

## **Cisco E-Mail Manager Agent Guide**

**Cisco E-Mail Manager Release 5.0(0)**

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# Table of Contents

<b>Introduction .....</b>	<b>10</b>
Audience .....	10
Cisco E-Mail Manager Documentation .....	10
Getting Started with Cisco E-Mail Manager.....	12
Getting Help .....	14
<b>Retrieving Messages .....</b>	<b>16</b>
About Pulling Messages from the Status Screen.....	16
How to Pull Messages from the Status Screen .....	18
About Picking Messages from a Queue .....	18
How to Pick Messages from a Queue .....	20
About Outgoing Queues and Queue Choosers.....	23
About Push Mode.....	24
About Message Searches .....	25
How to Search for Messages .....	26
About MailTrack .....	31
Menu Commands.....	35
<b>Message Fields in the Queue .....</b>	<b>38</b>
Queue Image Map .....	38
Select .....	39
Open .....	39
Claim .....	39
View .....	39
From.....	40

Status .....	40
Subject .....	40
Date .....	40
Retry Count .....	41
History .....	41
Owner .....	41
<b>Changing your Working Modes .....</b>	<b>44</b>
About Modes .....	44
Entering and Exiting Push Mode .....	45
Waiting for New Mail .....	45
<b>Working with Messages in the Queue .....</b>	<b>48</b>
Working with Messages .....	48
How to Work with Messages .....	49
Menu Commands in the Queue .....	51
<b>Working with Additional Message Information .....</b>	<b>54</b>
About Notes .....	54
Adding Notes to a Message .....	56
About the Sender History .....	57
Viewing the Sender History .....	57
About Tracking Numbers .....	58
Viewing the Tracking Number History .....	60
<b>Reading Messages .....</b>	<b>64</b>
What is a Message Screen? .....	64
Message Screen Options .....	65
Menu Commands .....	66

<b>Working With Internally Generated Messages .....</b>	<b>68</b>
About System Messages.....	68
How to Work with System Messages .....	69
About Mail Errors.....	70
How to Work with Mail Errors .....	71
<b>Responding to Messages .....</b>	<b>74</b>
About the Response Screen .....	74
Opening the Response screen .....	75
About the Response Screen Options.....	76
How to Use the Response Screen Options.....	81
Sending a Response.....	84
The Wrapup screen.....	85
<b>Creating Messages .....</b>	<b>88</b>
Creating Outgoing Messages .....	88
Creating Internal Messages.....	89
<b>Real Time Reports .....</b>	<b>92</b>
About Agent States.....	92
Viewing Agent States .....	94
About Queue Status.....	95
Viewing Queue Status .....	96
About Team Reports .....	97
Viewing Team Reports .....	97
About Logged In Agents .....	98
Viewing or Logging Out Agents.....	98
Accessing Web View Reporting .....	99

<b>Working with Templates .....</b>	<b>102</b>
About Templates .....	102
Locating a Template .....	104
Creating Templates.....	105
Modifying and Deleting Templates .....	107
About Dynamic Templates .....	108
<b>Customizing Your Environment .....</b>	<b>112</b>
Configuring the Response Screen .....	112
Changing Your Login Password.....	113
<b>Additional Message Tasks .....</b>	<b>116</b>
Printing a Message .....	116
Reassigning and Escalating a Message .....	117
Adding the Sender to a Mailing List.....	118
<b>Working With Your Personal Settings .....</b>	<b>122</b>
About Your Personal Profile.....	122
Customizing Your Personal Profile.....	127
Personal Mailing Lists .....	131
<b>Menus and Icons .....</b>	<b>136</b>
View Menu Options .....	136
Select Menu Options .....	138
Manage Menu Options.....	138
Special Menu Options.....	140
Search Menu Options .....	140
Preview Menu Options.....	140
Actions Menu Options.....	141

Help Icon Options .....	141
Status Icons and Message Priorities .....	141
Searching for Messages with a Specific Status Type .....	143
<b>Logging Off and Going on Break .....</b>	<b>146</b>
Logout Icon Options.....	146
The Not Ready State .....	146
Entering a Not Ready State.....	147
The Working State.....	147
Entering the Working State.....	147
<b>About Agent Workflow Options .....</b>	<b>150</b>
Pick Mode .....	150
Pull Mode .....	151
Push Mode.....	151
The Message Screen .....	152
The Wrap Screen.....	155
The Message and Wrap Screens Together.....	157
<b>Glossary .....</b>	<b>161</b>
<b>Index .....</b>	<b>166</b>





## **About this Guide**

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## Introduction

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Welcome to the *Cisco E-Mail Manager Agent Guide*. This introduction contains the following sections:

- Audience
- Cisco E-Mail Manager Documentation
- Getting Started with Cisco E-Mail Manager
- Getting Help

### Audience

This guide is written for agents who read and respond to email messages. Tasks described are those that an agent based on the \_\_averageuser role can perform. Since Cisco E-Mail Manager is highly configurable:

- Agents, depending on their role flag settings, may not be able to access every screen described in this guide.
- Not all features within a screen may be available to the agent.

### Cisco E-Mail Manager Documentation

The following documentation is available for E-Mail Manager Release 5.0(0):

Document	Audience	Description	Where to Find
<i>Cisco E-Mail Manager Overview Guide</i>	All E-Mail Manager users.	An overview of E-Mail Manager functionality, capability, and architecture.	Cisco E-Mail Manager CD Help menu in the Administration Desktop  Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>
<i>Cisco E-Mail Manager Administration Guide</i>	Administrators and managers working with the Administration Desktop.	Conceptual information about typical administrative and managerial	Cisco E-Mail Manager CD Help menu in the Administration Desktop

		tasks done through the Administration Desktop.	Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>
<i>Cisco E-Mail Manager Agent Guide</i>	Managers who set up agents and determine how they will respond to e-mail messages, as well as those agents.	Conceptual information about typical agent tasks done through the Agent Desktop.	Cisco E-Mail Manager CD  Help icon in the Agent Desktop  Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>
Cisco E-Mail Manager Installation and Configuration Guide	Those who install and configure E-Mail Manager on the server.	Instructions and requirements for installing and configuring E-Mail Manager on the server.	Cisco E-Mail Manager CD  Help menu in the Administration Desktop  Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>
Cisco E-Mail Manager Database Guide	Those who maintain the database used by E-Mail Manager, and those who generate reports.	Descriptions of all database tables and columns	Cisco E-Mail Manager CD  Help menu in the Administration Desktop  Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>
Cisco E-Mail Manager Implementation and Customization Guide	Those who are implementing and customizing E-Mail Manager to fit particular business needs of the customer.	Guidelines on implementing E-Mail Manager to meet your business needs, instructions on customizing the look of the Web interface, and information about extending the capabilities of rules and templates.	Cisco E-Mail Manager CD  Help menu in the Administration Desktop  Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>

Cisco E-Mail Manager Application Programming Interface Guide	Programmers and developers creating external application to E-Mail Manager that work with agents and messages.	Reference information, instructions, and examples on building applications that communicate with the E-Mail Manager API Server.	Cisco E-Mail Manager CD Help menu in the Administration Desktop Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>
Cisco E-Mail Manager External Data Access Guide	Programmers and developers customizing E-Mail Manager to work with data from an external database.	Information on the External Data Access toolkit, which demonstrates how data from external databases can be used within E-Mail Manager.	Cisco E-Mail Manager CD  Help menu in the Administration Desktop  Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>
Release Notes	Those who are administering and managing E-Mail Manager.	Information about the current release, known problems, and documentation updates.	Cisco E-Mail Manager CD  Cisco Web site: <a href="http://www.cisco.com">www.cisco.com</a>

In addition, for all screens in the Agent Desktop and the Administration Desktop, there is online help.

If you are integrating E-Mail Manager with ICM Software, you should also consult the Cisco ICM Software documentation set.

## **Getting Started with Cisco E-Mail Manager**

This section contains the following information:

- Browser Versions
- Browser Settings
- Desktop Colors

- Logging In to the Agent Desktop
- Logging In to the Administration Desktop

For more information about getting started with E-Mail Manager, or if you cannot successfully log in, see your system administrator.

## **Browser Versions**

To use the E-Mail Manager Web interface, you must be using Internet Explorer 5.5 or Internet Explorer 6.0.

## **Browser Settings**

Before using E-Mail Manager, ensure that your browser is set up to:

- Always accept cookies.
- Compare the document in cache to the document on the network once per session.
- Enable JavaScript
- Enable Style Sheets

**Caution:** Internet Explorer must use the Microsoft Virtual Machine for Java Applets. Ensure that the Sun Virtual Machine is not selected in the Advanced Tab of the Internet Options dialog box. (This option may or may not be available, depending on whether the Sun's Virtual Machine was installed and the options selected.)

For specific instructions, see the documentation for your browser.

## **Desktop Colors**

Your desktop computer must be set to display at least 256 colors in order for you to use E-Mail Manager successfully.

## **Logging In to the Agent Desktop**

To log into the Agent Desktop, you can point your browser to server in one of the following ways:

- a. `http://<hostName>/<instanceName>`
- b. `http://<hostName>/<instanceName>/default/CEM/index.html`
- c. `http://<hostname>/<instanceName>/uicommander?req=CEM.userMaintenance.CEMLoginStart`

**Note:** The instance name part of the URL is case-sensitive and must be entered exactly as the instance was named on the E-Mail Manager server.

You may want to include your user ID in the bookmarked URL, to automatically populate the Login Name field when the Log In page opens. To do this, you must use the URL in option b above, and include the user ID as follows:

`http://<hostName>/<instanceName>/default/CEM/index.html?user=userID`

**Caution:** Do not attempt to run multiple browser sessions on the same desktop with different user IDs or connected to different servers. Unexpected errors may result.

## Logging In to the Administration Desktop

To log into the Administration Desktop, point your browser to the name of the server, followed by the port number, as follows:

`http://server-name:port-number`

The default port number for the Administration Desktop is 8088. If your installation has multiple instances, other instances will have different port numbers.

In the Log In screen, enter your Login Name and Password.

If there is another active session with your Login Name, you are prompted to close that session and log in again.

**Caution:** Do not attempt to run multiple browser sessions on the same desktop with different user IDs or connected to different servers. Unexpected errors may result.

## Getting Help

For issues with Cisco E-Mail Manager, your system manager can open a case through the Technical Assistance Center on the Cisco Web site: [www.cisco.com](http://www.cisco.com). You will need your Contract ID to open a case.

If you have questions, please call us at 800-553-2447, option #3, or send email to [tac@cisco.com](mailto:tac@cisco.com). From outside of the United States, call 1-408-526-7209.

## **Retrieving Messages**

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## Retrieving Messages

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This topic describes the various methods you may employ to retrieve messages in Cisco E-Mail Manager. You can access messages from several different screens in the user interface.

This topic contains the following sections:

- About Pulling Messages from the Status Screen
- How to Pull Messages from the Status Screen
- About Picking Messages from a Queue
- How to Pick Messages from a Queue
- About Outgoing Queues and Queue Choosers
- About Push Mode
- About Message Searches
- How to Search for Messages
- About MailTrack
- Menu Commands

**Note:** There are a wide variety of settings for E-Mail Manager. Consequently, your screens may not exactly match the screen captures pictured here.

### About Pulling Messages from the Status Screen

The Status screen shows the status of your personal queues, skill group queues and messages. This section contains the following concepts:

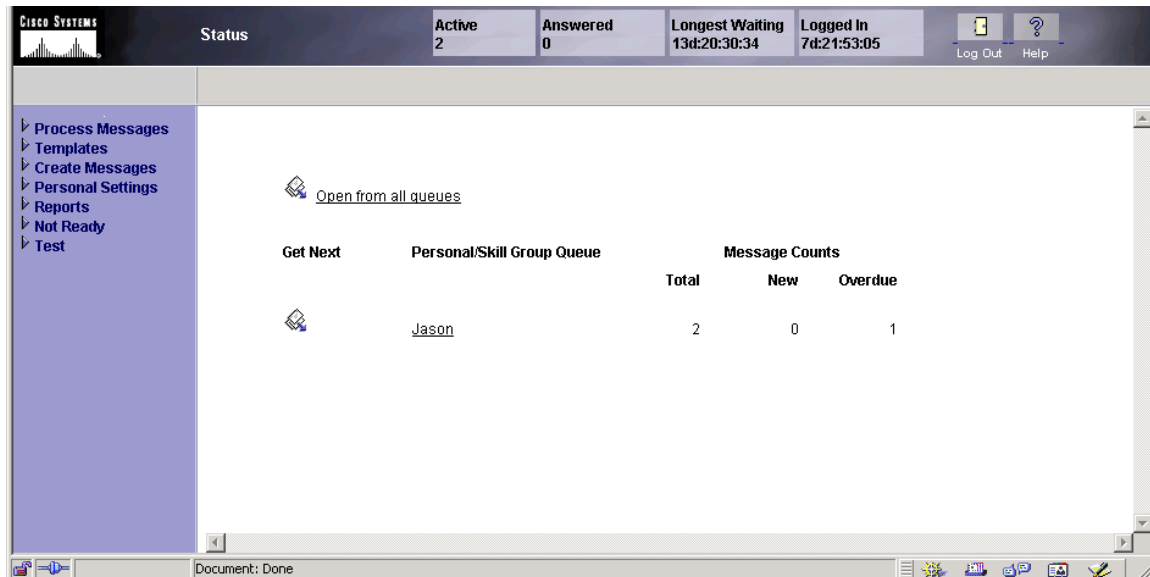
- Status Screen Information
- The Workflow in the Status Screen

#### Status Screen Information

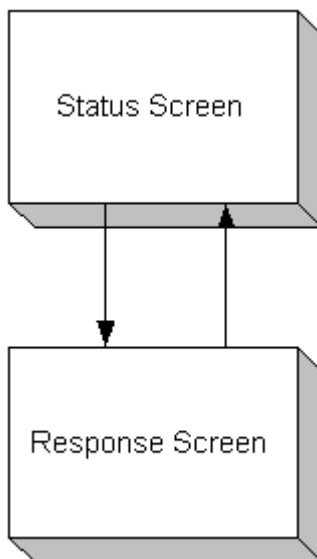
The Status Screen lists:



- The total number of messages in each queue you belong to
- The number of new messages in each queue
- The number of overdue messages in each queue



### The Workflow in the Status Screen



## How to Pull Messages from the Status Screen



- Opening the Status Screen
- Opening the Response Screen from the Status Screen
- Opening Your Personal Queue from the Status Screen
- Opening a Skill Group Queue from the Status Screen

### Opening the Status Screen

You may have the Status screen set as your default screen in your Personal Profile, which means the Status screen is the first screen you see after you log on. If not, you can access the Status screen by clicking **Process Messages > Status** on the navigation menu.

### Opening the Response Screen from the Status Screen

You have two options for opening messages in the Response screen from the Status screen:

- Click  next to a queue name to open the Response screen for a message in that queue. E-Mail Manager opens the oldest message with the highest priority first.
- Click  Open from all queues to open the Response screen for messages from any of your queues. E-Mail Manager opens the oldest message with the highest priority first.

### Opening Your Personal Queue from the Status Screen

Click your Agent username to open your Personal Queue.

### To Open a Skill Group Queue from the Status Screen

Click a skill group queue name to open a Skill Group Queue.

## About Picking Messages from a Queue

- What is a Queue?
- Queue Workflow

## **What is a Queue?**

A queue is where messages are stored. Each agent has a personal queue, but can also belong to skill group queues. You can also view system queues. This section describes every type of queue.

### ***Personal Queue***

Your personal queue contains messages specifically assigned to you that you haven't archived yet. The oldest messages with the highest priority are the first listed. Depending on how your personal profile is configured, your personal queue may or may not be your default screen. If you begin at the Status screen, you need to click your username to open your personal queue. You can also access the personal queue from the navigation menu by selecting **Process Messages > Personal Queue**.

### ***Skill Group Queue***

Created by an administrator, a skill group queue is a queue that a skill group of selected agents have access to. These selected agents can choose messages in the queue to read and respond to. Once you choose a message from a skill group queue, however, you claim it. If you open a message from a skill group queue and do not archive it, it moves to your personal queue. You can belong to more than one skill group.

### ***System Queues***

There are four types of system queues:

- Unassigned Queue
- rejected Queue
- admins Queue
- external Routing Error Queue

#### **Unassigned Queue**

The Unassigned queue contains messages that have not been assigned to any agent or skill group. You can open the Unassigned queue and claim messages to work on. The Unassigned queue has the same options as a regular queue. Once you claim a message, it belongs to you. If you close it without archiving it, the message goes to your personal queue, not the Unassigned queue.

#### **rejected Queue**

The rejected queue contains messages that have been rejected by E-Mail Manager agents or administrators. The rejected queue has the same options as a regular

queue. From the rejected queue, you can open and work on messages. If you open a rejected message, you own it; it no longer resides in the rejected queue.

#### **admins Queue**

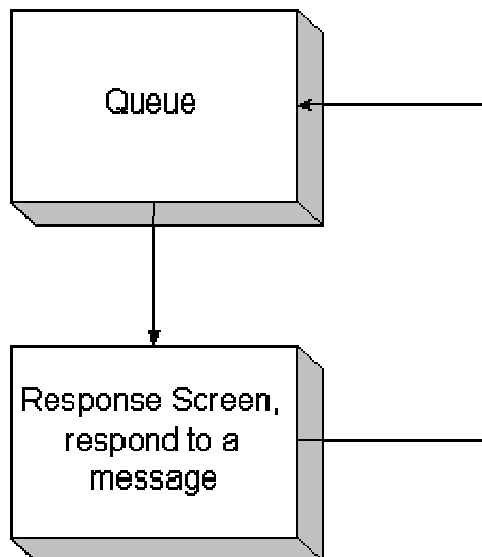
Depending on your associated role, you can view messages sent to an administrator through the contact admin function. The admin queue contains the same options as a regular queue. The only difference is that the messages you view were created by E-Mail Manager agents and sent to administrators; they are not messages from outside customers. You can view, claim and respond to these messages.

#### **external Routing Error Queue**

The external Routing Error queue only exists when Cisco E-Mail Manager is integrated with ICM. If there is an error when a message is being routed by the ICM, Cisco E-Mail Manager puts it into the external Routing Error queue. You can claim messages from this queue and work on them.

### **Queue Workflow**

This diagram shows the typical work flow of a "\_pick" agent once they access a queue:



### **How to Pick Messages from a Queue**

This section shows you how to open a queue and retrieve messages from it.


- Opening a Queue
- Opening Messages in Your Personal Queue

- Opening Messages from a Skill Group Queue
- Opening the Unassigned Queue
- Opening the rejected Queue
- Opening the admins Queue
- Opening the external Routing Error Queue

**Note:** The maximum number of route-requests allowed from CEM to ICM is 5000. When you exceed this limit, no more route-requests will be sent to ICM from CEM until the number of outstanding requests has fallen below the maximum number.

### Opening a Queue

To Access a Queue:


- Click the  icon in the Status screen
- Click **Process Messages > Personal** (for your Personal Queue)
- Click **Process Messages > Skill Group Queues** (for your Skill Group Queues)
- Click Process Messages > System Queues (for the Unassigned, rejected, admins or external Routing Error Queue)

From a queue, you can:

- Open a message in the Response screen
- View a Message
- View the Message History
- View the Message Fields
- Use the Menu Commands

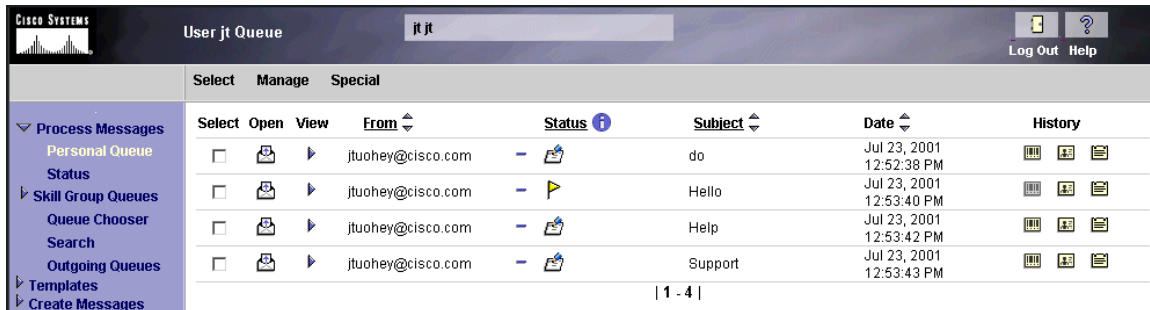
**Note:** CEM recognizes e-mail sent in any format other than plain text as an attachment. For example: When a mail is sent in a 'Rich Text' format, it comes as an attachment.

## Opening Messages in your Personal Queue

To open a message in the personal queue, click  to open the Response screen for that message.

**Note:** Depending on the message state and your role flags, you may open the message in the Message screen.

See the image below for definitions of the queue options.

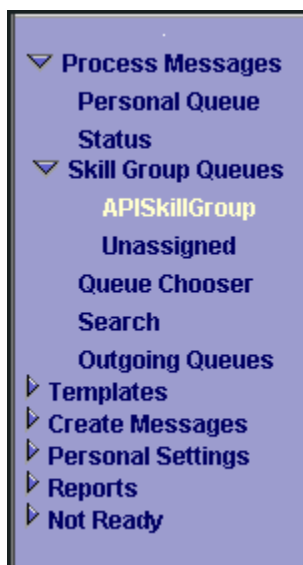



User jt Queue								
<div> <div>Cisco Systems</div> <div>jt jt</div> <div>Log Out Help</div> </div>								
	Select	Open	View	From	Status	Subject	Date	History
Process Messages								
Personal Queue								
Status								
Skill Group Queues								
Queue Chooser								
Search								
Outgoing Queues								
Templates								
Create Messages								
	<input type="checkbox"/>			jtuohey@cisco.com	-	do	Jul 23, 2001 12:52:38 PM	
	<input type="checkbox"/>			jtuohey@cisco.com	-	Hello	Jul 23, 2001 12:53:40 PM	
	<input type="checkbox"/>			jtuohey@cisco.com	-	Help	Jul 23, 2001 12:53:42 PM	
	<input type="checkbox"/>			jtuohey@cisco.com	-	Support	Jul 23, 2001 12:53:43 PM	
1 - 4								

## Opening Messages from a Skill Group Queue

To view a skill group queue, either:

- Click on the queue name in the Status screen.
- Select the skill group name from **Process Messages > Skill Group Queues**.



To open a message in the skill group queue, click  to claim the message.

### Opening the Unassigned Queue

You open the Unassigned queue from **Process Messages > System Queues > Unassigned**.

### Opening the rejected Queue

To open the rejected queue, select **Process Messages > System Queues > rejected**.

### Opening the admins Queue

You open the admins queue by clicking **Process Messages > System Queues > admins**.

### Opening the external Routing Error Queue

The external Routing Error queue only exists in an integrated instance of Cisco E-Mail Manager. You open the external Routing Error queue by clicking **Process Messages > System Queues > External Error**.

## About Outgoing Queues and Queue Choosers

This topic covers the following sections:

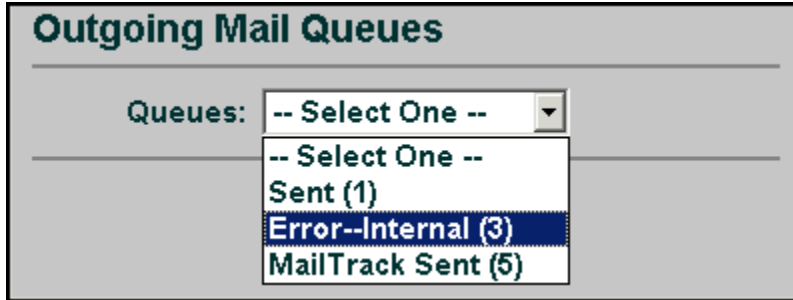
- Outgoing Queues
- Queue Choosers

### Outgoing Queues

The outgoing queues contain the same options as your personal queue, only the menu options differ. Messages in outgoing queues have been created and sent by agents. You access an outgoing queues dialog, and select from:

- **Sent Mail**- Mail that has already been sent by agents.
- **Error-Internal Mail**- Mail that entered your queues through an internal address. See the About Mail Errors section for more information about Error queues.

- **Error-Archived Mail**- Mail that could not be sent and was then archived. See the About Mail Errors section for more information about Error queues.
- **MailTrack Sent Mail**- The MailTrack feature forwards a copy of the incoming mail to an agent on an external account. In order to do this, it has to send a piece of mail out. This mail appears in this count. Notifications, forwards and MailTrack errors may also be listed in this queue.
- Any additional Mail Queues.



### Queue Chooser

The queue chooser lets you open any agent or skill group queue. Thus, you can view the messages in any queue. Although you can view every queue, you can only open the Response screen for messages in your personal queue or skill group queues. For queues you don't belong to, you can only view messages in the Message screen.

**Note:** Your associated role determines which queues you can access.

### About Push Mode

Administrators can designate agents for push mode. E-Mail Manager pushes messages to agents in push mode when messages enter the system. Thus, you do not have to go to a queue and select a message, E-Mail Manager instead opens the message on your screen. If you are a push agent, you enter push mode after login by selecting **Process Messages > Ready for Push**. See Changing Your Working Modes for more information on push mode.

**Note:** You still need to go to your personal queue to access messages that you previously opened and postponed working on.



## About Message Searches

The Message Search results screen opens after you run a search for messages.

- Viewing the Search Results Screen
- Viewing Messages

### Viewing the Search Results Screen

After you run a search from the Search Messages screen, the Search Results screen opens. The Search Results screen displays all the messages in E-Mail Manager that matched your search criteria. This screen resembles a queue. From the Search Results screen, you can open, view and, in some cases, respond to messages. See the Agent Help for more information on message options.

**Note:** If you run a search and do not have the associated role to view the messages identified, you receive a blank page with a message indicating that your search could not retrieve the messages matching that criteria. Talk to your administrator to change your associated role and view the messages.

Search Results <span>jt jt</span> <span>Log Out Help</span>							
Select	Manage	Special					
Select	Open	View	From	Status	Subject	Date	Owner
<input type="checkbox"/>			Alias	-	DT20010723_0000000001 do	Jul 24, 2001 11:08:42 AM	jt
<input type="checkbox"/>			mhoeber@cisco.com	-	Docserver up with Drop 5	Jul 20, 2001 4:34:33 PM	Mark
<input type="checkbox"/>			Alias	-	DT20010723_0000000005 Support	Jul 24, 2001 11:14:27 AM	jt
<input type="checkbox"/>			jtuohy@cisco.com	-	Hello	Jul 23, 2001 12:53:40 PM	jt
<input type="checkbox"/>			Alias	-	DT20010720_0000000102 Docserver up with Drop 5	Jul 20, 2001 4:39:55 PM	Mark

### Viewing messages

There are two options for viewing messages from the Search Results screen:

- The View option
- The Open option

## How to Search for Messages

The Search Messages screen lets you define search criteria and search E-Mail Manager for messages that fit that criteria. This section covers the following concepts:

- Opening the Search Messages Screen
- Creating Searches
- Running Searches
- Using Search Fields
- Saving a Search
- Using Saved Searches

### Opening the Search Messages Screen

The search tool allows you to search for messages according to specific information, such as date and content. To access the Search Messages screen, click **Process Messages > Search**.

### Creating Searches

To create a search, fill out the search criteria to fit your needs.

**Note:** You do not need to fill in every field in the Search Message screen to run a search.

### Running Searches

Fill out the search fields in the Search Message screen to customize your search. This allows E-Mail Manager to quickly identify the messages you are looking for.

After you fill out the search fields, select  Search to run the search. E-Mail Manager runs a search for all the messages that fit your search criteria and the Search Results screen opens.

Once you have run a search, the Search Results screen appears.

### Using Search Fields

The Search Messages screen has numerous search criteria. The search criteria is listed below, with links to detailed explanations.

- Type
- Original Owner
- Category
- Field
- Exact Search Fields
- Date
- Tracking Number

### Type

This option retrieves messages according to their state. In the example above, the search is looking for "Incoming Unread" messages.

<b><u>Type Option</u></b>	<b><u>Definition</u></b>
Incoming Archived Unreplied	Incoming mail that hasn't been responded to, but is archived.
Incoming Archived Replied	Incoming mail that has been responded to and is archived.
Incoming New	Incoming mail that hasn't been read by an agent yet.
Incoming Read Replied	Incoming mail that has been read and replied to.
Incoming Read Unreplied	Incoming mail that has been read but not replied to.
Incoming Overdue	Incoming mail that is overdue for a response.
Incoming Warning	Retrieves messages that have passed the escalation warning threshold, but have not passed the overdue escalation point.
Outgoing Sent	A response that has been sent by an agent.
Outgoing Waiting	A composed response that has yet to be sent.

Outgoing Error- Over Retry Count	A message that was not sent because of an SMTP gateway failure.
Outgoing Error-Internal	A message that was not sent because of an internal error, such as an invalid e-mail address.
Internal Unread	A message sent to an administrator that hasn't been read.
Internal Read Replied	A message sent to an administrator that has been read and replied to.
Internal Read Unreplied	A message sent to an administrator that has been read but not replied to.
Internal Archived Unreplied	A message sent to an administrator that has been archived but not replied to.
Internal Archived Replied	A message sent to an administrator that has been archived and replied to.

**Note:** Selecting **Incoming Unread** from the search screen only produces "new" messages, not those in a **warning** or **overdue** state. Currently, you cannot find unopened messages if their state is **overdue** or **warning**. These states cancel the **unopened** state. If you wish to search for all **unreplied** messages, however, you can select the **new**, **overdue**, **read unreplied** and **warning** options.

<u>Search Field Option</u>	<u>Definition</u>
By Owner	This option retrieves messages by the agent who owns them.
By Original Owner	This option retrieves messages by the agent who originally owned them.
Category	Categories are words and phrases that a user or system rule associates with a message.

Field	<p>This option allows you to retrieve messages according to the messages':</p> <ul style="list-style-type: none"><li>• If any of these fields</li><li>• Subject</li><li>• Sender</li><li>• Recipient</li><li>• If all of these fields</li></ul> <p>You can further specify these fields by typing word(s) to search for in messages in the blank fields. Then, you narrow the search with the second drop-down list to identify messages with:</p> <ul style="list-style-type: none"><li>• Any of the words you just typed</li><li>• All of the words you just typed</li><li>• None of the words you just typed</li><li>• Match exact phrases</li></ul> <p><b>Note:</b> The <b>By Field</b> option is case-insensitive.</p> <p><b>Note:</b> If you enter a search phrase that has spaces, you need to put the phrase in quotes (" ") in order for the search to work. For instance, if you wanted to search the subject for: <b>Summary Test Results</b>, you would need to type "Summary Test Results."</p>
Exact Search Fields	<p>You'll notice that the three search fields in the <b>By Field</b> option have <b>And</b> following them. This means if you enter information into more than one search field, the search only finds messages that meet all the criteria listed.</p>

Date	<p>You enter a date and time to search for. You can search for messages from:</p> <ul style="list-style-type: none"><li>• Within a period of time</li><li>• Not within a period of time</li></ul> <p>You can also click the <b>Set to Today</b> option to set the date to today's date.</p>
Tracking Number	<p>Enter a tracking number to find the messages associated with that number.</p>

**Note:** The date/time format in the older versions of CEM was abbreviated, as in: Thu, 12 May 2005 12:30 EST.

In Cisco E-Mail Manager 5.0 and higher versions the date/time format is changed to a numeric value offset, as in: Thu, 12 May 2005 12:30:32 -0300.

### **Saving a Search**

You can save any search you create, to reuse at a later date.

To save a search, select the **Save Search** option from the **Special** menu.

You access the Search Results by running a search from the Message Search screen.

**(OPEN SAVED SEARCHES)**

By Type	By Owner	By Original Owner	By Category
--Ignore--	--Ignore--	--Ignore--	--Ignore--
Incoming Archived Unreplied	Self	Self	api
Incoming Archived Replied	apis_sub302	apis_sub302	
<b>Incoming New</b>	atrasi	atrasi	
Incoming Read Replied	dhiren_test	dhiren_test	

**By Field**

**Exact Search Fields**

If Subject	has any of these words:	"bulk mail"	And
If Sender	has any of these words:	gfranco@hotmail.com	And
If Recipients	has any of these words:		And

By **Date** --Ignore--

**SET TO TODAY**

By Tracking Number ☐ exact match

Mid	Jan	1	2000
Mid	Jan	1	2001

**Using Saved Searches**

Agents can save a search, so that they can use the same search criteria in the future. Thus, you can use these previously created searches instead of entering new information into the search fields.

To access a saved search, click the **(OPEN SAVED SEARCHES)** icon and choose one of the searches listed. You save a search from the Search Results screen, which pops up after you perform the search.

**Note:** Searches are saved on a per-user basis. Searches that you save are not accessible by other users, and you cannot use searches saved by other users.

**About MailTrack**

This section describes the following MailTrack concepts:

- What is MailTrack?
- Headings
- MailTrack Workflow

## What is MailTrack?

MailTrack is the forwarding of a message, as well as the tracking number, suggested response, templates, comments, and any other system information associated with the message.

**Note:** The tracking number is included in the subject, heading and body lines.

MailTrack messages get forwarded through Cisco E-Mail Manager to the agent's or skill group's default notification email address.

An agent responds to a MailTrack message from the default notification address, using a standard e-mail program. The response is sent through Cisco E-Mail Manager. This ensures that the message gets properly tracked and that the customer cannot directly respond to the default notification e-mail address.

MailTrack creates a new piece of mail which includes special headers, the original mail, notes and suggested templates so that mail can be handled by a mail client.

To use mailtrack:

- Enable MailTrack
- Add Comments
- Add Suggested Templates (**Note:** Any template attachments are NOT be available)
- Add Signatures
- Add Priority
- Attach Original Message

Cisco E-Mail Manager qualifies the following clients:

- Outlook Express
- Outlook 2000
- Netscape Messenger
- Eudora 4.3

## Headings

Featured below is a picture of the MailTrack headings.



```

MTH> This is a MailTrack 5.0 message.
MTH> You must not alter the coded header block below
MTH> All lines or quoted lines starting with "MTH>" must remain.
MTH> All lines or quoted lines starting with "MT>" must be removed.
MTH>
MTH> Failure to do so will result in an error.
MTH>
MTH> ---MAILTRACK BLOCK BEGIN---
MTH> Q1lQS1NNZXNzYWdlSUQ6IDAxMDg3ZTdlNmEzZTEwZDRhM2QxMDA5MDI3YjEw
MTH> N2IyDQpDWVBLU1NvdXJjZTogRG9jU2VydmVyDQpDWUZYb2O6IE1hcmsgSG9l
MTH> YmVYIDxtaG9lYmVYQGNpc2NvLmNvbT4NCkNZVG86IEphc29uIFR1b2hleSA8
MTH> anR1b2hleUBjaXNjb55jb2O+LCBZYWhvbyA8bWFya19ob2ViZXJaeWFob28u
MTH> Y29tPgOKQ1lEYXR1OiBGcmksIDA0IEF1ZyAyMDAwIDE1OjM1OjM5IC0wNDAw
MTH> DQpDWVNiYmplY3Q6ICBtYWlsdHJhY2sgc2hvdWxkIGJlIHdvcmtpbmcNCKNZ
MTH> T3duZXI6IGpOdW9oZXkNCgOKUGx1YXNlIGluY2x1ZGUgdGhlIGZvbGxvd2lu
MTH> ZyBsaW5lIGluIGFsbCB5ZXBSaWVzLgOKVHJhY2tpbmccglnVtYmVYOiBEVDIw
MTH> MDAwODAwXzAwMDAwMDAwMTIgDQoNCgOKQ1lEaWdlc3Q6IDBjMjE4NDQwZGI5
MTH> NGU4MmFlOTFjZTczNDYxNjEwOTA1DQo=
MTH> ---MAILTRACK BLOCK END----
MTH> End of the MailTrack 5.0 headers.

```

Depending on how your agent profile is configured, this section of the MailTrack could include:

- A space for your response
- The message text
- Any notes associated with the message
- Suggested responses you can use
- The tracking number (in subject lines)
- All your customized signatures

```
MT> Prepare your response here:

Mark McMahon <mmch@yahoo.com> wrote:
> My browser won't load certain applications.
>

MT> This Message's Priority was Urgent

MT> Notes: (1)
MT> Note #1, author: system
MT> This is a sample note

MT> Suggested Responses: (1)

MT> Suggested response:1, Sample Template
Restart your computer and try again.

MT> End of suggested responses.

Please include the following line in all replies.
Tracking number: DT20000004_000000012

MT> Choose one of these signatures:

MT> Signature # 1
--
Sincerely,
Gerrard Thock

MT> Signature # 2
--
Gerrard Thock

MT> Signature # 3
--
Yours Truly,
Gerrard

MT> End of the MailTrack Message
```

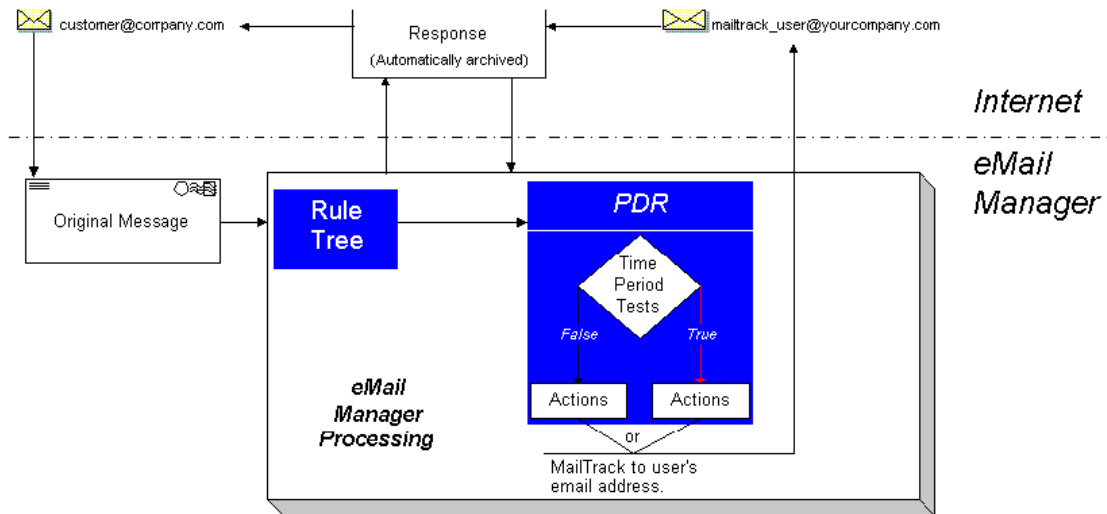
You should either:

- Type a response to the customer underneath the **prepare your response here:** section, or
- Use one of the suggested responses listed.

**Warning:** Don't alter any of the **MTH>** headings in the messages, and make sure you include them in the response. However, you must delete the lines that begin with **MT>**. If you do not, you get an error message when you try to send your response.

## MailTrack Workflow

This workflow shows the steps involved in processing a MailTrack message.



## Menu Commands

You can select commands from these three menus at the top of your queue screen:

- Select
- Manage
- Special



## **Message Fields in the Queue**


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## Message Fields in the Queue

---


This topic defines the fields in the queue:

- Queue Image Map
- Select
- Open
- Claim
- View
- From
- Status
- Subject
- Date
- Retry Count
- History
- Owner

**Note:** You can click the  next to the headings to realign the order of the messages in the queue.

**Note:** Depending on your associated role and the queue you are in, you may not see all of these fields.

### Queue Image Map


The definitions below explain the various message fields depicted in a queue. You can also click on this image map to see an explanation of that field. If you see a  icon listed next to the field, you can rearrange the order of the field's contents by clicking on it.

Cisco Systems		User jt Queue		jt		<div>Log Out</div> <div>Help</div>				
		Select		Manage		Special				
<div>Process Messages</div> <div>Personal Queue</div> <div>Status</div> <div>Skill Group Queues</div> <div>Queue Chooser</div> <div>Search</div> <div>Outgoing Queues</div> <div>Templates</div> <div>Create Messages</div>		Select	Open	View	From	Status	Subject	Date	History	
		<input type="checkbox"/>			jtuohey@cisco.com			do	Jul 23, 2001 12:52:38 PM	
		<input type="checkbox"/>			jtuohey@cisco.com			Hello	Jul 23, 2001 12:53:40 PM	
		<input type="checkbox"/>			jtuohey@cisco.com			Help	Jul 23, 2001 12:53:42 PM	
		<input type="checkbox"/>			jtuohey@cisco.com			Support	Jul 23, 2001 12:53:43 PM	
		1 - 4								


## Select

You can make a check mark in this box to select that message. You select one or more messages and then choose an option from the **Manage** menu.

## Open


Click  to view the message in the Response screen or Message screen, depending on your preferences and the state of the message.




## Claim

The claim option appears in skill group queues. Click  to open the message in the Response screen and claim it. Claiming a message means assigning it to yourself. Once you claim a message from a skill group queue you own it; it no longer belongs to the group queue. If you do not archive this message, E-Mail Manager stores it in your personal queue, not the group queue.

## View

You view messages in a queue. Viewing messages allows you to read a message text without having to open the Response or Message screen.

If you click  next to the message you want to view, the message text appears below.

Select	Manage	Special					
Select	Open	View	From	Status	Subject	Date	Owner
<input type="checkbox"/>			Alias	- 	DT20010723_0000000001 do	Jul 24, 2001 11:08:42 AM	jt
Please include the following line in all replies. Tracking number: DT20010723_0000000001							

**Note:** You cannot view attachments when previewing a message.

## From

The email address of the sender. The From option lets you run a search to organize the message list. Click the word "from" to open a search dialog box. Enter a search word or phrase into the dialog box and click **OK**. Messages in your queue matching the search appear at the top of your list. You don't need to put quotes around the words you type in the search box.

**Note:** The search looks for any sub-string of the word(s) you typed, not merely the word itself.

## Status

The status of the message. You can click the  icon to view status definitions.

## Subject

The subject of the message as entered by the sender. The Subject option lets you run a search to organize the message list. Messages in your queue matching the search appear at the top of your list. Click the word "Subject" to open a search dialog box. Enter a search word or phrase into the dialog box and click **OK**.

**Note:** The search looks for any sub-string of the word(s) you typed, not merely the word itself.

**Note:** If you search for a phrase or expression with spaces, you need to place quotation marks around the phrase.

## Date

The date the message was sent.






## Retry Count

For Outgoing messages, this is the amount of times that Cisco E-Mail Manager attempted to send the message.

## History

There are three icons under the History section you can select.

-  - Click this to open the Notes and Messaging screen.
-  - Click this to open the Sender History screen.
-  - Click this to open the Tracking History screen.

## Owner

This field does not appear in a regular queue. However, it is in a Search Results queue. This field shows the agent who owns the message.



## **Changing your Working Modes**

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## Changing your Working Modes

---

If you are a push agent, you can change your working modes. You can enter push mode, and once there, you can change your availability to receive messages.

**Note:** This section only concerns push agents.

This topic contains the following sections:

- About Modes
- Entering and Exiting Push Mode
- Waiting for New Mail

### About Modes

- About Push Mode
- Available Modes



### About Push Mode

When you enter push mode, the highest priority message in the system that you can work on opens. If there are no messages in the system for you to work on, the Wait screen opens and you wait until a message is "pushed" to you. When a message that you can work on enters the system, that message opens in either the Message or Response screens, depending on your associated role. Once the message is pushed to you, you work on that message. After you finish with the message, the next available message is pushed to you. If there are no available messages, you return to the Wait screen to wait for the next available message.

Depending on your associated role, you may automatically be in push mode when you log into Cisco E-Mail Manager.

### Available Modes

When in push mode, a traffic light icon appears in the upper left of your screen. This traffic light indicates your status mode while in push mode. The two available modes are:

	<p>The green light icon means you are in push mode and ready to receive messages. If you click on the green light icon you enter the Not Ready mode, meaning you can work on the message you have open, but when you complete it no additional messages are pushed to you.</p>
	<p>The red light icon means you are no longer ready to receive messages. If you enter the not ready mode when you are working on a message, you may continue working on that message. To enter the push mode, click the not ready icon.</p>


## Entering and Exiting Push Mode

- Entering Push Mode
- Exiting Push Mode

### Entering Push Mode


If you are a push agent, you enter push mode by:

- Selecting **Processing Messages > Ready for Push.**

- Select  Enter Ready for Push Mode on the Status screen.

- Click  while in push mode.

### Exiting Push Mode

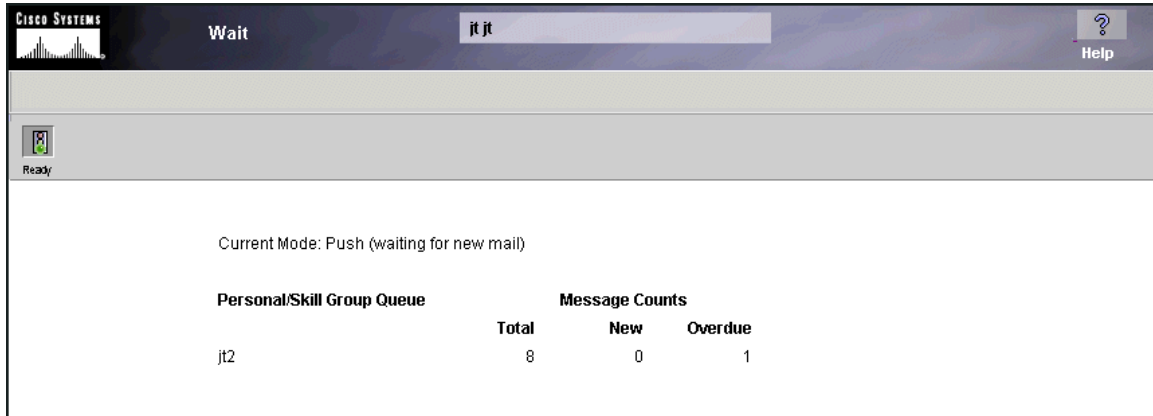
If you want to exit push mode, select the  icon.

## Waiting for New Mail

When there is no mail in the Cisco E-Mail Manager system that can be pushed to you, you enter the Wait screen. The Wait screen monitors your recent activity, listing:

- Your current mode
- Message counts from User and Group queues
- The Agent Real-time Status

Once a message enters the system, E-Mail Manager automatically retrieves it for you. Depending on your associated role, the message may open in either the Read or Response screens.



The screenshot shows the Cisco Systems E-Mail Manager interface. At the top, there is a header bar with the Cisco logo on the left, the word 'Wait' in the center, a user ID 'jt jt' in a box on the right, and a 'Help' button with a question mark icon. Below the header bar, there is a status bar showing a 'Ready' icon and text. The main content area displays 'Current Mode: Push (waiting for new mail)'. Below this, there is a table showing message counts for the 'jt2' queue.

Personal/Skill Group Queue	Message Counts		
	Total	New	Overdue
jt2	8	0	1

## **Working with Messages in the Queue**

## **Working with Messages in the Queue**

---

This section describes:

- Working with Messages
- How to Work with Messages
- Menu Commands in the Queue

### **Working with Messages**

This sections discusses the options you can use to view, claim and open messages.

- About Claiming Messages
- Working with Archived Messages
- Working with Attachments

#### **About Claiming Messages**

If you belong to a skill group queue, you need to claim messages from that queue before you can begin working on them. Claiming a message moves it from a skill group queue to your personal queue, making you the sole owner of that message.

#### **Working with Archived Messages**

When an agent archives a message, it becomes unavailable. Archiving a message takes it out of any queues. Agents should only archive messages when they are finished working on them, or if they do not need to work on the message for an extended period of time. You can retrieve archived messages by using the Search Message screen.

#### **Working with Attachments**

Attachments are any type of file that accompanies a message. Often, attachments are provided to give additional information about the message. Messages may contain multiple attachments. You view and save attachments from the Response Screen, or the Message Screen, depending on your preferences. When you select to view an attachment, it opens in a separate window. Similarly, when you save an attachment, a separate window opens so you can select save options.



## How to Work with Messages

This sections shows you how to work with messages.

- Viewing Messages
- Opening Messages
- How to Claim Messages
- How to Open Archived Messages
- How to Open Attachments
- How to Save Attachments


### Opening Messages

To open messages from the Queue, click  next to the message you want to read. The Message screen opens first, allowing you to view the message.

**Note:** Depending on your associated role, the Response screen may open instead of the Message screen.

### How to Claim Messages

You claim messages in skill group queues to work on them. Once you claim a message, it belongs to you.


Click  next to the message you want to claim. The Response screen opens (or the Message screen, if you're a read-first agent).

**Note:** As soon as the Response screen opens, that message belongs to you. If you close the message without archiving it, it is saved in your personal queue, not the group queue.

### How to Open Archived Messages


You can access archived messages through the Search Message screen. Just set the search options to either **Incoming Archived Unreplied**, or **Incoming Archived Replied**. Your search returns a **Search Results** screen.

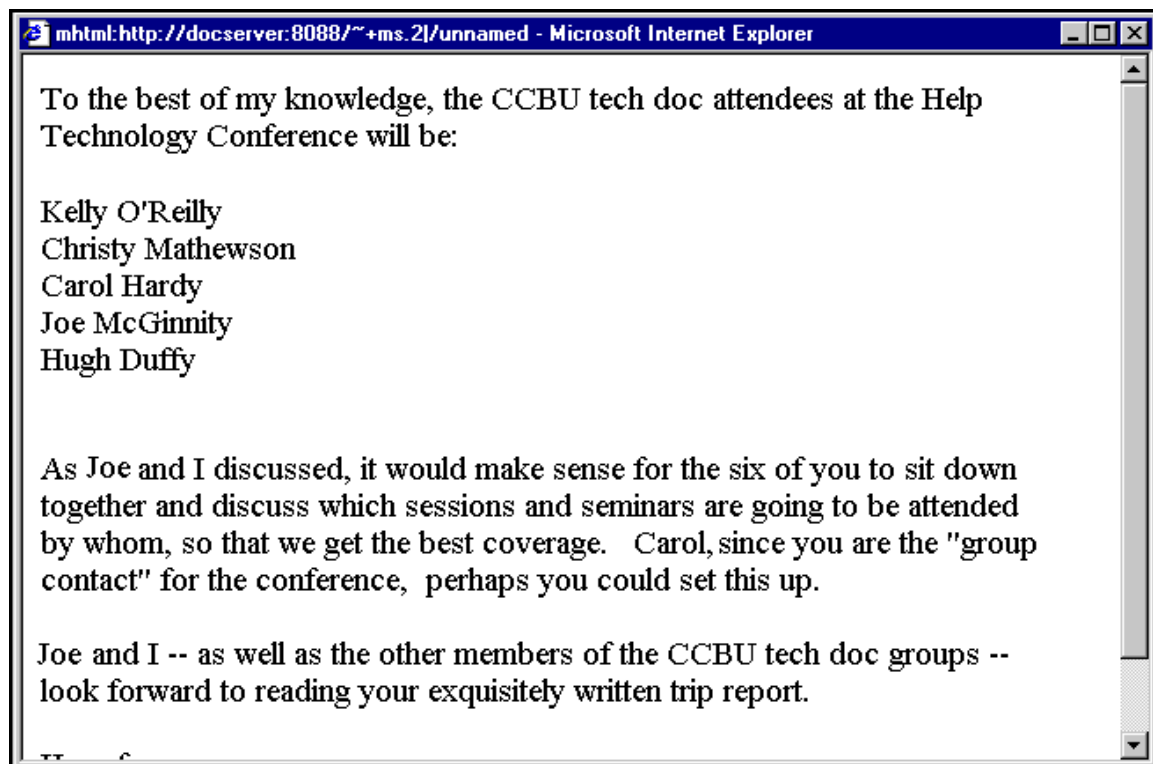
The Search Results screen strongly resembles a queue.

To work with an archived message, click  and the Message screen opens. Use the Unlock, the Unarchive or the Unarchive and Claim options to work with the archived message.


### How to Open Attachments

Attachments accompany messages, but are not displayed openly. You need to open attachments in order to view them in E-Mail Manager.

To view an attachment to a message, click  above the message text box in either the Response screen or Message screen. If there is more than one paper clip icon, click on the one to the right. The attachment opens in a separate window.



### How to Save Attachments

In the Response or Message screens, click the  icon above the "original message" field.

## **Menu Commands in the Queue**

The gray command bar provides four menus. Click on a link below for a list of the available options in that menu:

- [Select](#)
- [Manage](#)
- [Special](#)
- [Help](#)



## **Working with Additional Message Information**

## **Working with Additional Message Information**

---

This topic discusses additional message queues. The screens and concepts in this section elicit historical information about the message and the sender.

This topic contains the following sections:

- About Notes
- Adding Notes to a Message
- About the Sender History
- Viewing the Sender History
- About Tracking Numbers
- Viewing the Tracking History

### **About Notes**

- What is a Note?
- Viewing Notes on a Message
- Viewing Responses Sent to this Message
- Viewing a Message Action Report

#### **What is a Note?**

Adding a note to a message allows additional information to be associated with the message. You can elaborate on the subject, include a warning, or just note anything important. Notes can also be added by rules. Notes are only used internally; they are not sent with messages and thus customers don't see them.

**Notes and Message History** it Help

Notes on Message	Agent	Date
This problem has been resolved	jtuohey	Sep 10, 2001 10:56:23 AM

Notes on Tracking Number DT20010907_0000000101	Agent	Date
None		

Notes on Sender jtuohey@cisco.com	Agent	Date
This sender has a history of configuration problems	jtuohey	Sep 10, 2001 10:56:39 AM

**Add Note**

Add Note to This Message +

**Message Action Report**

Action Code	Time	Report	Status Code	Rule
Offer	Sep 7, 2001 2:07:37 PM	Rules process started	200	BeforeRules
Auto Assign	Sep 7, 2001 2:07:37 PM	Doc	0	To doc

## Viewing Notes on a Message

This section lists the notes already associated with:

- The message
- The tracking number
- The sender

Also provided in this section is the name of the agent who created the note and the date of the note's creation.

## Viewing Responses Sent to this Message

This section lists all the responses that have already been sent to the message. Listed in this section is the:

- **Owner**- The agent who claimed the message.
- **Time**- The date and time the response was sent.
- **Link**- Click **OPEN** to view the response in the Message screen.
- **Status**- The status of the response.

RESPONSES SENT TO THIS MESSAGE				
Owner	Time	Link	Status	
Jason	02 Jun 00 11:52	<a href="#">OPEN</a>		
Jason	16 Jun 00 14:36	<a href="#">OPEN</a>	Sent	

## Viewing a Message Action Report

This report lists the following information for the message:

- **Action Codes**- The action performed.
- **Time**- The date and time of the action.
- **Reports**- A brief description of the action.
- **Status Codes**- The status code associated with the action. Rserver indicates a status code of '0' for success, while Tserver shows '200'.
- **Rules**- The rule associated with the action.


MESSAGE ACTION REPORT					
Action Code	Time	Report	Status Code	Rule	
	02 Jun 00 11:52	Rules process started	200	BeforeRules	
Auto Assign	02 Jun 00 11:52	Jason	0	Jason	
Received	02 Jun 00 11:52	Initial rules assign to Jason;DT20000602_0000000010	200	FromRServer	
MailWrap	02 Jun 00 11:52	To assignee	0	Jason	
	02 Jun 00 13:22	Marked warning	200	StatusManager	

## Adding Notes to a Message

- Accessing the Notes and Message History screen
- Adding a Note to a Message

### Accessing the Notes and Message History screen

To access the Notes and Message history screen:

- From a message queue, click  under the History section.
- From the Response screen, click **View > Notes and Actions**.



**Note:** If the **N** is in boldface (in the History section), then a note is associated with the message. If not, there are no notes associated with the message.

### **Adding a Note to a Message**

Enter the note into the **Add Note** field. Select where you want the note added from the drop down menu (your choices are The Message, the Tracking Number and the Sender address).

You can add as many notes as you need to.

### **About the Sender History**

- What is a Sender History?
- About Older Messages

#### **What is a Sender History Screen?**

The Sender History screen lists every message sent to Cisco E-Mail Manager by the current sender address. Thus, an agent can view all past messages sent from that address.

#### **About Older Messages**


To view older messages from the same sender that have been moved to the LAMBDA database, through the **View Older Messages** option. A new queue opens listing the older messages. These messages are read-only.

### **Viewing the Sender History**

- Opening the Sender History Screen
- Viewing Messages
- Viewing Older Messages

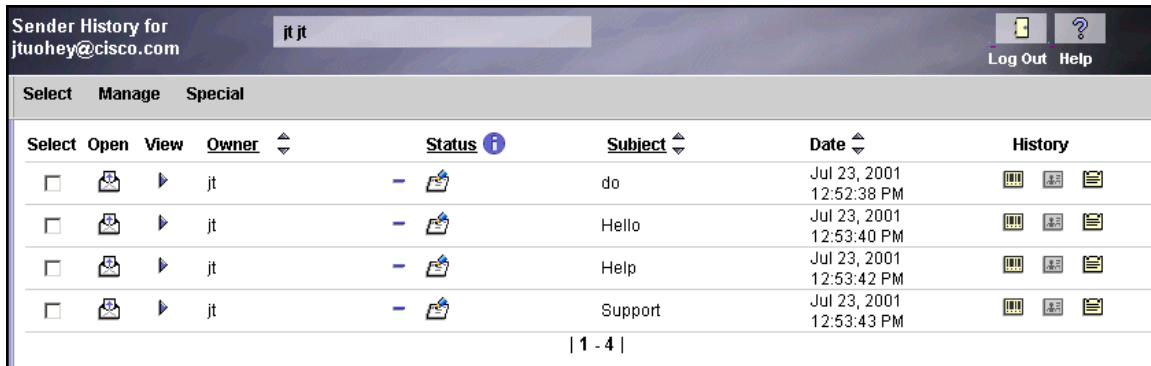
#### **Opening the Sender History Screen**

















There are two methods for opening the Sender History screen:

- Click **View > Sender History** from the Message or Response screen.
- Click the  icon in a queue

**Note:** If this is the first message sent by the sender, no Sender History screen exists.

From this screen, you can view the messages listed.



Select	Open	View	Owner	Status	Subject	Date	History
<input type="checkbox"/>			jt		do	Jul 23, 2001 12:52:38 PM	
<input type="checkbox"/>			jt		Hello	Jul 23, 2001 12:53:40 PM	
<input type="checkbox"/>			jt		Help	Jul 23, 2001 12:53:42 PM	
<input type="checkbox"/>			jt		Support	Jul 23, 2001 12:53:43 PM	

| 1 - 4 |

The Sender History screen strongly resembles a queue.

## Viewing the Messages

There are two ways to view past messages from the Sender History screen:

- The View option
- The Open option

## Viewing Older Messages

To view older messages from the same sender that have been moved to the secondary database, click **View Older Messages**. A new Tracking History queue opens listing older messages that have been moved from the main Cisco E-Mail Manager database. These messages are read-only.

## About Tracking Numbers

- What is a Tracking Number?
- What is a Child Tracking Number?

- About Older Tracking Numbers
- Workflow

### **What is a Tracking Number?**

Every message is assigned a tracking number. Subsequent returns and responses to that message maintain the same tracking number. This allows an agent to view all the messages associated with a certain issue.

### **What is a Child Tracking Number?**

The child tracking numbers are numbers that have been split off from the original tracking number. An agent splits a tracking number when the message deals with more than one issue, so that each issue has its own tracking number. Thus, you can view all the tracking numbers that stemmed from the messages listed, as well as the messages themselves.

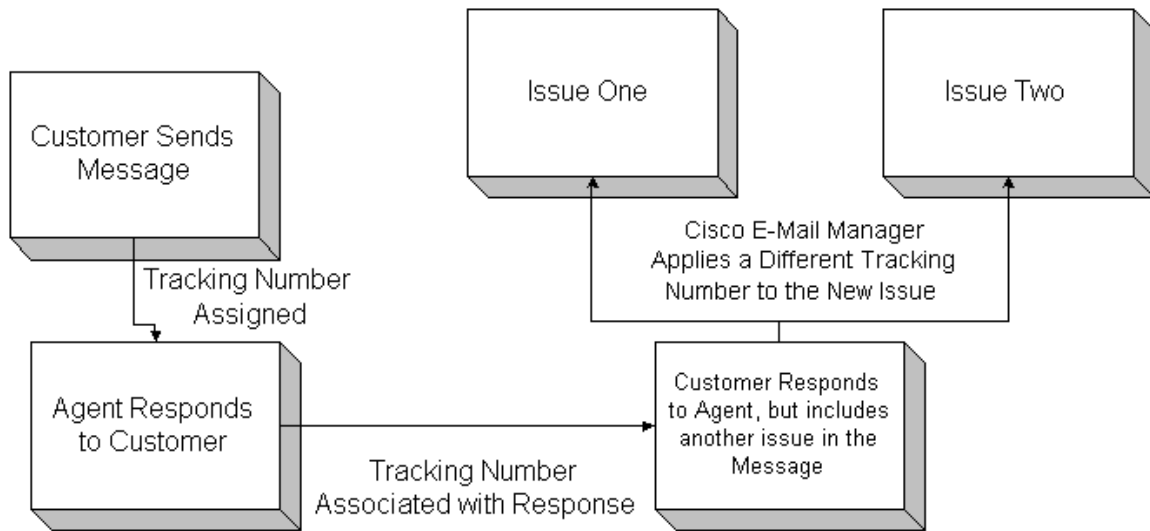
**Note:** You can only use the **split, thread and reassign** or **split, thread and escalate** options one time per original message. In other words, if you split a thread and reassign the child thread to another agent, that agent cannot split the thread again. However, you can use the **split a thread and archive** and **split, thread and keep current** options multiple times per original message.

### **About Older Tracking Numbers**

If messages with the tracking number have been moved to the LAMBDA database, they are considered "older messages" by Cisco E-Mail Manager. You can view these messages from the tracking history screen through the **View Older Messages** option. These messages are read-only.

### **Workflow**

This diagram shows the typical workflow of a tracking number and child tracking number.



The child tracking numbers are listed below the tracking number messages. The **Comment** section shows the agent assigned to the tracking number. The **Time Created** section shows when the child tracking number was created. Click on the child tracking number to view all the messages associated with that number.

Child Tracking Numbers	Comment	Time Created
<a href="#">DT20000613_0000000002</a>	New Tracking Number DT20000613_0000000002 assigned to Jason	13 Jun 00 15:52
<a href="#">DT20000613_0000000003</a>	New Tracking Number DT20000613_0000000003 assigned to Jason	13 Jun 00 15:52


## Viewing the Tracking Number History

- Opening the Tracking History Screen
- Opening Messages
- Viewing a Child Tracking History
- Viewing Older Messages

























**Note:** To prevent the tracking number from appearing in the subject line, add the following line in the tserver.properties file: NOTNSUBJ=true

## Opening the Tracking History screen

To access the Tracking History screen:

- Select  in a queue
- Select **View > Tracking History**

**Note:** Not all messages have Tracking Histories.

Tracking History for DT20010723_0000000002						jt jt		Log Out Help	
Select	Manage		Special						
Select	Open	View	From	Status	Subject	Date	History		
<input type="checkbox"/>			jtuohey@cisco.com	- 	Hello	Jul 23, 2001 12:53:40 PM			
<input type="checkbox"/>			Alias	- 	DT20010723_0000000002 Hello	Jul 24, 2001 12:56:48 PM			
<input type="checkbox"/>			Alias	- 	DT20010723_0000000002 Hello	Jul 24, 2001 12:57:45 PM			
<input type="checkbox"/>			Alias	- 	DT20010723_0000000002 Hello	Jul 24, 2001 1:06:08 PM			
1 - 4									
Child Tracking Numbers			Comment				Time Created		
<a href="#">DT20010724_0000001001</a>			New Tracking Number DT20010724_0000001001 assigned to jt				Tue Jul 24 13:13:21 GMT+01:00 2001		

## Opening Messages

There are two ways to view past messages from the Tracking History screen:

- The View option
- The Open option

## Viewing a Child Tracking Number

To view a child tracking number, click on the child tracking number you want to view. The Child Tracking number screen appears:

Tracking History for DT20010724_0000001001				jt jt		 Log Out		 Help	
Select   Manage   Special									
Select	Open	View	From	Status	Subject	Date	History		
			Alias		DT20010724_0000001001 Hello	Jul 24, 2001 1:13:21 PM			
1 - 1									
Parent Tracking Number: <u>DT20010723_0000000002</u>									

The Child Tracking History queue lists:

- The messages associated with that Child Tracking number
- The Parent Tracking number

You can click the Parent Tracking Number to return to the Parent Tracking Number Queue.

### Viewing Older Messages

To view older messages with the same tracking number that have been moved to the secondary database, click **View Older Messages**. A new Tracking History queue opens listing the older messages. These messages are read-only.

## **Reading Messages**

---

## Reading Messages

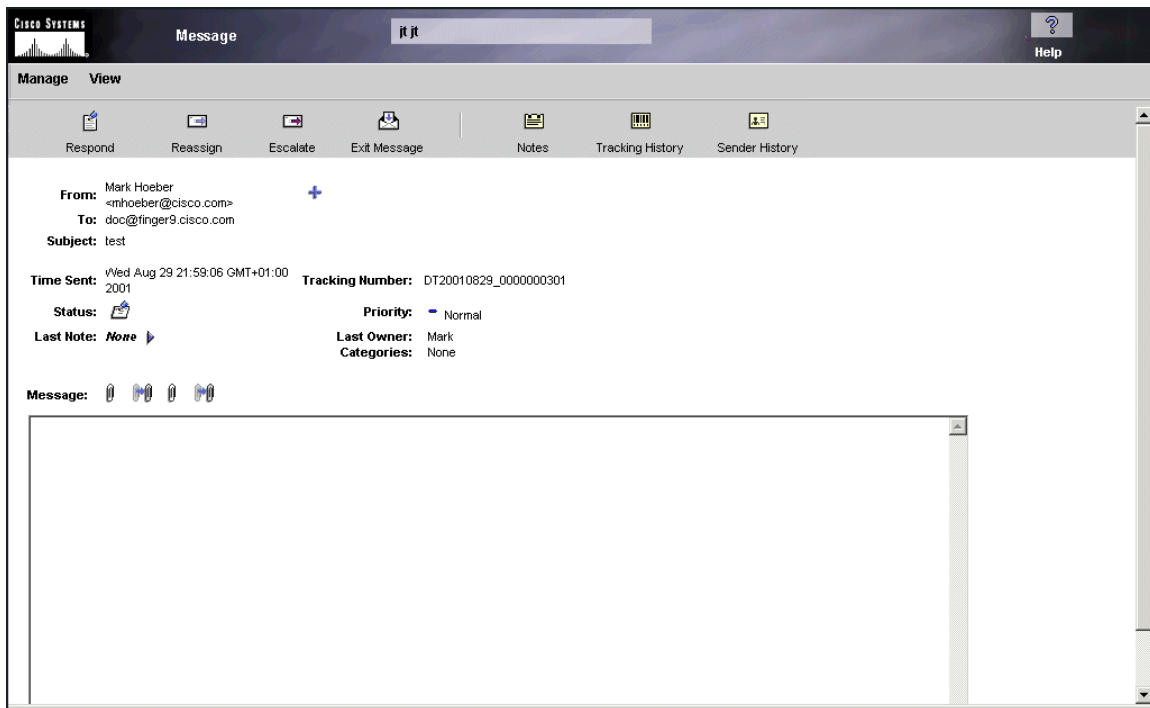
---

This topic contains the following sections:

- What is a Message Screen?
- Message screen options
- The Wrapup Screen
- Menu Commands

### What is a Message Screen?

The Message screen allows agents to read a message before responding. Agents with read-first options have to read the Message screen before they can proceed to the Response screen.



The Message screen lists:






- The message text
- Priority
- Who assigned the message




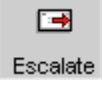



- Who sent the message
- The subject
- Any notes or categories associated with the message
- The time the message was sent and received
- The last owner of the message
- The last note added to the message
- The status of the message
- The tracking number
- Attachments

## Message Screen Options

There are always options provided at the top of the page, right under the gray command menu. However, the links change, depending on the state of the message being viewed.

 Claim and Respond	This option allows you to claim the message and opens the Response screen, so you can respond to the message.
 Exit Message	This link returns you to the screen you opened the message from.
 Notes	This brings you to the Notes and Message screen, allowing you to add and view any notes associated with the message.
 Tracking History	The Tracking History screen displays all the messages associated with a known issue. This may or may not be applicable, depending on whether the message is a continuation of a previous issue.
 Sender History	This brings you to the Sender History screen, allowing you to view the history of the person who sent the email.

 Respond	This link brings you to the Response screen, so you can create a response to the message. You can only access the Response screen for messages assigned to you.
 Unarchive	Takes the message out of the archive and opens the Response screen, allowing you to work with the message.
 Unarchive and Claim	(if you don't own the message) Takes the message out of the archive and assigns you as the owner. The Response screen opens and you can work with the message.
 Unlock	Sometimes, a message is "locked." This means you cannot respond to that message without "unlocking" it first. To unlock a message and open it in the Response screen, click the Unlock icon.
 Reassign	This icon allows you to reassign the message to another agent.
 Escalate	This icon lets you reassign a message to another agent (or manager) and also escalates the priority to the next level of severity.
 Close Window	If the message screen opened in a separate window, click this icon to close it.

## Menu Commands

You can also select an option from the gray command menu at the top of the screen:

- Actions
- View

## **Working with Internally Generated Messages**

## **Working With Internally Generated Messages**

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- About System Messages
- How to Work with System Messages
- About Mail Errors
- How to Work with Mail Errors

### **About System Messages**

A System Message is a text notification generated by Cisco E-Mail Manager to inform you when an action has completed. System Messages appearing in the Agent UI are generated by an event. Thus, they appear immediately after the event occurs.

This section contains the following concepts:

- System Message Information
- System Message Situations

#### **System Message Information**

A System Message features:

- Header information
- The action taken
- Whether or not the result was successful
- The time (in milliseconds) it took to perform the action

#### **System Message Situations**

Cisco E-Mail Manager generates a System Message during the following instances when a bulk action is performed. A bulk action is an action that is performed on more than 10 messages simultaneously.

System Messages are generated for the following bulk actions:

- Archiving messages
- Deleting messages
- Changing the priority of the messages
- Escalating messages
- Reassigning messages

**Note:** If you generate multiple System Messages before first viewing them, Cisco E-Mail Manager lists them in succession in the "System Messages" dialog box. Thus, if you perform multiple System Message generating actions, you may have multiple actions listed when you open your System Message.


## How to Work with System Messages

This section contains the following concepts:

- Opening a System Message
- Saving a System Message
- Closing a System Message

### Opening a System Message



Click the  icon to open a System Message. If there is no icon, no System Messages currently exist.

### Saving a System Message

To save a system message, select the box next to "Save Messages" and click **OK**. The System Message icon remains on your interface and you can access the saved System Message in the future.

### Closing a System Message

To close a System Message, click **OK**.

## About Mail Errors

- What is a Mail Error?
- The Outgoing queue - Error screen
- The Archived - Internal Error queue screen
- The Repair Messages screen

### What is a Mail Error?

Mail errors appear when Cisco E-Mail Manager experiences problems sending messages through the SMTP gateway (the gateway which handles outgoing mail). If a message cannot be sent, it is routed to an error queue and a Mail Error icon appears. Usually, the reason for the send failure is an incorrect address, and Cisco E-Mail Manager lets you repair the message and resend it. When a Mail Error appears,

you receive a  icon.

### The Outgoing queue - Error screen

The Outgoing queue - Error screen opens when you click the Mail Errors icon. The Outgoing queue - Error screen acts like a queue, allowing you to view the messages that encountered problems while sending. When you click on a message, you open it in the Repair Message screen.

### The Archived - Internal Error queue screen

If you have administrative privileges, you can also open the Archived-Internal Error queue from the Outgoing queue chooser option. The Archived-Internal Error queue displays messages that had problems being sent and were subsequently archived. This screen acts just like a typical Outgoing queue. When you open a message from the Archived-Internal Error queue, it appears in the Repair Message screen.

### The Repair Message screen

The Repair Message screen resembles the Message screen in both appearance and functionality. The only difference is that you can correct and change the To:, CC:, and BCC: fields in the Repair Message and then attempt to resend the message.

## How to Work with Mail Errors

This section covers the following concepts:

- Opening Mail Errors
- Using Error Queues
- Repairing a Message

### Opening Mail Errors



Click on the icon to open the Outgoing queue for Error messages.

### Using Error Queues

Error queues work just like a regular queue, only they store messages that were not sent due to an error. See the About Picking Messages from a Queue section for information on how to use queues.

### Repairing a Message

To repair a message in the Repair Messages screen, first review the information in the To:, CC:, and BCC: fields to confirm the validity. If this information is incorrect, enter the correct information and click the **RESEND** icon to try and resend the message.





## **Responding to Messages**

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## **Responding to Messages**

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This topic contains the following sections:

- About the Response Screen
- Opening the Response screen
- About the Response Screen Options
- How to Use the Response Screen Options
- Sending a Response
- The Wrapup screen

### **About the Response Screen**

- What is the Response Screen?
- Response Screen Details

#### **What is the Response screen?**

The Response screen allows you to respond to a message. Depending on your associated role, you may either read the message before in the Message screen, or the original message is included in the Response screen. You compose your response here, and you can either send your response or you can save it to work on at a later date. If you do not respond to a message, it still shows up in your Status screen and queue.

#### **Response Screen Details**

The Response screen shows you a variety of details for each message, including:

- The sender
- The subject
- The time the message was sent
- The tracking number
- The last owner of the message
- Any categories associated with the message

- Any notes associated with the message
- The status of the message
- The original message
- Any attachments

**Note:** The original message text may or may not be displayed, depending on your associated role.

**Note:** In instances when mails are re-assigned or escalated within the CEM domain, The "**Last Owner**" field displays the name of the agent from whom the mail was re-assigned/ escalated, and when the same mail is re-replied by the customer (from outside the CEM domain) to the Agent, it is considered as a new incoming message and the last owner shows "**Unknown**".

## Opening the Response screen

Click the following links to view how to open the Response screen:

- From the Queue (or the Notes and Messaging, Tracking History or Sender Screens).
- From the Message screen
- For Agents in Push Mode
- From the Status screen

The screenshot displays the Cisco Systems Response interface. At the top, a status bar shows 'Response' with metrics: Active (9), Answered (0), Longest Waiting (13d:22:38:21), and Logged In (0:19:23). Below this is a 'Manage View' section with icons for Save Draft, Reassign, Escalate, Exit Message, Notes, Tracking History, and Sender History.

The main message details section includes:

- From:** jlorett2@devmailx.cisco.com
- To:** wchurch@eng.com
- Cc:**
- Bcc:**
- Subject:** E-Mail
- Time Sent:** Jan 30, 2002 4:34:23 PM
- Tracking Number:** CT20020130\_0000000492
- Status:** (indicated by a red flag icon)
- Priority:** Normal
- Last Note:** None
- Last Owner:** unassigned
- Categories:** None

On the right, there are tabs for **Templates**, **Attachments**, and **Categories**. The **Templates** tab is active, showing 'Personal Templates' and 'Suggested Templates', both of which are currently empty (displaying '--none available--'). Below the templates are buttons for 'Insert Template', 'Preview Template', and 'Browse Libraries'.

The bottom section is divided into two panes. The left pane, titled 'Original Message:', contains the text: 'This is a test to see if this message body shows up in the View Raw Message screen. If it does, I will make a screen capture and include it in the documentation.' The right pane, titled 'Response:', shows a list of message headers and body text:
 

- > -----Original Message-----
- > From: wchurch@eng.com
- > Sent: Jan 30, 2002 4:34:23 PM
- > To: cdegaulle@fra1.com
- > Our network is experiencing problems.

 Above the response text is a menu bar with options: 'Send Reply', 'Insert Original', 'Check Spelling', 'Insert Signature', and 'Reply Language'.

At the very bottom, a status bar indicates 'Applet started' and 'Local intranet'.

## About the Response Screen Options

To respond to a message, you choose from a variety of options, enter a response in the response field, and choose a send option from the menu.

- The From:List
- The Original Message
- Templates
- Attachments
- Categories
- Message Priorities
- Signature
- Spell Check
- Reply Language

## The From: List

The **From:** list is where you select the return address of the response you send out. This is the address the customer can respond to. The **From:** list address options appear in the following order, from top to bottom:

- The last saved address.
- Group aliases associated with the message skill.
- The default POP3 mailbox
- All other POP3 mailboxes
- User aliases
- Other group aliases
- Force POP3 mailboxes

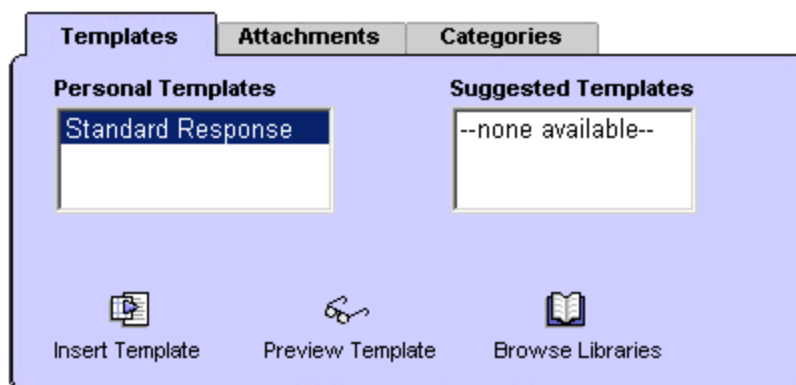
Each of the From List address options are sorted in the alphabetical order.

## The Original Message

You can include the original message in your response. By including the original message, you give the recipient a frame of reference to the situation you are responding to.

## Templates

Templates are pre-composed responses to common questions. By using a template, you can avoid typing the same response multiple times. The template section is light blue and in the upper right section of the Response screen (see image).



The template section is divided into two parts:

- **Personal templates**- Templates you created.
- **Suggested templates**- Public templates that, based on the message's content, have been suggested by rules as possible responses.

You also have the option to:

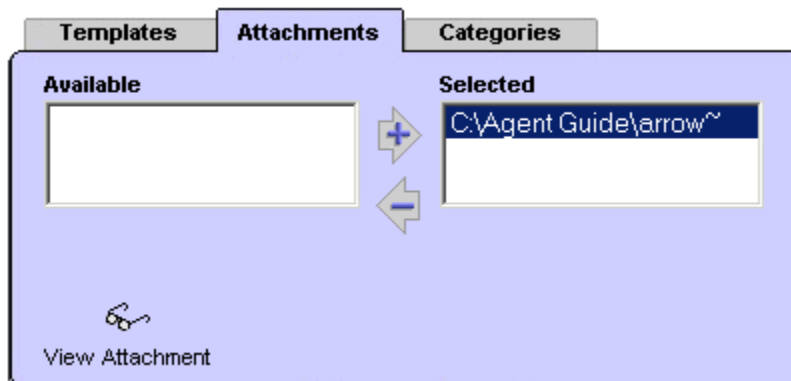
- **Preview a template**- This opens the template, allowing you to review it and make sure it contains the information you want to send.
- **Browse Libraries**- This option lets you browse through all the template libraries available to you.

## Attachments

Attachments are previously selected documents that you can included in your response. You use the attachments to provide the customer additional information about their issue. The list of available attachments appear in the blue section to the upper right of your Response screen. You can also view an attachment, to make sure it contains the information you want to send to the customer.

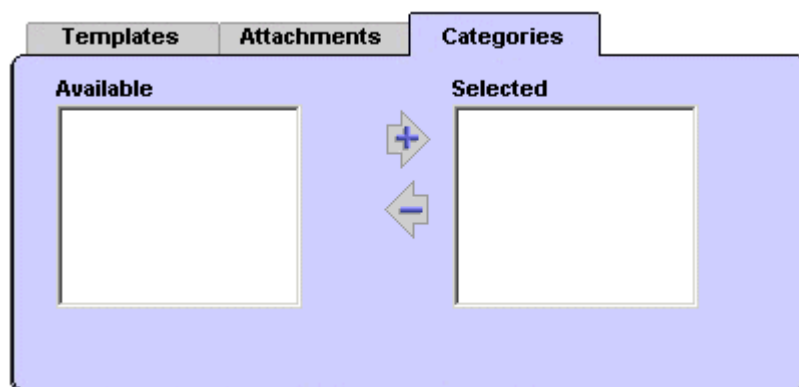
**Note:** The size of E-Mail attachments is restricted to 1.9 MB in CEM, which is inclusive of the message size. If you have multiple attachments, the total size of all attachments and the message size must not exceed 1.9 MB.

Sometimes attachments are included in the messages you receive. You can save these attachments, and use them for future responses if you have the proper associated role.



## Categories

A category is a defined word or group of words that you attach to a message. Associating a message with a category is a way of summarizing the message content. The categories are available in the light blue menu in the upper right hand corner.



**Note:** Categories are used within E-Mail Manager; customers do not see them in responses.

## Message Priority





The priority measures the importance or severity of a message. Rules can set the initial priority of a message. You can manually change the priority. Priorities are:

- Normal
- High
- Very High
- Urgent

Normal is the lowest priority, while Urgent is the highest. You can alter the priority of a message from the Response screen.

## Signatures

You can customize three signatures from your Personal Profile. These signatures allow you to enter additional information about yourself, such as your job title, company and location.

**Response:**    English (US) ▼ 

Send Reply   Insert Original   Check Spelling   Insert Signature

This is a sample response.

Gerrard Thock  
Technical Writer  
Cisco Systems  
Lowell, MA 01844

## Spell Check

The "Response:" field is equipped with a spell checking option. When you have finished typing your response you should always check the spelling before sending, to avoid any embarrassing mistakes. The spell check reviews all of the text you typed and identifies any words not in the dictionary. You can run a spell check for any of the languages featured in the menu next to the Check Spelling option. Depending on your associated role, the spell checker may run automatically.

**Note:** The Spell-Check option might not be available from Agent UI if the CEM hostname used by the browser client is not present in the DNS. To enable the Spell-Check option in Agent UI, add the hostname first in the browser client.

## Reply Language

You designate the language you are using to compose your response.




## How to Use the Response Screen Options


- Adding a Sender Address to a Mailing List
- Including the Original Message
- Using Templates
- Including Attachments
- Using Categories
- Changing a Message Priority
- Inserting a Signature
- Checking the Spelling
- Choosing a Reply Language

**Note:** If you use the navigational buttons of your browser or the keyboard shortcuts (Backspace and Arrow keys) to navigate through CEM, you may encounter a 'Page has Expired' warning or any such unexpected behavior. This happens because CEM does not allow web browser caching. Instead, use the navigation links in CEM to navigate through the application.

### Adding a Sender Address to a Mailing List

You can add the sender address to a mailing list by clicking the  icon.


### Including the Original Message

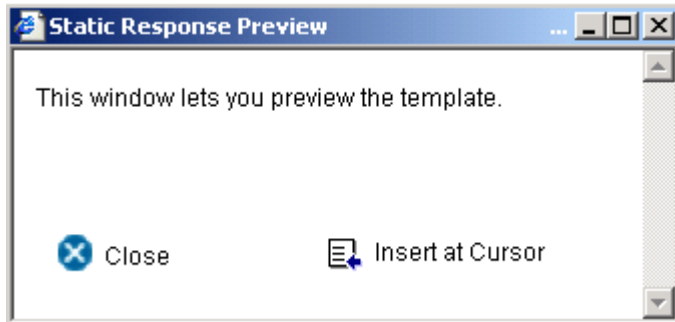
Click the  icon, to add the original message where the cursor is in your Response field.

### Using Templates

From the Response Screen, you can preview a template, browse available templates, or insert a template.


### *Previewing a Template*

To preview a template, select the template and click  **Preview Template**. The Static Response Preview appears.




From the Static Response Preview screen you can either Insert the template where the cursor is in your **Response** field or close the screen.

### ***Browsing Available Templates***

To browse through available templates, click  **Browse Libraries**. The **Your Template Library** screen appears, allowing you to view your available templates.

### ***Inserting a Template***

Click the  **Insert Template** icon to insert a template into your response.

### ***Using Attachments***

In the Response screen, you can select, view or save attachments.

### ***Selecting Attachments***


Select the attachment(s) you want from the available field and click the arrow to include them in your response.

### ***Viewing Attachments***

To view an attachment, select it and click  **View Attachment**.

## ***Saving Attachments***

Sometimes attachments are included in the messages you receive. You can save these attachments, and use them in turn for future responses.

To save an attachment, click the  icon and enter the appropriate information into the Save Attachment screen.

Revise or Include information for this attachment:

**Attachment name:**

**Attachment Description:**

You might want to revise these settings:

**Attachment MIME type:**

**Attachment Encoding:**

**Attachment Charset:**

## **Using Categories**

To add a category to a message, select the category in the **Available:** list and click the arrow.

**Note:** Categories are used within E-Mail Manager; customers do not see them in responses.

## **Changing a Message Priority**

Use the priority menu to select a new message priority.

## **Inserting a Signature**



You insert your signature into your responses by clicking **Insert Signature** and choosing your signature from the drop down list.

## **Checking the Spelling**

Select the language you want to check from the drop down menu above the



**Response:** field and click **Check Spelling**. The dialog box reviews the text in the "Response:" field box and stops at every word that doesn't appear in its dictionary.

In the SpellCheck dialog box:

- If the selected word is typed correctly, choose **Ignore**.
- Click **Ignore All** if the selected word is typed correctly and appears more than once in the document.
- Click **Add** to add the selected word to your personal SpellCheck dictionary.
- Click **Change** to change the selected word to the word in the **Change To:** field. You can also select a replacement word from the scroll down list provided, or manually type a word.
- Click **Change All** to change every instance of that word in the "Response:" field.
- Click **Done** when you are finished.
- Click **Cancel** to abort the spell check.

### Choosing a Reply Language








To select the language you are composing your reply in, choose the language from the Reply Language menu in the **Response:** field.

### Sending a Response

You send your response from the menus and options at the top of the screen. Here are the send options:

- From the Manage menu
- From the View menu

Also provided at the top of the Response screen are five options:

 Save Draft	Saves the draft of the response you just wrote and allows you to keep working in the Response screen.
 Reassign	Allows you to reassign the message to another agent.
 Escalate	This option lets you reassign a message to another agent (or manager) and also escalates the priority to the next level of seriousness.
 Exit Message	Exits the message and returns to the queue.
 Notes	This icon opens the Notes and Messaging screen.
 Tracking History	This icon opens the Tracking History screen.
 Sender History	This icon opens the Sender History screen.

After sending a response, you return to the queue, the Message screen, or the Response screen for another message (depending on your associated role). Archiving a message removes it from the Status screen and queue.

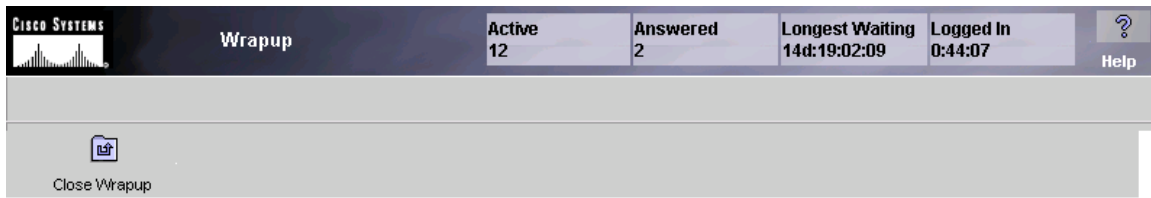
**Note:** If you update the priorities or categories options and then cancel the response, the updates do not occur.

### **Important:**

When you format/ change the font of an email message, it does not appear in the same way to the viewer as it happens to the sender. Hence, font changes will not be reflected in the email of the receiving mail client.

## **The Wrapup screen**

Depending on your associated role, you may have to view the Wrapup screen after you send a response, archive, reassign, escalate or save and archive a message. This allows administrators to track the time spent wrapping cases separately.



The following message has been sent.

**From:** jbrettp2@devmailx.cisco.com

**To:** jtuohey@cisco.com

**Subject:** CT20020214\_0000000109 to\_nrnw\_ipta\_sg

**Reply**

```
> -----Original Message-----
> From: Jason Tuohey <jtuohay@cisco.com>
> Sent: Feb 14, 2002 11:13:13 AM
> To: jbrettp2@devmailx.cisco.com
>
>
>
>
>
```

The Wrapup screen displays:

- Who sent the response
- Who the response is going to
- The subject of the message, with the tracking number
- The reply text



Click the  icon to close the Wrapup screen when you are finished.

## **Creating Messages**

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## Creating Messages

---

For an integrated agent, Cisco E-Mail Manager does not report agent state changes or task events for handling internal messages, such as responding to messages from Contact Admins, or when sending outbound mail. Agents using these features remain in the Not Ready - Working in the ICM mode.

This topic contains the following sections:

- Creating Outgoing Messages
- Creating Internal Messages

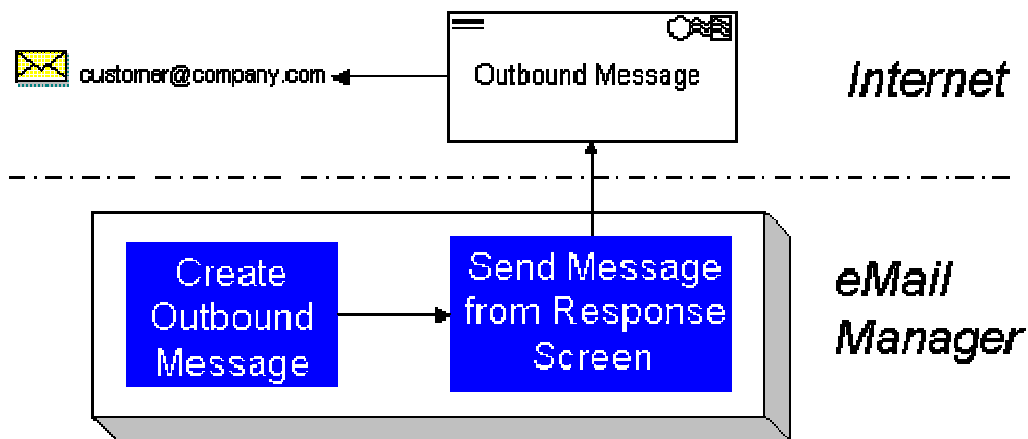
### Creating Outgoing Messages

You can create messages and send them outside Cisco E-Mail Manager. This topic discusses:

- Creating Outbound Messages
- Creating Broadcast Messages

#### Creating Outbound Messages

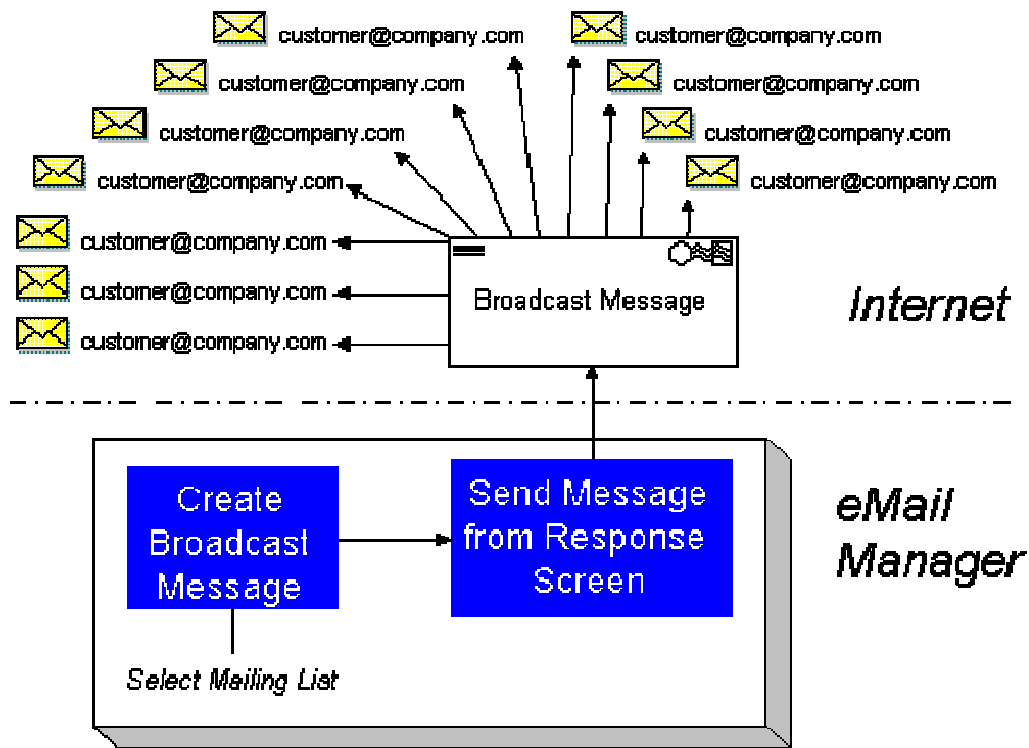
An outbound message is a message to a customer that you create that is not in response to a received message, as shown to the right.



#### Creating Broadcast Messages

A broadcast message is a message you send to all members of a mailing list. You send a broadcast message when you want to send the same message to several addresses. The broadcast message screen is very similar to the Response screen.





**Caution:** It is recommended that in the Broadcast Message screen you choose to force all replies through the rules. Otherwise, all replies to the broadcast message are assigned to the user who sent it, and will all be on the same thread.

## Creating Internal Messages

You can create two types of messages that are sent internally through Cisco E-Mail Manager. This section discusses:

- Creating Inbound Messages
- Contacting the Administrator

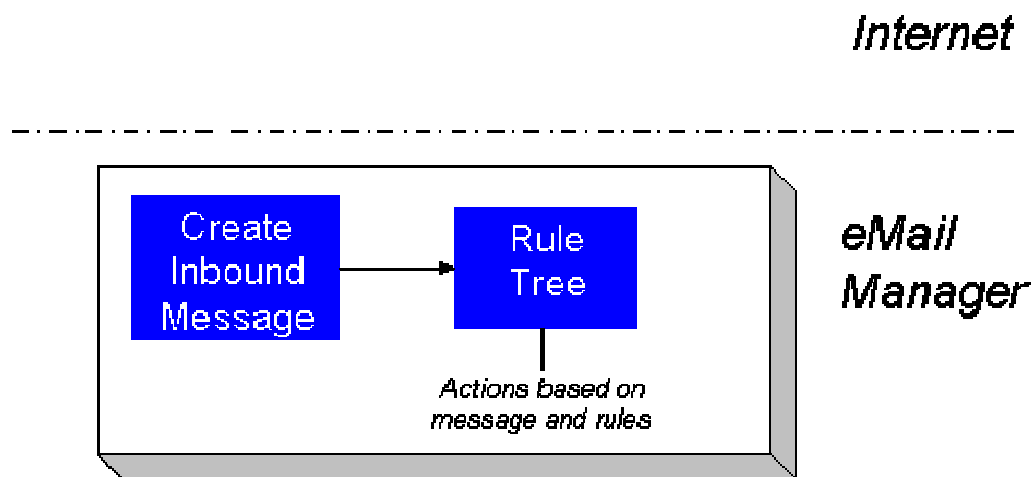
**Important Note:** For all internal e-mail communication, use the following 'To...' address: `<agentname>@WLINTERNAL`.

## Creating Inbound Messages


You can create a message to Cisco E-Mail Manager from within the system. The message you send is processed by system rules as is any incoming message is.

You may use this feature to:

- Create messages from non-email-based customer contacts, such as phone messages
- To test rules



## Contacting the Administrator

You send a message to the administrator to report a problem or to request help. The message is sent directly to the admins queue, without processing by the system rules. In the admins queue, the message status icon  shows that it was sent through this method.

Depending on your associated role, you may be responsible for responding to other agent's messages in the admins queue.

## **Real-Time Reports**

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## Real Time Reports

---

Cisco E-Mail Manager allows you to view reports that display the status of all agents.

This topic contains the following sections:

- About Agent States
- Viewing Agent States
- About Queue Status
- Viewing Queue Status
- About Team Reports
- Viewing Team Reports
- About Logged In Agents
- Viewing or Logging Out Agents
- Accessing Web View Reporting

### About Agent States

The Agent State Display screen displays the status of all agents in the Cisco E-Mail Manager instance.

The following table lists and describes the columns in the Agent State Display screen:

<u>Column</u>	<u>Description</u>
Agent	The full name of the agent, in this format: <b>first name &lt;space&gt; last name</b> .
State	The current state of the agent. Possible values are: <ul style="list-style-type: none"><li>• Ready</li><li>• Reading</li><li>• Responding</li></ul>

- Logged Out
- On Break
- On Vacation
- Done for today

**Answered**

The number of responses the agent has sent during the current day.

This value is reset to zero at the beginning of each day.

**XFerred**

The number of messages the agent has transferred to another agent or queue during the current day. This number does not include escalated messages.

This value is reset to zero at the beginning of each day.

**Reading**

The amount of time the read screen is displayed during the current day. This value is refreshed every 30 seconds.

Reading time is only recorded if the user is required to read messages before opening the response page. For more information, see the description of the *For (role): display read screen before allowing responses* access privilege.

**Note:** The time between when a user with \_\_subadmin privileges opens a message from an agent's queue, and when the user actually claims the message, is not recorded as reading time, as the user does not yet own the message.

This value is reset to zero at the beginning of each day.

**Responding**

The amount of time the agent spends on the Response screen during the current day. This value is refreshed every 30 seconds.

This value is reset to zero at the beginning of each day.

**Current task** The amount of time the agent has spent on the current task. This value is refreshed every 30 seconds.

**Note:** This time is a measurement of the time spent on the current task and begins again at zero for each new task; this time is not a cumulative measurement.

**Logged in** The amount of time the agent has been logged in for the current session. This value is refreshed every 30 seconds.

**Wrap up** The amount of time the agent has spent in the Wrap screen during the current day. This value is refreshed every 30 seconds.


This value is reset to zero at the beginning of each day.

## Viewing Agent States

To access the Agent State Display screen, from the **Reports** menu, select **Agent State Display**.

The Agent State Display screen opens:

Agent	State	Answered	Xferred	Reading	Responding	Current task	Logged in	Wrap up
Administrator	On Break	2	110	00:00:00	00:03:59	00:27:40	00:00:00	00:00:00
Mark Hoeber	Ready	0	0	00:00:00	00:00:00	00:00:32	00:00:32	00:00:00
anordberg	Logged Out	0	0	00:00:00	00:00:00	03:59:46	00:00:00	00:00:00
bnichols	Logged Out	0	0	00:00:00	00:00:00	03:59:44	00:00:00	00:00:00
boomer	Done for today	0	0	00:00:00	00:00:00	03:29:13	00:00:00	00:00:00
dobarbrow	Timed Out	0	0	00:00:00	00:00:00	00:47:26	00:00:00	00:00:00
gpaul	Logged Out	0	0	00:00:00	00:00:00	03:59:47	00:00:00	00:00:00
hugh	Responding	0	0	00:00:00	02:34:05	00:54:13	01:28:16	00:00:00
mbaumwald	Ready	0	0	00:00:00	00:03:48	00:13:20	00:13:20	00:00:00
strierley	Logged Out	0	0	00:00:00	00:00:00	03:59:45	00:00:00	00:00:00
tbucciero	Logged Out	0	0	00:00:00	00:00:00	03:59:49	00:00:00	00:00:00
wkenrich	On Vacation	0	0	00:00:00	00:26:02	01:49:29	00:00:00	00:00:00
		<b>Total</b>			<b>Average</b>			
		<b>Answered</b>	<b>Xferred</b>	<b>Reading</b>	<b>Responding</b>	<b>Current task</b>	<b>Logged in</b>	<b>Wrap up</b>
		2	110	0	00:46:59	02:18:24	00:34:03	0

Use the up and down arrows, , to sort the table by that column in ascending or descending order.

## About Queue Status

The Agent and Skill Group Queue Display screens show the status of all queues in the Cisco E-Mail Manager instance.

The following table lists and describes the columns in the Agent or Group Queue Display screens:

<u>Column</u>	<u>Description</u>
Queue	The User ID or Group ID for the queue. You can click on this field to access the queue if you have the proper associated role.
Number Active	<p>The number of active messages for which a response has not been sent.</p> <p>A yellow flag appears in this column for queues that contain messages that have passed the escalation warning threshold.</p> <p>A red flag appears in this column for queues that contain overdue messages.</p> <p><b>Note:</b> Messages that have had a response sent and were kept current are not included in this count.</p>
Incoming Today	<p>The total number of messages during the current day that were:</p> <ul style="list-style-type: none"><li>• Assigned to the queue by the rules</li><li>• Reassigned to the queue by a user or a PDR</li><li>• Claimed into the queue</li><li>• Unarchived and placed in the queue</li></ul> <p>This value is reset to zero at the beginning of each day.</p>





Outgoing Today	<p>The total number of messages during the current day that were:</p> <ul style="list-style-type: none"><li>• Manually or automatically reassigned from the queue to another queue</li><li>• Sent as responses from the queue, whether or not the original message was kept current or archived.</li><li>• Closed without a response</li><li>• Claimed from the queue by another user</li><li>• Deleted</li><li>• Archived</li></ul> <p>This value is reset to zero at the beginning of each day.</p>
Longest Waiting	<p>The longest amount of time an active message has been waiting for a response.</p>
Average Age	<p>The average amount of time active messages have been waiting for responses.</p> <p><b>Note:</b> Queues without messages are not counted when the Average Age for all queues is computed.</p>


## Viewing Queue Status

To access these screens, from the **Reports** menu, select **Agent Queue Display** or **Skill Group Queue Display**. To view a queue from these screens, click the agent or group name.

The Agent or Group Queue Display screen opens:



Queue 	Number Active 	Incoming Today 	Outgoing Today 	Longest Waiting 	Average Age 	Number Overdue 
<a href="#">Mark</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">admin</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">brendal</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">dbarbrow</a>	1	0	0	3 days 00:05:22	3 days 00:05:13	1
<a href="#">hughcraw</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">jhh</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">marki</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">melissab</a>	1	0	0	3 days 00:06:00	3 days 00:05:25	0
<a href="#">moutmann</a>	2	0	0	3 days 00:05:31	2 days 22:17:58	1
<a href="#">mikesoto</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">overdue</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">overload</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">rejected</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">rtravis</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">tbuccier</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">tharrisx</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">unassigned</a>	2	0	0	1 day 21:51:54	1 day 21:51:53	0
<a href="#">wkenrich</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">ychens</a>	0	0	0	00:00:00	00:00:00	0
<a href="#">yichen</a>	 17	0	0	3 days 00:05:53	3 days 00:05:33	16
<b>Total Active</b>	<b>23</b>	<b>Incoming Today</b>	<b>Outgoing Today</b>	<b>Longest Waiting</b>	<b>Average Age</b>	<b>Total Overdue</b>
		<b>0</b>	<b>0</b>	<b>3 days 00:06:00</b>	<b>2 days 18:29:12</b>	<b>18</b>

Use the up and down arrows,  , to sort the table by that column in ascending or descending order.

## About Team Reports

Teams are groups of agents that an administrator creates. This is an effective way for an administrator to monitor the status of a group of agents. Agents can only belong to one team.

You can filter the real time report display by teams. For the agent state display, queue status display and skill group queue display, you can choose a team to run a report for, providing you have the proper permissions.

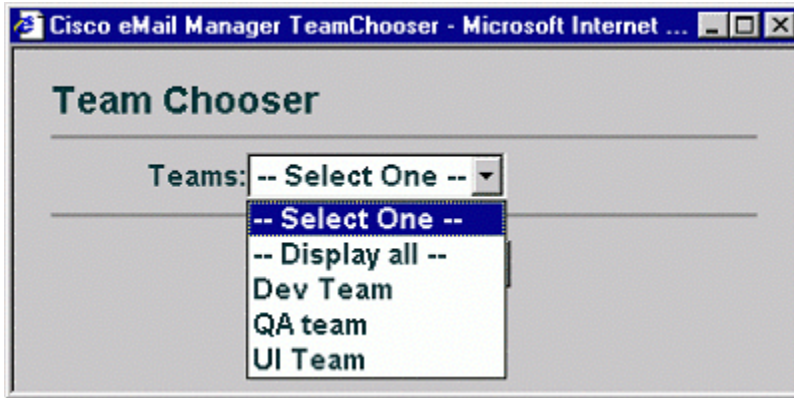
**Note:** You cannot generate Team reports from E-Mail Manager for integrated systems. For team reporting in integrated systems, use the ICM reporting tools.

## Viewing Team Reports

To view a team report, either:

- Click  **Select Team**.
- Click **Manage > Select Team**.

These two options open the Team Chooser dialog box.



From the dialog box, you select the team you want to run a report for and click **OK**.

## About Logged In Agents

The Logged In Agents screen lists all the agents logged into Cisco E-Mail Manager.

Agent Login Name	Agent Full Name	Agent Logged In Time
TestAdmin1	Admin Test1	0:04:42
TestAgent2	Agent Test2	0:06:09

This screen shows:

- The Agent's Login Name
- The Agent's Full Name
- The Agent's Logged In Time

You may also be provided with the option to log out other agents.

## Viewing or Logging Out Agents

You view Logged In Agents from the Logged In Agents screen. To access this screen, select **Real-Time Displays > Logged In Agents**.

Depending on your associated role, you may be able to logout out other agents. If you have this option, select Logout Agent next to the agent you want to logout.

## Accessing Web View Reporting

Depending on your associated role, you may have the option of accessing the Web View Reporting option.

To access Web View Reporting:

1. Select **Reports**. The Web View Reporting window opens.
2. Click **Web View Reporting**. The Web View Reporting screen opens.
3. Enter your Web View username and password and select **Log In**.



## **Working with Templates**

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## Working with Templates

---

This topic includes the following sections:

- About Templates
- Locating a Template
- Creating a Template
- Modifying and Deleting Templates
- About Dynamic Templates

### About Templates

- What is a Template?
- Kinds of Templates
- Template Ownership
- Using the Template List Screen

#### What is a Template?

A template is a common response that is saved for reuse. Building templates saves time and helps you present consistent, professional information to your customers.

When you create a template, you save it to a library based on its contents and intended use. The type of library you save it to defines the kind of template it is and the way it is referenced by rules.

#### Kinds of Templates

Personal templates	If you save a template to your Personal library, only you or another user with access privileges to do so can use it in responses. Only you as owner can modify or delete it. Templates in a Personal library can be sent automatically by the user's personal distribution rule. They cannot be suggested as responses by system rules.
Public templates	If you save a template to a Public library, by default it becomes available to all but users who can use public templates. Only you as owner can modify it or delete it, but other users can

search for it and use it in responses. Users with the privilege to do so can open a public template, save it to their personal library, and modify it for personal use. Templates stored in public libraries may be suggested as responses by system rules. They cannot be used by personal distribution rules.

#### Dynamic templates

A dynamic template is a special type of personal or public template that incorporates data from a specific message, an external database, or both. Dynamic templates cannot be used in AutoResponses.

#### AutoResponse templates

Templates saved to the AutoResponse library are used in responses that are sent automatically by system rules, with no user action. Users cannot browse in the AutoResponse library, and they cannot use autoresponse templates for their message responses.

### Template Ownership

Each template in E-Mail Manager is owned by a user. Only its owner can modify or delete a template.


- When a template is in a user's personal library, the owner is that user.
- For templates in public libraries, including the AutoResponse library, the template owner can be any user.







Users with the \_\_privilegeduser and above can change the owner and library of all public templates.

### Viewing and Opening Templates from a Template List screen

When you make a selection from the Libraries menu and when your search for templates returns results, you are presented with a Template list screen. Refer to the *Online Help* for information on using this screen.

#### Notes

- All five columns on this screen allow you to sort in ascending or descending order.
- To see (or hide) the text content of each listed template, use the **Preview** menu to toggle between **Show Preview** and **Hide Preview**.
- The  icons indicates a dynamic template.

<u>Title</u> 	<u>Keywords</u> 	<u>Description</u> 	<u>Library</u> 	<u>Owner</u> 
 <u>Custom Response</u>		Dynamic Response for known customers	personal	Mark
<u>Standard Response</u>		Standard Response from all Group Queues	personal	Mark

[1 - 2]

## Locating a Template

- Using the Template Menu to Locate a Template
- Searching for a Template

### Using the Template Menu to Locate a Template

- Select **Personal**, to see a list of your personal templates
- Select **All Public**, to see a list of all public templates
- Expand **Public Libraries** and then select a specific library to see that list of library's templates
- Select **AutoResponse**, to see the list of AutoResponse templates

All of these actions result in a Template List screen.

### Searching for a Template

Use the Search Templates screen, shown below, to search for templates that match criteria you specify. To open this screen, select **Templates > Search** from the Navigation menu.

Refer to the Online Help for information on using this screen. You enter search criteria to obtain field matches, and then click **Submit** to display a list of templates that match your criteria.



## Search by Field

If Any Field	▼	has any of these words:	▼	<input type="text"/>	And
If Any Field	▼	has any of these words:	▼	<input type="text"/>	And
If Any Field	▼	has any of these words:	▼	<input type="text"/>	And
If Any Field	▼	has any of these words:	▼	<input type="text"/>	And
If Any Field	▼	has any of these words:	▼	<input type="text"/>	And
If Any Field	▼	has any of these words:	▼	<input type="text"/>	

**Notes**

- You cannot search for phrases with spaces. For example, a search for "system support" does not return any templates. Instead, you should enter "system, support" as the search criteria, and select "has all of these words" as the type of match.
- All search criteria are combined with a logical AND operator. Therefore, the search only retrieves templates that meet all of the criteria you enter.

**Creating Templates**

- Opening the Create Template Screen
- Creating Template Options
- Checking the Spelling

**Opening the Create Template Screen**

To create a template, select **Templates > Create Template** from the Navigation menu. This opens the Create Template screen, shown below.

## Creating Template Options

Use this screen to specify:

- The library where the template will be saved.
- The template owner.

**Caution:** If you select Personal as the library, and select an owner other than yourself, the template will be placed in that user's personal library, and you will not be able to modify the template after you save it.

- A name and description for the template.
- The content, including any tokens, if this will be a dynamic template.
- Keywords to associate with the templates.
- Attachments to include in the template.

Complete the screen, referring to the *Online Help* for details. Then select **Actions > Save**.

**Note:** Public Libraries must be created in the administrator User Interface before creating the Public Templates in the Agent User Interface.

### Checking the Spelling

You can check the spelling of your template after creating it. This allows you to avoid making embarrassing mistakes when sending responses.



Select the language you wrote your template in and click **Check Spelling** to run a spell check. The dialog box reviews the text in the template and stops at every word that doesn't appear in its dictionary.

**Note:** Depending on your role flags, Cisco E-Mail Manager may automatically check the spelling of any templates you create.

In the SpellCheck dialog box:

- If the selected word is typed correctly, choose **Ignore**.
- Click **Ignore All** if the selected word is typed correctly and appears more than once in the document.
- Click **Add** to add the selected word to the SpellCheck dictionary.
- Click **Change** to change the selected word to the word in the **Change To:** field. You can also select a replacement word from the scroll down list provided, or manually type a word.
- Click **Change All** to change every instance of that word in the template.
- Click **Done** when you are finished.
- Click **Cancel** to abort the spell check.

### Modifying and Deleting Templates

- Modifying Templates
- Deleting Templates

#### Modifying Templates

You can modify templates that you own. Simply locate and open the template from its library or through a search.

Modify data as needed, and select **Action > Save**.

**Note:** If you delete a user, you should modify templates owned by that user and select a new owner.

**Caution:** If you modify the owner of the template, you can't modify the template after you save it.

## Deleting Templates

You can delete templates that you own. Simply locate and open the template from its library or through a search. Then, select **Actions > Delete**. Respond to the prompt confirming the deletion.

**Caution:** Do not delete a template from the AutoResponse library until you have verified that the template is not referenced by any system rules. If the deleted template in the AutoResponse library is referenced by a system rule, and that rule tries to send a response using the template, a blank message is sent.

## About Dynamic Templates

- What are Dynamic Templates?
- Using Tokens to Create a Dynamic Template
- Tokens for Message Parts
- Tokens for External Data

### What are Dynamic Templates?

The text in dynamic templates incorporates data (inserted as tokens) from a specific message or an external database, or both. Because of this feature, a response that uses a dynamic template can be customized for the specific content or context of the email it replies to.

In most respects, dynamic templates are similar to other templates. You create them, locate them, review them on a list, modify them, and delete them in the same manner as you do any other template.

The points of difference for dynamic templates are that:

- When you create them, you insert tokens into the template text.
- You cannot use them for AutoResponses.
- They are identified on a template list by a green, triangle icon.

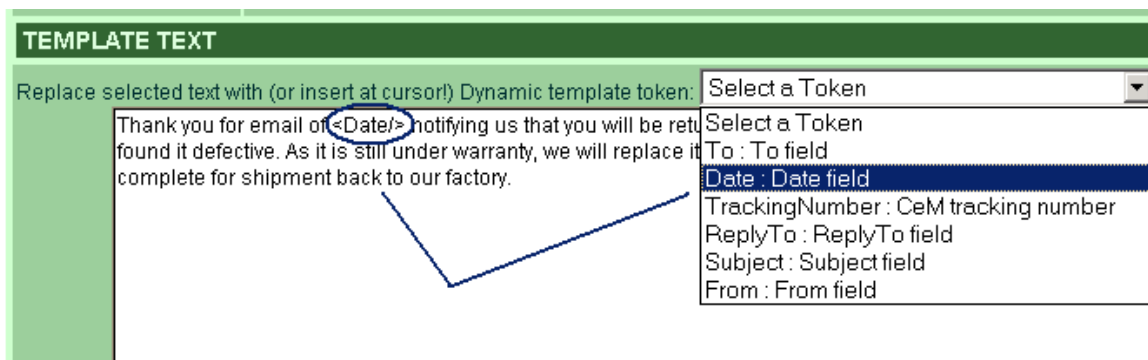
For information on setting up dynamic templates on the server so that you can use custom tokens, refer to the *Cisco E-Mail Manager Implementation and Customization Guide*.

## Using Tokens to Create a Dynamic Template

A token is a placeholder in a dynamic template for a value that is specific to the message being responded to. In other words, a token is the "dynamic" part of a dynamic template.

When you have the proper privilege, the Create Template or Modify Template screen contains a Token drop-down list, which is configured on the E-Mail Manager server.

**To add a token to a template**, position the cursor in the template text where you want the token. Then select the token from the drop-down list. The token is inserted at the token position with an ending slash (/) and appears between brackets; for example, <Subject/>. When the template is used in a response, the token value is replaced by a specific value.



**Note:** You can manually type a token; however, if the syntax or token name is not correct, you cannot save the template.

**Caution:** Brackets ('<' and '>') indicate a token. You cannot save a template that uses these characters in other places or for other purposes.

When working with dynamic templates, follow all other instructions for creating a template.

## Tokens for Message Parts

Cisco E-Mail Manager allows you to add tokens to a template to represent the following parts of a message:

- To Address
- From Address

- Reply To Address
- Subject
- Date
- Tracking Number
- Any additional custom tokens added to your E-Mail Manager instance

For example, the text of the dynamic template could read:

```
"Thank you for your message of <Date/>, "<Subject/>" . . .
```

In this example, <Date/> and <Subject/> are not the actual text a customer would see. When the template is used in a response to a specific message, values from that message are retrieved and inserted in place of the tokens. For example, in a response to a message received on July 3, with the subject "Request for Product Information, the line is:

```
"Thank you for your message of July 3, 2000, "Request for Product  
Information" . . .
```

In this example, the date and subject are taken from the original message; therefore, the text in each response will be different.

### **Tokens for External Data**

A token can also represent data retrieved from an external database. For example, a template could include the line:

```
<FirstName/> <LastName/>, thank you for your recent purchase of a  
<LastPurchase/>
```

In this example, the From address of a message is used to retrieve the customer's first name, last name, and last product purchased from a database at your company, so each customer receives a personalized response. For example, a customer who receives a response with this template might read:

```
John Smith, thank you for your recent purchase of a garden hose.
```

## **Customizing Your Environment**

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## Customizing Your Environment

---

This topic covers the following sections:

- Configuring the Response screen
- Changing Your Login Password

### Configuring the Response Screen

Cisco E-Mail Manager allows you to configure the size of the three frames of your Response screen.

#### To Configure the Response Screen

1. Specify a height (in pixels) for the frames of the Response screen in the **Height:** and the **Width:** field.
2. Enter a time interval in the **Automatically save draft every:** field. Cisco E-Mail Manager automatically saves a copy of the response draft you're working on according to the time specified.
3. Click **OK** to save your changes.

**Note:** Your changes do not immediately take effect. You need to close the Response screen and open it again.



Configure your response page

**Response**

Choose the **Height** of the top portion of the response page

<b>Original Message:</b>	<b>Response:</b>
Choose the <b>Width</b> of the original message portion of the response page	

**Height:**  Your total screen height is 768

**Width:**  Your total screen width is 1024

**Response text font size:**



hours : minutes

**Automatically save draft every:**  :

## Changing Your Login Password

You can change your login password through your Personal Profile screen. You access your Personal Profile screen by selecting **Personal Settings > Personal Profile**.

### To change your password

1. Enter your old password into the **Old Password** field.
2. Enter your new password into the **New Password** field.
3. Re-enter your new password into the **Retype New Password** field.
4. Click  Update Settings to finalize the change. Click  Reset to cancel your changes.

The next time you log on, you'll need to use your new password.

**Note:** By default, passwords must be at least six characters long and can contain any combination of letters, numbers, spaces, and symbols (+, -, \_, %, &, #, @, !). Your administrator may have configured your password rules differently.

## **Additional Message Tasks**

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## Additional Message Tasks

---

This topic contains the following section:

- Printing A Message
- Reassigning a Message
- Escalating a Message
- Add a Sender to a Mailing List

### Printing a Message

You can print any messages in Cisco E-Mail Manager, so you can have a hard copy.

Cisco Systems

Print Message

jt jt

?

Help

**Cisco E-Mail Manager Message ID: c34f9553d75c41b2959a707f47a2cabb**  
**Tracking Number: DT20010723\_0000000001**  
**Print on Jul 24, 2001 4:53:22 PM**

Print Close

Categories:	None
Last Note:	None
Priority:	Normal
Assigned By:	unassigned
Owner:	jt
Previously:	unassigned

**MESSAGE INFO**

Sent:	Mon Jul 23 17:41:30 GMT+01:00 2001
Received:	Mon Jul 23 12:52:38 GMT+01:00 2001
From:	jtuohey
To:	doc@finger9.cisco.com
Subject:	do

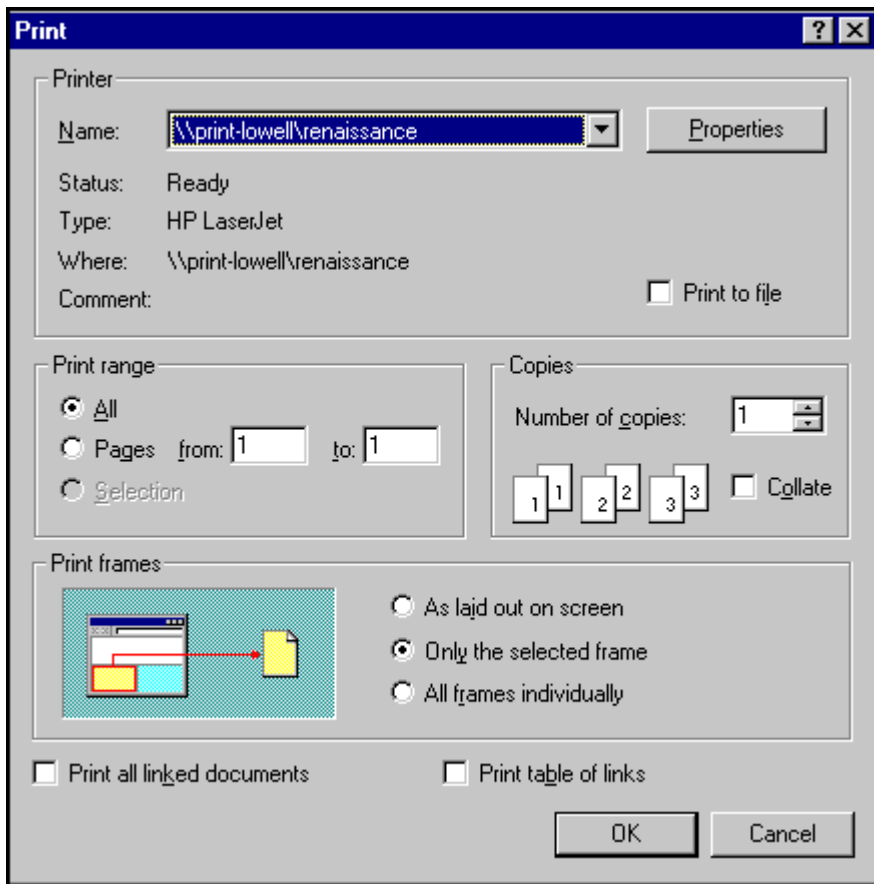
**Message**

Hello,

**RESPONSE (AS OF PRINTING)**

## To print a message

1. Click **Print**. The Print dialog box appears.



2. Customize the print settings you want.
3. Click OK.

## Reassigning and Escalating a Message

When you reassign a message, you pass ownership to another Cisco E-Mail Manager agent. When you escalate a message, you reassign it to another agent but also escalate the message priority to the next level.

**Note:** Your associated role and skill group membership determine which queues you can reassign messages to.

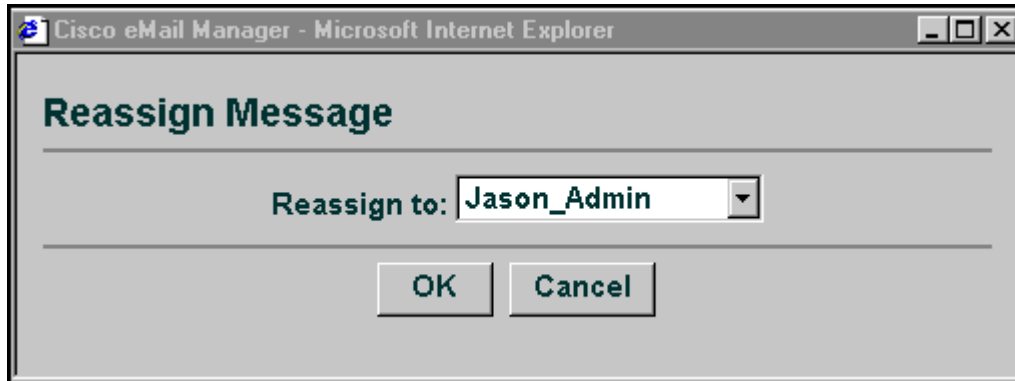
### Accessing the Reassign and Escalate options

You access the reassign and escalate options from:

- The Manage menu in a queue.
- The Reassign and Escalate icons at the top of the Response screen.

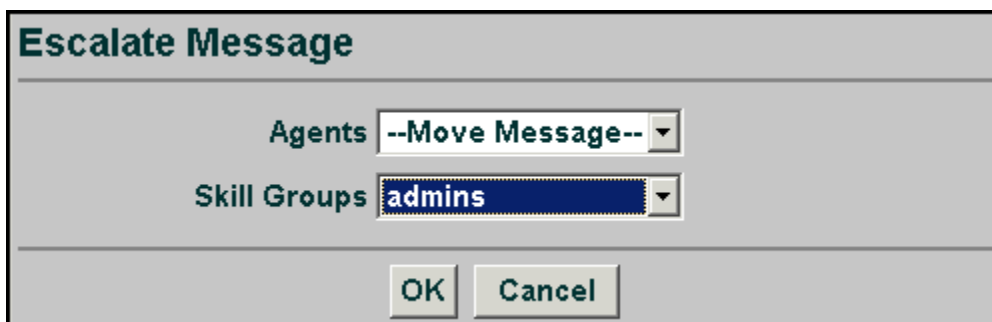
### To Reassign a Message

1. Select the agent you want to reassign the message to.
2. Click **OK**.



### To Escalate a Message

1. Choose the agent you want to reassign it to.
2. Click **OK**.




### Adding the Sender to a Mailing List

Adding a sender address to a mailing list allows you to group certain Cisco E-Mail addresses together. If an issue affects multiple customers, you can send a response to that group of addresses at once, instead of sending the same reply several times.

- Opening the Add to Mailing List Screen
- Adding a Sender Address to a Mailing List

### Opening the Add to Mailing List Screen

You can add the sender of a message to a mailing list in two ways:

- From the Response or Message screens, click on the  icon next to the sender's email address. The **Add to Mailing List** dialog appears.
- From a Queue, select the message sent by the email address you want to add to the mailing list and select **Manage > Add to Mailing List**.

### Adding a Sender Address to a Mailing List.

1. Enter the address you want to add.
2. Select the appropriate options.
3. Click **OK**.

See the *Agent Help* for detailed instructions on the **Add to Mailing List** options.

### Add to Mailing List

---

Address to add:

GThock@cisco.com

Add to:

☒ Existing List   ☐ New List   ☐ Opt-Out List

---

Existing lists:

Lowell - Lowell tech writers ▼

---

New List Owner:

☒ Jason   ☐ Public

New List:

Description:

---

Reason for Opt-Out:

---

OK

Cancel



## **Working With Your Personal Settings**

## **Working With Your Personal Settings**

---

Your personal settings define your options as an agent. You can, depending on your permissions, alter your options and settings.

This topic contains the following sections:

- About Your Personal Profile
- Customizing Your Personal Profile
- Personal Mailing Lists

### **About Your Personal Profile**

You customize your agent options through your Personal Profile. When your agent account is created, an administrator assigns you permissions and a user role. Although you cannot change your role or permissions, you can modify some of your default settings. This section describes how to modify the following general settings of your profile.

- Changing Your Password
- Choosing Your Time Zone
- Modifying Your Real Name
- Modifying Your Description
- Creating Signatures
- Default Notification Email Address
- Email Locale
- Specifying Rows Per Page
- Specifying Page Grace
- Specifying a Start Screen
- Specifying a Screen Locale
- Specifying an Alias
- Changing your User Role

- User Role
- Viewing User Flags
- Using your Personal Distribution Rule
- Enable Automatic Overdue Escalation
- Enable Automatic Overload Escalation
- Overload Warning Threshold
- Overload Escalation Threshold

### **Changing Your Password**

For security reasons, you can change your login password. For instructions on how to do this, check the customizing your environment page.

**Note:** Your password must adhere to the rules specified below the password fields, or else E-Mail Manager does not accept your new password.

### **Choosing Your Time Zone**

The time zone menu provides several different time zones you can set. This attaches a time to autoresponses sent from your agent account.

### **Modifying Your Real Name**

This field should contain your real name. If it doesn't, enter your real name here.

### **Modifying Your Description**

This field contains a description of your agent account. You can modify this field as necessary.

### **Creating Signatures**

These three options allow you to customize signatures for your responses. You may want to type such information as your job title, company name and location. You insert your signature when you type a response.

### **Default Notification E-mail Address**

The default notification e-mail address is an outside email address that you can specify. If an address is specified and your account has either special notification or external notification permission, then E-Mail Manager sends a mail notification to the specified email address. Thus, you can check whether you are receiving e-mails in your queue from an outside email account. The default notification e-mail address is also used by Mailtrack.

### **E-mail Locale**

This option is where you select your locality and the language of the message. This option is used for auto-responses.

### **Specifying Rows Per Page**

This is the number of messages that can be displayed in a single screen in the queue. The default should be 25.

### **Specifying Page Grace**

This is the minimum number of messages to be displayed on an additional queue screen. If an additional queue screen has fewer messages than the page grace specifies, they are instead added to the previous queue screen, even if that makes the total greater than the Rows per Page setting.

For example, if Rows per Page is 25 and Page Grace is 5, and there are 28 messages in the queue, all 28 messages are displayed in one screen in the queue. This is because otherwise the second queue screen would have only 3 messages, less than the Page Grace.

### **Specifying a Starting Screen**

By default, the Starting Screen is the Status screen. You can change the starting screen to:

- your personal queue
- a group queue you have access to
- a blank screen

### **Specifying a Screen Locale**

The screen locale defines the locale that the interface is displayed in.

### **Specifying an Alias**

If you want message returns from customers to be routed to a separate email address, you can specify an alias address. Returns to your responses will be routed to the specified email address.

An alias is an e-mail address used for responses. E-Mail Manager makes the responses appear as if they came from a different e-mail address.

You can enter one or more aliases, separated by commas. For example: Sales <sales@company.com>, Support <support@company.com>. The alias field supports a maximum of 1024 characters.

### **User Role**

This lists your user role.

### **Viewing User Flags**

The personal profile screen lets you view your User Flags. The user flags show you what permissions you have and do not have. Your User Flags screen resembles the screen shot below.

**USER FLAGS for jtuohney, Role: \_\_priviledgeduser**

- ☒ Allow **jtuohey** to change Password.
- ☐ Force **jtuohey** to change Password at next login
- ☒ Allow **jtuohey** to change Time Zone.
- ☒ Allow **jtuohey** to change First Name and Last Name.
- ☒ Allow **jtuohey** to change Signature1.
- ☒ Allow **jtuohey** to change Signature2.
- ☒ Allow **jtuohey** to change Signature3.
- ☒ Allow **jtuohey** to change Default Notification E-Mail Address.
- ☒ Allow **jtuohey** to change Style and Paging.
- ☒ Allow **jtuohey** to change Aliases.
- ☐ Allow **jtuohey** to change Role.
- ☐ Allow **jtuohey** to change Distribution Rule.
- ☐ Allow **jtuohey** to enable or disable Distribution Rule.

---

- ☒ Allow **jtuohey** to see their Personal Queue.
- ☒ Allow **jtuohey** to see their Skill Group Queues.
- ☒ Allow **jtuohey** to use Personal status screen.
- ☒ Allow **jtuohey** to use the Queue Chooser.
- ☒ Allow **jtuohey** to assign outside of peer skill groups.
- ☐ Allow **jtuohey** to reassign to agents.
- ☒ Allow **jtuohey** to use search screen

In this window, a checkmark indicates that the user role has the access privilege. Lack of a check mark means that the user role does not have the access privilege.

**Note:** You cannot modify your user role settings, only administrators can.

### Using Your Personal Distribution Rule

Your Personal Distribution Rule is a rule that processes a message at the time the message is assigned to your queue. The distribution rule executes when a message is assigned to the queue by rules, or by manual reassignment from a different queue. Your distribution rule does not execute when you claim a message from a skill group queue. You can enable or disable your personal distribution rule.

### Enable Automatic Overdue Escalation for (username)

This option processes messages in the user's queue by the Overdue Rule Tree when messages become overdue.

So, for example, if the overdue time is set to 18 hours, and user didn't process the new incoming message within this time, the message will be marked as overdue.

### **Enable Automatic Overload Escalation for (username)**

This option processes messages by the Overload Rule Tree when the number of messages in the user's queue surpasses the threshold.

### **Overload Warning Threshold**

Overload warning sends a warning out that the number of messages in your queue is reaching its limit. You can enter the number of messages that you want.

### **Overload Escalation Threshold**

Overload escalation is the reprocessing of the oldest messages in a queue once that queue exceeds the number of messages allowed. When the number of messages in your queue exceeds the escalation threshold you entered (or the default number), then E-Mail Manager starts processing the overload rules for you.

## **Customizing Your Personal Profile**

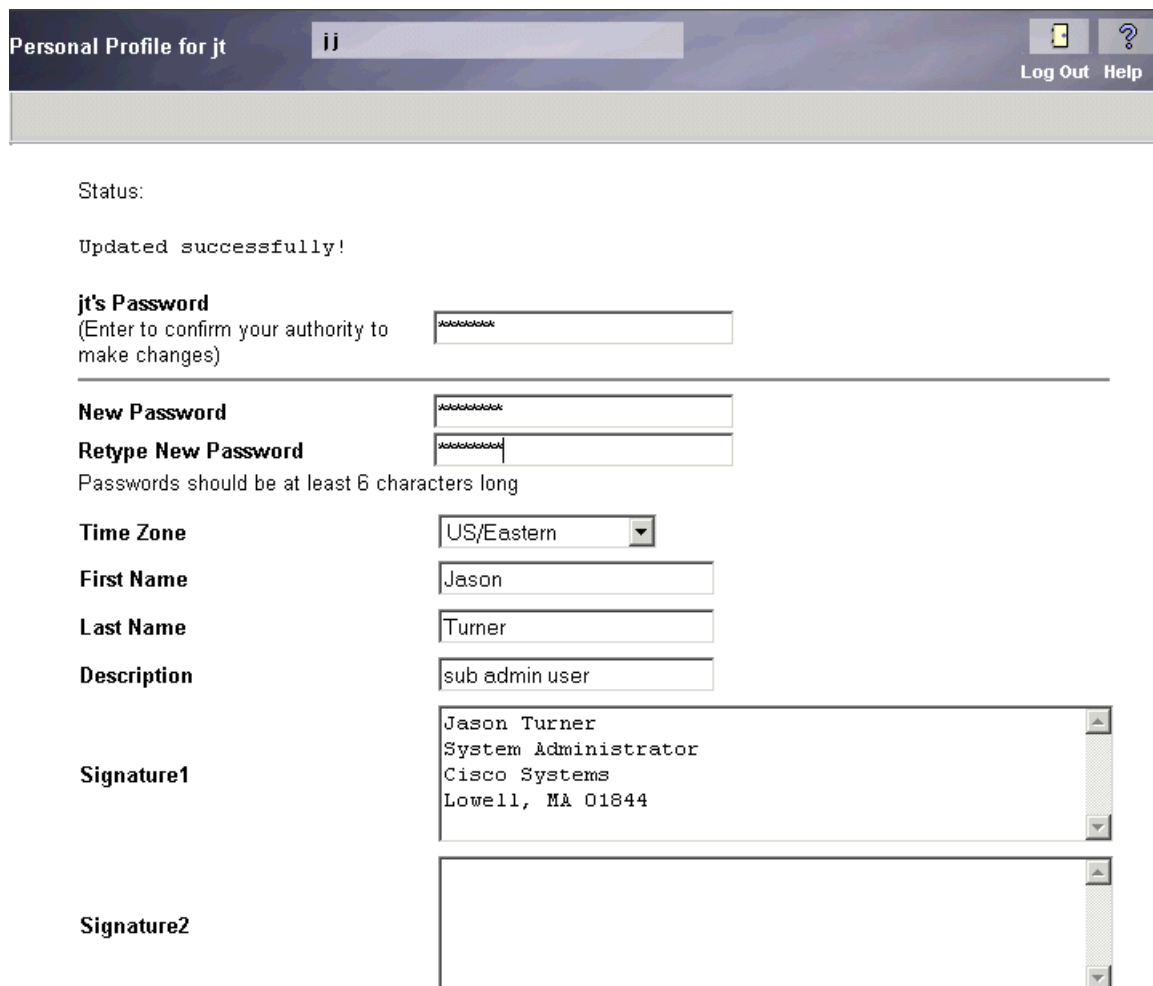
- Changing Your Password
- Choosing Your Time Zone
- Modifying Your Real Name
- Modifying Your Description
- Creating Signatures
- Entering a Default Notification Email Address
- Specifying Email Locale
- Specifying Rows Per Page
- Specifying Page Grace
- Specifying a Start Screen
- Specifying a Screen Locale
- Specifying an Alias
- Viewing User Flags
- Using your Personal Distribution Rule

- Enable Automatic Overdue Escalation
- Enable Automatic Overload Escalation
- Overload Warning Threshold
- Overload Escalation Threshold
- Updating Your Settings

### Opening the Personal Profile Screen

To access your Personal Profile, click **Personal Settings > Profile**.

The screen below is an example of an agent's personal profile. Click an option for an explanation of its function.



Personal Profile for jt jj Log Out Help

Status:

Updated successfully!

**jt's Password**  
(Enter to confirm your authority to make changes)

**New Password**

**Retype New Password**  
Passwords should be at least 6 characters long

**Time Zone** US/Eastern

**First Name** Jason

**Last Name** Turner

**Description** sub admin user

**Signature1**  
Jason Turner  
System Administrator  
Cisco Systems  
Lowell, MA 01844

**Signature2**



Default Notification E-Mail Address	<input type="text" value="defaultemail"/>
E-Mail Locale	<input type="text" value="English (United States)"/>
Rows per Page	<input type="text" value="15"/>
Page Grace	<input type="text" value="5"/>
Starting Screen	<input type="text" value="Status"/>
Screen Locale	<input type="text" value="Use Browser Setting"/>
Aliases (return address)	<div>alias</div>
Role	<input type="text" value="__subadmin:description"/> <a href="#">See it's Permission flags</a>

---



Use Personal Distribution Rule: ☐ Yes ☒ No

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☒ Enable automatic overdue escalation for jt  
☐ Enable automatic overload escalation for jt

Overload Warning Threshold  messages or ☒ Use system default

Overload Escalation Threshold  messages or ☒ Use system default

 [Update Settings](#)  [Reset](#)

## Changing Your Password

For instructions on how to do this, check the customizing your environment page.

**Note:** Your password must adhere to the rules specified below the password fields, or else E-Mail Manager does not accept your new password.

## Choosing Your Time Zone

Choose the time zone you want autoresponses sent from in this drop down menu.

## Modifying Your Real Name

Enter your real name here.

## Modifying Your Description

Enter a description of your agent account here.

## Creating Signatures

Type prevalent information in a signature field, such as your job title, company name and location. You insert your signature when you type a response.

**Entering Default Notification Email Address**

Enter the default notification email address into the field.

**Specifying an E-mail Locale**

Select the locale/language you are working in.

**Specifying Rows Per Page**

Enter the number of messages you want displayed in the field to the right of **Rows Per Page**.

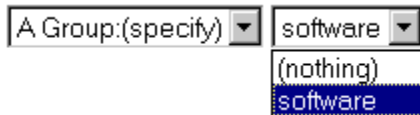
**Specifying Page Grace**

To set the Page Grace, enter the desired number in the field to the right of **Page Grace**.

**Specifying a Starting Screen**

To choose a new Starting Screen, select one from the drop-down menu.

If you choose the group queue option, you need to specify a group queue for your Starting Screen from the drop-down menu next to Starting Screen menu.

**Specifying a Screen Locale**

Specify the language you want your message text to appear in.

**Specifying an Alias**

Enter an e-mail address into the alias field.

**Changing your User Role**

Depending on your permissions, you may be able to change your user role by clicking the drop-down menu and selecting a new user role.

### Viewing Permission Flags

Click the **See (your username) Permission Flags** link to view your E-Mail Manager user permissions.

### Using Your Personal Distribution Rule

Click **Yes** to enable your personal distribution rule, or **No** to disable it.

### Enable Automatic Overdue Escalation for (username)

Click this check box to enable this option.

### Enable Automatic Overload Escalation for (username)

Click this check box to enable this option.

### Overload Warning Threshold



Cisco E-Mail Manager releases a warning after the amount of messages you specify here enter your queue. Check the default box to use the default number of messages.

### Overload Escalation Threshold

Cisco E-Mail Manager begins processing overload rules once the number of messages you specify here enter your queue. Check the default box to use the default number of messages.

**Caution:** Frequent escalation of messages can slow system performance. You should carefully consider your needs before setting a small Overload Escalation Threshold.

### Updating Your Settings

Click  [Update Settings](#) to update any changes you have made on your Personal Profile screen. Click  [Reset](#) to abort any changes you've made to the screen.

### Personal Mailing Lists

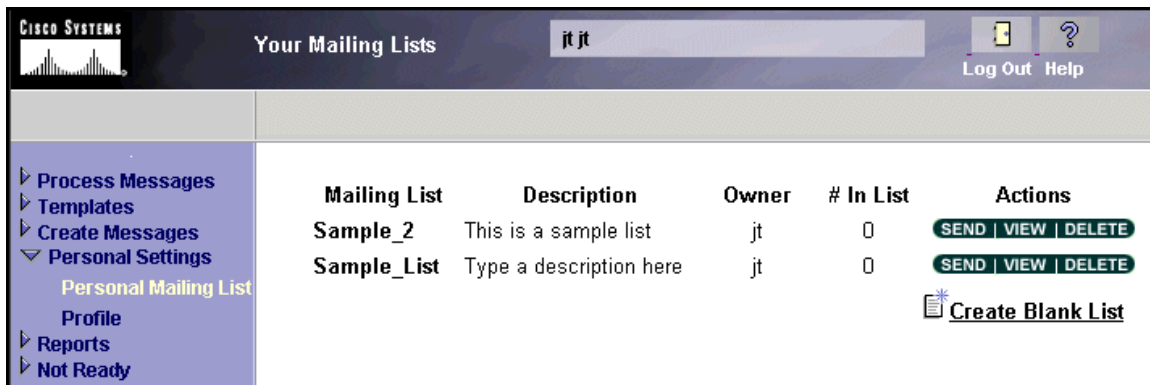
A personal mailing list is a collection of sender addresses. You create lists for multiple addresses that deal with similar issues, so that if you need to send the same information to multiple customers, you can just send it once to the mailing list.

- Opening the Personal Mailing List Screen
- Mailing List Screen Commands
- Adding an Address to a Mailing List
- Creating a New Mailing List

### Opening the Personal Mailing List Screen

You can create a mailing list from your Personal Settings menu. To open the Create Mailing List dialog box, click **Personal Settings > Personal Mailing List**.

The Your Mailing Lists screen appears. This screen lists all your personal mailing lists, a short description, the owner and the number of addresses in the list.



	Mailing List	Description	Owner	# In List	Actions
Process Messages	Sample_2	This is a sample list	jt	0	SEND   VIEW   DELETE
Templates	Sample_List	Type a description here	jt	0	SEND   VIEW   DELETE
Create Messages					
Personal Settings					
Personal Mailing List					Create Blank List
Profile					
Reports					
Not Ready					

### Mailing List Screen Commands

You can perform three actions on lists from this screen:

- **Send**- This command opens the Broadcast Message screen, allowing you to send a message to the mailing list.
- **View**- This command opens the Member of list screen. This screen lists the addresses in the mailing list, allowing you to add addresses or delete addresses from the list, or view the addresses' Sender History.
- **Delete**- This command deletes the mailing list.

### Actions from a Mailing List

When you're viewing one of your mailing lists, you have three options:

- **View History**- Click this option to view the sender history of the email address.
- **Delete**- This option deletes the sender address from your mailing list.
- **Add Mailing List Member**- Enter an email address into this field and click **Add** to add it to the current mailing list.

### Creating a New Mailing List

You can also create a new mailing list by clicking  **Create Blank List**. This opens the Create a New Mailing List dialog box.

You enter a name for the list, a short description for it, make it accessible to either the public or just you and click **OK**.



## **Menus and Icons**

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## Menus and Icons

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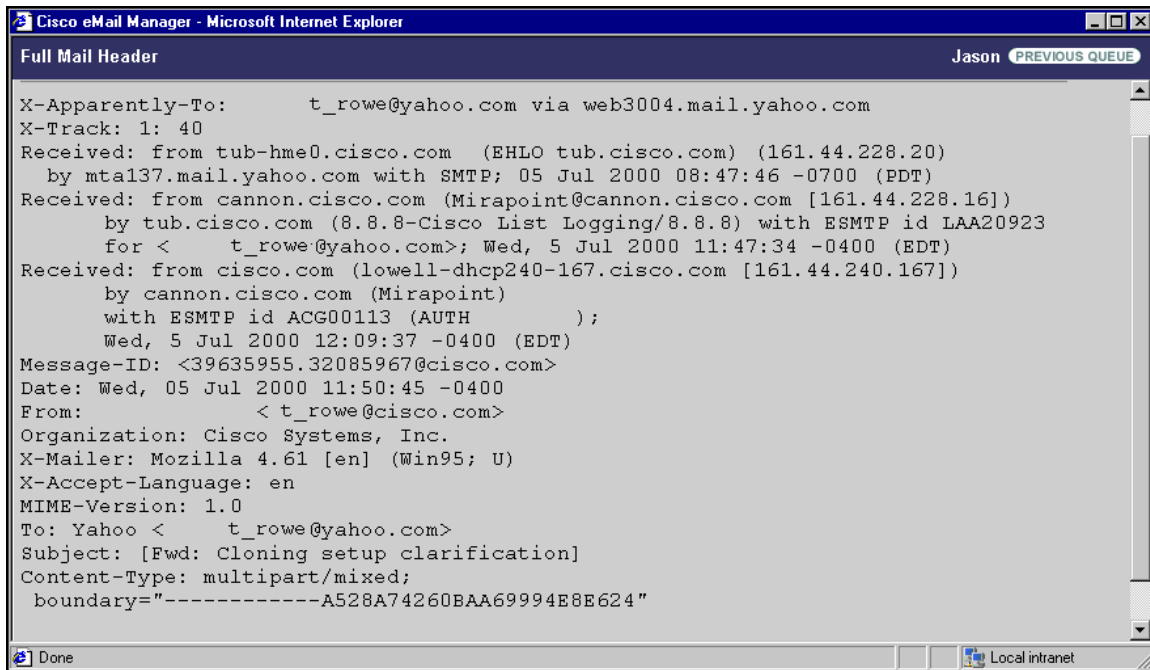
Command menus appear in the gray bar at the top of your Cisco E-Mail Manager screen. Status icons and Message Priorities define the status and severity of messages, while icons provide links to help and logging out. This section defines the options in the following command menus:

- View Menu
- Select Menu
- Manage Menu
- Search Menu
- Special Menu
- Preview Menu
- Actions Menu
- Help Icon
- Status Icons
- Searching for Messages with a Specific Status Type

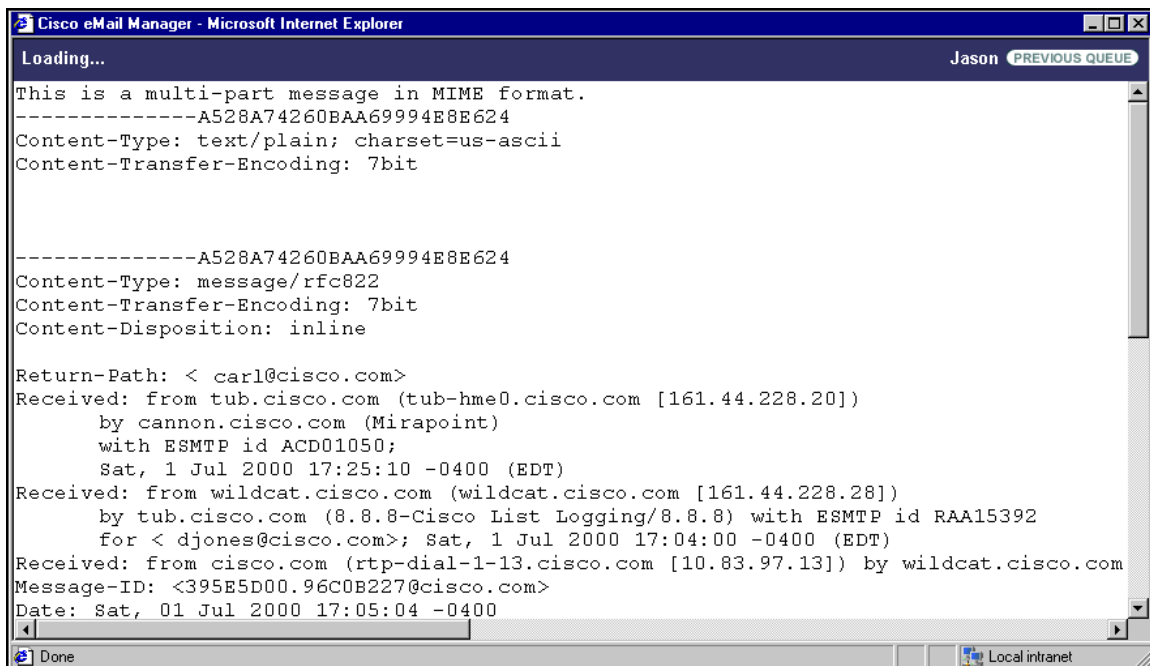
### View Menu Options

- **Notes and Actions**- This opens the Notes and Message history screen.
- **Tracking History**- This opens the Tracking History screen.
- **Sender History**- This opens the Sender History screen. This screen lists all the messages that the current customer has sent.
- **View Headers**- This option produces a window containing the message's headers. See the screen shot below for an example.





- **View Raw Message-** This option opens a window showing all the message's information, including message content and headers. See the screen shot below for an example.



- **Configure...** - A screen appears, allowing you to reconfigure the size of your Response screen frames. See the Customizing Your Environment.

## Select Menu Options

- **Select All**- Selects and displays all the messages listed in the queue.
- **Select Matched**- Selects and displays all the matching messages in the queue.
- **Select Unmatched**- Selects and displays all the unmatched messages in the queue.
- **Unselect All**- This options unselects any selected messages and closes them in the queue.
- **Unselect Matched**- Unselects any matching messages and closes them in the queue.
- **Unselect Unmatched**- Unselects any unmatched messages and closes them in the queue.
- **Remove Matched**- This removes any matched messages from the queue.
- **Remove Unmatched**- This removes any unmatched messages from the queue.
- **Remove Selected**- Removes any selected messages from the queue.
- **Remove Unselected**- Removes any unselected messages from the queue.
- **Keep Matched**- This keeps any matched messages in the queue.
- **Keep Unmatched**- This keeps any unmatched messages in the queue.
- **Keep Selected**- Keeps any selected messages in the queue.
- **Keep Unselected**- Keeps any unselected messages in the queue.

**Note:** If you remove a message from your queue, it only disappears temporarily. The message is not permanently deleted, and appears next time you open your queue.

## Manage Menu Options

To select a message, click on the box under the **Select** heading. From the Manage drop-down menu you can choose to:

- **Preview Selected**- This allows you to view the selected message in your queue. However, if the message is or contains an attachment, you cannot view it.

Select	Open	View	From	Status	Subject	Date	Owner
<input type="checkbox"/>			Alias		DT20010723_0000000001 do	Jul 24, 2001 11:08:42 AM	jt

Please include the following line in all replies.  
Tracking number: DT20010723\_0000000001

- **Add Selected to List-** This option lets you add the sender's email address to a mailing list.
- **Split Thread, Send and Archive-** Splitting the thread divides the message, assigning two different tracking numbers. You should do this when a message concerns multiple issues, thus giving each issue its own tracking number. After splitting thread, this option sends the response and archives it.
- **Split Thread, Send and Keep Current-** Splitting the thread divides the message, assigning two different tracking numbers. You should do this when a message concerns multiple issues, thus giving each issue its own tracking number. After splitting thread, this option sends the response but keeps the message active in your queue.
- **Send and Archive-** This sends the response and archives the message.
- **Send and Keep Current-** This sends the response but keeps the message in your queue.
- **Save Draft and Continue-** Saves the draft of the response you just wrote and allows you to keep working in the Response screen.
- **Save Draft and Exit Message-** Saves the draft of the response you just wrote and exits the message, returning you to your queue. For agents with push routing, another message opens in the Response screen.
- **Save as Template-** This opens the Save Template screen, allowing you to create a template out of the response you just sent.
- **Print-** Loads the Print Message screen, allowing you to print the response.
- **Split Thread and Reassign-** Splitting the thread divides the message, assigning two different tracking numbers. You should do this when a message concerns multiple issues, thus giving each issue its own tracking number. The reassign option reassigns the message to a different agent.
- **Split Thread and Escalate-** This option splits the thread of the message and reassigns it, but it also escalates the priority to the next highest degree, making the issue more serious. For example, a message that had a **High Priority** would escalate to **Very High Priority**.

**Note:** If you Split Thread and Reassign/Escalate a message, the tracking number is not split. The message appears in the reassigned queue (with escalated priority), but containing the same tracking number.

- **Reassign-** Allows you to reassign the message to another agent.
- **Escalate-** This option lets you reassign a message to another agent (or manager) and also escalates the priority to the next level of seriousness.
- **Archive-** Archives the message.
- **Select Team-** This option opens the Team Chooser dialog box, letting you choose a team to run a report for.
- **Exit Message-** Exits the message and returns to the queue.

## Special Menu Options

From the Special drop-down menu, you can access these options:

- **Restore View** - This option restores the content of the queue. For example, if you accidentally remove a message in your queue, click **Restore View** to make it reappear.
- **View Notes-** This option opens the Sender History Notes screen, allowing you to view or create notes for the sender's history.
- **Archive Selected-** This options archives the selected message(s). Once a message is archived, it no longer appears in any queue.

## Search Menu Options

There are only two options provided by the search menu item.

- **Search-** This runs a search for messages, according to the data you entered.
- **Reset-** This resets the Search screen, cancelling the information you entered in the search fields.

## Preview Menu Options

The preview menu offers the **Show Preview** option. Select this option to preview a template in the **Your Template Library** screen.


## Actions Menu Options

This menu offers you the following options from **Edit Template** screen.

- **Save**- This option saves the template you are editing.
- **Delete**- This option deletes the template you are editing.


## Help Icon Options

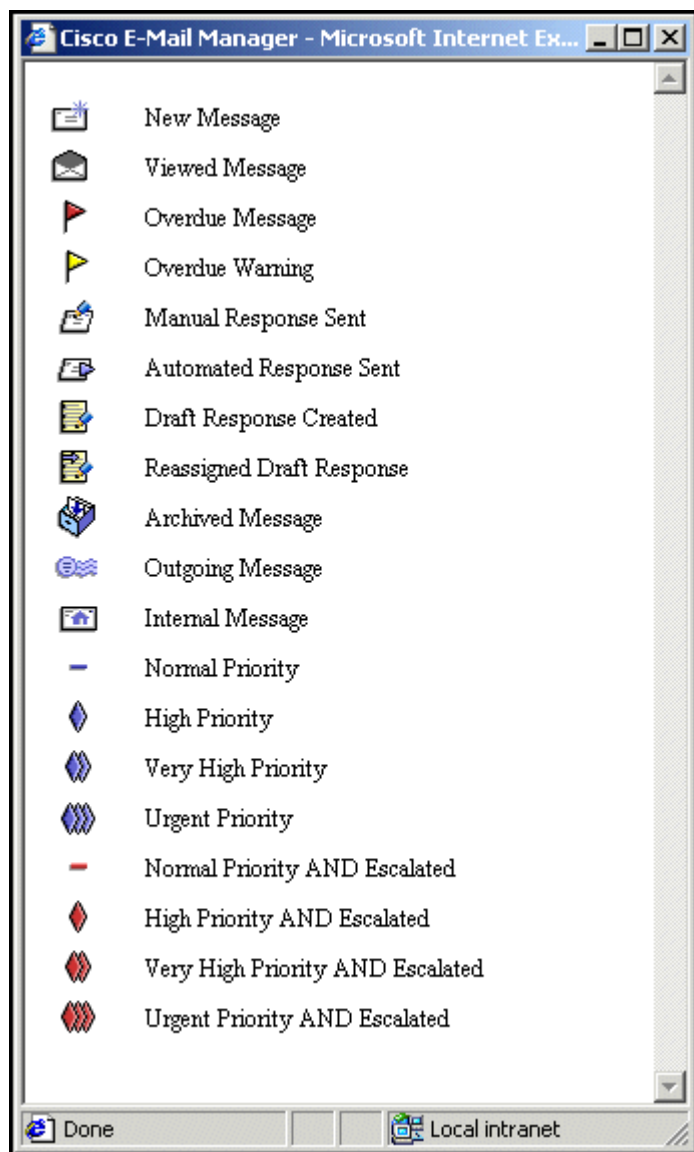


Click the  icon and select one of these options from the menu.



- **Context-sensitive help**- The name of this link differs, depending on the screen you are on. This link opens a help topic for the current screen/activity.
- **Agent Guide**- This link opens the Agent Guide, which is the guide you are currently reading.
- **About Cisco E-Mail Manager**- This link gives you background about Cisco E-Mail Manager, such as the version, server name etc.

## Status Icons and Message Priorities

Messages are tagged with status icons, which identify the state of the message, and priorities, which indicate the importance of the message. Below is a list of the icons and priorities, and their definitions. For example, in this image , the status icon is the pencil and note, and the priority is the blue dash.

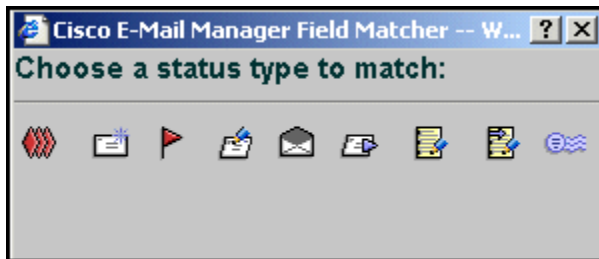


If you are viewing messages in an Outgoing queue-Error screen, or a Search Results screen, you may also see the following two status icons:

	<p>This icon signifies that the message encountered an internal problem while sending and that you must manually attempt to resend the message. To manually resend a messages, see the Repair Message screen.</p>
	<p>This icon signifies the message is marked to be sent, but has not yet been sent.</p>

## Searching for Messages with a Specific Status Type

Status types are icons that describe the priority or status of the current message. You can search for messages with a specific status type in any queue. There are nine different Status types:



To search for a Status type, click the **Status** heading in a queue and click the status icon you want to search for.





## **Logging Off and Going On Break**

## Logging Off and Going on Break


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This topic covers:

- Logout Icon Options
- The Not Ready State
- Entering the Not Ready State
- The Working State
- Entering the Working State

### Logout Icon Options



There are two options to logout of Cisco E-Mail Manager. Click the  icon and select one of these options:

- Done for the day
- On vacation

**Note:** Push agents must first go to the the Not Ready state to log out.

**Note:** You cannot access the log out icon when you are processing a message. You need to close the message before logging out.

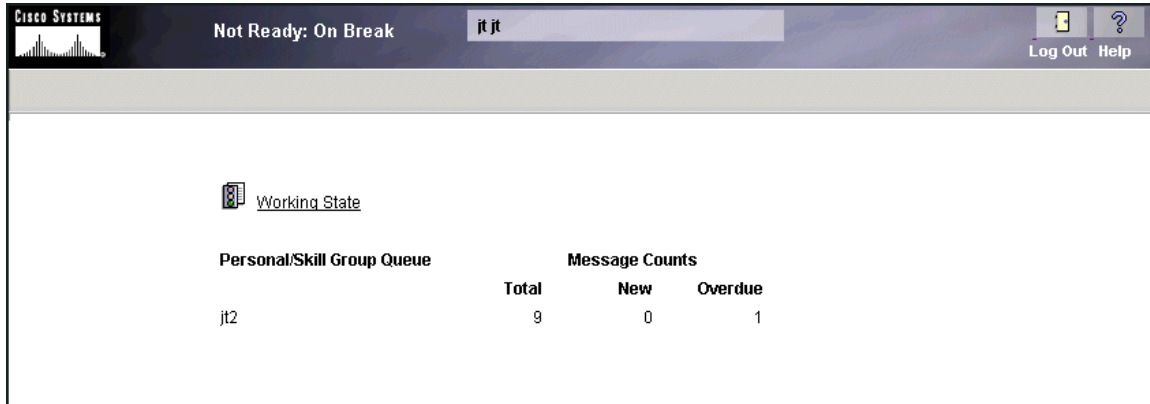
Every logout option brings the agent to the E-Mail Manager logout page.

### The Not Ready State

The Not Ready screen blocks messages from being pushed to your screen, allowing Cisco E-Mail Manager to record the times when you are not available to answer messages. You enter a Not Ready state if you want to take a break, yet stay logged in to Cisco E-Mail Manager. Like the Wait screen, the Not Ready screen lists the Message Count for your queues. In addition, the Not Ready screen lists your current state.

## Entering a Not Ready State


To enter the not ready state, click the **Not Ready** menu and select an option. This opens the Not Ready screen.



## The Working State

You enter a working state from the Not Ready screen. Entering a working state means you are ready to receive and work on e-mail.

## Entering the Working State

Click  [Working State](#) to enter the working state. You return to your default screen.



## **About Agent Workflow Options**

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## About Agent Workflow Options

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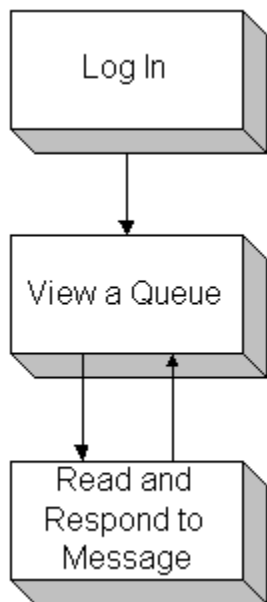
This topic contains the following sections:

- Pick mode
- Pull mode
- Push mode
- The Message screen
- The Wrap screen
- The Message and Wrap screens together

**Note:** This topic explains various agent workflow options. The *Cisco E-Mail Manager Administration Guide*, describes these options from an administrator's perspective.

### Pick Mode

The Pick mode refers to the workflow in which you select messages from their personal queue and from skill group queues in which they are members.

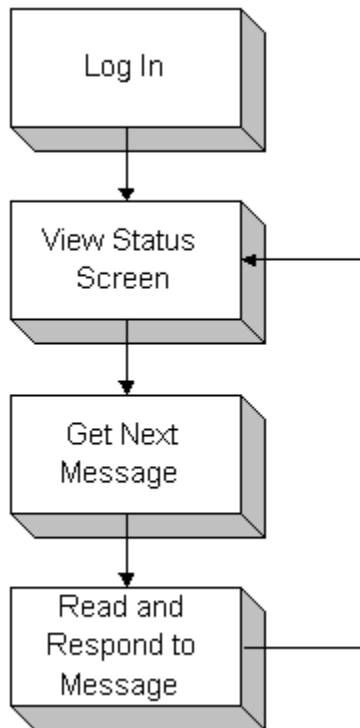


**Note:** This image does not show the mandatory use of the Message screen or Wrap screen.

If your agent account is based on any of the default roles, or other roles that do not have the access privilege For (role): require push routing, you can use pick mode or pull mode.

## Pull Mode

The Pull mode refers to the workflow in which you retrieve messages from the Status screen by clicking **Get Next** for a single queue or for all queues in which you are a member. When you click **Get Next**, the message with the highest priority and longest wait time, from a single queue or all queues listed, is presented.

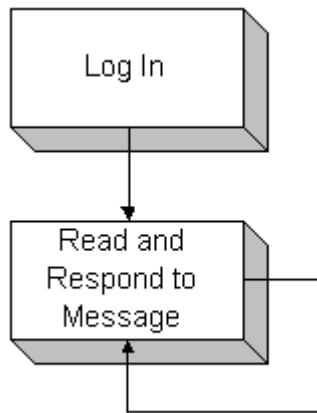


**Note:** This image does not show the mandatory use of the Message screen or Wrap screen.

If your agent account is based on any of the default roles, or other roles that do not have the access privilege For (role): For (role): require push routing, you can use pull mode or pick mode.

## Push Mode

The Push mode refers to the workflow in which you do not select messages from their queue. Messages from your personal queue, as well as queues in which you are a member, are automatically presented for reading and responding to, as shown in the figure below.



**Note:** This workflow does not show the mandatory use of the Message screen or Wrap screen.

Messages with the highest priority and longest wait time are presented first. Push routing ensures that the most important messages are responded to first. You do not have a choice of messages or queues to work with.

The access privilege For (role): require push routing, determines whether agents based on the role access messages through push mode.

If you belong to ICM Routing skill groups and are assigned messages through ICM software, you are presented these messages in push mode, regardless of their role settings. For more information, see [Integration with ICM Software](#).

**Note:** If you use push mode, you are able to leave the push mode to pick messages from your personal queues. You should do this periodically if you exit messages without responding to them. For more information, see the [About Push Mode](#) section.

## The Message Screen

Depending on the setting of the access privilege For (role): display Message screen before allowing response, you may be forced to view the Message screen before viewing the Response screen for each message. By dividing reading and responding into two steps, managers can track the time spent on both activities separately.

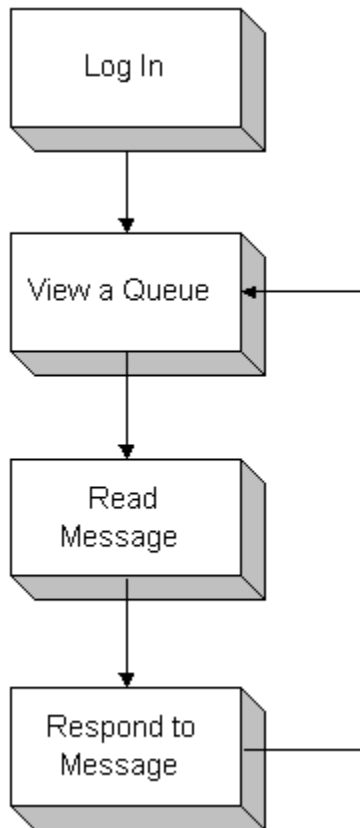
You must be based on a custom role with the access privilege For (role): display Message screen before allowing response set to use the Message screen. This access privilege is not set for the default roles.

Whether or not you must use the Message screen is independent of whether you use pick, pull, or push mode, or whether you view the Wrap screen.



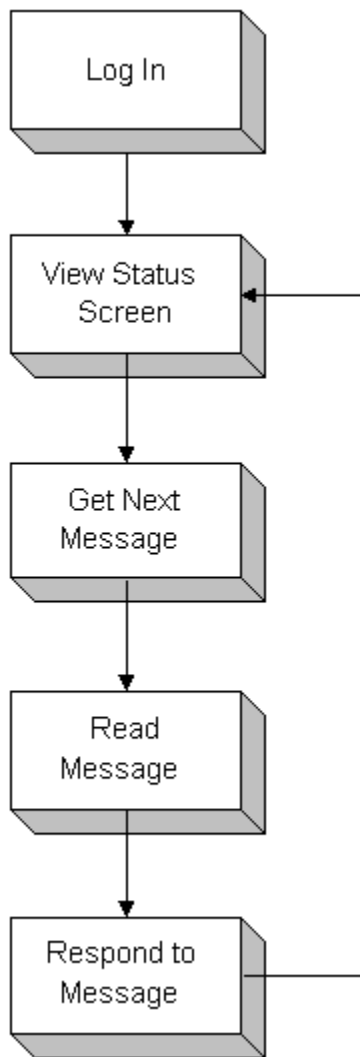
### **Pick Mode with the Message Screen**

The following figure shows the workflow for agents who use pick mode and are forced to view the Message screen:



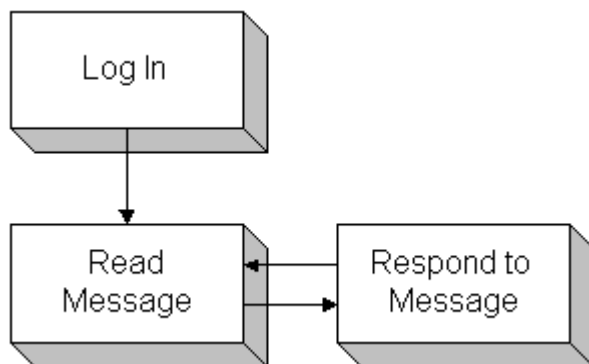
### **Pull Mode With the Message Screen**

The following figure shows the workflow for agents who use pull mode and are forced to view the Message screen:



### **Push mode With the Message Screen**

The following figure shows the workflow for agents who use push mode and are forced to view the Message screen:



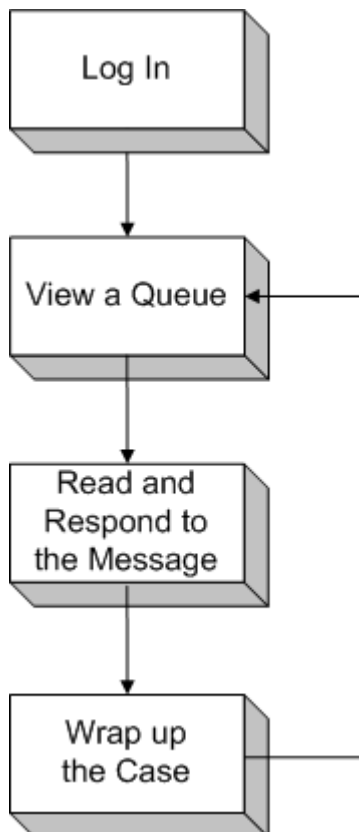
## The Wrap Screen

Depending on the setting of the access privilege Allow (role) to use wrap screen, you may be forced to view the Wrap screen after responding to a message. By forcing you to view this screen while they wrap the case in an external system, managers can track the time spent wrapping cases separately.

Whether or not you must use the Wrap screen is independent of whether you use pick, pull, or push mode, or whether you view the Message screen.

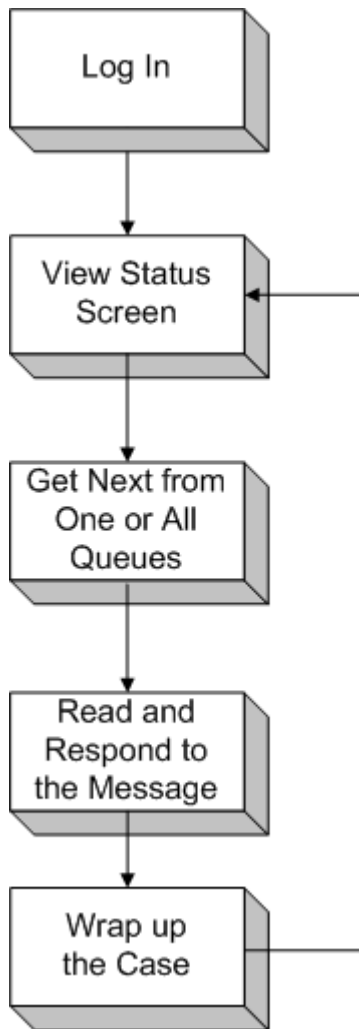
### Pick Mode with the Wrap Screen

The following figure shows the workflow for agents who use pick mode and are forced to view the Wrap screen:



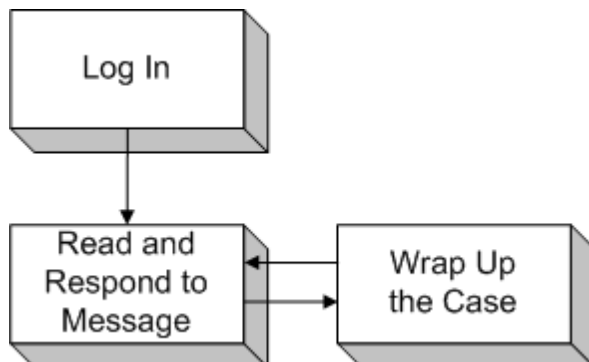
### Pull mode with the Wrap Screen

The following figure shows the workflow for agents who use pull mode and are forced to view the Wrap screen:



### **Push mode With the Wrap Screen**

The following figure shows the workflow for agents who use push mode and are forced to view the Wrap screen:



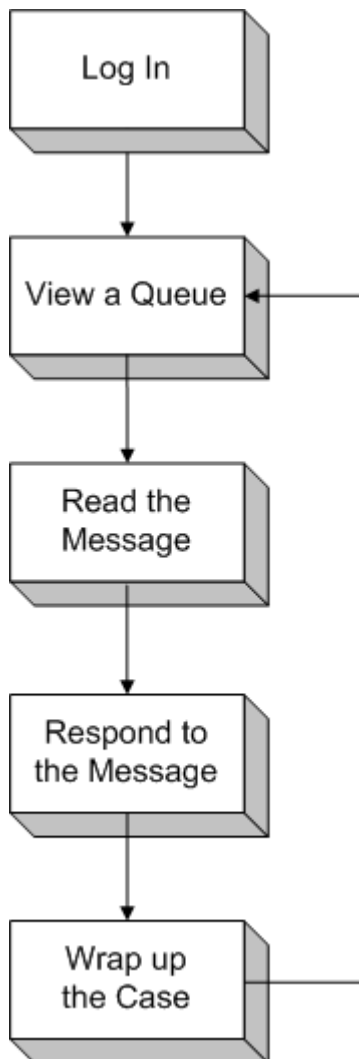
## The Message and Wrap Screens Together

Your administrator can force you to use both the Message and Wrap screens, to track the time spent on both these tasks. If so, your agent account must be based on a role that has both the For (role): display Message screen before allowing response and Allow (role) to use wrap screen access privileges set.

Whether or not you must use both the Message screen and the Wrap screen is independent of whether you use pick, pull, or push mode.

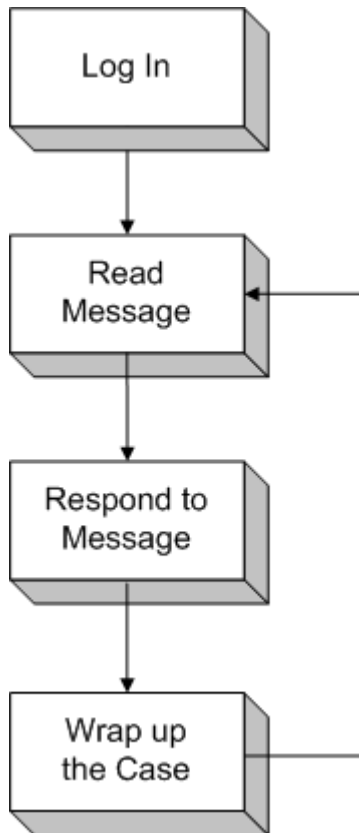
### Pick mode with the Message and Wrap Screens

The following figure shows the workflow for agents who use pick mode and are forced to view the Message and Wrap screens:

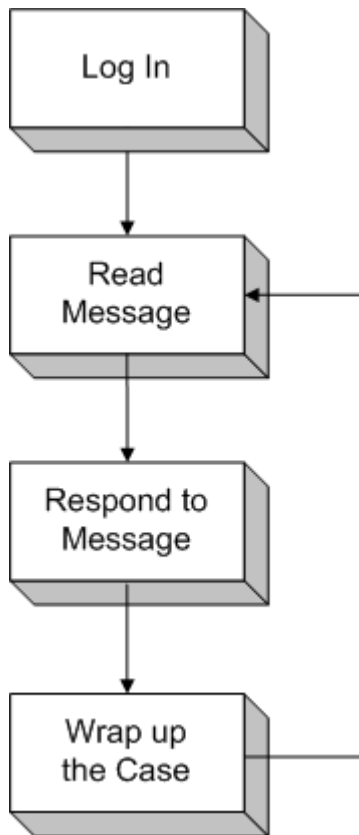


**Pull mode with the Message and Wrap Screens**

The following figure shows the workflow for agents who use pull mode and are forced to view the Message and Wrap screens:

**Push mode with the Message and Wrap Screens**

The following figure shows the workflow for agents who use push mode and are forced to view the Message and Wrap screens:







## Glossary

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### A

**access privileges:** Access privileges define which functions users based on the role are able to perform. You set access privileges when defining a role.

**Administration Desktop:** The Web application for completing typical administration tasks such as defining rules and maintaining agents and skill groups.

**agent:** An individual - a customer-contact agent, manager, or administrator - who has a distinctID with which to log in to E-Mail Manager. Each agent has an associated queue for assigned messages. Agents are specific to the E-Mail Manager instance and cannot be shared across instances.

**Agent Desktop:** The Web application for completing typical agent and manager tasks such as retrieving and responding to messages, working with templates, and viewing real-time reports.

**alias:** An e-mail address used for responses that make responses appear as if they came from a different e-mail address.

**application programming interface (API):** The programming interface that allows third-party applications to access E-Mail Manager functions.

**archive:** A holding place for messages after agents have completed working with them. Messages in the archive may still reside in the Primary Transaction Database until they have been moved to the LAMBDA database.

**assign:** The placement of a message in an agent or skill group queue.

**attachment:** A file that can be stored in E-Mail Manager for use in responses, or a file sent with an incoming message.

**autoresponse:** A response, using a template, that is sent automatically by a rule.

**autosuggestion:** A template that a rule determines may be an appropriate response to a message. Such templates are not sent automatically; agents view the suggestions and must manually choose to use them.

### C

**category:** A word or phrase that can be associated with a message by an agent (at the Response screen) or by a rule.

**CEMWatcher:** A tool for monitoring E-Mail Manager from other Windows computers.

**Cisco Independent Reporting (CIR) database:** The database that stores replicated data for reporting purposes.

**Configuration Utility:** The application on the E-Mail Manager server used to configure instances.

### D

**default notification e-mail address:** An Internet e-mail address used to alert a user to a message in E-Mail Manager, if specified by rules, and for MailTrack, which is used in distribution rules.

**distribution rule:** A rule that processes a message at the time the message is assigned to a user's or skill group's queue. A distribution rule executes when a message is assigned to a queue by rules, or by manual reassignment from a different queue. A distribution rule does not execute when an agent claims a message from a group queue.

**dynamic template:** A template that contains variables that allow e-mail responses based on the template to pull data from a message, an external database, or both. Thus, responses based on the dynamic template are automatically customized for specific messages and customers.

## E

**escalate:** The reassignment of a message while raising its priority one level.

**external data access:** The bringing of data in a non-E-Mail Manager database into E-Mail Manager, either for display in the user interface or into rules for additional processing.

**external data access (EDA):** The bringing of data in a non-E-Mail Manager database into E-Mail Manager, either for display in the user interface or into rules for additional processing.

## I

**InBasket:** The component of E-Mail Manager that retrieves messages from one or more POP3 Mailboxes and Web forms and sends them to system rules for processing.

**instance:** An instance is a partition of E-Mail Manager that uses its own databases, has its own configuration, and processes e-mail messages separately. Data in one instance is not accessible to other instances. One E-Mail Manager installation can support multiple instances.

**integration:** For E-Mail Manager, the use of ICM software for routing messages to agents and for reporting across multiple channels.

## J

**JavaScript customization:** The feature that allows you to use JavaScript to customize the Agent Desktop.

## K

**keyword:** A word or phrase that can be associated with one or more templates.

## L

**LAMBDA:** The acronym for Load Adaptive Message-Base Data Archiving. The E-Mail Manager component that moves older messages to a secondary database for storage.

**library:** A storage area for templates. Each template is saved in one (and only one) library, based on its content and intended use.

## M

**mailing list:** A group of multiple e-mail addresses (list members) under one list name.

**MailTrack:** The forwarding of a message, as well as the tracking number, suggested response templates, comments, and other system information associated with the message.

**matrix:** A set of instances that can exchange messages through rules.

**message access privileges:** Role settings that determine which messages agents based on the role can work with, and what actions they can perform on messages.

## O

**opt-out list:** A special list of e-mail addresses that is checked before a broadcast message is sent out. Opt-out list e-mail addresses do not receive broadcast messages, even if they are members of personal and public mailing lists.

**overdue escalation:** The reprocessing of messages after they have waited in a queue for longer than the time period you set.

**Overdue rule tree:** The rule tree that processes messages that are escalated because they have been in the queue longer than the default or queue-specific Overdue Escalation Time.

**overload escalation:** The reprocessing of the oldest messages in a queue after that queue contains more messages than the number allowed that you set.

**Overload rule tree:** The rule tree that processes messages that are escalated because the number of messages in the queue was greater than the default or queue-specific Overload Escalation Threshold.

## P

**pick mode:** The workflow in which agents select messages from their personal queue and from skill group queues in which they are members.

**POP3 Mailbox:** An account on an e-mail server that E-Mail Manager polls for incoming messages destined for the InBasket.

**Primary Transaction Database:** The main database used by E-Mail Manager. This database stores such things as messages and agent and skill group settings.

**priority:** The importance of a message, which can be set automatically by rules or manually by an agent.

**pull mode:** The workflow in which agents retrieve messages from the Status screen by clicking Get Next for a single queue or for all queues in which the agent is a member.

**push mode:** The workflow in which agents do not select messages from their queue. Messages from the agent's personal queue, as well as queues in which the agent is a member, are automatically presented for reading and responding to.

## Q

**queue:** A storage space for messages, associated with an agent or skill group.

## R

**real-time displays:** Reports that show the current status of agents and queues.

**reassign:** The act of moving a message from one queue to another.

**rebranding:** The feature that allows you customize the interface to display your own company's information.

**response:** The reply to a message.

**role:** A collection of settings and access privileges associated with agents. Each agent is based on a role.

**round-robin:** The even distribution of messages to logged-in members of a skill group.

**RServer:** The E-Mail Manager component that processes incoming messages and serves the Administration Desktop.

**rule:** An object that tests a message for certain criteria and performs an action on the message if it meets that criteria. Rules are grouped into rule trees and subroutines.

**rule tree:** The complete series of rules that process a message.

## S

**service level management:** A collection of several areas of functionality that enable you to manage messages so that you can ensure that: (1)agents in a skill group are working with an equal number of messages. (2)Messages that are not responded to in a set amount of time are escalated and re-processed according to rules you define. (3) Messages in queues with more messages than the number you set are escalated and reprocessed according to rules you define.

**skill group:** A collection of agents who work with messages assigned to the skill group's own queue.

**SMTP Server:** The server used by E-Mail Manager to send outgoing messages.

**subroutine:** A single rule, or a linked series of rules, that is not part of the main rule tree through which messages pass. Subroutines process messages when they are called by other rules.

## T

**team:** A collection of agents grouped for reporting purposes.

**template:** A predefined response stored in a library for agents' use.

**TServer:** The E-Mail Manager component that controls database transactions.

## W

**WebView:** The application used for reporting, accessible through the Agent Desktop.

**wrap:** The state agents go into when they are required to close a case after responding to a message.

## Index

---

### A

Accessing messages ..... 16

Additional message information ..... 54

### C

Changing a user profile ..... 122

Command menu ..... 136

Contacting the administrator ..... 88

Creating messages ..... 88

### G

Getting Messages ..... 16

### I

Internal messages ..... 68

### M

Menu options ..... 136

Message fields ..... 38

Message history ..... 54

Message screen ..... 64

Modes ..... 150

### O

Opening messages ..... 16

### P

Personal profile ..... 122

### Q

Queue screens

Message fields ..... 38

### R

Reading messages ..... 64

Real time reports ..... 92

Reports ..... 92

Responding to messages ..... 74

Retrieving messages ..... 16

### S

States ..... 44

System messages ..... 68

### U

User configuration ..... 122

### V

Viewing messages ..... 64

### W

Working modes ..... 44

Working with messages ..... 48

Working with template libraries ..... 102

Working with templates ..... 102