Email Queue Overview

Queue Administration

- Creating an Email Queue
  - Setting up an email queue requires a sys admin to first define the inbound and outbound email account.
  - The inbound email account can be configured initially as inactive until the group is ready to start feeding emails to the queue.
  - A sys admin also has to set up the account as an outbound email account and define the roles that can use that outbound account to send emails.
  - Security to create an email queue has been granted to admin roles for several departments.
  - When creating an email queue only those accounts configured as an inbound and outbound account will be available as an option to link to the new queue.
  - Once an account is linked to a queue it will no longer display as available. In addition to having the ability to create queues, department administrators with this role will see additional options such as ‘view analytics/reassign emails’.

- Adding users to the Queue
  - Once the queue is created the dept admin will add the resources that will be assigned emails in this queue.
  - The default status of the user is ‘active’. Adding a user as inactive will ignore the user when the distribution rule is set up to ‘Round Robbin’. This option is helpful when the user will be out of the office. Note however that setting the user to inactive will not reassign hi/her emails to another user. Use the ‘Reassign emails’ tool to accomplish this (to be discussed in a few moments).
  - Auto Assign form External System-This option is used as an indicator for auto assigning an email based on an external system ex Slate (If this box is checked, the user will not be assigned emails if the distribution method for the queue is
round robin.) The user can still be assigned emails if the distribution method is manual.

- **Setting up Email Rules**
  - ‘Email Rules’ can also be created in this view. Rules available include the following:
    - Default - (no special rule or criteria to define how to treat the incoming email)
    - Assign from Slate – looks up the counselor in Slate and routes emails to that person
    - Has attachments
    - Key word
    - Key word (body)
    - Key word (subject)
  - The dept admin also selects a distribution method (a distribution method is not available when the “assign from Slate ‘ rule is selected since this rule assigns the email to a specific person)
    - Manual – a resource manually assigns emails in the queue
    - Round Robbin – a user is selected randomly
  - A sequence number is used to define the priority of that rule over other rules defined for the queue

- **Queue Analytics**
  - Available for each queue and provides the following details:
    - By user ‘read and unread emails in this queue’ includes a bar chart representation

- **Reassign Emails**
  - Under the ‘email queue module’ go to the ‘View Analytics/reassign emails’ menu option.
  - Select the Queue to review ( ex. Banner 8)
  - Select the Reassign emails option (a different queue or a user in the queue)
    - Use the wizard to define how the emails should be reassign (select first the person to reassign and then who to reassign it to. You can also select to reassign the individual’s emails to all others in the queue using a round robin distribution
• **Email Response**
  - **Viewing Emails**
    - Go to the email module under ‘Respond to emails’
    - All of your available queues will display on the left hand side
    - Select a queue and the emails that you would like to see in the queue (my emails new, my emails pending and all emails)
    - When you select the emails that you want to read you will see a list view of all of the emails including who the email is assigned to if the email has been assigned to a user and the status of the email
    - Select an email to see the message
    - The following options are available - reply, mark as unread, reassign, delete and call the record of the student in Slate
    - When viewing a message you can choose to reassign the email to a different person. The following options are available
      - Assign to a specific user in the existing queue
      - Assign to a different queue (Note-you cannot assign the email to a specific user in another queue) The assignment of the email in the new queue will follow the rules of the new queue
    - Related to information displays based on the data in Fordham Connect as it relates to the ‘from’ email address.
      - This means that Fordham Connect is using the email address from the incoming message to identify the contact record
      - The ‘related to’ section of the message will provide a link to the contact record as well as denote the status of the contact within Fordham Connect (EM, ST, AL).
      - Relationships found will display along with a link to the contact record for the relationship (parent, spouse, etc). Their status as an EM, ST, AI or OT will also display in the header of the email
• If the email was incorrectly associated with a record you can remove the link.
• You also have the option to link the email to a contact record by selecting the ‘Related To’ button. This will open a search box where you can look up the contact.
• Lastly, you can decide to respond without linking the email to the individual’s contact record. You can accomplish this by removing the ‘related to’ data for the person. Simply select the minus icon to remove the association. Note this step only removes the association for the email it will not update any existing relationships between the contact records.

  o Responding to Emails
  • Options are similar to the options available in your personal inbox with a few additions
  • You can send, cancel, add an attachment, insert a header/signature and create an interaction for this contact
  • You will only have the option to use an outbound email account that you are associated with. Security for outbound email accounts is driven by roles. The roles that can send emails from the specific outbound account are defined when the outbound email account is configured by the system administrator.
  • You can also add a related to person in this view (ex a parent)
  • You can select a template or an FAQ to insert as part of your response

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