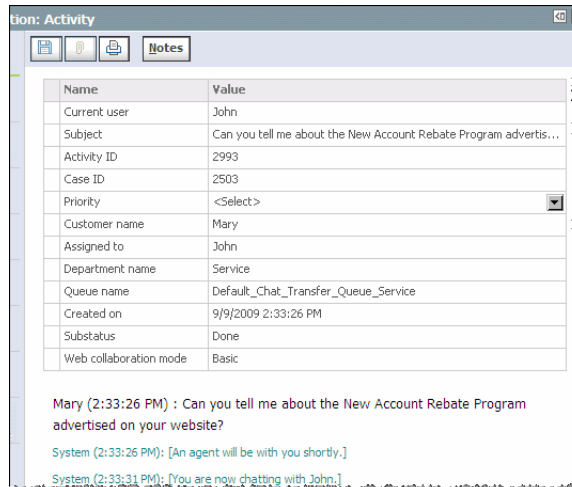
### Viewing Activity Details and Body

You can view the details of chat activities from the Activities 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. Below the activity details, the entire transcript of the chat is also displayed.

#### To view the activity details and body:

- ▶ In the Information pane, go to the Activity  section. By default, the Activity 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. You can assign a priority from 1-7, where 1 is the highest priority and 7 is the lowest priority.
  - **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, or Advanced.**



*View chat transcript*

Below the activity details, you can view 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 links to web pages and attachments that were sent during the chat session.

# 10

## Notes

- ▶ [About Notes](#)
- ▶ [Adding Notes](#)
- ▶ [Viewing Notes](#)
- ▶ [Copying the Content of Notes](#)
- ▶ [Deleting Notes](#)

# About Notes

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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. In some panes, **Notes** is available as an option in the **More** button.

## Adding Notes

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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. In some panes, **Notes** is available as an option in the **More** 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:

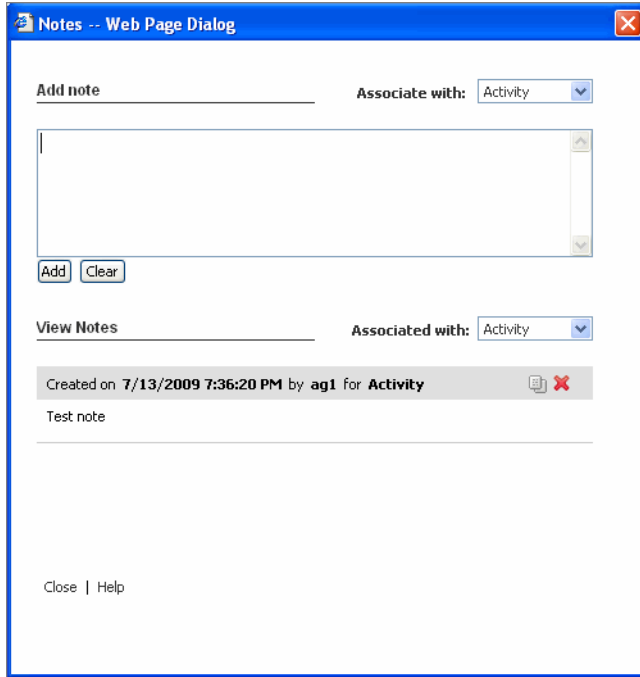
1. In the toolbar of the pane you are working in, click the **Notes** button. In some panes, **Notes** is available as an option in the **More** button.

The Notes window is opened. By default, existing notes for the object that is selected are displayed in the View Notes section, with the most recent notes at the top. You can select other objects from the **Associated with** dropdown list. Choose Activities, Cases, Customers, or All notes

For each note, 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 Notes” on page 99](#) and for more information on deleting notes see [“Deleting Notes” on page 100](#).



*View a note*


## Copying the Content of Notes

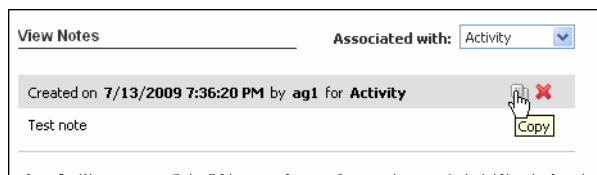
When you copy a note, only the content of the note is copied to the clipboard. It is meant to enable you to quickly copy the content of a note for use outside the system. Once you copy the content, you can use the Windows Ctrl-V to paste the content into an email or external document.

### To copy a note:

1. In the toolbar of the pane you are working in, click the **Notes** button. In some panes, **Notes** is available as an option in the **More** 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.




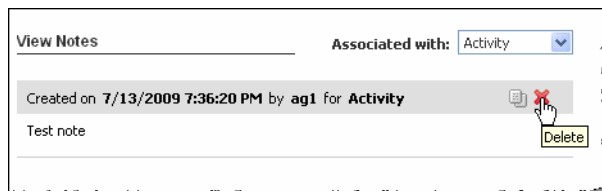
*Copy the content of a note*

# Deleting Notes

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## To delete a note:

1. In the toolbar, click the **Notes** button. In some panes, **Notes** is available as an option in the **More** 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*

# 11 Messages

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- ▶ [Viewing Messages](#)
- ▶ [Creating Messages](#)
- ▶ [Deleting Messages](#)

# About Messages

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Messages allow you to send simple text messages to other users of the system using their user name. Email addresses can be used to send messages to team members who are not users of the system.

Messages can be scheduled for delivery at a specific time, and can be set to expire in a specified time frame. Only users with the Create Message and Delete Message actions can create and delete messages.

## Related User Actions

You can create, schedule and delete messages.

There are two actions related to Messages: **Create message** and **Delete message**. These actions have to be assigned to you by your administrator.

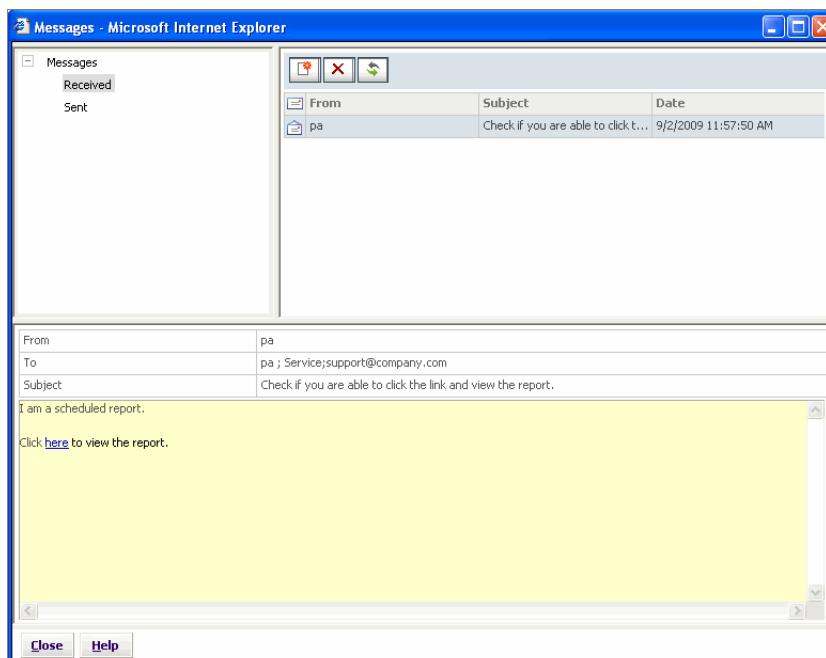
- ▶ The Create message action allows you to create messages and schedule message delivery.
- ▶ The Delete message action allows you to delete messages.

## Viewing Messages

---

**To view a message:**

1. In the Console toolbar click the **Messages** button. The Messages window opens.
2. If it is not already selected, click **Received** in the tree pane. The list pane refreshes to display messages.





*View message*

3. Click a specific message to view its contents in the properties pane.

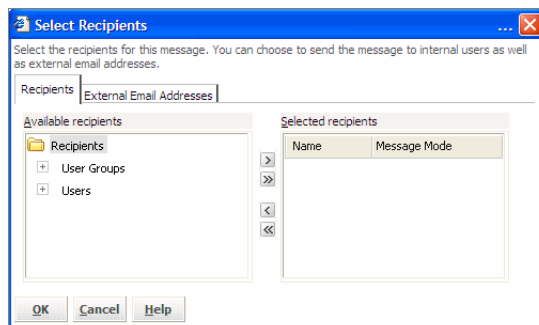
## Creating Messages

You should have the Create Message action to create new messages. This action is not assigned by default to users with the Agent role.

### To create a message:


1. In the Console toolbar click the **Messages** button.  
The Messages window opens. Existing messages are listed in the list pane.
2. Click the **New**  button. The properties pane refreshes and displays a new blank message.
3. The **From** field displays your user name.
4. In the **To** field, click the **Assistance**  button. The Select Recipients window opens.
5. In the Select Recipients window, select the users to whom you want to send the message.

Click the External Email Addresses tab to add email addresses.



*Select recipients for the message*

For internal users, you can use the Message Mode dropdown menu to select the type of message. The options are:

- **Internal:** Sends an internal message. The Messages button in the recipients Console toolbar blinks to indicate that a new message has arrived.
  - **Email:** Sends and email.
  - **Both:** Sends both an internal message and an email. The email is sent only if an email address is configured for the user.
6. Type a subject in the **Subject** field.
  7. In the **Delivery date and time** field, click the **Assistance**  button. In the Select Delivery Date and Time window that appears, do the following:
    - i. Specify whether the message should be delivered immediately, once at a specific time, or multiple times.

- ii. Specify whether the message should expire after it has been delivered. You can set the message to never expire, expire after a certain time, or expire at a particular time.

When a message expires, it is removed from the recipients list of received messages.


Click **OK** to close the window.

8. Type your message.
9. Click the **Send** button to send the message.

## Deleting Messages

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### To delete a message:

1. In the Console toolbar, click the **Messages** button.  
The Messages window opens and a list of existing messages is displayed in the list pane.
2. Locate the message you want to delete and click the **Delete**  button.  
A message appears asking you to confirm the deletion.
3. Click **Yes** to delete the message.

# Knowledge Base

- ▶ [About the Knowledge Base](#)
- ▶ [Suggesting Responses](#)
- ▶ [Managing Your Suggestions](#)

# About the Knowledge Base

The Knowledge Base (KB) is a department's common repository of pre-defined content for use during interactions with customers. It enables your organization to offer consistent and effective "knowledge-powered" interactions to customers through all channels—chat, email, and phone.

The KB is available to you from the Information pane. For more information about using KB articles in responses to email inquiries, see [“Using Articles From the Knowledge Base” on page 82](#).


## Suggesting Responses

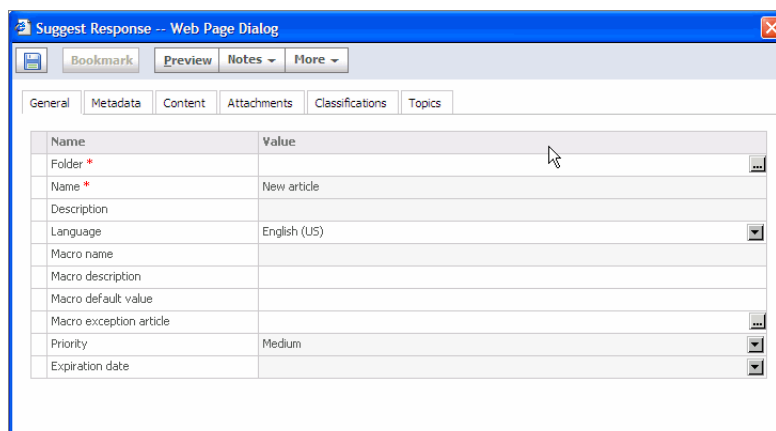
Agents can suggest responses which can be added to the KB for enterprise-wide use. Authors must approve these responses before they are added to the KB. Once approved, articles become available to everyone who has permissions to view the folder in which it is placed.

The article content has following parts:

- ▶ **Typed content:** This is the content that an author composes.
- ▶ **Macros:** Shortcuts that expand into articles, paragraphs, or simple sentences. Macros can be used in the content of articles to avoid duplicating the same content in more than one article.
- ▶ **Internal File Attachment:** A file on the local network that is attached to an article. Such attachments are stored on the file server.
- ▶ **External File Attachment:** Points to a URL on the world wide web.

### To suggest a response:

1. Create a response in the text box in the Reply pane.
2. Click the **Suggest Response**  button in the Reply pane toolbar. The Suggest Response window opens.




Name	Value
Folder *	
Name *	New article
Description	
Language	English (US)
Macro name	
Macro description	
Macro default value	
Macro exception article	
Priority	Medium
Expiration date	

*Suggest a response*

3. In the General tab, complete the required fields.
  - **Folder:** The path to the folder in which you are suggesting the response. You can only choose folder for which you have been given the Suggest Article permission. This is required information.

- **Name:** Type the name of the article. This is required information.
  - **Priority:** Set the priority of the article. Choose from Low, Medium, or High. This field is used in the article approval process. Approvers at various levels of the approval process can change the priority of the article. Once the article is approved, the priority field stays enabled and authors can still change the priority.
4. Now, go to the Content tab.
 

The text box displays the content that was typed in the Reply pane text box. Make any desired changes in the text box.
  5. You can point to the Notes button and select Add Notes to add a note to the suggestion.
  6. Click the Preview button to view the article as it will appear in the KB or self-service portal.
  7. Click the Save  button to complete your suggestion.

## Managing Your Suggestions

### Updating Pending Articles

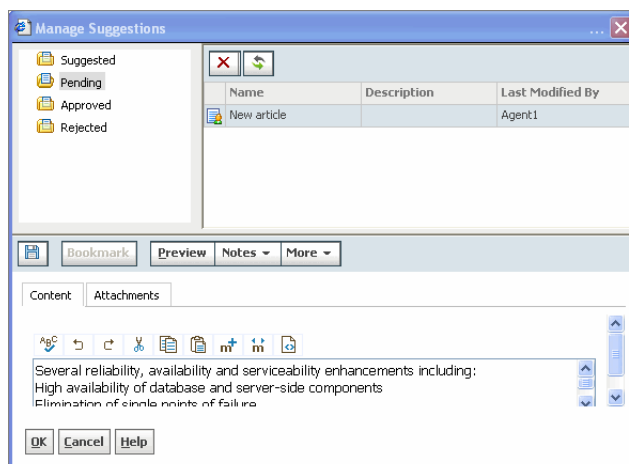
As part of the approval process, authors may send suggested responses back to you. You may wish to update these articles and submit them for approval again.

#### To work on articles sent back to you:


1. In the Information pane, go to the KB section.
2. In the Information pane toolbar, click the **Suggestions** button.

The Manage Suggestions window appears.

3. In the Manage Suggestions window, select the Pending folder. Here you will find the articles that have been sent back to you.



View articles in **Pending** folder

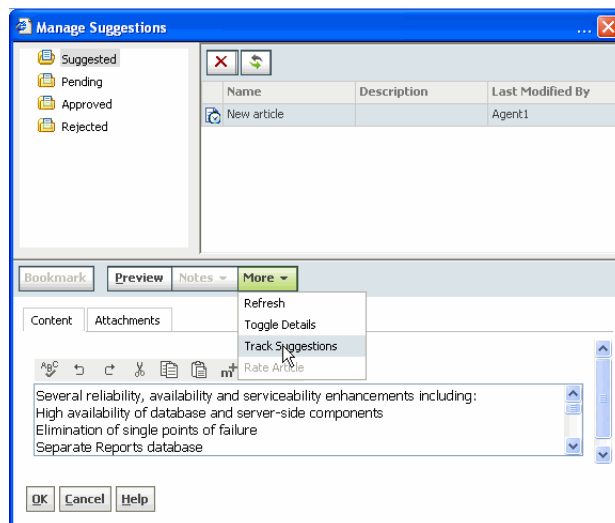
4. Point to the Notes button and select View Notes to read any notes that the reviewer may have added to the article.
5. Update your article. You can make changes only to the content and attachments.  
Add a note to the article indicating the changes you are making.
6. Click the **Save**  button. The article is resubmitted for approval and moved to the Suggested folder.

## Tracking the Status of Your Suggestions

You can track the status of all the articles you have suggested from a single window.

### To track the status of your suggestions:

1. In the Information pane, go to the KB section.
2. In the Information pane toolbar, click the **Suggestions** button.  
The Manage Suggestions window appears. Click **Suggested** in the tree pane.
3. In the List pane, select the name of the article whose status you wish to view.  
The Properties pane updates with the details of the article.
4. In the Properties pane toolbar, point to the More button and select Track Suggestions.



Select **Track Suggestions** from **More**

5. In the Track Suggestion Status window, view the audit trail of events associated with the suggestion. The following details are shown.
  - Time
  - Event
  - Priority
  - State
  - Notes

You can view the status of pending, approved, and rejected articles by selecting the appropriate folder from the Tree pane.

# 13 Reports

- ▶ [About My Reports](#)
- ▶ [Agent Login Summary Report](#)
- ▶ [Agent Efficiency Report](#)
- ▶ [Agent Availability for Chat Report](#)
- ▶ [Running Reports](#)

# About My Reports

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You can run three types of reports to evaluate your performance:

1. Agent Login Summary report
2. Agent Efficiency report
3. Agent Availability for Chat report, in systems that include Unified Web Interaction Manager.

These reports let you measure your performance over one day, week, or month.

## Agent Login Summary Report

---

This report has four levels.

### Level 1

Displays the following information.

- ▶ **User Name:** User name of the agent.
- ▶ **Activities Worked On:** Number of distinct activities which the agent worked on. For example, the agent composes an email and does save draft and then comes back to the email after one hour works on it and sends it out to the customer. In this case he has worked on the same activity twice so this will be counted as one activity only. Also if the agent replies to an email and for some reason after one hour sends another reply to the same email, this will also be counted as only one activity.

- ▶ **Average Time (hh:mm:ss):**

- **Work:** Average time spent on working on the activity. This is not the time for which the activity stays in the agents inbox, but the time for which the agent works on the activity. For example an activity stays in the agent's inbox for 15 minutes and the time for which the agent has clicked on the activity is five minutes, the work time for the activity will be five minutes.

Average work time = Total time spent on working the activities/ Number of distinct activities worked on

Example: Agent works on Activity1 for five minutes, then works on Activity2 for five minutes and then works on Activity1 for five minutes. The average work time will be  $5+5+5/2$  because the agent has worked on two distinct activities.

- **Wrap:** Average wrap time for all the activities worked on. As wrap time is not considered for email activities its value is always zero.
- **Handle:** Average handle time for all the activities worked on. As the wrap time for email activities is always zero the work time and handle time will be the same.

Average Handle Time = Total Work Time + Total Wrap Time / Number of distinct activities worked on

- ▶ **Time (hh:mm:ss):**

- **Cumulative Handle Time:** The total handle time for all the activities worked on by the user.
- **Logged On Time:** Total time agent was logged in to the application.

## Level 2

This level allows you to drill down to the details to see the data broken down by activity type for the reporting time period.

## Level 3

This level displays the data broken down by time increment for the selected activity type.

## Level 4

Level 4 displays the following information:

- ▶ **Login Time:** The date and time of login.
- ▶ **Logout Time:** The date and time of logout.
- ▶ **Reason:** The reason for logout. The reasons for logout can be one of the following:
  - Logout: The agent clicks the Logout button and logs out of the application.
  - Timeout: The agent doesn't logout of the application but his login is timed out because of inactivity. In this case the Logged on time will also include the inactive time.
  - Forced Logout: Some one else logged in with the same user name and the agent is forced to logout.
- ▶ **Time Logged On:** The time for which the agent was logged into the system.

# Agent Efficiency Report

---

This report has only one level, and displays the following information.

- ▶ **User Name:** Names of the agents for whom report is run.
- ▶ **Activities:** Activities include emails, phone, tasks or custom activities that exist in your system.
  - **Open at Start:** Number of open activities in the agent's inbox at the start of the reporting period.
  - **In:** Number of new activities that came to the agent's inbox. This column takes into account the activities assigned by workflows, transferred in manually or by alarm workflows, pulled by the agent and composed by the agent.
  - **Moved Out By Users:** Activities manually transferred out by the agent or pulled by other users.
  - **Moved Out By Rules:** Activities moved out by rules. This column counts the activities moved out of the agent's inbox by auto pushback and alarm rules.
  - **Completed:** Activities completed by the agent.
  - **Open At End:** Open activities in the agent's inbox at the end of the reporting period.  
$$\text{Activities open at end} = (\text{activities open at start} + \text{activities in}) - (\text{activities moved out by users} + \text{activities moved out by rules} + \text{activities completed by users} + \text{activities completed by rules})$$
- ▶ **Cases:** If a case has more than one activity in it, the report counts each activity individually, but will count the case only once. For example a case has three activities, the report will show three activities and one case.

- **Open at Start:** Open cases associated with the agent at the start of the reporting period. The agent has been assigned activities that belong to these cases.
- **Offered:** Cases offered to the agent during the time period. If the agent is assigned an activity, the case to which it belongs gets offered to the agent. Cases created by composing activities will also be counted in this column.
- **Closed:** Cases closed by the agent.
- **Reopened:** Of the cases closed by the agent in the reporting period, the number of cases that were reopened by the time the report was run.

For example: You run a report on September 15, for the time period: August 1 to August 30.

- A case was opened on August 27th, closed on August 28th, and reopened on August 29th.
- A case was opened on August 2nd, closed on August 4th, reopened on August 6th, and closed on August 7th.
- A case was opened on August 27th, closed on August 28th, and reopened on September 5th.

All the above mentioned cases are reported as reopened.

- **Percentage Closed:** Out of the cases which were open at start and the cases offered, the percentage of cases closed by the agent.

Percentage closed = (cases closed/ (cases at start + cases offered)) \* 100

- **Percentage Reopened:** Out of the cases closed, the percentage of cases that were reopened by the time the report was run.

Percentage reopened = (cases reopened/ cases closed)\* 100.

## Agent Availability for Chat Report

---

This report has 2 levels.

### Level 1

Level 1 displays the following information:

- ▶ **User Name:** User names of the agents for whom report is run.
- ▶ **Time**
  - **Logged On:** The total time the user was logged into the application.
  - **Available For Chat:** The time for which you were available for servicing chats. This is the time for which your availability indicator showed you as available for chats.
  - **Not Available For Chat:** The time for which you were logged in to the application, but unavailable for chats.

Time Not Available for Chat = Time Logged On - Time Available for Chat
- ▶ **Percentage Availability For Chat:** Out of the total logged in time, the percentage of time that you were available for chats.

Percentage Availability for Chat = Time Availability for Chat (in seconds)/ Time Logged On (in seconds)  
\*100

## Level 2

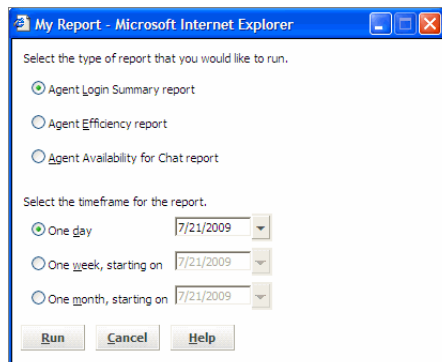
This levels breaks down the data in the report by time increment. To drilldown to this level of report, click on your user name.

## Running Reports

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1. Click the **My Report** button in the Console toolbar.

The My Report window opens.



*Select the type of report to run*

2. Select the type of report to run. Choose from Agent Activity Summary report, Agent Efficiency report, and Agent Availability for Chat report.
3. Specify the time frame of the report. It can be:
  - One day
  - One week
  - One month
4. Click **Run**.