



## Launch and Use SocialMiner

To launch SocialMiner, use a web browser to access the root of the web server (for information on supported browsers, see [SocialMiner Browsers](#)).

Enter `http://<servername>` where `<servername>` is the name hostname or IP address of your SocialMiner server.

The browser opens at a sign-in page where you type your username and password.

SocialMiner has one default user—the SocialMiner Administrator. The SocialMiner Administrator is the application user who is configured during installation. The credentials for the SocialMiner Administrator allow initial access to SocialMiner.



If you have downloaded and installed language files, the sign-in page also has a drop-down for selecting your language.

When you see a "trusted certificate" warning, acknowledge it by clicking

- **Continue to Web Site** in Internet Explorer or
- **I understand the Risk** in Mozilla Firefox or
- **Advanced** in Google Chrome.

You can allow the current connection to the server or save a security certificate for the server. For details about certificates, see [Certificates](#).

For some browsers, you can obtain and upload a CA-Signed certificate so that the security warnings do not persist.

A successful sign in presents the SocialMiner Home tab. All users see the Search and Configuration tabs.

If you sign in as the SocialMiner administrator, you also see the Administration tab. Certain SocialMiner functions are available only to the SocialMiner Administrator, such as access to the Active Directory on the Administration tab where the SocialMiner Administrator can set up other users.

**Note**

SocialMiner does not automatically sign out inactive users. Be sure to sign out when your work on SocialMiner is complete.

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## The SocialMiner Interface

Use the SocialMiner interface to view and respond to contacts.

Internet postings, voice callback requests, email messages, and click-to-chat requests captured by SocialMiner are referred to as contacts. There are different types of contacts including callback contacts, email contacts, chat contacts, and social contacts. Callback contacts are contacts created in SocialMiner when a customer requests a call from a contact center agent. These contacts are collected by SocialMiner and routed to Unified CCE for an agent to handle.

A Chat contact is created when a customer requests a chat session with an agent. Email contacts are created when a customer sends an email message to a contact center. SocialMiner retrieves these contacts and routes them to Unified CCX for agents to handle.

Social contacts are posts collected by SocialMiner. A social contact can be a Tweet, a Facebook wall post, a blog, or a Forum post. SocialMiner creates separate contacts for each post or interaction.

For example, separate social contacts are created when:

- A customer tweet matches the feed criteria of a SocialMiner campaign.
- An agent replies to a tweet.
- A customer replies to an agent's reply.

SocialMiner stores the following information about each contact:

- Author—the username of the person who posted.
- Creation date—the date the contact was first stored in SocialMiner.
- Title—the title of the post.
- Description—the nature of the contact text.
- Published date—the date the contact was published on the Internet. (Not all feeds have this.)
- Source type—the type of feed that collected the contact.

- Tags—the tags applied by SocialMiner users.

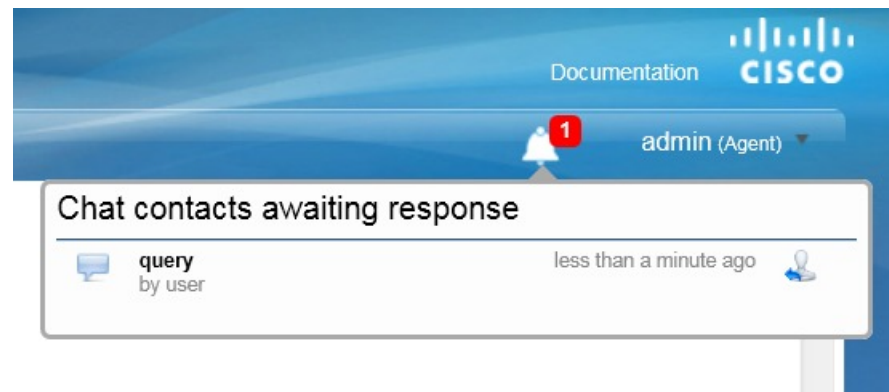
All contacts remain in the data store until they are purged.

SocialMiner documentation can be accessed by selecting the **Documentation** link in the title bar.

The navigation bar consists of up to four tabs (depending on whether the user currently signed in is an administrator), an alerts indicator, and a control that displays the user currently signed-in that also allows the user to sign out.



The bell icon near the top right corner of the interface is the alerts indicator and shows when there are outstanding alerts for the signed in user. The number of outstanding alerts is superimposed on the icon (with a count of up to 99, after which the display shows '99+' until the number of outstanding alerts falls below that threshold again). Since the alerts indicator is in the navigation bar, it is always available to users (regardless of which tab they are viewing).



Select the alerts indicator to see a drop-down showing details for all outstanding alerts (sorted by oldest alert first). Select the reply icon beside any alert to respond to that alert. Unanswered chats appear in the "Chat contacts awaiting response" section of the alerts drop-down. Selecting the reply option for a chat alert opens the chat reply template.


## Home Tab

The SocialMiner Home tab is a dynamic "Inbox" for viewing and responding to contacts. It displays the most recent contacts captured for the selected campaign.

Contacts are arranged by campaign and appear on the Home tab only after:

- at least one feed (a stream of contacts coming from a single source) is configured.
- at least one campaign (contacts grouped for handling by the customer care team) is configured.
- the feed is added to the campaign.

- the campaign is selected from the **Please select a campaign...** drop-down menu.

A message bar appears periodically at the top of the page indicating that there are one or more new contacts in the campaign. You can select the bar to refresh the results or select the refresh icon  in the upper-right corner of the window. State changes and new tags made by one agent are immediately visible to all agents working in that campaign.

A small lock icon appears at the bottom of the Home tab (and on the chat reply template) to indicate the status of the eventing and chat connection. The lock displays as locked if the connection is secure and as unlocked if the connection is not secure. The lock is grayed out if there is no connection.

Open the drop-down at the top left to select a campaign name and to see the contacts that have been returned for it. Contacts are sorted by time posted, with the newest at the top.


The information displayed for each contact includes:

- how old the contact is and the username of the author (4 days ago by harry99).
- a hyperlink (showing all or part of the tweet, post, blog, or other contact retrieved by SocialMiner).
- icons to change the state of the contact (for those contacts whose state can be changed manually).
- the name of the user responsible for the action that put the contact into its current state (Discarded:user 3).

When the page is first loaded (or refreshed), you see the 50 newest contacts for the selected campaign. If there are more than 50 contacts, select **More Results** at the bottom of the page to append the next 50. If the **More Results** button does not appear, there are no more results to view for this campaign at this time.

The title of any chat social contact is an active link if a transcript has been saved. Select the link to open a window displaying the chat transcript. (The chat transcript only becomes available once a chat session is closed. If one party in the chat does not close their window, then the system cannot generate the transcript until the inactivity timeout expires.)


There are four ways to modify the display on the Home tab. You can:

- select a different campaign from the drop-down list at the top left.
- show social contacts in a given state by selecting a state from the drop-down at the top right.
-  select the settings icon to
  - set your chat alias,
  - enable or disable the Accessibility feature on the agent chat interface,
  - show or hide social contacts by tag
  - enable or disable training for a Bayesian filter.









#### Note

Settings are user-specific. Your changes to settings determine what *you* see, but do not affect what others see.

-  refresh the list with the newest social contacts.

# Working with Contacts

There are six possible states for a contact: Unread, Reserved, Draft, Handled, Discarded, and Queued. These states are options on the **Show** drop-down menu and are represented by icons that appear at the top of the list and to the right of each contact.

- Unread 
- Reserved 
- Draft 
- Handled 
- Discarded 
- Queued 

## Show Contacts by State

You can control what contacts are displayed by selecting a 'Show' option from the drop-down at the top right of the title bar.

**Show Unread**—All contacts captured by SocialMiner are initially in the Unread state.

**Show Reserved**—These contacts have been reserved by an agent, but activity on these contacts is not yet complete (they are not yet discarded or handled).

**Show Drafts**—These Twitter and Facebook social contacts have had a draft reply saved, but the reply has not yet been sent.

**Show Handled**—These contacts have been handled by an agent.

**Show Discarded**—These contacts have been discarded either by an agent because they do not require a response or by the system (see [System Changes to Contact States](#), on page 6). Discarded contacts remain in the system until the next purge. (Administrators can find the total number of system-discarded chat or callback contacts using the Serviceability API.)

**Show Queued**—These contacts have been routed for external handling and are not editable in the SocialMiner interface.

The list of contacts updates immediately when you change the state of a contact (but it can take up to four seconds for the change to update the database). The name of the last user to change a state appears next to the contact as soon as the change occurs.

When a user hovers over the contact state indicator, a tool tip opens to say why the contact is in that state (except for contacts in the Unread state).

State selection is retained by a cookie and saved in the browser. This means that when an agent selects to show contacts of a particular state and then closes the campaign or signs out, only contacts in that state appear the next time that agent opens the campaign in that browser. To see contacts that are in other states, select a different Show option.

### System Changes to Contact States

SocialMiner sets contacts to Discarded when it is over capacity (for chat and callback contacts), when a callback social contact has been cancelled, and after it recovers from a system failure. After recovery, SocialMiner looks for these types of contacts that were in these states before the system failure and discards them:

- Unread chat
- Reserved chat
- Queued callback

The tool tips displayed when a user hovers over these contact state indicators describe the situation that caused the system to put the social contacts into this state. For example, callback social contacts that were successfully cancelled will display the tool tip "Callback was successfully cancelled" when you hover over them.

SocialMiner sets email contacts to Discarded when

- The folder on the Exchange server that contains the customer email is deleted.
- The customer email is deleted from the Exchange server.
- The feed on which the reply came in is deleted.

## Change Contact State

A contact state can be changed by any user by clicking the contact state button. The name of the last user to change a state appears next to the contact as soon as the change occurs: for example, *Discarded: User2*.

State changing can be done by different agents. For example, Agent1 can reserve a social contact, and Agent2 can handle it.

To change the state of a contact, click the button to select the state for your intended action.

- Reply—Select this to respond to a contact. For Twitter and Facebook social contacts, and for Chat contacts that come in on a feed that has the Cisco Chat reply template assigned, selecting this state opens the reply template. The contact transitions to the Draft (if Save Draft is selected) or Handled state and appears on the appropriate list.

For Chat contacts that come in on a feed that has the Cisco Multi-Session Chat reply template assigned, the reply template does not open.

- Draft—Select this to display the draft response, edit it, and send it.
- Handle—Select this to move the contact directly to the Show Handled list.
- Discard—Select this to move the contact directly to the Show Discarded list.



#### Note

The Show list updates immediately when you change the state of a contact.

**Real-time synchronization:** If one agent changes the state of a contact, other agents working in that campaign see the change within a few seconds.

To undo a state change: show the list for that state, locate the contact, and click the button again to reverse the state.

For example, here is what you would do if you set a contact to Handled and then change your mind about handling it.

- Select **Show Handled**.
- Locate that contact.
- Click the Handle button. This removes the contact from the Show Handled list immediately. The contact is returned to the Show Unread list within a few seconds.

The state of a contact is universal across the SocialMiner system. For example, if one user handles a contact, the contact appears as handled in the browser interface for all other users. This also occurs if the contact appears in multiple campaigns.



#### Note

When a chat session ends, the state change buttons for the social contact become inactive and are grayed out.

Contacts in the Queued state are not editable in the SocialMiner interface, therefore the state change buttons for those contacts are grayed out too. Additionally, for Queued contacts, you do not have the option to add tags to them (although you can remove tags from them).



## Tagging Contacts

Tags are labels that allow you to categorize contacts, to track workflow, and to set up notifications. For example, all social contacts that mention billing concerns could be tagged with Billing. You could then set up notifications to email social contacts with that tag to Customer Service. Use the Settings page to filter the list of contacts to show only those contacts with a particular tag.



#### Note

Contacts in the queued state are not editable from the SocialMiner user interface. You cannot add tags to them, although you can remove tags from them in this state.

### Adding Tags

The Tag text field, a **Tag** button, and suggested tags are visible when you hover the cursor over a contact.

To add a tag to a contact, enter text in the tag text field and press **Enter** or click **Tag**. You can add a maximum of twenty tags to a contact.

You can also use Automatic tagging on the Feeds panel to specify up to ten tags that are applied to new contacts as they are retrieved for a feed.

The most commonly used tags for the campaign appear as 'suggested tags' links to the right of the **Tag** button. These suggestions provide one-click tagging for commonly used tags. To add one or more suggested tags to

the contact, select the link for the suggested tag. The suggestions are specific to the campaign (not to the entire SocialMiner system) and are only updated on a refresh.

Click **Refresh** to see new suggested tags. If the contact is already tagged with a suggested tag, that tag does not appear on the list of suggested tags.

### Real-time synchronization

If one agent adds or deletes a tag for a contact, other agents working in that campaign see the addition or deletion immediately.


### Tips for tagging

- Tags are not case sensitive (Cisco and cisco are the same tag).
- Multiple tags must be separated by commas. For example, type the following into the tag text area--Cisco, TelePresence, Cisco TelePresence. Then click Tag to create these three tags:
  - Cisco
  - TelePresence
  - Cisco TelePresence
- Do not use quotation marks around tags; use commas to separate them. If you type quotation marks, they become part of the tag.

### Removing Tags

To remove a tag from a social contact, select the small, gray **x** at the right of the tag name.

## Replying to Contacts

Reply to contacts by selecting the reply icon  that appears beside contacts shown on the Home tab, in the search results display, and in the alerts indicator drop-down list.

You reply to Twitter, Facebook, and chat contacts using reply templates (you do not reply directly to callback contacts or RSS social contacts). There are five system-defined templates: Cisco Twitter, Cisco Facebook, Cisco Chat, Cisco Multi-session Chat, and Cisco Email. The SocialMiner Administrator can add custom reply templates



#### Note

The Cisco Multi-session Chat reply template is the default reply template for Unified Contact Center Express multi-session chat. You cannot use this reply template in a standalone SocialMiner environment.

The Cisco Email reply template is the reply template that agents use to reply to email contacts when SocialMiner is integrated with Unified Contact Center Express. You cannot use this reply template in a standalone SocialMiner environment.

Reply templates are configured on the **Add/Edit Feed** page for each feed type in a campaign. Certain feed types have default reply templates. A feed can have only one reply template.



**Note**

SocialMiner uses the support available in your browser to provide spellcheck functionality. Refer to the documentation about language dictionary support for your browser for information.

## Replying to a Chat Social Contact

When a customer submits a chat form, a new social contact opens in the chat campaign and the customer waits for an agent. The agent who selects the Reply icon for that social contact launches the chat reply template and enters into a dialogue with the customer.

A small lock icon appears at the bottom of the Home tab (and on the chat reply template) to indicate the status of the eventing and chat connection. The lock displays as locked if the connection is secure and as unlocked if the connection is not secure. The lock is grayed out if there is no connection.

**Note**

For a chat to occur, there must be at least one SocialMiner chat feed configured and the feed must be added to a campaign.

The agent types in the text-entry area and presses Enter.

The customer sees the agent's message and enters a response.

### To Reply to a Chat Using the Cisco Chat Reply Template

- 1 Select a chat social contact. Select the Reply icon. The chat interface opens to show the customer's name and any extension field data in the left panel.
- 2 Type a remark in the lower right panel and press **Enter** to begin the dialog.

## Customer Chat

A chat session is initiated when a customer submits a chat form to a chat feed in a campaign. Agents can then respond to the chat contacts in SocialMiner. These chat contacts must belong to a campaign that is set up with a chat feed.

SocialMiner supports a maximum of 120 (in a small deployment) and 400 (in a large deployment) simultaneous chat sessions between a customer and an agent.

### Chat Invitation

An agent can also invite a customer from existing Twitter or Facebook social contacts to a chat session by clicking on the Insert Chat Invitation button that appears in the reply template.

A <<chat invitation link>> placeholder is added to the reply template text area, which is replaced by the actual link when the message is sent.

For Twitter, the placeholder reduces the number of characters available to tweet by 22, and Twitter shortens the actual link text to 22 characters when the message is sent.

For Facebook, the total comment along with the generated chat invitation URL must not exceed 8000 characters.

The customer selects the chat URL in the message they receive to accept the invitation. This initiates the chat session.

For a chat to occur, there must be at least one SocialMiner chat feed, and the feed must be added to a campaign. Within each campaign, one chat feed must be designated as the Chat Invitation Feed for the Insert Chat Invitation button to appear in either the Twitter or Facebook reply template.

## Chat Transcript

When the chat ends, the customer is presented with an option to download the chat transcript as a PDF file. The chat ends when the customer clicks the **End** button or presses **Ctrl-Shift-E**. The chat can also be ended if the agent ends the chat session. To download the transcript, the customer can click the **Yes** button or press **CTRL-Shift-Y**. The customer can click the **No** button or press **CTRL-Shift-X** to cancel.

The chat ends and the customer does not receive the chat transcript download option in the following scenarios:

- The session times out due to inactivity
- Customer closes the browser window
- Customer navigates to another URL from the browser window
- Customer refreshes the browser window



### Note

- The chat transcript PDF supports all languages that SocialMiner supports except for the following:
  - Chinese Simplified (zh\_CN)
  - Chinese Traditional (zh\_TW)
  - Japanese (ja\_JP)
  - Korean (ko\_KR)

If a chat session is conducted using one of these languages, the option to download a PDF is not presented to the customer.

For more information about supported languages on SocialMiner, see the *Cisco SocialMiner Developer Guide* available here:

<https://developer.cisco.com/site/socialminer/overview/>

## Chat Process

This is the flow of the chat process.

### The SocialMiner Administrator:

- Creates and saves a chat feed in SocialMiner, using the Cisco chat reply template.
- Adds the chat feed to a campaign.
- Copies the chat feed sample code and pastes it in a text editor.
- Makes changes to the code, if needed.

- Saves the code as HTML.
- Publishes the HTML to a website.

#### The customer:

- Selects a Click-to-Chat (or similar) link or button on the website to open the chat feed form; then completes and submits it.
- Or, selects the URL sent in a Twitter or Facebook message inviting the Twitter or Facebook user to chat with an agent.

The customer sees a welcome message asking them to wait while they are connected to a customer care representative.

If no agent responds before a defined timeout, the customer is sent a message indicating that they can continue to wait or try again later. If an error occurs during setup, the customer is sent a message indicating that chat is not available and to try again later.

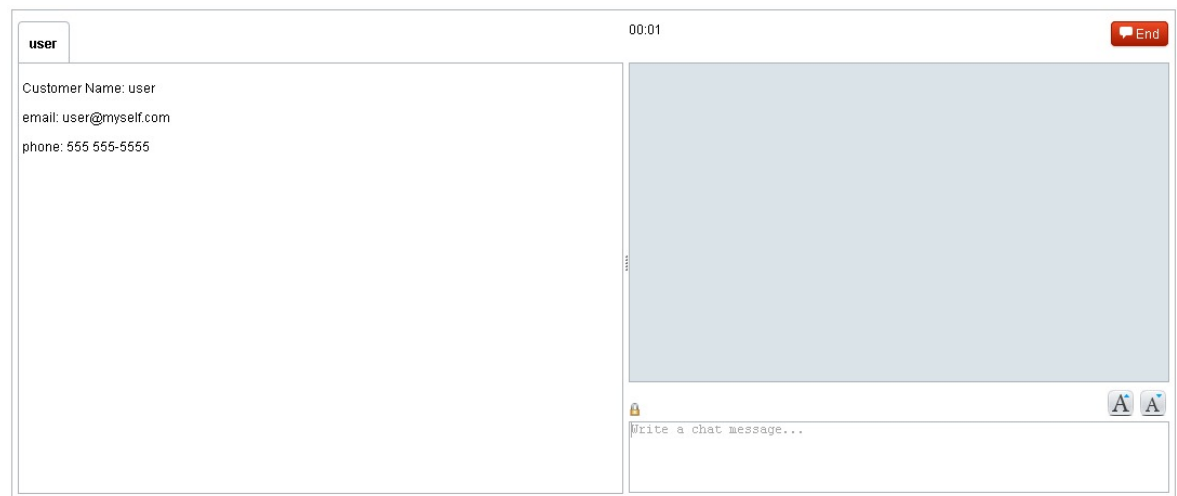
#### SocialMiner:

- Sets up a chat session and creates a social contact in SocialMiner with the form data, the URL of the chat session, and the URL of the chat reply template that serves as the chat gadget interface.
- Generates a chat, which appears in the chat campaign.

#### The agent:

The agent selects the Reply icon for the social contact to enter the chat session and to display the Agent Chat Reply template (similar to the example shown here). The conversation between the agent and customer begins and the social contact state changes to Reserved. Information about the customer appears on the left side of the screen. The agent can use the font sizing buttons to increase or decrease the size of the font in the chat window. The agent can also press **Ctrl-Shift-]** to increase the font size or **Ctrl-Shift-[** to decrease it.

The agent can end the chat session and close the chat reply template by clicking the **End** button or by pressing **Ctrl-Shift-E**.

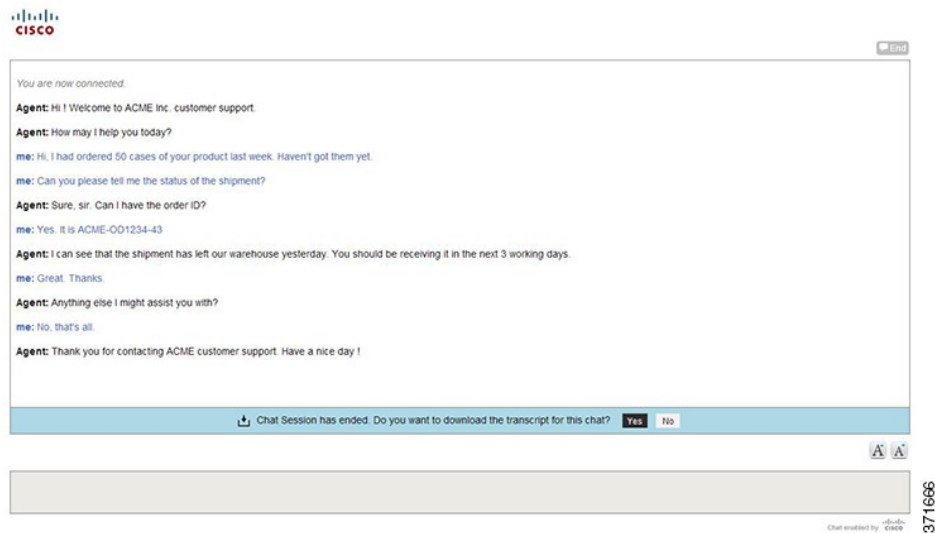


#### The customer:

A customer chat interface opens when an agent joins. The chat interface supports accessibility using the JAWS 'highlighted text' functionality. With JAWS configured to read highlighted text and Accessibility mode enabled,

incoming chat messages and other events are highlighted briefly so JAWS can announce them. Customers enable Accessibility mode by pressing **Ctrl-Shift-S**.

Customers can use the font sizing buttons to increase or decrease the size of the font. Customers can also press **Ctrl-Shift-]** to increase the font size or **Ctrl-Shift-[** to decrease it.



After the conversation is complete, the customer can click the **End** button or press **Ctrl-Shift-E**. This ends the chat from the customer side and removes the customer from the chat room.

Alternately, if the chat session is closed by the agent's desktop, the customer is left alone in the chat room and the option to download the chat transcript as PDF is presented to the customer.

For more information on chat transcript, see [Chat Transcript](#), on page 10.

## Chat Behavior

In the chat session interface:

- Each party types a message and presses **Enter**. The agent receives the customer's message immediately. The customer receives the agent's response within five seconds, based on the timing of the response in relation to the five-second polling interval.
- The agent sees a time marker next to each customer entry.
- URLs and email addresses are actionable links.
- When the agent ends the chat, the chat session is removed and the customer receives an end of conversation message. The social contact state changes to **Handled**.
- Once chat starts, there is no timeout for the agent but there is a user-defined customer inactivity timeout. By default, a customer who does not send a message for five minutes is removed from the chat session.
- Agents who navigate away from a chat (for example, to consult a web page) can reconnect by selecting **Reply** to change the social contact state back to **Unread**, then selecting **Reply** again to reserve the social contact and rejoin the chat.
- After a chat ends, agents can search for the chat session transcript using the interface on the Search tab.

## Chat Errors

If the server goes down, or if cookies are cleared on the customer side, the customer sees a "Connecting..." message, followed by an "Error connecting to server" message.

The provisioning section outlines information on system limitations for chat that, if exceeded, may also cause chat errors.

# Replying to a Twitter Social Contact

There are multiple ways to reply to a Twitter social contact.


- Direct-message the author of the tweet.
- Create an "@" reply that is viewable to everyone on Twitter.
- Retweet (repost or forward) the tweet.

## To Reply to a Tweet Using the Cisco Twitter Reply Template



### Note

Either a Twitter account, search, or stream feed needs to be configured for the Twitter reply template to work properly.

- 1 Select a Twitter social contact and select the Reply icon . The Cisco Twitter template opens with the following elements:
  - A link to the tweet you are responding to.
  - A picture, the userid and handle, and a description of the tweet author.
  - A link to the Twitter page of the tweet author.
  - A display of the number of followers for the tweet author.
  - An **Account** drop-down menu. Select the Twitter account from which you are replying. All Twitter accounts configured on this system appear in the drop-down menu.
 

Once the account is selected, the system checks the Follow status of the intended recipient. If the account is not already following the recipient, you can click the **Follow** button to begin following.
  - The conversation history of the social contact is listed and includes the handle of the tweet author, an indicator of the time elapsed since each tweet was posted, and the text of the tweet itself. You can reply, re-tweet, or send a direct message to any tweet in the conversation.
  - Reply icons. Click either **Reply**, **Retweet**, or **Direct Message**. A pop-up dialog appears where you can enter your message. Note: You can only direct message a Twitter user if the intended recipient is following you. Replies and re-tweets are posted to the time line of the Twitter account. A direct message is sent directly to the author of the tweet.
  - Enter your reply in the text box of the pop-up dialog. Text input is limited to 140 characters. The current character count is listed at the upper right of the text box.

- If a chat invitation feed has been defined for the campaign, an **Insert Chat Invitation** button appears in the bottom right corner of the reply template. An agent can click on this button to send a URL that the customer can select to initiate a chat with the agent.
- 2 Click **Tweet**, **Retweet**, or **Send** to send the response (depending on the type of reply selected). Or, for replies and direct messages, click **Save Draft** to save the response for review and then send it later. If you save a draft message, it is marked as Draft and can be found under the Show Drafts menu. Once the response has been sent, the social contact is marked as Handled.

**Note**

The reply template is customizable. The instructions above pertain to the default Cisco Twitter template. If your administrator has provided a custom reply template, the steps for replying may differ.


## Replying to a Facebook Social Contact

Configure the feed to use the Cisco Facebook reply template to respond directly to the fan page from SocialMiner.

**Note**

If you reply to a Facebook comment, the reply appears in Facebook as a reply to the original post rather than as a reply to the comment. You can Reply, Like or Comment on a post only if you are the authorized administrator of the respective fan page.

### To Reply to a Facebook Fan Page

- 1 Select a Facebook social contact. Select the Reply icon .

The Cisco Facebook Reply form opens with the following elements:

- The link to the Facebook page.
- The Facebook picture of the person who posted or commented on the page.
- The Facebook name of the person who posted or commented on the page.
- The elapsed time since the post or comment was made.
- The text of the post or comment.
- A Like/Unlike indicator. (If you have never replied, or if you have previously replied with an Unlike, the template shows Like. If you have previously replied with Like, the template shows Unlike. You can reply without selecting Like or Unlike.)
- A text area for your comment.
- Send and Save Draft buttons.
- If a chat invitation feed has been defined for the campaign, an **Insert Chat Invitation** button appears. An agent can click on this button to send a URL that the customer can select to initiate a chat social contact with the agent.
- A Cancel button.

- 2 Click **Send** to send the reply or click **Save Draft** to save the response for review and then send it later. If you save a draft message, it is marked as Draft and can be found under the Show Drafts menu. Once the response has been sent, the social contact is marked as Handled.

**Note**

The instructions above pertain to the default Cisco Facebook reply template. If your SocialMiner Administrator has created and configured a custom reply template for Facebook, the steps for replying may differ.

## Replying to an RSS Social Contact

You cannot reply directly to a social contact from an RSS feed. You can, however, tag the RSS contact and set notifications so that an agent receives an email or an Instant Message for the social contact.

## Replying to a Callback Contact

You cannot reply directly to callback contacts.

When a customer submits a request for a callback (for example, they click on a "Call me" button), a new social contact is created in SocialMiner and a notification is sent to Unified Contact Center Enterprise (Unified CCE) requesting that a return call be placed.

The reply to the contact is the return phone call initiated by Unified CCE.


## Replying to an Email Contact

You cannot reply directly to an email contact from SocialMiner.

When a customer sends an email message, a social contact is created in SocialMiner and a notification is sent to Unified Contact Center Express (Unified CCX). The Finesse agent desktop in Unified CCX is used to reply to the email contact.

## Settings

Use this page to set your chat / contact/ callback alias, to enable or disable the Accessibility feature on the agent interface, to show or hide social contacts by tag and to enable or disable training for a Bayesian filter.

Select the Settings icon  at the top right of the Home tab to open the Settings page.

Although tags and Bayesian filters are global (all users can see them), settings are user-specific. Your changes to settings determine what *you* see for the campaign, but do not effect what others see in the campaign.

You can customize the Home tab to show contacts with certain tags and to enable filter training for Bayesian filters. (You need to add tags and add Bayesian filters before these options appear in Settings.) You can also customize the appearance and function of the agent chat interface.

## Chat Settings

The default chat alias value "Agent" can be changed to a string of up to 40 characters (stored in the browser as a cookie). Agents use this value to define how they will be identified to users.

When using a Firefox browser, the chat interface supports accessibility by using the JAWS 'highlighted text' functionality. With JAWS configured to read highlighted text and Accessibility mode enabled, incoming chat messages and other events are highlighted briefly so JAWS can announce them. Note that the "Enable Accessibility for Agent Chat (Firefox only):" checkbox only appears when you sign in using a Firefox browser.

Check or uncheck the checkbox to enable or disable the Accessibility feature in the agent chat interface.

## Train Bayesian Filters

The Bayesian filter is a trainable filtering technology based on a Bayesian statistical probability model. Bayesian filters are not pre-programmed or configured with business rules. You must apply a Bayesian filter to a campaign and then train the filter to recognize the content of "good" contacts. When training a Bayesian filter, you have the option to "train in" or "train out" each contact in a campaign. After a sufficient amount of training, the filter begins to exclude unwanted contacts from a campaign. You must add a Bayesian filter before you can train it.

Bayesian filters can be trained for many different uses.

- A filter can take a broad keyword search and narrow the results down to the posts related to a specific brand. For example, a search for "Finesse" could return posts about hair products, Cisco software, and a move in the card game bridge. If the purpose of the campaign is to capture posts about the Cisco Finesse, a Bayesian filter can be trained to exclude the social contacts about hair care and playing bridge.
- A filter can be trained to look for social contacts with negative sentiment or positive sentiment.
- Filters can also be trained to include or exclude social contacts written in specific languages.



When training a filter, it includes the complete text of the post—not just certain keywords. Therefore it offers much more sophisticated filtering capability than a keyword exclusion approach to filtering.

You can train a Bayesian filter using any campaign. If you have added a Bayesian filter, you can select it on the Settings page to activate training mode (the default selection is None). To deactivate training, reselect None.

Selecting a Bayesian filter enables filter training and changes the campaign display on the Home tab to show the name of the filter at the top left and to show Plus (+) and Minus (-) training buttons for each social contact



- Click + to 'train in' the social contact (indicating that this is the type of contact you would like the filter to keep in the campaign).
- Click - to 'train out' the social contact (indicating that this is the type of contact you would like the filter to reject).

Training settings are user-specific. Your changes do not impact what others see for the campaign.

The training does not impact the campaign until you edit the campaign and move the filter from Available to Selected.

Create a test campaign that mirrors an existing 'in production' campaign. Add several feeds to the test campaign (some that you know will have relevant posts and some with irrelevant posts). Create the filter and set the test campaign to training mode. The more you train the filter, the better the filter will perform. It is important to do a significant amount of training before applying your filter to the production campaign.

## Show Tags

By default, a campaign shows contacts with all tags. You can refine the list to show only those contacts with certain tags.

### On the Settings page

- 1 Check **Enable**.
- 2 Select one or more tags.
- 3 Click **OK**.

For example, if you select Cisco and TelePresence from the tag list, only contacts with a Cisco tag or a TelePresence tag (or both), are displayed in the results.

To undo the tags and see all contacts again, return to the Settings page, uncheck **Enable**, and click **OK**.

Tab settings are user-specific. Your changes to Settings determine what you see on the Home tab but do not impact what others see for the campaign.

# Search

The Search tab enables users to search for specific contacts on SocialMiner.

You can perform a default search or a field-specific search.

A default search is a freeform search. To perform a default search, enter the text that you want to search for in the Search field and then click **Search**. A default search searches the following fields:

- sc.author
- sc.title
- sc.tags
- sc.description
- sc.socialContactStatus
- sc.sourceType
- sc.isSoftLocked
- chat.agentName
- chat.agentNickname
- chat.transcript

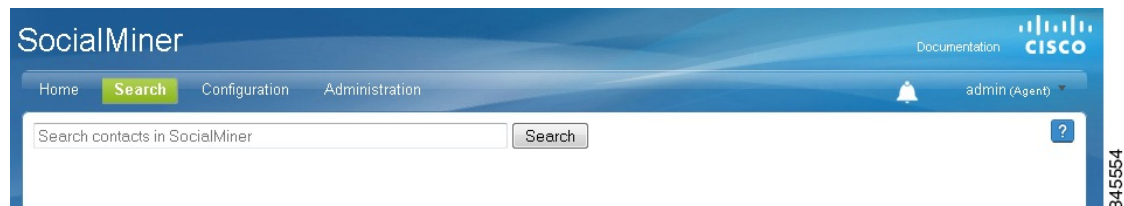
The sc.title, sc.description, and chat.transcript field searches are not case-sensitive. To search in all other fields, the search term you enter must be an exact (case-sensitive) match.



## Note

For SocialMiner standalone chat or Unified CCX single-session chat, the chat.agentName is always saved in the database in lower case text, no matter how an agent signs in. For example, if an agent signs in as JSmith, you must search for jsmith to find the contact.

A field-specific search allows you to choose the field in which you want to search. Place your cursor in the Search field and press the spacebar to view a drop-down list of searchable fields. Select the specific field you want to search and enter a term (or more than one term enclosed in quotes) beside the field name. Wildcard-based searches using "?" (for a single character) and "\*" (for multiple characters) are allowed.



When you start to type, the drop-down list of searchable fields is filtered based on what you type. For example, if you type chat, only the fields that contain chat appear.

Certain characters are special and cannot be included in the default search unless they are escaped—meaning either enclosing them in quotes or preceding them with a backslash. For example, if you want to include the character + in your search, you need to enter \+ or "+". The same is true for the colon (:). To include it in your search, you must enter \: or ":" to have it recognized. (For a full list of all special characters, see the [Solr wiki](#).)

You can perform a field-specific search on the following fields:

- **sc.author:** The person who created the social contact (chat request, email message, Tweet, Facebook post).
- **sc.link:** The link to the social contact.
- **sc.publishedDate:** The date the social contact was published.
- **sc.createdDate:** The date the social contact was created.
- **sc.socialContactStatus:** The status of the social contact (unread, reserved, handled, discarded, draft, or queued).
- **sc.socialContactStatusDate:** The date that the status of the social contact last changed.
- **sc.tags:** The tags applied to the social contact. Tags can be applied automatically by the system when the contact enters a feed or manually by a user.
- **sc.sourceType:** The feed type to which the social contact belongs.
- **chat.agentNickname:** Nickname for the agent in the chat room.
- **chat.agentName:** Login username for the agent in the chat room.
- **de.id:** The social contact ID. This ID is upper-case. The field is case-sensitive.

SocialMiner also allows for a combination of default and field-specific searches using AND and OR operators.

For example, to search for a contact that contains the phrase "This is a test contact" and is authored by John Smith, you can search using any of the following criteria:

- **sc.author:John\*** (wildcard in field-based search)  
OR
- **sc.author:"John Smith" AND test contact** (a mix of field-based search and default search)  
OR
- **test contact** (just the default search)

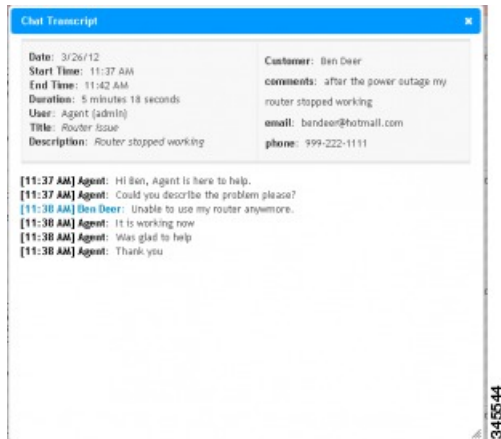
Search results are displayed similarly to campaign results.



**Note**

You cannot insert a chat invitation link in Twitter or Facebook replies opened from the search results list.

The title of any chat social contact is an active link if a transcript has been saved. Select the link to open a window displaying the chat transcript. The chat transcript only becomes available once a chat session is closed. If one party in the chat does not close their window, then the system cannot generate the transcript until the inactivity timeout expires.



Email contacts appear in search results but the email messages cannot be viewed in SocialMiner. If you want to view an email message, you must locate the message in the appropriate folder on the Exchange server and view it from there.