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

For Unified Contact Center Enterprise

Release 11.0(1)
August 2015

Americas Headquarters
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
http://www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 527-0883
Contents

Preface .................................................................................................................................................6
  About This Guide ................................................................. 7
  Obtaining Documentation and Submitting a Service Request ................................. 7
  Documentation Feedback ..................................................... 7
  Field Alerts and Field Notices ............................................ 8
  Document Conventions .......................................................... 8
  Other Learning Resources .................................................. 8
    Online Help ........................................................................ 8
    Document Set ..................................................................... 9

Chapter 1: Console Basics ........................................................................................................ ......10
  Key Terms and Concepts ........................................................................ 11
  Elements of the User Interface ....................................................... 11

Chapter 2: Language Option ...........................................................................................................13
  Setting Language Options for the User Interface ........................................ 14

Chapter 3: Custom Attributes ........................................................................................................17
  About Business Objects .................................................................... 18
  Creating Custom Attributes ............................................................ 18
  Adding Custom Attributes to Screens ............................................ 19
  Creating Macros for Custom Attributes .......................................... 20

Chapter 4: Custom Values .................................................................................................................21
  About Custom Values .................................................................... 22
  Creating Custom Values ............................................................... 22
  Adding Custom Subtypes ............................................................. 23
  Creating Custom Product Types .................................................. 24
Contact Person Search Data .............................................. 47
Contact Point Data .......................................................... 47
Contact Point Search Data ............................................... 47
Customer Data ............................................................... 47
Corporate Customer Data ................................................... 48
Group Customer Data ......................................................... 48
Individual Customer Data .................................................... 48
Customer Search Data ....................................................... 48
Customer Group Data .......................................................... 48
Customer Organization Data ................................................ 48
Routing Queue ................................................................. 48
User Data ........................................................................... 49
User Search Data ............................................................... 49
Editable Screens ............................................................... 49
Custom Attributes Available in New Activity Shortcuts ........ 49
Predefined Attribute Values ................................................. 49
Activity: Mode ................................................................. 49
Activity: Type ................................................................. 49
Activity: Status ............................................................... 50
Case: Status ................................................................. 50
Chat: Status ................................................................. 50
Contact person: ID type ..................................................... 50
Currency: Type .............................................................. 50
Customer: Contact person type .......................................... 51
Customer: Country ........................................................... 51
Customer: Group Type ....................................................... 58
Customer: Industry .......................................................... 58
Customer: Level ............................................................. 58
Customer: Organization Type ............................................. 59
Customer: Region ........................................................... 59
Customer: Webtype ......................................................... 59
Product: Type ................................................................. 59
User: Type ................................................................. 59
Welcome to Cisco® Unified EIM & WIM™, multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A unified suite of the industry’s best applications for web and email interaction management, it is the backbone of many innovative contact center and customer service helpdesk organizations.

Cisco Unified EIM & WIM includes a common platform and one or both of the following applications:

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

### About This Guide

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

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

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

### Obtaining Documentation and Submitting a Service Request


Subscribe to _What's New in Cisco Product Documentation_, which lists all new and revised Cisco technical documentation as an RSS feed and delivers content directly to your desktop using a reader application. The RSS feeds are a free service.

### Documentation Feedback

To provide comments about this document, send an email message to the following address: contactcenterproducts_docfeedback@cisco.com

We appreciate your comments.
Field Alerts and Field Notices

Cisco products may be modified or key processes may be determined to be important. These are announced through use of the Cisco Field Alerts and Cisco Field Notices. You can register to receive Field Alerts and Field Notices through the Product Alert Tool on Cisco.com. This tool enables you to create a profile to receive announcements by selecting all products of interest.

Log into www.cisco.com and then access the tool at http://www.cisco.com/cisco/support/notifications.html

Document Conventions

This guide uses the following typographical conventions.

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

Other Learning Resources

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

Online Help

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

<table>
<thead>
<tr>
<th>Use</th>
<th>To view</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Help button" /></td>
<td>Topics in <em>Cisco Unified Web and E-Mail Interaction Manager Help</em>; the Help button appears in the console toolbar on every screen.</td>
</tr>
<tr>
<td><code>F1</code> keypad button</td>
<td>Context-sensitive information about the item selected on the screen.</td>
</tr>
</tbody>
</table>

Online help options
Document Set

- The Cisco Unified Web and E-Mail Interaction Manager documentation is available in the Documents folder on the product CD. The latest versions of all Cisco documentation can be found online at http://www.cisco.com
- All Unified EIM documentation can be found online at http://www.cisco.com/en/US/products/ps7236/tsd_products_support_series_home.html
- All Unified WIM documentation can be found online at http://www.cisco.com/en/US/products/ps7233/tsd_products_support_series_home.html
- In particular, Release Notes for these products can be found at http://www.cisco.com/en/US/products/ps7236/prod_release_notes_list.html
- For general access to Cisco Voice and Unified Communications documentation, go to http://www.cisco.com/en/US/products/sw/voicesw/tsd_products_support_category_home.html

The document set contains the following guides:

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

User guides for agents and supervisors

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

User guides for Knowledge Base managers and authors

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

User guides for administrators

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

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

### Key Terms and Concepts

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

**System settings**

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

**Screen settings**

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

### Elements of the User Interface

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

![Elements of the console user interface](image-url)
1. **Console toolbar**: The main toolbar of the console appears at the top of the screen. It provides quick access to commonly performed actions such as “refresh,” “view Help,” and “log out.”

2. **Tree pane**: The Tree pane presents the contents of your work area as a tree list, allowing you to select the node (folder) that you wish to work in. When you select a folder, its first-level contents are displayed in the List pane.

   To expand all first and second level nodes with a single click, shift + click the plus [+] button next to the topmost node. The contents of all first and second level nodes are displayed in the Tree pane.

3. **List pane**: The List pane displays first-level contents of the folder selected in the Tree pane. You can view the name, description, date of creation, etc., of displayed items. In this pane, you can create items or select existing ones to modify or delete them.

4. **Properties pane**: The Properties pane displays the contents of the folder or article selected in the List pane. In this pane, you can edit the properties of the selected item.

5. **Status bar**: The status bar is present at the bottom of every screen. It displays the following information:
   - The user name with which the user has logged in to the system.
   - The language currently in use.
   - The status of the system (Loading, Ready, etcetera).
Language Option

- Setting Language Options for the User Interface
Setting Language Options for the User Interface

The Unified EIM and WIM user interface (UI) is available in the following 15 languages:

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

By default the English language is selected. If users need to access the application in more than one language, you can provide a list of languages on the login page for the user to select from.

To set the language for the user interface:

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

### Select the Language Packs

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

![A sample Login page](image)

4. Click the **Save** button.
3 Custom Attributes

- About Business Objects
- Creating Custom Attributes
- Adding Custom Attributes to Screens
- Creating Macros for Custom Attributes
About Business Objects

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

- **Activity data** (The custom attributes automatically becomes available for: Activity search data, Generic activity data)
- **Case data** (The custom attributes automatically becomes available for: Case search data)
- **Contact person data** (The custom attributes automatically becomes available for: Contact person search data)
- **Contact point data** (The custom attributes automatically becomes available for: Contact point search data, Email address contact point data, Phone number data, Postal address data, Web site data)
- **Customer association data** (The custom attributes automatically becomes available for: Customer association search data)
- **Customer data** (The custom attributes automatically becomes available for: Customer search data, Change customer data, Corporate customer data, Group customer data, Individual customer data)
- **Customer group data**
- **Customer organization data**
- **KB article data** (The custom attributes automatically becomes available for: Article search data, Article summary for version and pending)
- **Routing queue**
- **User data** (The custom attributes automatically becomes available for: User search data)

Creating Custom Attributes

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

**To add a custom attribute:**

1. In the Tree pane, browse to **Tools > Partition name > Business Objects > Attribute settings > System.**
2. In the List pane, select the business object to which you want to add a custom attribute. You can add custom attributes to 11 business objects.
   In the Properties pane, the Attributes tab is selected automatically.
3. In the Attributes tab go to the Custom section and provide the following details.
   - **Name:** Type a name for the custom attribute. The following characters are not allowed in the name: ~ ! @ # $ % ^ & * ( ) _ - + ? > < { } = \ / , . (dot) : ; ” ” ’ . Also, the name cannot start with a digit.
   - **Data Type:** Select the type of data for the custom attribute. The options available are String and Integer.
Definition: Click the Assistance button. In the Define Custom Attribute window, different options are available for the integer and string data type. For integer data type, the data size nine is specified and it can’t be changed. You can provide a default value for this field. For string data type, provide the following details.

- **Data size:** You can specify the maximum characters the custom attribute can have. The default value is eight. You can give a value between one and 4000. For example, if you give a value 10, then you cannot enter data exceeding 10 characters, in the custom field.

- **String type:** This option gives you the flexibility to define how the data can be entered in the custom field. You have two options available:
  - **User specified in a text box:** You can provide an empty field where the user can type any data. You can also give a default value for the field.
  - **User-selected in the list of choice below:** Provide a list of possible values, from which the user can select one. You can specify a default value for the field. Also, you can allow users to select multiple values from the list.

- **View:** Select this option if you want to show this attribute in the screens at the department level.

- **Search:** This feature is not available yet.

- **Edit:** Select this option if you want to allow the agents to edit this field.

- **Encrypt:** This option is enabled only if the data type selected is string.

4. Click the Save button.

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

**Adding Custom Attributes to Screens**

After creating the custom attributes make sure you add them to the screens where you want them to show in the system. For details on how to add custom attributes to the screens see the section on “Configuring Screen Attributes for Departments” on page 38. And for a list of screens to which you can add the attributes, see the appendix (page 43).
Creating Macros for Custom Attributes

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

- About Custom Values
- Creating Custom Values
- Adding Custom Subtypes
- Creating Custom Product Types
- Creating Custom Activity Types
About Custom Values

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

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

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

Creating Custom Values

**To create a custom value:**

1. In the Tree pane, browse to **Tools > Partition name > Business Objects > Attribute values.**
2. Select the business object attribute to which you want to add a custom value.
3. In the List pane toolbar, click the **New** button.
   
   The Properties pane refreshes to show the properties of the new attribute value.
4. In the Properties pane, go the General tab and provide the following details.
   - **Type:** Type a name of the new attribute value.
- **Description:** Type a brief description.

![Properties: <New>]

*Set the general properties*

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

   Press the ENTER key, and create additional subtypes.

![Properties: <New>]

*Create a new subtype*

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

---

**Adding Custom Subtypes**

**To create a custom subtype:**

1. In the Tree pane, browse to **Tools > Partition name > Business Objects > Attribute values**.
2. Select the business object attribute to which you want to add a custom subtype.
3. In the Properties pane, go the Subtype tab and provide the following details.
   - **Name:** Type a name of the subtype.
   - **Description:** Type a brief description.

   Press the **ENTER** key, and create additional subtypes.
4. Click the **Save** button. Once saved the subtypes cannot be deleted.
Creating Custom Product Types

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

- Credit Cards
- Finance
- Physical
- Software
- Wireless

To create a custom product type:

1. In the Tree pane, browse to Tools > Partition name > Business Objects > Attribute values > Product: Type.
2. In the List pane toolbar, click the New button. The Properties pane refreshes to show the properties of the new attribute value.
3. In the Properties pane, go the General tab and provide the following details.
   - Type: Type a name of the new attribute value.
   - Description: Type a brief description.

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

Press the ENTER key and create additional subtypes.
5. Click the Save button.

Creating Custom Activity Types

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

- Chat
- Email

To create a new activity type:

1. In the Tree pane, browse to Tools > Partition name > Business Objects > Attribute values > Activity: Type.
2. In the List pane toolbar, click the New button.
3. In the Properties pane, go to the General tab and provide the following details.
   - **Type**: Type the name of new activity type.
   - **Description**: Type a brief description.
   - **Agent Console - Information pane section**: From the dropdown select the information pane section that should open when the agent creates the activity.
   - **Agent Console - Reply pane label**: Type a label for the Reply pane.

Set the general properties

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

Create a new activity subtype

5. Click the Save button.

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

- Configuring Customer Associations
- Deleting Customer Associations
Configuring Customer Associations

Customer Associations capture additional details about previous and current transactions of the customer with the organization. These transactions may be signing some contracts or purchasing products from the organization.

You may choose to deploy custom associations according to your business needs. Within the system, customer associations can be linked with customers in a department.

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

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

**To create a custom customer association:**

You can create custom customer associations at the department level.

1. In the Tree pane, browse to **Tools > Departments > Your department > Business Objects > Relationships > Customer Associations**.

2. In the List pane toolbar, click the **New** button.

   The Properties pane refreshes to show the properties of the new customer association.

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

![Properties: Accounts](image)

*Set the general properties*

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

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

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

![Properties: Accounts](image)

*Create subtypes*

5. Lastly, go to the Relationships tab and select the customer association to be associated with the customer association you are creating.

6. Click the **Save** button.
Deleting Customer Associations

To delete a customer association:

Important: The predefined customer associations cannot be deleted.

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

- About Customizing Screens
- Configuring the Information Pane Section Toolbar
- Configuring Screen Attributes for Departments
- Configuring Screen Attributes for Users
About Customizing Screens

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

Configuring the Information Pane Section Toolbar

The system consists of 10 predefined information pane section toolbar buttons. Out of those, seven are available to all agents, while three are only available to agents with specific licenses.

- The following buttons are available to all the agents.
  - Activity
  - Case
  - Customer
  - History
  - Audit
  - KB
  - Classify

- The Links button is available to only the agents with Data Adapter license.

- The Page Push button is available only to the agents with the Unified WIM license.

- The Visitor History button is available only to agents working on proactive chats - that is, chats that result from an offer on a website.

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

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

**Important:** These changes are made at the partition level and take affect throughout the system.
Changing the Order of Buttons

The default order of buttons is:

1. Activity
2. Case
3. Customer
4. History
5. Audit
6. KB
7. Classify
8. Links
9. Visitor History
10. Page Push

To change the order of buttons:

1. In the Tree pane, browse to Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar.
2. In the List pane select, Agent Console - Information Pane - Sections Toolbar.
   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.
3. In the Buttons tab, select the button you want to move up or down the order, and click the Move up or Move down button.

4. Click the Save button.
Removing Buttons

Buttons can be removed from the information pane section toolbar if agents don’t use them or you wish to limit their access to those buttons.

Things to note:

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

To remove a button:

1. In the Tree pane, browse to Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar.
2. In the List pane, select, Agent Console - Information Pane - Sections Toolbar.
   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.
3. In the Buttons tab, in the Visible field, clear the option for the buttons you want to remove from the Information pane section toolbar of the Agent Console.

4. Click the Save button.
Adding Custom Buttons

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

Creating Custom Buttons

To create a button:

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

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

Adding Custom Buttons to the Information Pane Section Toolbar

To add a button:

1. In the Tree pane, browse to Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar.
2. In the List pane select, Agent Console - Information Pane - Sections Toolbar.
   
   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane section toolbar buttons.
3. In the Buttons tab, provide the following details.
   
   - **Internal name:** Type the internal name of the button.
   - **Name:** Type the name of the button as it should appear in the Agent Console.
   - **URL:** Click the Assistance button. In the Configure A Toolbar Section window, do the following:
     
     - Type the URL of the website or file that you want to access using this button. You can give the URL of a website such as http://www.company.com.
   - **SHIFT+CTRL shortcut:** Select a shortcut key for the button.
   - **Image:** Click the Assistance button. From the Image window, select the image you want to use for the button and click the OK button.

---

Important: The internal name cannot have only digits, and you cannot use spaces in the internal name.
Visible: Select the option if you want to make the button visible in the Information pane, in the Agent console.

After providing all the values, press the ENTER key.

Deleting Custom Buttons

Important: The predefined buttons cannot be deleted.

To delete a custom button:
1. In the Tree pane, browse to Tools > Partition name > Business Objects> Attributes Settings > Screen > Toolbar.
2. In the List pane select, Agent Console - Information Pane - Sections Toolbar.
   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the Information pane toolbar buttons.
3. Select the button you want to delete and press the DELETE key.
   The selected button is deleted.
4. Click the Save button.
Changing Shortcut Keys for Buttons

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

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

Things to note

- You can use one of the following function keys in the shortcut key.
  - F2
  - F3
  - F4
  - F6
  - F7
  - F8
  - F9
  - F10
  - F11
  - F12
- The same function key cannot be assigned to multiple buttons.
- Try to refrain from changing shortcut keys too often. Frequent changing of shortcut keys may hinder the performance of agents by forcing them to relearn the keys over and over again. If you need to change your shortcut keys, as a best practice, you can notify them about the changes so that they are aware of them and have time to prepare.

To change the shortcut keys of the buttons:

1. In the Tree pane, browse to Tools > Partition name > Business Objects > Attributes Settings > Screen > Toolbar.
2. In the List pane select, Agent Console - Information Pane - Sections Toolbar.
   In the Properties pane, the Buttons tab is selected automatically. It shows a list of the information pane section toolbar buttons.
3. In the Buttons tab, in the Ctrl + Shift shortcut field, select the function key you want to assign to the button.
4. Click the Save button.
Configuring Screen Attributes for Departments

For each department, you can customize 120 screens (page 45). You can specify which attribute you want to show in the screens and the order in which they should appear. Each screen has a number of attributes that cannot be removed.

To customize a screen:

1. In the Tree pane, browse to Tools > Departments > Your Department > Business Objects > Attribute Settings > Screen.

2. In the List pane, select the screen you want to customize. For a list of screens that can be modified see the Appendix.

3. In the Properties pane, go to the Attributes tab and do the following.
   a. Select the attributes you want to add to the screen.
   b. In the selected attributes list, specify if you want display the attribute or not.
   c. Also, you can change the order of the attributes. Select the attribute you want to move up or down the order and click the Move up or Move down button.

4. Click the Save button.

Configuring Screen Attributes for Users

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

You can create multiple user attribute settings for various users depending on the expected level of their functioning. For example; a normal user in the system will not have the level of access similar to his supervisor. Agent, manager, supervisor, etc., can be user attribute settings with different access levels determined in the system. Whenever a new user is created in the system, the administrator can assign one of the pre-determined user attribute settings to the user to function accordingly.
New Activity Shortcuts

- Preparing for Creating New Activity Shortcuts
- Creating New Activity Shortcuts
- Deleting New Activity Shortcuts
Preparing for Creating New Activity Shortcuts

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

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

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

Creating New Activity Shortcuts

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

The predefined shortcuts are:

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

To create a new activity shortcut:

1. In the Tree pane, browse to Tools > Partition name > Business Objects > New Activity Shortcuts.
2. In the List pane toolbar, click the New button.
3. In the Properties pane, go to the General tab and provide the following details.
   - Name: Type a name of the new activity shortcut. Use a name that clearly indicates what the activity shortcut is for, so that the agents can identify them easily.
   - Description: Type a brief description.
   - Activity type: Select the activity type for which you want to create a shortcut.
   - Activity subtype: Select the activity subtype.
   - Mode: Select the activity mode. The options available are, inbound, outbound, and none. You can add custom modes to this list. For details see the chapter on “Custom Values” on page 21.
   - Case: Specify if you want to create a new case for the activity created using the new activity shortcut. The options available are:
● **Current**: The case of the currently selected activity in the inbox is assigned to the new activity being created.

● **New**: A new case is created for the activity.

● **None**: No case is created to the activity.

○ **Shortcut key**: Select a shortcut key for the new activity shortcut. You can assign a FUNCTION KEY from F2, F3, F4, F6, F7, F8, F9, F10, and F12. Select **None** if you don’t want to assign a shortcut key to the new activity shortcut. For the ease of the agents make sure that you don’t change the shortcut keys too often because the agents will have to unlearn and learn the shortcut keys again and again. And, if you do need to change them any time, as a best practice you can notify them about the changes so that they are aware of them and are prepared for it.

<table>
<thead>
<tr>
<th>Properties: &lt;New&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td><strong>General</strong></td>
</tr>
<tr>
<td><strong>Options</strong></td>
</tr>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>name</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>activity type</td>
</tr>
<tr>
<td>activity subtype</td>
</tr>
<tr>
<td>mode</td>
</tr>
<tr>
<td>case</td>
</tr>
<tr>
<td>shortcut key</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

---

Set the general properties

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

---

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

○ Select the attribute that the agent should be asked to provide when this new activity shortcut is used. The following attributes of the business objects are available.

  ● **Case**: Case ID
  
  ● **Contact point**: Email address, phone number, complete address, URL
  
  ● **Customer**: Customer name, level
  
  ● **Contact person**: First name, middle name, last name

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

---

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

○ For the selected attributes specify the following.

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

---

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

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

---

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

---

Select the attributes for the new activity shortcut

5. Click the **Save** button.

---

**Deleting New Activity Shortcuts**

To delete a new activity shortcut:

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

- Custom Attributes
- Customizable Screens
- Editable Screens
- Predefined Attribute Values
**Custom Attributes**

You can add custom attributes to the following business objects.

1. **Activity data**: The custom attributes added for activity data automatically becomes available for:
   - Activity search data
   - Generic activity data

2. **Case data**: The custom attributes added for case data automatically becomes available for:
   - Case search data

3. **Contact person data**: The custom attributes added for contact person data automatically becomes available for:
   - Contact person search data

4. **Contact point data**: The custom attributes added for contact point data automatically becomes available for:
   - Contact point search data
   - Email address contact point data
   - Phone number data
   - Postal address data
   - Web site data

5. **Customer association data**: The custom attributes added for customer association data automatically becomes available for:
   - Customer association search data

6. **Customer data**: The custom attributes automatically becomes available for:
   - Customer search data
   - Customer search data1
   - Change customer data
   - Cooperate customer data
   - Group customer data
   - Individual customer data

7. **Customer group data**

8. **Customer organization data**

9. **KB article data**: The custom attributes automatically becomes available for:
   - Article search data
   - Article summary for version and pending

10. **Routing queue**

11. **User data**: The custom attributes automatically becomes available for:
    - User search data
Customizable Screens

Activity Data

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

Activity Search Data

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

Generic Activity Data

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

6. Agent Reply Custom_Activity_Type_Name General

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

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

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

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

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

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

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

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

- Agent Console - Customer - Corporate Customer Details screen

Group Customer Data

- Agent Console - Customer - Group Customer Details screen

Individual Customer Data

- Agent Console - Customer - Individual Customer Details screen

Customer Search Data

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

Customer Group Data

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

Customer Organization Data

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

Routing Queue

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

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

User Search Data

- Administration Console - Search - User - Basic screen

Editable Screens

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

Custom Attributes Available in New Activity Shortcuts

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

Predefined Attribute Values

Activity: Mode

1. Inbound
2. Outbound
3. None

Activity: Type

1. Chat
2. Email
3. Phone
4. Task

**Activity: Status**
1. Assigned
2. Assignment
3. Completed
4. New
5. Pre_completion
6. Preworkflow
7. Workflow

**Case: Status**
1. Closed
2. Open
3. Ready for closure

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

**Contact person: ID type**
1. License
2. Passport
3. SSN

**Currency: Type**
1. Euro
2. UK Pound
3. USD
4. Yen

**Customer: Contact person type**

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

**Customer: Country**

1. Afghanistan
2. Albania
3. Algeria
4. Andorra
5. Angola
6. Anguilla
7. Antarctica
8. Antigua and Barbuda
9. APO (Army Post Office)
10. Argentina
11. Armenia
12. Aruba
13. Australia
14. Austria
15. Azerbaijan
16. Bahamas
17. Bahrain
18. Bangladesh
19. Barbados
20. Belarus
21. Belgium
22. Belize
23. Benin
24. Bermuda
25. Bhutan
26. Bolivia
27. Bosnia and Herzegovina
28. Botswana
29. Bouvet Island
30. Brazil
31. British Industry Ocean Territory
32. British Virgin Islands
33. Brunei
34. Bulgaria
35. Burkina Faso
36. Burundi
37. Cambodia
38. Cameroon
39. Canada
40. Cape Verde
41. Cayman Islands
42. Central African Republic
43. Chad
44. Chile
45. China
46. Christmas Island
47. Colombia
48. Cocos Island
49. Comoros
50. Congo
51. Cook Islands
52. Costa Rica
53. Cote d’Ivoire
54. Croatia
55. Cuba
56. Cyprus
57. Czech Republic
58. Denmark
59. Djibouti
60. Dominica
61. Dominican Republic
62. East Timor
63. Ecuador
64. Egypt
65. El Salvador
66. Equatorial Guinea
67. Eritrea
68. Estonia
69. Ethiopia
70. Falkland Islands
71. Faroe Islands
72. Fiji
73. Finland
74. FPO (Fleet Post Office)
75. France
76. French Guiana
77. French Polynesia
78. French Southern Territories
79. Gabon
80. Gambia
81. Georgia
82. Germany
83. Ghana
84. Gibraltar
85. Greece
86. Greenland
87. Grenada
88. Guadeloupe
89. Guam
90. Guatemala
91. Guinea
92. Guinea Bissau
93. Guyana
94. Haiti
95. Heard and McDonald Islands
96. Honduras
97. Hong Kong
98. Hungary
99. Iceland
100. India
101. Indonesia
102. Iran
103. Iraq
104. Ireland
105. Israel
106. Italy
107. Jamaica
108. Japan
109. Jordan
110. Kazakhstan
111. Kenya
112. Kiribati
113. Kitts and Nevis
114. Kuwait
115. Kyrgyzstan
116. Laos
117. Latvia
118. Lebanon
119. Lesotho
120. Liberia
121. Libya
122. Liechtenstein
123. Lithuania
124. Luxembourg
125. Macau
126. Macedonia
127. Madagascar
128. Malawi
129. Malaysia
130. Maldives
131. Mali
132. Malta
133. Marshall Islands
134. Martinique
135. Mauritania
136. Mauritius
137. Mayotte
138. Mexico
139. Micronesia
140. Moldova
141. Monaco
142. Mongolia
143. Montserrat
144. Morocco
145. Mozambique
146. Myanmar
147. Namibia
148. Nauru
149. Nepal
150. Netherlands
151. Netherlands Antilles
152. New Caledonia
153. New Zealand
154. Nicaragua
155. Niger
156. Nigeria
157. Niue
158. Norfolk Island
159. North Korea
160. Northern Mariana Islands
161. Norway
162. Oman
163. Pakistan
164. Palau
165. Panama
166. Papua New Guinea
167. Paraguay
168. Peru
169. Philippines
170. Pitcairn Islands
171. Poland
172. Portugal
173. Puerto Rico
174. Qatar
175. Reunion
176. Romania
177. Russia
178. Rwanda
179. Saint Helena
180. Saint Pierre and Miquelon
181. Saint Vincent and the Grenadines
182. Saint Lucia
183. Samoa American
184. Samoa Western
185. San Marino
186. Sao Tome and Principe
187. Saudi Arabia
188. Senegal
189. Seychelles
190. Sierra Leone
191. Singapore
192. Slovakia
193. Slovenia
194. Solomon Islands
195. Somalia
196. South Africa
197. South Georgia
198. South Korea
199. Spain
200. Sri Lanka
201. Sudan
202. Suriname
203. Svalbard and Jan Mayen Islands
204. Swaziland
205. Sweden
206. Switzerland
207. Syria
208. Taiwan
209. Tajikistan
210. Tanzania
211. Thailand
212. Togo
213. Tokelau
214. Tonga
215. Trinidad and Tobago
216. Tunisia
217. Turkey
218. Turkmenistan
219. Turks and Caicos Islands
220. Tuvalu
221. Uganda
222. United Kingdom
223. Ukraine
224. United Arab Emirates
225. United States Minor Outlying Islands
226. Uruguay
227. United States
Customer: Group Type

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

Customer: Industry

1. Finance
2. Health care
3. Telecom

Customer: Level

1. Gold
2. Platinum
3. Premium
4. Silver
5. Standard
Customer: Organization Type
1. Non-profit
2. Other
3. Partnership
4. Private
5. Public
6. Sole-proprietor

Customer: Region
1. Asia Pacific
2. Europe
3. United States

Customer: Webtype
1. AOL
2. MSN
3. URL
4. Yahoo

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

User: Type
1. Anonymous user
2. Authenticated agent
3. Authenticated customer
4. Identified agent
5. Identified customer