



EMS Advanced Features

Module 2 – Version 2.01

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CYCLES EXPLAINED

INTRODUCTION

Cycles are in place to monitor different types of service delivery and have predefined start and stop times based on certain criteria. Each cycle will now be defined.

BOX CYCLE

This cycle starts when a new enquiry is created in a mailbox and continues until the enquiry is placed in any of the completed statuses. If the enquiry is re-opened, the enquiry is deemed never to have been completed and will calculate the cycle from the original starting point.

This cycle is used in determining how long it takes to finish cases from the client's perspective.

USER CYCLE

This cycle starts when a user pops an enquiry, or for assigned enquiries and cherry picked enquiries, when the user opens the wizard to work the enquiry for the first time. The clock continues to tick until the enquiry is placed in a completed status.

The cycle comes alive again if a new message is received on an enquiry that was completed (Has New Message) and the cycle will be calculated from the start of ownership till the arrival of the new message.

There are two exception actions:

- if the user completes the enquiry immediately with "Completed No Response" or
- User selects the "Make a New Enquiry",

the cycle "awakening" will be reversed to the previous completed state and timestamp.

If another user needs to work the enquiry, the point that the new user opens the wizard on the enquiry for the first time will complete the previous enquiry owners cycle and open the new user's cycle.

This cycle is used to track how long it takes a user to complete enquiries.

The user cycle is most often used when the user is accountable for ensuring that the enquiry is completed within a particular time period irrespective of what needs to be done to complete it. For instance a complaint has 5 days in which to be resolved. If emails aren't getting through then the user is expected to phone, have a meeting or whatever action needs to be performed to ensure that it is completed to the satisfaction of the customer in the allotted.

That said, it is virtually impossible to ensure 100% service compliance with this cycle as sometimes there are circumstances beyond the control of the user. For instance the client is Uncontactable or the company is waiting on a directive from SARS.

RESPONSE CYCLE

This cycle starts when an email message arrives from the enquirer and continues to tick according to the box's time rules until a user replies to the enquirer.

The reply need not mean that the enquirer has the answer; it is a feedback email keeping the enquirer in the loop as the company proceeds towards the resolution of the query. Should the user pend an enquiry, the user can set a new expiry point and this point will be the new response delivery timeout point.

This cycle is used to track how departments manage their response SLAs.

IMPORTANT:

- A user should always create a pend timeout in keeping with the promise to the customer.
- The user should never pend for times that they aren't going to be at their desk
- It is important to note that only emails from the enquiry trigger this cycle and the user needs to check that the correct person is configured as the enquirer.

For instance assume a telephony agent sends an email to the user's mailbox requesting that certain information be assembled for the customer. The enquirer will be the telephony agent as this is the person who sent the email to the mailbox. The user will need to ensure that they change the enquirer to reflect the customer and then action the enquiry as needed. This will ensure that the customer triggers the cycle. If the user pends the enquiry it is their responsibility to set this time to a point in the future which coincides with the delivery promise to the customer and should never be set for times like Sunday or after hours unless the user is going to be there.

WIZARD PRODUCTION

This cycle starts when the user opens the Wizard and continues ticking until the user closes the Wizard by clicking on the "Finish", "Finish & Copy" or "Send to Process" buttons.

This cycle is ideal for recording user production as well as the status upon closing the Wizard.

RULES OF EMBEDDING

INTRODUCTION

In Outlook a user selects the message which they want to embed at the bottom of their email and then they selects either “Reply”, “Reply All” or “Forward”. This is very convenient but does have a problem in that the original email can then be easily modified. Another problem surfaces which is that while the first part of the email may be what a user needs to send on to the customer there may be other correspondence that is not client centric or suitable for including in the email.

To avoid these problems EMS introduces the concept of embedding which places a non-editable copy of the most appropriate email at the bottom of the new email. This email is chosen so as to minimise the chance of any internal correspondence going to the customer.

HOW EMS DETERMINES WHICH EMAIL TO EMBED

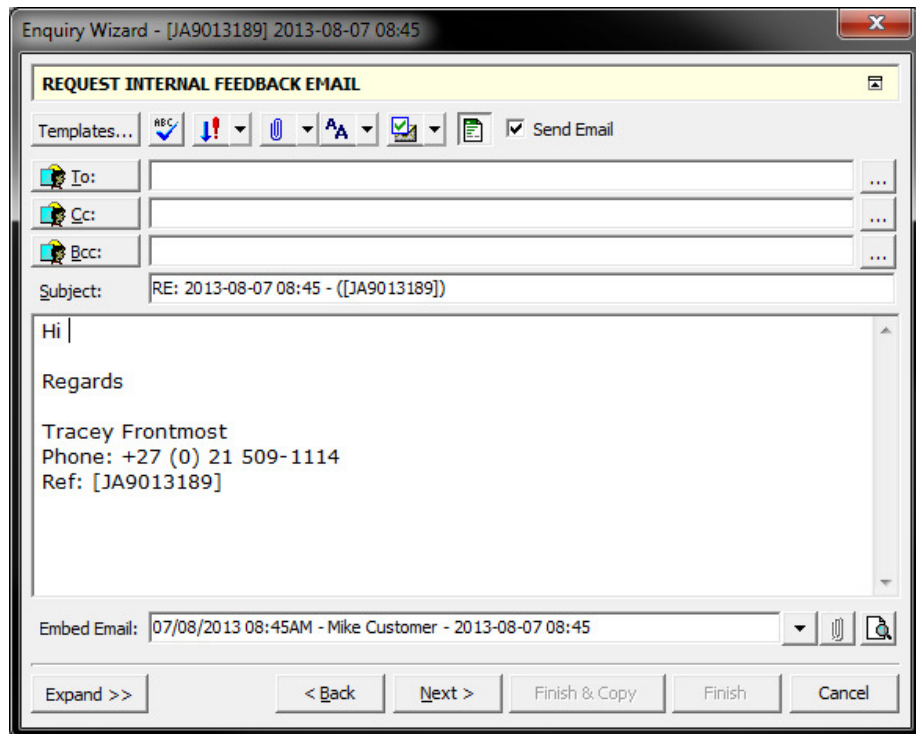
The rule is simple. EMS uses the most recent email in the enquiry history that the person being addressed sent the mailbox. If, however, the person being addressed never sent an email which forms part of the enquiry history then EMS embeds the most recent email from the Enquirer.

CAUTIONARY NOTES

1. Ensure that the correct person is the enquirer otherwise the incorrect email could be embedded.
2. The first person selected in the “To” list determines the embedding rules
3. The user must always make sure that they have selected a “To” person before selecting a message to embed (See below).

HOW TO OVERRIDE WHICH MESSAGE IS EMBEDDED

The user must make sure that the correct person appears in the “To” list before manually overriding which message to embed otherwise the users selection will be lost when the user does select a “To” recipient.



1. Ensure that the correct person is being addressed
2. Click the down arrow to the right of "Embed Email"
3. Select the email that you want to embed
4. Use the Preview button to ensure that the result is what you expected.

ATTACHMENT HANDLING FROM PREVIOUS EMAILS

INTRODUCTION

In a product like Outlook one has the actions “Reply”, “Reply All” and “Forward”.

“Reply” and “Reply All” do not include the attachments from the previous message as one is going back to the parties who would have either sent the attachments or would have received them. “Forward” will include the attachments as one is addressing a third party not in the previous email.

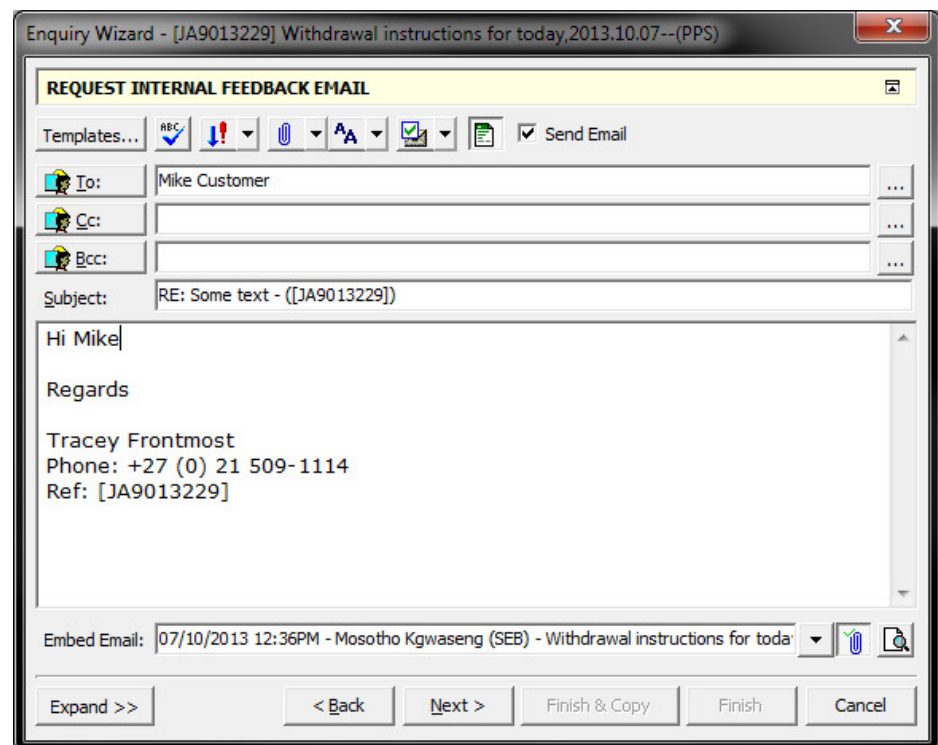
HOW EMS DETERMINES WHETHER TO INCLUDE ATTACHMENTS

EMS does not include these three actions but rather looks at the person who is the first in the “To” list and makes the call which email to embed and then whether to include the attachments or not.

Simply if you are addressing a person which did not send you the email that is being embedded, then a forward is assumed and the attachment(s) is/are included.

OVERRIDING ATTACHMENT SELECTION

There are times that you may need to only include some attachments in an email.



1. Ensure that the selected email has attachments otherwise the Paperclip button will be disabled.
2. Pick the email from the Embed Email dropdown if necessary
3. Ensure that the “Blue Paperclip” button has a green tick
4. Click on the “Preview” button
5. Close the preview

You will now have all the attachments visible and can select with the left mouse button and delete it using the delete key.

ATTACHMENTS FROM FOLDERS AND OTHER SOURCES

INTRODUCTION

EMS provides most of the functionality expected from an email client and in some instances surpasses traditional email clients.

This section we will cover:

1. Inserting File(s) from Folders
2. Insert Messages from Enquiry
3. Insert File(s) from Temporary Store
4. Insert Attachment from Clipboard
5. Insert EMSPro Viewer File
6. Dragging And Dropping

INSERTING FILE(S) FROM FOLDERS

This is the default option when one clicks on the paperclip button at the top of the email composer. It gives one access to an Insert dialog window with the title "Select the file(s) to attach...". One can select one file or many using the shift and control options as in other windows applications.

INSERT MESSAGES FROM ENQUIRY

Sometimes there is a need to insert a whole email as an attachment. This option allows one to select one or all emails in the enquiry and it will be attached as an EML file. To access this feature, click on the down arrow to the right of the paperclip button at the top of the email composer.

Cautions:

1. Inserting an email from an internal source when addressing the customer may expose the company to potential brand damage. Always check the whole content of the email for any content that may damage the perception of the brand.
2. Some Internet Service Providers (ISPs) block attached emails as they perceive this as a potential security risk. If you want to play it safe, copy the content from the email in question and paste it into the content of your email.

INSERT FILE(S) FROM TEMPORARY STORE

Sometimes one needs to save attachments to a temporary space and then attach them to a new email. More often than not this leads to a cluttered Desktop. Here the temporary store is a useful tool. To use the Temporary Store one first needs to copy attachments to the Temporary Store.

Saving attachments to the Temporary Store requires one to preview the email and then click on the Paperclip button in the email preview pane. Next click the "Temp. Store" button within the "Attachments..." dialog window and then the Save button.

Note: single files or multiple attachments can be saved to the store using the shift and Control key combinations available in other Windows applications.

Now within the email composer one accesses this feature by clicking on the down arrow to the right of the paperclip button at the top of the email composer. The

“Select the file(s) to attach...” dialog appears. Select the attachments needed and click the Open button.

Suggestion

If one wants to delete, rename or edit files this can be done within the “Select the file(s) to attach...” dialog by right clicking on a file and selecting the appropriate action. Remember to complete the action before finally selecting the file to insert into the email.

The Temporary Store lasts while EMS is open so so don't need to do a daily cleanup. If you want to clear the store simply close and re-open EMS.

INSERT ATTACHMENT FROM CLIPBOARD

This feature pastes an optimised image of whatever is on the clipboard as an attachment into your email. Try it, it's useful for screen dumps and sample signatures, etc. anything where a picture speaks a thousand words.

INSERT EMSPRO VIEWER FILE

By default this feature is disabled in EMS but can be turned on if requested (email EMS Support accessible in the GAL).

Moving attachments within the company often results in the duplication of attachments stored which increases storage needs as well as cost. To alleviate this EMS has the EMSPro Viewer file.

It works by including a small tag file that contains a link to a preview of the currently embedded enquiry.

Warning:

1. The recipient(s) need to have EMS installed for this functionality to work and it is therefore not suitable for external recipients or internal recipients that don't have EMS installed.
2. All emails in the enquiry are visible to the recipient. If there is a chance that PPI security requirements may not be met, then this feature should not be used.

DRAGGING AND DROPPING

EMS supports the dragging of attachments from folders to the body section of the email composer. It also supports the dragging of attachments from the attachment dialog accessible from the email preview's paperclip button to folders.

It currently does not support dragging from other applications to EMS or vice-versa nor does it support the internal dragging of attachments. This is catered for by using the Temporary Store.

TEMPLATES AND REPLACEABLE TAGS

INTRODUCTION

EMS is capable of providing action specific templates that are selected as the basis for an outbound email. Fields can be merged at the time of compilation and it is best practice to make use of templates as they provide consistent language and are a productivity booster.

STANDARD REPLACEABLE FIELDS

The standard replaceable fields are as follows:

- Enquiry Reference
- Current Date
- Current Time
- Current Date and Time
- Logged User Full Name
- Logged User First Name
- Mailbox Address
- Mailbox Name
- Mailbox Telephone
- Mailbox Facsimile
- Enquirer Name
- Enquirer Email Address
- Enquiry Subject
- User Telephone
- User Facsimile
- User Mobile
- User Email Address

The fields are standard and can be embedded in templates which are replaced with actual data at the point of template selection. These fields are also available to the user from within the email composer and are accessible by right clicking anywhere in the body of the text.

SMARTTAGS

These replaceable fields are exposed by way of a dialog window which prompts the user to insert values that are then merged into the body of the email. These tags are extremely useful when there are multiple points in an email that need custom values inserted at the point of compilation. Rather than creating a template that has XXXXs in it for areas that need to be filled this functionality ensures that all the fields are dealt with in a clear consistent interface.