Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Tools Console

For Unified Contact Center Enterprise and Hosted and Unified ICM

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Preface

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

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

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

About This Guide

Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Tools Console introduces you to the Tools Console and helps you understand how to use it to configure and extend business objects.

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

Note: The Tools Console is not available in Basic editions of Unified WIM and Unified EIM.

Document Conventions

This guide uses the following typographical conventions.

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

Document conventions

Other Learning Resources

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

Online Help

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

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

Online help options

Document Set

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

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

The document set contains the following guides:

- *Cisco Unified Web and E-Mail Interaction Manager System Requirements*
- *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 Console Basics

A highly specialized workspace for business analysts and programmers, Tools Console lets you configure business objects according to the needs of your organization. This console even lets you extend business objects by creating custom attributes and values. You can also customize screens through this console.

Key Terms and Concepts

Here are some of the key terms and concepts used in Tools Console.

System settings

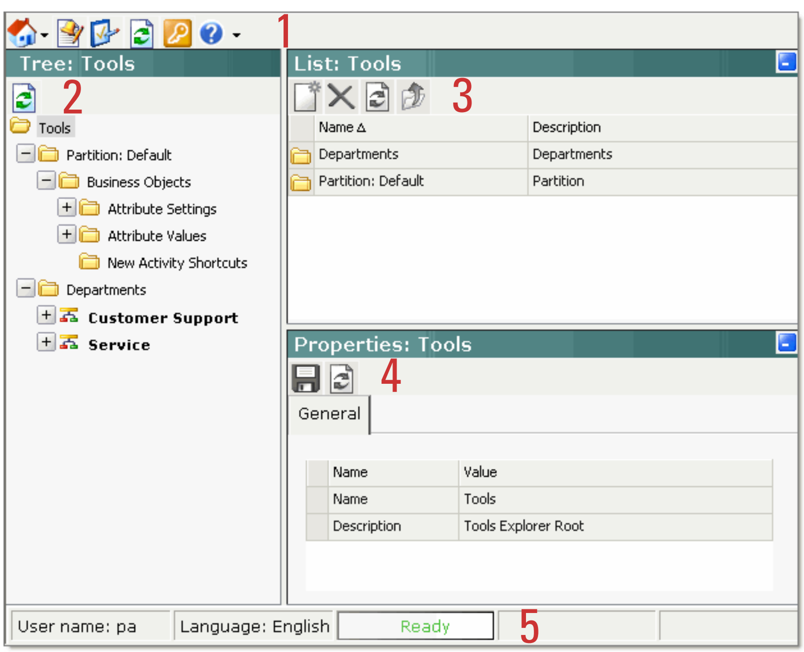
System Settings let you configure business objects for the entire system. Business objects, such as customer or user data, consist of numerous attributes. Based on the needs of your business, you can define the scope of an object by configuring which attributes to make available. You can also extend the objects in the system by adding custom attributes and values.

Screen settings

Screen Settings give you the flexibility to customize various screens according to your business needs. For each department you can customize some screens. You can enable, restrict, or reorder the attributes that can be viewed in these screens. You can also customize the Information pane of the Agent Console by adding, removing, or changing the order of the section toolbar buttons.

Elements of the User Interface

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



Elements of the console user interface

1. **Console toolbar:** The main toolbar of the console appears at the top of the screen. It provides quick access to commonly performed actions such as “refresh,” “view Help,” and “log out.”
2. **Tree pane:** The Tree pane presents the contents of your work area as a tree list, allowing you to select the node (folder) that you wish to work in. When you select a folder, its first-level contents are displayed in the List pane.

   To expand all first and second level nodes with a single click, shift + click the plus [+] button next to the topmost node. The contents of all first and second level nodes are displayed in the Tree pane.
3. **List pane:** The List pane displays first-level contents of the folder selected in the Tree pane. You can view the name, description, date of creation, etc., of displayed items. In this pane, you can create items or select existing ones to modify or delete them.
4. **Properties pane:** The Properties pane displays the contents of the folder or article selected in the List pane. In this pane, you can edit the properties of the selected item.
5. **Status bar:** The status bar is present at the bottom of every screen. It displays the following information:
   - The user name with which the user has logged in to the system.
   - The language currently in use.
   - The status of the system (Loading, Ready, etcetera).

2 Language Option

Setting Language Options for the User Interface

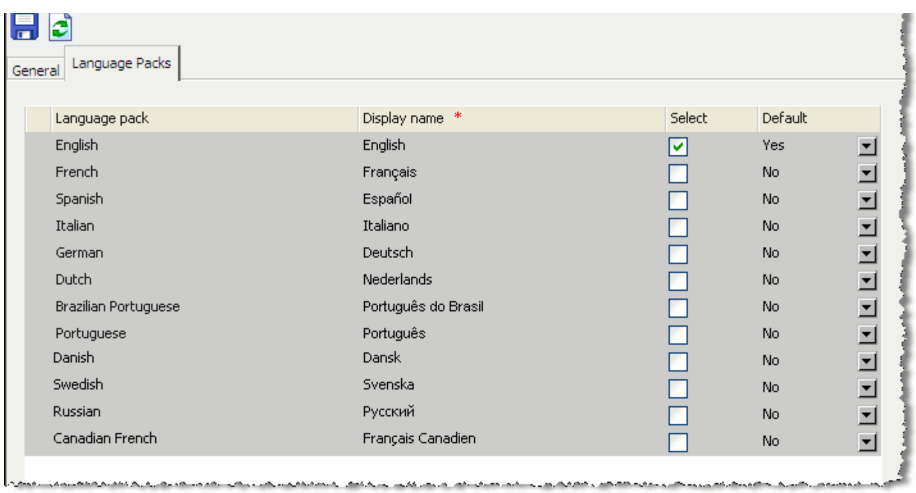
The Unified EIM and WIM user interface (UI) is available in the following 12 languages:

- English
- French
- Spanish
- German
- Dutch
- Italian
- Brazilian Portuguese
- Portuguese
- Danish
- Swedish
- Russian
- Canadian French

For each business partition, you can set the default language for the UI. If users need to access the application in more than one language, then you can provide a list of languages on the login page for the user to select from.

To set the language for the user interface:

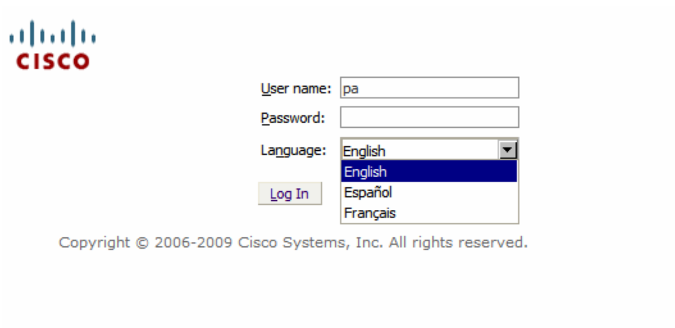
1. In the Tree pane, browse to **Tools >** *Partition_Name* **> Business objects > Attribute settings > Screen > Login Page.**
2. In the List pane, select **Login page - Language Selection.**
3. In the Properties pane, on the Language Packs tab, select the language in which you want to display the UI and set it as the default language pack. By default **English** is selected and is set as the default language pack.



Language pack	Display name *	Select	Default
English	English	✓	Yes
French	Français		No
Spanish	Español		No
Italian	Italiano		No
German	Deutsch		No
Dutch	Nederlands		No
Brazilian Portuguese	Português do Brasil		No
Portuguese	Português		No
Danish	Dansk		No
Swedish	Svenska		No
Russian	Русский		No
Canadian French	Français Canadien		No

Select the language packs

If you want the users to be able to view the UI in multiple languages, then select the language packs to be made available to the users. When more than one language packs are selected, then a new **Language** option shows on the login page. At the time of login, the user can select the language in which he wants to see the UI.



A sample Login page

4. Click the **Save** button.

3 Custom Attributes

About Business Objects

You can customize the business objects by adding custom attributes. You can add custom attributes to the following business objects.

- Activity data
  - Activity search data
  - Generic activity data
- Case data
  - Case search data
- Contact person data
  - Contact person search data
- Contact point data
  - Contact point search data
  - Email address contact point data
  - Phone number data
  - Postal address data
  - Web site data
- Customer association data
  - Customer association search data
- Customer data
  - Customer search data
  - Change customer data
  - Cooperate customer data
  - Group customer data
  - Individual customer data
- Customer group data
- Customer organization data
- KB article data
  - Article search data
  - Article summary for version and pending
- Routing queue
- User data
  - User search data

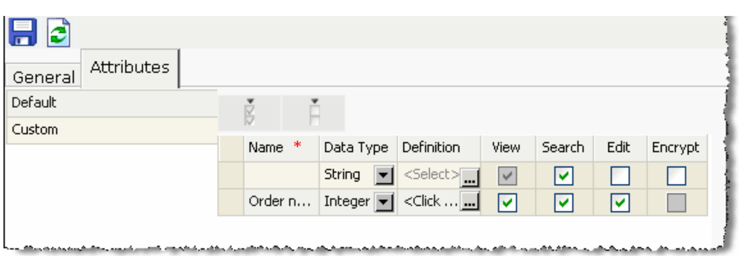
Creating Custom Attributes

Important: Once you create a custom attribute it cannot be deleted and its properties cannot be changed.

To add a custom attribute:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attribute settings > System.**
2. In the List pane, select the business object to which you want to add a custom attribute. You can add custom attributes to 11 business objects.

   In the Properties pane, the Attributes tab is selected automatically.
3. In the Attributes tab go to the Custom section and provide the following details.
   - **Name:** Type a name for the custom attribute. The following characters are not allowed in the name: ~ ! @ # $ % ^ & * ( ) _ - + ? > < { } | [ ] = \ / , .(dot) : ; “ ” ‘ ’. Also, the name cannot start with a digit.
   - **Data Type:** Select the type of data for the custom attribute. The options available are **String** and **Integer.**
   - **Definition:** Click the **Assistance** button. In the Define Custom Attribute window, different options are available for the integer and string data type. For integer data type, the data size nine is specified and it can't be changed. You can provide a default value for this field. For string data type, provide the following details.
     - **Data size:** You can specify the maximum characters the custom attribute can have. The default value is eight. You can give a value between one and 4000. For example, if you give a value 10, then you cannot enter data exceeding 10 characters, in the custom field.
     - **String type:** This option gives you the flexibility to define how the data can be entered in the custom field. You have two options available:
       - **User specified in a text box:** You can provide an empty field where the user can type any data. You can also give a default value for the field.
       - **User-selected in the list of choice below:** Provide a list of possible values, from which the user can select one. You can specify a default value for the field. Also, you can allow users to select multiple values from the list.
   - **View:** Select this option if you want to show this attribute in the screens at the department level.
   - **Search:** This feature is not available yet.
   - **Edit:** Select this option if you want to allow the agents to edit this field.
   - **Encrypt:** This option is enabled only if the data type selected is string.



Create a custom attribute

4. Click the **Save** button.

If you plan to use this attribute in searches or data adapters, you must create database indexes on the custom attribute. Contact your database administrator to get the indexes created.

Adding Custom Attributes to Screens

After creating the custom attributes make sure you add them to the screens where you want them to show in the system. For details on how to add custom attributes to the screens see the section on "Configuring Screen Attributes for Departments" on page 35. And for a list of screens to which you can add the attributes, see the appendix.

Creating Macros for Custom Attributes

You can create macros for the custom attributes added to some of the business objects. For details, see *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

4 Custom Values

About Custom Values

According to your business needs, you can add custom values to the following attributes of the business objects.

Important: **Once you create a custom value, it cannot be deleted. Also, the system provided values cannot be deleted.**

- Activity mode
- Activity type
- Activity status
- Case status
- Chat status
- Customer contact person type
- Customer country
- Customer group type
- Customer industry
- Customer level
- Customer organization type
- Customer region
- Customer web type
- Contact person ID type
- Currency type
- Product type
- User type
- User unavailability reason

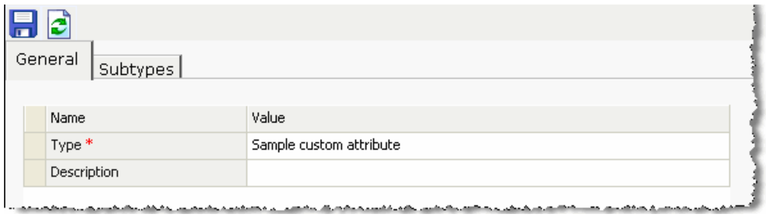
Creating Custom Values

To create a custom value:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attribute values.**
2. Select the business object attribute to which you want to add a custom value.
3. In the List pane toolbar, click the **New** button.

   The Properties pane refreshes to show the properties of the new attribute value.
4. In the Properties pane, go the General tab and provide the following details.
   - **Type:** Type a name of the new attribute value.

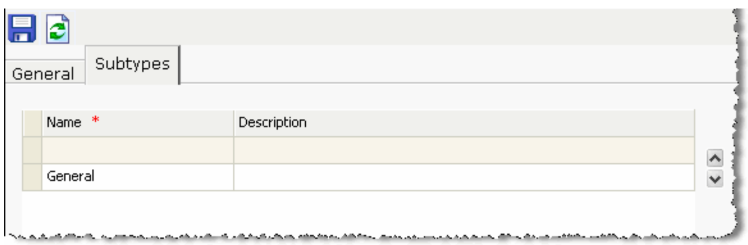
- **Description:** Type a brief description.



Set the general properties

5. Next, go to the Subtype tab, and provide the following details.
   - **Name:** Type a name of the subtype.
   - **Description:** Type a brief description.

   Press the ENTER key, and create additional subtypes.



Create a new subtype

6. Click the **Save** button. Once you save the custom value, its subtypes cannot be deleted. But, you can add new subtypes to the custom values later.

Creating Custom Product Types

There are five predefined product types created in the system. They are:

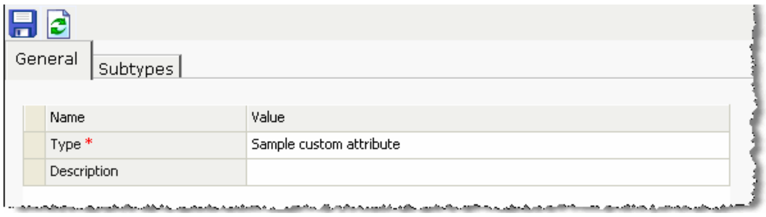
- Credit Cards
- Finance
- Physical
- Software
- Wireless

To create a custom product type:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attribute values > Product: Type.**
2. In the List pane toolbar, click the **New** button.

   The Properties pane refreshes to show the properties of the new attribute value.
3. In the Properties pane, go the General tab and provide the following details.

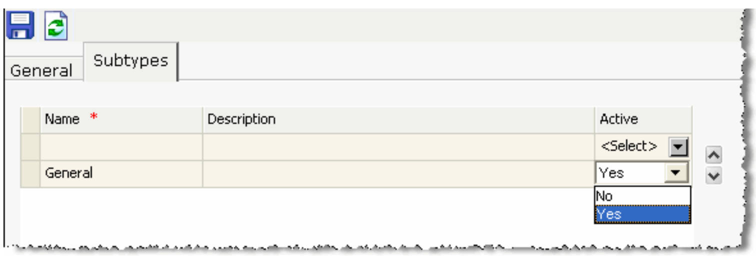
- **Type:** Type a name of the new attribute value.
- **Description:** Type a brief description.



Set the general properties

4. Next, go to the Subtype tab and provide the following details.
   - **Name:** Type a name of the subtype.
   - **Description:** Type a brief description.
   - **Active:** Select **Yes** to make the product subtype active. Only active subtypes are available for use in the system.

     Press the ENTER key and create additional subtypes.



Create a new subtype

5. Click the **Save** button.

Creating Custom Activity Types

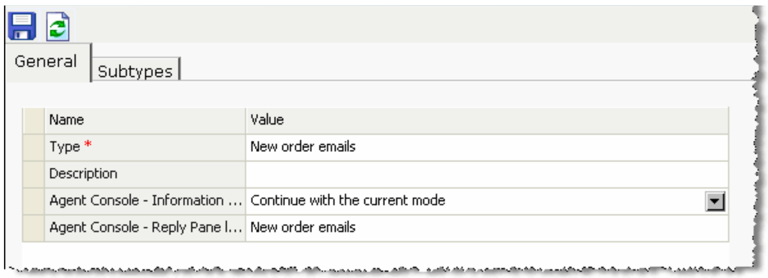
There are four predefined activity types created in the system. They are:

- Chat
- Email
- Phone
- Task

To create a new activity type:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attribute values > Activity: Type.**
2. In the List pane toolbar, click the **New** button.
3. In the Properties pane, go to the General tab and provide the following details.

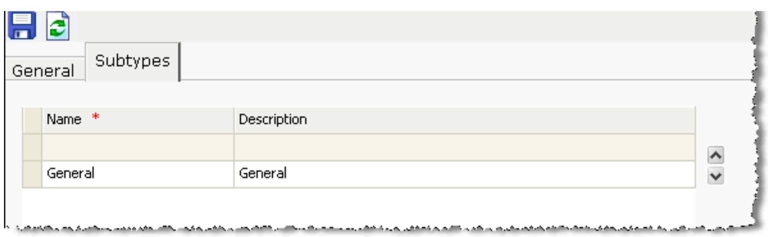
- **Type:** Type the name of new activity type.
- **Description:** Type a brief description.
- **Agent Console - Information pane section:** From the dropdown select the information pane section that should open when the agent creates the activity.
- **Agent Console - Reply pane label:** Type a label for the Reply pane.



Set the general properties

4. Next, go the Subtypes tab. Here you can create the subtypes of the new activity type. A predefined subtype, **General** is created for the activity type and it cannot be deleted. In addition to it you can add more subtypes.
   - **Name:** Type a name for the subtype.
   - **Description:** Type a brief description.

     Press the ENTER key and create additional subtypes.



Create a new activity subtype

5. Click the **Save** button.

Important: **Once you save the custom value, the activity type, or its subtypes cannot be deleted.**

Associating Classifications to Activity Types

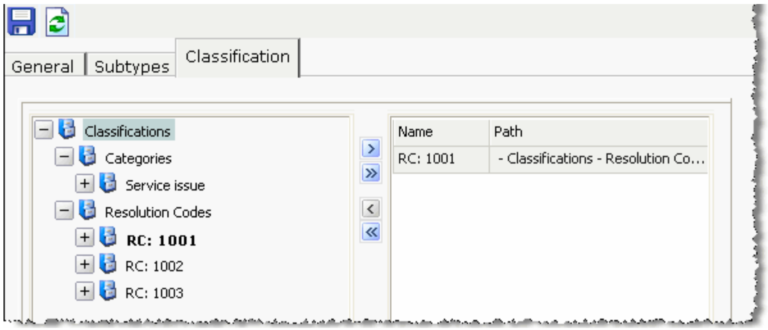
For each department you can associate different classifications to the activity types. Whenever the agent creates a new activity of this type, the classifications associated with the activity type will be assigned to the activity.

To associate classifications to activity type:

1. In the Tree pane, browse to **Tools > Department >** *Your Department* **> Activity: Type.**
2. In the List pane select the activity type with which you want to associate a classification.

   The Properties pane refreshes to show the properties of the activity type.

3. In the Properties pane, go to Classifications tab and select the resolution code and category you want to assign to the activity type.



Assign categories and resolution codes

4. Click the **Save** button.

5 Customer Associations

Configuring Customer Associations

The system comes with a set of predefined customer associations. They are:

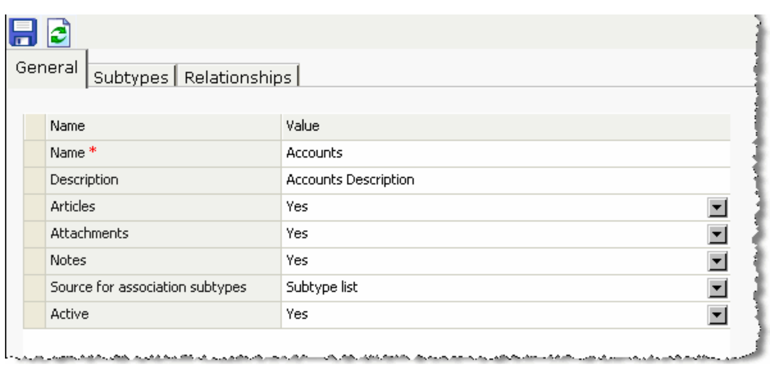
- Accounts: Predefined subtypes are saving, checking, and policy
- Contracts: Predefined subtypes are license, professional services, and non disclosure
- Products: You need to create the product catalog from the Administration Console.

To create a custom customer association:

You can create custom customer associations at the department level.

1. In the Tree pane, browse to **Tools > Departments >** *Your department* **> Business Objects > Relationships > Customer Associations.**
2. In the List pane toolbar, click the **New** button.

   The Properties pane refreshes to show the properties of the new customer association.
3. In the Properties pane, go to the General tab and provide the following details.
   - **Name:** Type a name of the customer association.
   - **Description:** Type a brief description.
   - **Articles:** Select **Yes** if you want to allow agents to add articles to customer associations. By default **No** is selected.
   - **Attachments**: Select **Yes** if you want to allow agents to attach attachments to customer associations. By default **No** is selected.
   - **Notes:** Select **Yes** if you want to allow agents to add notes to the customer association. By default **No** is selected.
   - **Source for association subtypes:** From the dropdown select the source for association subtypes. There are two options available:
     - **Product catalog**
     - **Subtype list**
   - **Active:** Select **Yes** if you want to make the customer association active. Only active customer associations are available to agents in the Agent Console.

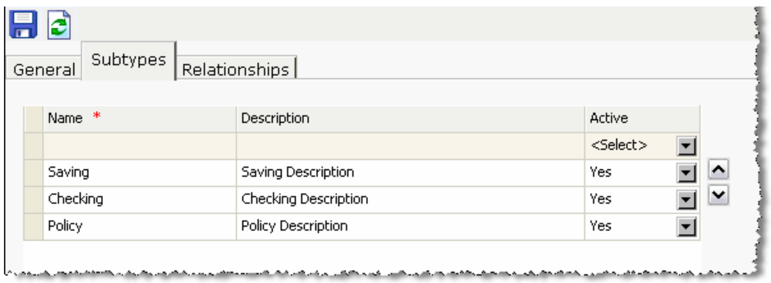


Set the general properties

4. Next, go to Subtypes tab and provide the following details.

> Important: **The Subtype tab is enabled only if you select the source for association subtype as Subtype list.**

- **Name:** Type the name of the subtype.
- **Description:** Type a brief description.
- **Active:** Select **Yes** if you want to make the subtype active or not. Only active subtypes are available to agents in the Agent Console.



Create subtypes

5. Lastly, go to the Relationships tab and select the customer association to be associated with the customer association you are creating.
6. Click the **Save** button.

Deleting Customer Associations

To delete a customer association:

> Important: **The predefined customer associations cannot be deleted.**

1. In the Tree pane, browse to **Tools > Departments >** *Your department* **> Business Objects > Relationships > Customer Associations.**
2. In the List pane, select the customer association you want to delete.
3. Click the **Delete** button in the List pane toolbar.
4. A message appears, asking to confirm the deletion. Click **Yes** to delete the selected customer association.

6 Screen Attribute Settings

About Customizing Screens

Tools Console provides you with the flexibility to customize various screens according to your business needs. For each department you can customize about 120 screens. You can enable, restrict, or reorder the attributes that can be viewed in these screens. You can also customize the Information pane section toolbar of the Agent Console by adding, removing, or changing the order of the section toolbar buttons. The customization of Information pane section toolbar can be done only at the partition level. The changes made at the partition level, take affect throughout the system.

Configuring Information Pane Section Toolbar

The system consists of nine predefined information pane section toolbar buttons. Out of them, seven are available to all the agents and two are available to only the agents with specific licenses.

- The following buttons are available to all the agents.
  - **Activity**
  - **Case**
  - **Customer**
  - **History**
  - **Audit**
  - **KB**
  - **Classify**
- The **Links** button is available to only the agents with Data Adapter license.
- The **Cobrowse** button is available only to the agents with Unified WIM license.

You can make the following changes to the buttons of the Information pane section toolbar of the Agent Console.

- Change the order of buttons
- Remove buttons
- Add custom buttons
- Change the shortcut keys for buttons

> Important: **These changes are made at the partition level and take affect throughout the system.**

Changing the Order of Buttons

The default order of buttons is:

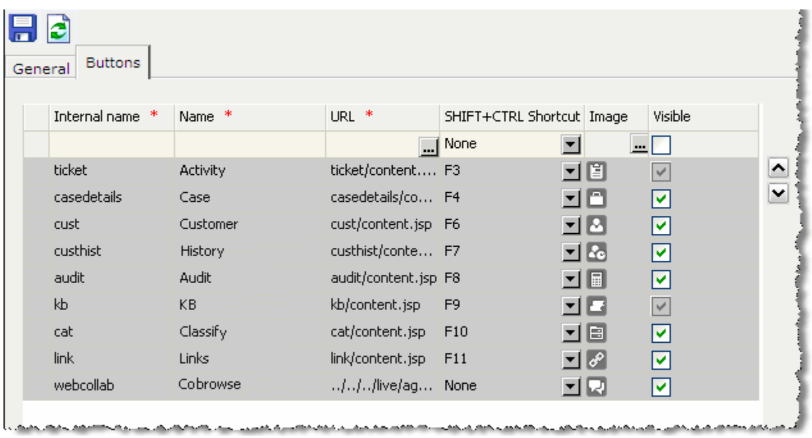
1. Activity
2. Case

3. Customer
4. History
5. Audit
6. KB
7. Classify
8. Links
9. Cobrowse

To change the order of buttons:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attributes Settings > Screen > Toolbar.**
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar.**

   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.
3. In the **Buttons** tab, select the button you want to move up or down the order, and click the **Move up** or **Move down** button.



Change the order of buttons

4. Click the **Save** button.

Removing Buttons

You can remove buttons from the information pane section toolbar, if agents don't use them or you don't want them to use.

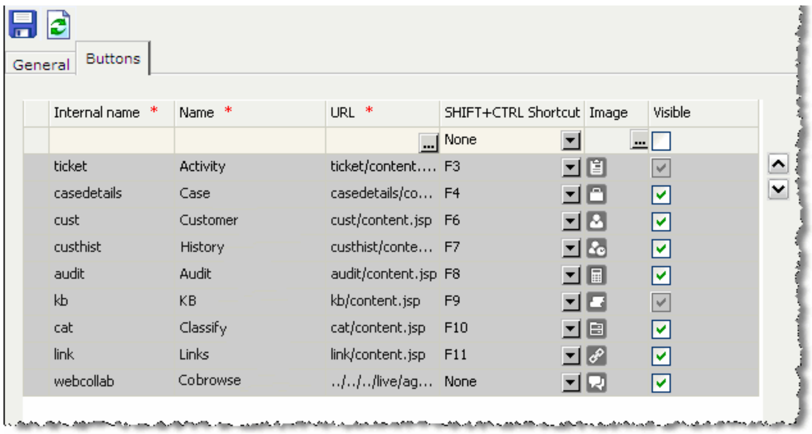
Things to note:

- The **Activity** and **KB** buttons cannot be removed.
- The changes are made at the partition level and take affect throughout the system.

To remove a button:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attributes Settings > Screen > Toolbar**.
2. In the List pane, select, **Agent Console - Information Pane - Sections Toolbar.**

   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.
3. In the Buttons tab, in the **Visible** field, clear the option for the buttons you want to remove from the Information pane section toolbar of the Agent Console.



Show or hide buttons

4. Click the **Save** button.

Adding Custom Buttons

Before adding the buttons to the Information pane section toolbar, you need to first create the buttons and add them to the custom folder on the file server.

Creating Custom Buttons

To create a button:

1. First, create a button of size 16 x 16 pixels and save it as a GIF file `(.gif)`.
2. Then, go to the file server and add the button to the custom folder at the following location.

   Cisco_Home`\eService\web\image\platform\custom`

   The added image becomes available in the Tools Console for adding in the Information pane section toolbar.

Adding Custom Buttons to the Information Pane Section Toolbar

To add a button:

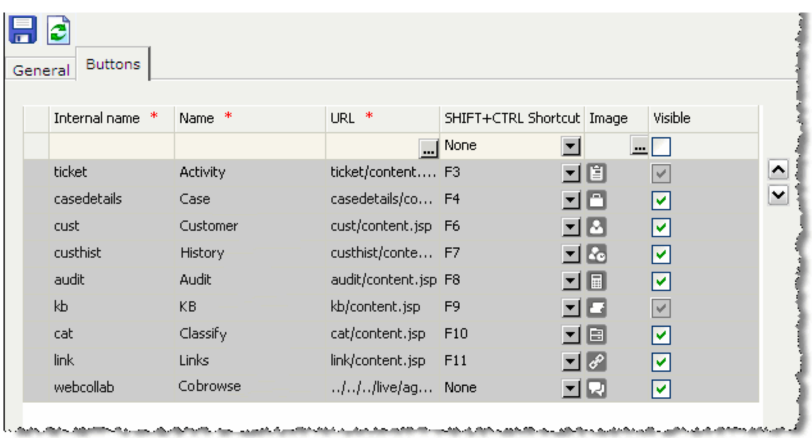
1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attributes Settings > Screen > Toolbar**.
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar.**

   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane section toolbar buttons.
3. In the Buttons tab, provide the following details.
   - **Internal name:** Type the internal name of the button.

   Important: **The internal name cannot have only digits, and you cannot use spaces in the internal name.**

   - **Name**: Type the name of the button as it should appear in the Agent Console.
   - **URL**: Click the **Assistance** button. In the Configure A Toolbar Section window, type the URL of the website or file that you want to access using this button. You can give the URL of a website such as *http://www.company.com*.
   - **SHIFT+CTRL shortcut:** Select a shortcut key for the button.
   - **Image**: Click the **Assistance** button. From the Image window, select the image you want to use for the button and click the **OK** button.
   - **Visible**: Select the option if you want to make the button visible in the Information pane, in the Agent console.

   After providing all the values, press the ENTER key.

   Add a new button

4. Click the **Save** button.

Deleting Custom Buttons

Important: **The predefined buttons cannot be deleted.**

To delete a custom button:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects> Attributes Settings > Screen > Toolbar**.
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar.**

   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.
3. Select the button you want to delete and press the DELETE key.

   The selected button is deleted.
4. Click the **Save** button.

Changing Shortcut Keys for Buttons

The shortcut keys can provide quick and easy access to various sections of the Information pane section toolbar. Shortcut keys help to reduce the number of clicks saving your agents time. For example, you assign the shortcut key F4 to the Activity button, the agent can quickly access the Activity section using the shortcut key Ctrl + Shift + F4.

You can change the shortcut keys for the predefined buttons and also the customs buttons.

Things to note

- You can use one of the following function keys in the shortcut key.
  - F2
  - F3
  - F4
  - F6
  - F7
  - F8
  - F9
  - F10
  - F11
  - F12
- The same function key cannot be assigned to multiple buttons.
- For the ease of the agents make sure that you don't change the shortcut keys too often because the agents would have to unlearn and learn the shortcut keys again and again. And, if you do need to change them any time, as a best practice you can notify them about the changes, so that they are aware of them.

To change the shortcut keys of the buttons:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > Attributes Settings > Screen > Toolbar**.
2. In the List pane select, **Agent Console - Information Pane - Sections Toolbar.**

   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the information pane section toolbar buttons.
3. In the Buttons tab, in the **Ctrl + Shift shortcut** field, select the function key you want to assign to the button.
4. Click the **Save** button.

Configuring Screen Attributes for Departments

For each department, you can customize 120 screens. You can specify which attribute you want to show in the screens and the order in which they should appear. In all the screens there are some attributes which cannot be removed from them.

To customize a screen:

1. In the Tree pane, browse to **Tools** > **Departments** > *Your Department* **> Business Objects > Attribute Settings > Screen.**
2. In the List pane, select the screen you want to customize. For a list of screens that can be modified see the Appendix.
3. In the Properties pane, go to the Attributes tab and do the following.
   a. Select the attributes you want to add to the screen.
   b. In the selected attributes list, specify if you want display the attribute or not.
   c. Also, you can change the order of the attributes. Select the attribute you want to move up or down the order and click the **Move up** or **Move down** button.
4. Click the **Save** button.

Configuring Screen Attributes for Users

These are department specific settings. They let you restrict or allow a particular user to view or edit a particular attribute of a business object. Using this tool, you can control the level of access a user has in the system.

You can create multiple user attribute settings for various users depending on the expected level of their functioning. For example; a normal user in the system will not have the level of access similar to his supervisor.

Agent, manager, supervisor, etc., can be user attribute settings with different access levels determined in the system. Whenever a new user is created in the system, the administrator can assign one of the pre-determined user attribute settings to the user to function accordingly.

7 New Activity Shortcuts

Preparing for Creating New Activity Shortcuts

If you plan to use custom attributes, activity types, and activity modes in the new activity shortcuts, do the following before creating the new activity shortcut:

- Create the custom activity types for which you want to create new activity shortcuts.
- Create the activity modes you want to use for the new activity shortcuts.
- Create the custom attributes you want to use in the new activity shortcut. You can use the custom attributes added to the business objects customer, contact point, and contact person.
- For the custom attributes you use in the new activity shortcut, make sure that you make them visible at the department level. You need to add the custom attributes to the following screens.
  - Contact point: Agent Console - Search - Contact Point - Relationships screen
  - Contact person: Agent Console - Search - Contact Person - Relationships screen
  - Customer: Agent Console - Search - Customer - Relationships screen

  If you do not add the custom attributes to the screens at the department level, then the agents of that department will not be able to use the new activity shortcut.

Creating New Activity Shortcuts

The partition administrator can create new activity shortcuts from the Tools Console. The new activity shortcuts are created at the partition level and are available to all the agents in all the departments.

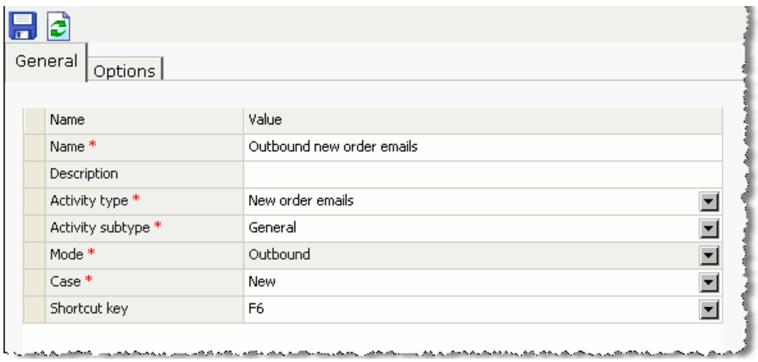
The predefined shortcuts are:

- Outbound email for current case
- Outbound email for new case
- Outbound email with no case

To create a new activity shortcut:

1. In the Tree pane, browse to **Tools >** *Partition name* **> Business Objects > New Activity Shortcuts.**
2. In the List pane toolbar, click the **New** button.
3. In the Properties pane, go to the General tab and provide the following details.
   - **Name**: Type a name of the new activity shortcut. Use a name that clearly indicates what the activity shortcut is for, so that the agents can identify them easily.
   - **Description**: Type a brief description.
   - **Activity type**: Select the activity type for which you want to create a shortcut.
   - **Activity subtype:** Select the activity subtype.
   - **Mode**: Select the activity mode. The options available are, inbound, outbound, and none. You can add custom modes to this list. For details see the chapter on "Custom Values" on page 20.
   - **Case**: Specify if you want to create a new case for the activity created using the new activity shortcut. The options available are:

    - **Current**: The case of the currently selected activity in the inbox is assigned to the new activity being created.
    - **New**: A new case is created for the activity.
    - **None**: No case is created to the activity.
  - **Shortcut key:** Select a shortcut key for the new activity shortcut. You can assign a FUNCTION KEY from `F2, F3, F4, F6, F7, F8, F9, F10, and F12.` Select **None** if you don't want to assign a shortcut key to the new activity shortcut. For the ease of the agents make sure that you don't change the shortcut keys too often because the agents will have to unlearn and learn the shortcut keys again and again. And, if you do need to change them any time, as a best practice you can notify them about the changes so that they are aware of them and are prepared for it.



Set the general properties

4. Next, go to the Options tab and configure the attributes the agent should be asked to provide for creating new activities. To accurately identify the customer on the phone, multiple search attributes can be provided.

> Important: **The Options tab is enabled only if in the General tab you select the case as new or none.**

  - Select the attribute that the agent should be asked to provide when this new activity shortcut is used. The following attributes of the business objects are available.
    - **Case**: Case ID
    - **Contact point:** Email address, phone number, complete address, URL
    - **Customer:** Customer name, level
    - **Contact person:** First name, middle name, last name

    You can also use the custom attributes added to the business objects contact point, contact person, and customer.

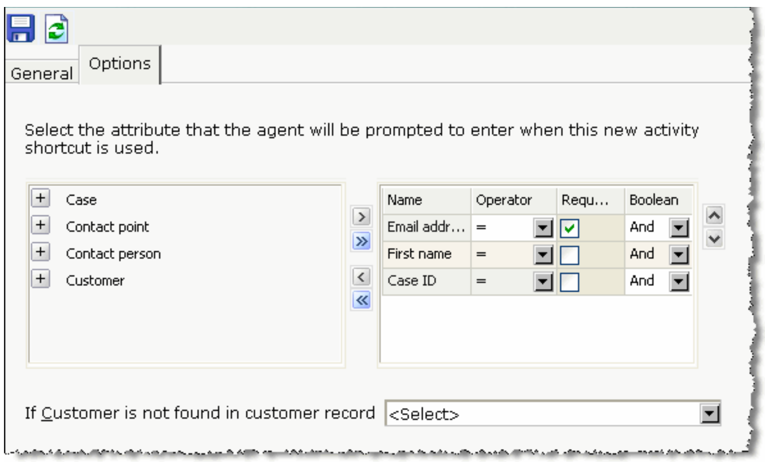
> Important: **If you are using any custom attributes in the new activity shortcut, make sure you add them to the screens at the department level.**

  - For the selected attributes specify the following.
    - **Operator**: The options available are, =, !=, >, <, begins with, contains, does not contain, and ends with. For case ID, only the operator EQUAL TO (=) can be used.
    - **Required**: At least one attribute should be marked as required.
    - **Boolean**: Select from the boolean AND and OR.

Important: **For best performance on searching these attributes they should be indexed in the database. Please contact your system administrator or database administrator for steps to index the specific attributes in the database.**

- **If customer is not found in customer record:** There are three options available:
  - **Create a customer and continue**
  - **Do not create a customer and continue**
  - **Show an error message**

Important: **This option is available only if you select the attribute, email address.**



Select the attributes for the new activity shortcut

5. Click the **Save** button.

Deleting New Activity Shortcuts

To delete a new activity shortcut:

1. In the Tree pane, browse to **Tools** > *Partition name* **> Business Objects > New Activity Shortcuts.**
2. In the List pane, select the new activity shortcut you want to delete.
3. In the List pane toolbar, click the **Delete** button.

Appendix: Reference Information

Custom Attributes

You can add custom attributes to the following business objects.

1. Activity data: The custom attributes added for activity data automatically becomes available for:
   - Activity search data
   - Generic activity data
2. Case data: The custom attributes added for case data automatically becomes available for:
   - Case search data
3. Contact person data: The custom attributes added for contact person data automatically becomes available for:
   - Contact person search data
4. Contact point data: The custom attributes added for contact point data automatically becomes available for:
   - Contact point search data
   - Email address contact point data
   - Phone number data
   - Postal address data
   - Web site data
5. Customer association data: The custom attributes added for customer association data automatically becomes available for:
   - Customer association search data
6. Customer data: The custom attributes automatically becomes available for:
   - Customer search data
   - Customer search data1
   - Change customer data
   - Cooperate customer data
   - Group customer data
   - Individual customer data
7. Customer group data
8. Customer organization data
9. KB article data: The custom attributes automatically becomes available for:
   - Article search data
   - Article summary for version and pending
10. Routing queue
11. User data: The custom attributes automatically becomes available for:
    - User search data

Customizable Screens

Activity Data

1. Administration Console - Workflows - Alarm - Activity Condition screen
2. Administration Console - Workflows - Alarm - Condition screen
3. Administration Console - Workflows - Modify Object - True or False screen
4. Agent Console - Information - Chat - Activity Body screen
5. Agent Console - Information - Email Activity Details screen
6. Agent Console - Information - Chat - Activity Details screen
7. Agent Console - Information - Case Details - Activity Details screen
8. Agent Console - Information - Case Details - Activity List screen
9. Agent Console - Case - Close Case - Article List screen
10. Agent Console - Information - Customer History - Activity Details screen
11. Agent Console - Information - Customer History - Activity List screen
12. Agent Console - Inbox - Main - Activity List screen
13. Agent Console - Inbox - Chat - Activity List screen
14. Agent Console - Inbox - My Monitor - Activity List screen
15. Agent Console - Inbox - Pull Selected screen
16. Agent Console - Reply Pane - Email screen
17. Agent Console - Activity - Transfer screen
18. Agent Console - Search - Activity - Results screen

Activity Search Data

1. Agent Console - Search - Activity - Relationships screen
2. Agent Console - Search - Activity - Advanced screen
3. Agent Console - Search - Activity - Basic screen

Generic Activity Data

1. Agent Console - Information - Task - Activity Body screen
2. Agent Console - Information - Phone - Activity Details screen
3. Agent Console - Information - Task - Activity Details screen
4. Agent Activity Body *Custom_Activity_Type_Name* General

5. Agent Activity Details *Custom_Activity_Type_Name* General
6. Agent Reply *Custom_Activity_Type_Name* General

KB Article Data

1. Agent Console - Knowledge Base - Article Property screen
2. Knowledge Base Console - Article - General screen
3. Agent Console - Search - Article - Results screen
4. Knowledge Base Console - Search - Article - Results screen

Article Search Data

1. Agent Console - Search - Article - Advanced screen
2. Agent Console - Search - Article - Basic screen
3. Knowledge Base Console - Search - Article - Advanced screen
4. Knowledge Base Console - Search - Article - Basic screen

Case Data

1. Administration Console - Workflows - Alarm - Case Condition screen
2. Administration Console - Workflows - Condition screen
3. Administration Console - Workflows - Modify Object - True or False screen
4. Agent Console - Information - Case Details screen
5. Agent Console - Information - Customer History - Case Details screen
6. Agent Console - Information - Customer History - Case List screen
7. Agent Console - Inbox - Case List screen
8. Agent Console - Search - Case - Results screen

Case Search Data

1. Agent Console - Search - Case - Relationships screen
2. Agent Console - Search - Case - Advanced screen
3. Agent Console - Search - Case - Basic screen

Contact Person Data

1. Administration Console - Workflows - Condition screen
2. Administration Console - Workflows - Modify Object - True or False screen
3. Agent Console - Customer - Contact Person Details screen
4. Agent Console - Customer - Contact Persons List screen
5. Agent Console - Inbox - Main - Activity List screen
6. Agent Console - Inbox - Chat - Activity List screen
7. Agent Console - Inbox - My Monitor - Activity List screen
8. Agent Console - Search - Contact Person - Results screen

Contact Person Search Data

1. Agent Console - Search - Contact Person - Advanced screen
2. Agent Console - Search - Contact Person - Basic screen
3. Agent Console - Search - Contact Person - Relationships screen
4. Agent Console - Search - Contact Point - Results screen

Contact Point Data

1. Agent Console - Customer - Contact Points Details screen
2. Agent Console - Search - Contact Point - Results screen

Contact Point Search Data

1. Agent Console - Search - Contact Point - Basic screen
2. Agent Console - Search - Contact Point - Relationships screen
3. Agent Console - Search - Contact Point - Advanced screen

Customer Data

1. Administration Console - Workflows - Condition screen
2. Administration Console - Workflows - Modify Object - True or False screen
3. Agent Console - Search - Customer - Results screen
4. Agent Console - Search - Contact Point - Results screen

Corporate Customer Data

- Agent Console - Customer - Corporate Customer Details screen

Group Customer Data

- Agent Console - Customer - Group Customer Details screen

Individual Customer Data

- Agent Console - Customer - Individual Customer Details screen

Customer Search Data

1. Agent Console - Search - Customer - Basic screen
2. Agent Console - Search - Customer - Relationships screen

Customer Group Data

1. Administration Console - Workflows - Condition screen
2. Administration Console - Workflows - Modify Object - True or False screen

Customer Organization Data

1. Administration Console - Workflows - Condition screen
2. Administration Console - Workflows - Modify Object - True or False screen

Routing Queue

1. Administration Console - Workflows - Condition screen
2. Administration Console - Workflows - Queues - General screen
3. Agent Console - Inbox - Main - Activity List screen
4. Agent Console - Inbox - Chat - Activity List screen
5. Agent Console - Inbox - My Monitor - Activity List screen
6. Agent Console - Activity - Transfer screen

User Data

1. Administration Console - Users - General - Custom screen
2. Administration Console - Workflows - Condition screen
3. Agent Console - Activity - Transfer screen
4. Agent Console - Inbox - My Monitor - Activity List screen

User Search Data

- Administration Console - Search - User - Basic screen

Editable Screens

1. Administration Console - Data Adapters - Usage Link Groups screen
2. Administration Console - Data Adapters - Usage Link screen
3. Administration Console - Workflows - Create Object - True or False screen

Custom Attributes Available in New Activity Shortcuts

- Contact point: Agent Console - Search - Contact Point - Relationships screen
- Contact person: Agent Console - Search - Contact Person - Relationships screen
- Customer: Agent Console - Search - Customer - Relationships screen

Predefined Attribute Values

Activity: Mode

1. Inbound
2. Outbound
3. None

Activity: Type

1. Chat
2. Email

3. Phone
4. Task

Activity: Status

1. Assigned
2. Assignment
3. Completed
4. New
5. Pre_completion
6. Preworkflow
7. Workflow

Case: Status

1. Closed
2. Open
3. Ready for closure

Chat: Status

1. Agent not connected
2. Customer exited chat
3. Waiting for customer to reply
4. Waiting for you to reply

Contact person: ID type

1. License
2. Passport
3. SSN

Currency: Type

1. Euro
2. UK Pound

3. USD
4. Yen

Customer: Contact person type

1. Billing
2. Legal
3. Shipping
4. Technical

Customer: Country

1. Afganistan
2. Albania
3. Algeria
4. Andorra
5. Angola
6. Anguilla
7. Antarctica
8. Antigua and Barbuda
9. APO
10. Argentina
11. Armenia
12. Aruba
13. Australia
14. Austria
15. Azerbaijan
16. Bahamas
17. Bahrain
18. Bangladesh
19. Barbados
20. Belarus
21. Belgium
22. Belize
23. Benin

24. Bermuda
25. Bhutan
26. Bolivia
27. Bosnia AHerzegovina
28. Botswana
29. Bouvet Island
30. Brazil
31. British Industry Ocean Territory
32. British Virgin Islands
33. Brunei
34. Bulgaria
35. Burkina Faso
36. Burundi
37. Combodia
38. Cameroon
39. Canada
40. Cape Verde
41. Cayman Islands
42. Central African Republic
43. Chad
44. Chile
45. China
46. Christmas Island
47. Colombia
48. Cocos Island
49. Comoros
50. Congo
51. Cooks Islands
52. Costa Rica
53. Cote Dlvoire
54. Croatia
55. Cuba
56. Cyprus
57. Czech Republic

58. Denmark
59. Djibouti
60. Dominica
61. Dominican Republic
62. East Timor
63. Ecuador
64. Egypt
65. El Salvador
66. Equatorial Guinea
67. Eritrea
68. Estonia
69. Ethiopia
70. Falkland Islands
71. Faroe Islands
72. Fiji
73. Finland
74. FPO
75. France
76. French Guiana
77. French Polynesia
78. French Sourthern Territories
79. Gabon
80. Gambia
81. Georgia
82. Germany
83. Ghana
84. Gibraltar
85. Greece
86. Greenland
87. Grenasa
88. Guadeloupe
89. Guam
90. Guatemala
91. Guinea

92. Guinea Bissau
93. Guyana
94. Haiti
95. Heard and McDonald Islands
96. Honduras
97. Hong Kong
98. Hungary
99. Iceland
100. India
101. Indonesia
102. Iran
103. Iraq
104. Ireland
105. Israel
106. Italy
107. Jamaica
108. Japan
109. Jordan
110. Kazakhastan
111. Kenya
112. Kiribati
113. Kitts and Nevis
114. Kuwait
115. Kyrgyzstan
116. Laos
117. Latvia
118. Lebanon
119. Lesotho
120. Liberia
121. Libya
122. Liechtenstein
123. Lithuania
124. Luxembourg
125. Macau

126. Macedonia
127. Madagascar
128. Malawi
129. Malaysia
130. Maldives
131. Mali
132. Malta
133. Marshall Islands
134. Martinique
135. Mauritania
136. Mauritius
137. Mayotte
138. Mexico
139. Micronesia
140. Moldova
141. Monaco
142. Mongolia
143. Montserrat
144. Morocco
145. Mozambique
146. Myannmar
147. Namibia
148. Nauru
149. Nepal
150. Netherlands
151. Netherlands Antilles
152. New Caledonia
153. New Zealand
154. Nicaragua
155. Niger
156. Nigeria
157. Niue
158. Morfolk Island
159. North Korea

160. Northern Mariana Islands
161. Norway
162. Oman
163. Pakistan
164. Palau
165. Panama
166. Papua New Guinea
167. Paraguay
168. Peru
169. Philippines
170. Pitcairn Island
171. Poland
172. Portugal
173. Puerto Rico
174. Quatar
175. Reunion
176. Romnia
177. Russia
178. Rwanda
179. Saint Helena
180. Saint Kitts and Nevis
181. Saint Pierre and Miquelon
182. Saint Vincent and the Grenadines
183. Saint Lucia
184. Samoa American
185. Samoa Western
186. San Marino
187. Sao Tome and Principe
188. Saudi Arabia
189. Senegal
190. Seychelles
191. Sierra Leone
192. Singapore
193. Slovakia

194. Slovenia
195. Solomon Islands
196. Somalia
197. South Africa
198. South Geargia
199. South Korea
200. Spain
201. Sri Lanka
202. Sudan
203. Suriname
204. Svalbard and Jan Mayen Islands
205. Swaziland
206. Sweden
207. Switzerland
208. Syria
209. Taiwan
210. Tazikistan
211. Tanzania
212. Thailand
213. Togo
214. Tokelau
215. Tonga
216. Trinidad and Tobago
217. Tunisia
218. Turkey
219. Turkmenistan
220. Turks and Caicos Islands
221. Tuvalu
222. Uganda
223. United Kingdom
224. Ukraine
225. United Arab Emirates
226. United States Minor Outlying Islands
227. Uruguay

228. United States
229. Uzbekistan
230. Vanuatu
231. Vatican City
232. Venezuela
233. Vietnam
234. Virgin Islands
235. Walls and Futuna
236. Western Sahara
237. Yemen
238. Yugoslavia
239. Zambia
240. Zimbabwe

Customer: Group Type

1. Association
2. Club
3. Household
4. Joint account
5. Membership
6. Other

Customer: Industry

1. Finance
2. Health care
3. Telecom

Customer: Level

1. Gold
2. Platinum
3. Premium
4. Silver

5. Standard

Customer: Organization Type

1. Non-profit
2. Other
3. Partnership
4. Private
5. Public
6. Sole-proprietor

Customer: Region

1. Asia Pacific
2. Europe
3. United States

Customer: Webtype

1. AOL
2. MSN
3. URL
4. Yahoo

Product: Type

1. Credit Cards
2. Finance
3. Physical
4. Software
5. Wireless

User: Type

1. Anonymous user
2. Authenticated agent

3. Authenticated customer
4. Identified agent
5. Identified customer