Cisco Interaction Manager Getting Started Guide

Release 4.1(1)
January 2007

Corporate 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: 408 526-4100

THE SPECIFICATIONS AND INFORMATION REGARDING THE PRODUCTS IN THIS MANUAL ARE SUBJECT TO CHANGE WITHOUT NOTICE. ALL STATEMENTS, INFORMATION, AND RECOMMENDATIONS IN THIS MANUAL ARE BELIEVED TO BE ACCURATE BUT ARE PRESENTED WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. USERS MUST TAKE FULL RESPONSIBILITY FOR THEIR APPLICATION OF ANY PRODUCTS.

THE SOFTWARE LICENSE AND LIMITED WARRANTY FOR THE ACCOMPANYING PRODUCT ARE SET FORTH IN THE INFORMATION PACKET THAT SHIPPED WITH THE PRODUCT AND ARE INCORPORATED HEREIN BY THIS REFERENCE. IF YOU ARE UNABLE TO LOCATE THE SOFTWARE LICENSE OR LIMITED WARRANTY, CONTACT YOUR CISCO REPRESENTATIVE FOR A COPY.

The Cisco implementation of TCP header compression is an adaptation of a program developed by the University of California, Berkeley (UCB) as part of UCB's public domain version of the UNIX operating system. All rights reserved. Copyright © 1981, Regents of the University of California.

NOTWITHSTANDING ANY OTHER WARRANTY HEREIN, ALL DOCUMENT FILES AND SOFTWARE OF THESE SUPPLIERS ARE PROVIDED "AS IS" WITH ALL FAULTS. CISCO AND THE ABOVE-NAMED SUPPLIERS DISCLAIM ALL WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THOSE OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT OR ARISING FROM A COURSE OF DEALING, USAGE, OR TRADE PRACTICE.

IN NO EVENT SHALL CISCO OR ITS SUPPLIERS BE LIABLE FOR ANY INDIRECT, SPECIAL, CONSEQUENTIAL, OR INCIDENTAL DAMAGES, INCLUDING, WITHOUT LIMITATION, LOST PROFITS OR LOSS OR DAMAGE TO DATA ARISING OUT OF THE USE OR INABILITY TO USE THIS MANUAL, EVEN IF CISCO OR ITS SUPPLIERS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

CCSP, CCVP, the Cisco Square Bridge logo, Follow Me Browsing, and StackWise are trademarks of Cisco Systems, Inc.; Changing the Way We Work, Live, Play, and Learn, and iQuick Study are service marks of Cisco Systems, Inc.; and Access Registrar, Aironet, ASIST, BPX, Catalyst, CCDA, CCDP, CCIE, CCIP, CCNA, CCNP, Cisco, the Cisco Certified Internetwork Expert logo, Cisco IOS, Cisco Press, Cisco Systems, Cisco Systems Capital, the Cisco Systems logo, Cisco Unity, Empowering the Internet Generation, Enterprise/Solver, EtherChannel, EtherFast, EtherSwitch, Fast Step, FormShare, GigaDrive, GigaStack, HomeLink, Internet Quotient, IOS, IP/TV, iQ Expertise, the iQ logo, iQ Net Readiness Scorecard, LightStream, Linksys, MeetingPlace, MGX, the Networkers logo, Networking Academy, Network Registrar, *Packet*, PIX, Post-Routing, Pre-Routing, ProConnect, RateMUX, ScriptShare, SlideCast, SMARTnet, StrataView Plus, TeleRouter, The Fastest Way to Increase Your Internet Quotient, and TransPath are registered trademarks of Cisco Systems, Inc. and/or its affiliates in the United States and certain other countries.

All other trademarks mentioned in this document or Website are the property of their respective owners. The use of the word partner does not imply a partnership relationship between Cisco and any other company. (0502R)

Any Internet Protocol (IP) addresses used in this document are not intended to be actual addresses. Any examples, command display output, and figures included in the document are shown for illustrative purposes only. Any use of actual IP addresses in illustrative content is unintentional and coincidental.

Cisco Interaction Manager Getting Started Guide
© 2007 Cisco Systems, Inc. All rights reserved.

Contents

Preface **4**

About this guide 5

Document conventions 5

Other learning resources 6

Online help 6

Document set 6

Chapter 1: Key terms and concepts **7**

Consoles 8

System and business areas 8

Partition 9

Department 9

User types 10

User levels 10

User roles 10

Standard users 11

User groups 11

Chapter 2: Setting up your web browser **12**

Verifying browser version 13

Configuring your browser 14

Configuring Sun JVM Plugin browser setting 18

Configuring pop-up blockers 18

Preface

- About this guide
- Document conventions
- Other learning resources

Welcome to **Cisco® Interaction Manager™**—unified multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A comprehensive suite of the industry's best applications for multichannel customer interaction management, Cisco Interaction Manager is the backbone of many innovative contact center and customer service helpdesk organizations.

About this guide

Cisco Interaction Manager Getting Started Guide is the first document that all users should read. It will help you understand a few key concepts, and get started with logging in and using the system

Document conventions

This guide uses the following typographical conventions.

Convention	Indicates
Italic	Emphasis, or the title of a published document.
Bold	The label of an item in the user interface, such as a field, button, or tab.
`Monospace`	A file name or command. Also, text that must be typed by the user.
Variable	User-specific text, which is supplied by the user.

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.

Use	To view
Help button	All topics in *Cisco Interaction Manager Help*; the **Help** button appears in the console toolbar on every screen, as well as on most windows.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Document set

For more information about Cisco Interaction Manager, see the following documents. They can be found in the `Documents` folder on the product CD.

- *Cisco Interaction Manager System Requirements*
- *Cisco Interaction Manager Installation Guide*
- Cisco Interaction Manager user's guides

1 Key terms and concepts

- Consoles
- System and business areas
- Partition
- Department
- User types

In this chapter we introduce you to some key words used in the interface. These terms will help you understand the conceptual framework of the system.

Consoles

The installation has seven user work spaces or consoles:

- **One service console**
  - Agent Console
- **One authoring console**
  - Knowledge Base Console
- **Five management consoles**
  - Administration Console
  - Reports Console
  - Supervision Console
  - System Console
  - Tools Console

The consoles make it easy for target users to perform their daily tasks. Each console is designed by our usability team to be a specialized work area for a specific set of interaction hub users such as agents, knowledge authors, supervisors, managers, business analysts, system administrators, and programmers.

System and business areas

Broadly speaking, the installation has two areas:

- **System area:** Used by system administrators to set up and manage system resources such as host machines and services. It has two consoles:
  - Administration Console
  - System Console

  Very few users need access to this area, as it is used to perform only system administration tasks.
- **Business area:** The main part of the installation, used by business users to perform their tasks. It has all seven consoles.

Partition

A partition contains system and business resources for a completely independent business unit or client. A single installation can have one or more partitions. With multiple partitions, you can use the same system in various independent business units—while the hardware and software is common, resources are stored and managed separately for each unit.

Partitions are ideal for organizations where business units (or clients, in the case of an out sourced business) do not need to share customer information or knowledge base. This is usually the case if the units serve very different customers. For example, a bank, which serves individual retail consumers as well as corporations, may want two partitions as the product offerings and customer service needs for these segments are different. Partitions can also be used for different geographies. The same bank, to continue with our example, may choose to use separate partitions for their US and China businesses because of legal and regulatory needs.

The first partition is created by the installation program. Additional partitions can be created using the custom installation option of the installation program.

You could set up additional partitions if you:

- Want complete segregation of data between business units in your enterprise.
- Are an outsourcer or application service provider and want to serve multiple customers from a single installation.

Setting up additional partitions is not very common. If you are still not sure whether you need partitions, you probably don't need them.

Department

Each partition can have one or more departments. While partitions do not share system resources or business objects, departments within a partition share system resources and—if required—specific business resources. Departments are suited for organizations where units would like to share system resources and a few business resources such as customer information or agents.

The first department in the first partition is created by the installation program. This department is called `Service`. You can rename it if you like.

You can create additional departments to:

- Mirror your company's organization.
- Create units with independent business processes.
- Allow limited sharing of information between largely independent units.

Customer information can be shared across all departments. Other resources such as agents and activities can be shared between departments. Sharing of such resources is one-directional, which means that even if Department A shares its agents with Department B, Department B could decide not to share its agents with Department A.

User types

The system lets you create various types of user accounts. Some important concepts are explained here.

User levels

Users can be created at three levels:

1. System
2. Partition
3. Department

- System level user: This user is typically the system administrator of the system who does not require any license to operate.
- Partition level user: This is the partition administrator user who uses licenses to create administrators and users in the system.
- Department level users: These are users who require licenses to perform their tasks in the system. The licenses associated with the user may also differentiate between the roles of the users.

User roles

The system lets you define roles to make it easy to mange user permissions. A role is nothing but a set of permissible actions for various business resources. An agent's role, for instance, would include actions such as "View Agent Console," "Edit customer," and "Add notes." You can assign one or more roles to a group of users or an individual user. Standard roles for eight types of users are provided. You can edit these roles or create new ones.

Standard users

Two users are created during the installation:

1. System Administrator: The first system user, created during installation, is a user called `System Administrator`. Assigned the System Administrator role, this user sets up system resources and creates one or more system-level users.
2. Partition Administrator: The first business user, created during installation, is a user called `Partition Administrator`. Assigned the Partition Administrator role, this user manages partition users and settings and creates more partition users as well as one or more department-level users to manage department resources.

User groups

User groups are a collection of users that share similar functions or roles in the system. Groups make it much easier to manage user accounts. A standard user group called `All Users in <Department Name>` is created in each department. Every new user in the department is automatically included in this group.

2 Setting up your web browser

- Verifying browser version
- Configuring your browser
- Configuring pop-up blockers

This chapter helps you set up your web browser for the application—a very important task as the application is mainly accessed through the web browser.

- The first section describes the procedure for verifying that the correct version of the browser is installed on your desktop.
- In the second section, you learn how to configure the browser.
- The final section describes the procedure for configuring a Sun JVM plugin browser setting.

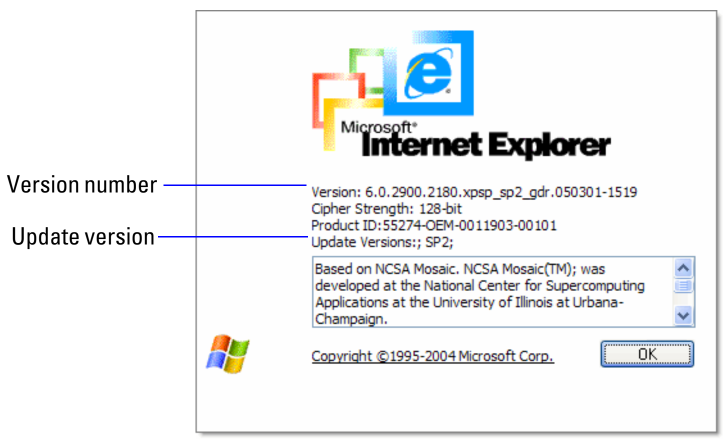
Verifying browser version

Your browser should be Microsoft Internet Explorer 6.0 (Service Pack 2 or higher).

To verify that you are using the correct version:

1. Open Internet Explorer.
2. Go to **Help** (menu) > **About Internet Explorer.**

   The **About Internet Explorer** window appears.



About Internet Explorer window

3. Verify that the version number is **6.0.x** and that the update version is **SP2.** If you need to get the correct version, download it from the Microsoft web site.

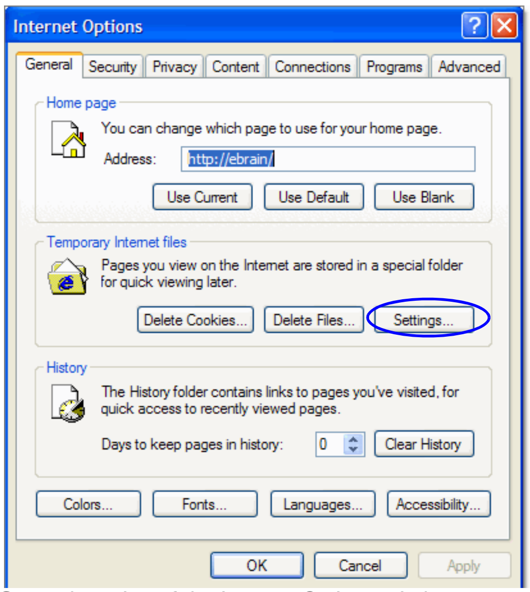
Configuring your browser

To configure your browser for eGain Service:

1. Open Internet Explorer.
2. Go to **Tools** (menu) > **Internet Options.**

   The **Internet Options** window appears.

3. On the **General** tab, in the **Temporary Internet Files** section, click the **Settings** button.



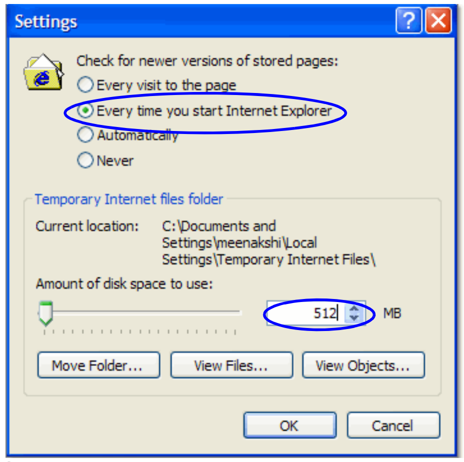
General section of the Internet Options window

4. In the **Settings** window that appears:

   a. Select, **Every time you start Internet Explorer,** as the option for checking newer versions of stored pages.

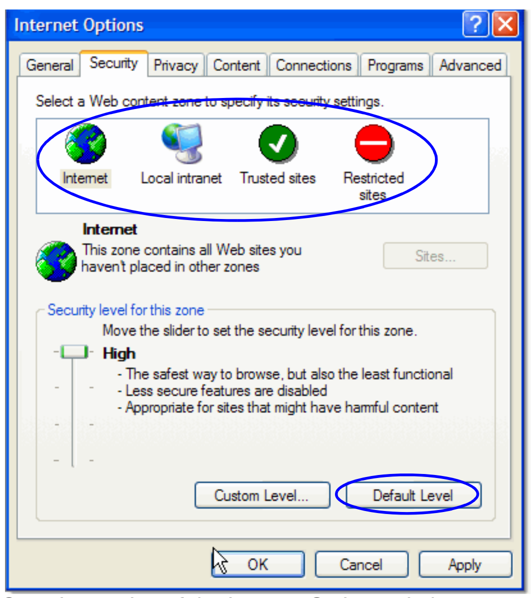
   b. In the **Temporary Internet files folder** section, specify at least 512 MB as the disk space to use.

   c. Click **OK.**



Settings window

5. On the **Security** tab, restore default settings for all web content zones (**Internet, Local Intranet, Trusted sites, Restricted sites)** by selecting each zone one by one and clicking the **Default Level** button. If the **Default Level** button is disabled, then default settings are already in use.



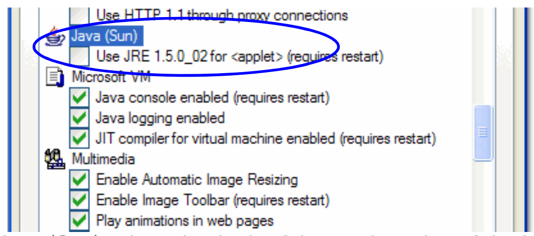
Security section of the Internet Options window

6. On the **Advanced** tab:

   a. Click the **Restore Defaults** button.

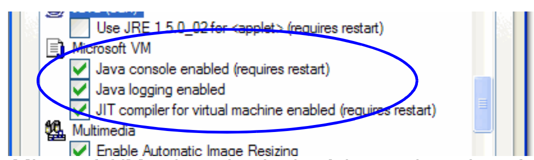
b. In the **Java (Sun)** section, clear the **Use JRE... for <applet>** option.

Important: This subsection is not displayed if your JRE version is older than 1.4.1. In that case, skip this step.



Java (Sun) subsection in the Advanced section of the Internet Options window

7. In the **Microsoft VM** section, select all three options and click **OK.** The options are:
   - **Java console enabled**
   - **Java logging enabled**
   - **JIT compiler for virtual machine enabled**



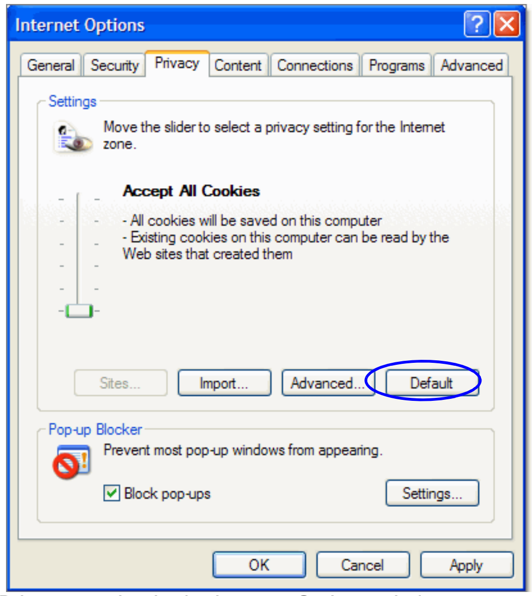
Microsoft VM subsection in the Advanced section of the Internet Options window

---

Important: This section is not displayed if your machine does not have Microsoft VM. Contact Cisco Support to get a copy of the Microsoft VM installation files.

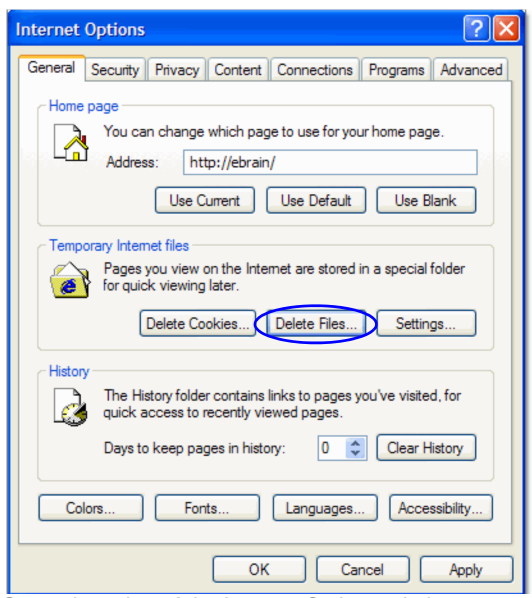
---

8. Close Internet Explorer.
9. Reopen Internet Explorer.
10. Go to **Tools** (menu) > **Internet Options.**
11. In the **Internet Options** window, click the **Privacy** tab.
12. Restore default settings by selecting the **Default** button and clicking **Apply.** If the **Default** button is disabled, then default settings are already in use.



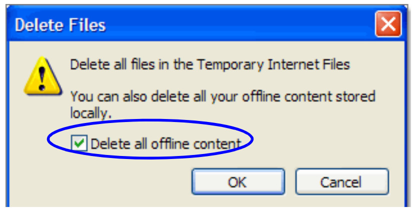
Privacy section in the Internet Options window

13. On the **General** tab, in the **Temporary Internet Files** subsection, click **Delete Files.**



General section of the Internet Options window

14. In the **Delete Files** window, select the **Delete all offline content** option, and click **OK.**



15. Click **OK** in the **Internet Options** window to close it.
16. Close the browser.

    Your web browser is now fully configured for eGain applications.

Configuring Sun JVM Plugin browser setting

The system may install the Sun® JavaSoft™ JVM plug-in on your machine when you first use the Workflow Designer in the Administration Console.

You must configure a browser setting again after the plugin is installed.

To configure your browser for the JVM plugin:

1. Open Internet Explorer.
2. Perform step 6 (page 15).

Configuring pop-up blockers

If you use a pop-up blocker such as the Google or Yahoo toolbar, configure it to allow pop-ups on your installation URL.