Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Chat and Collaboration Resources

For Unified Contact Center Enterprise and Hosted and Unified ICM

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Contents

Preface

- About This Guide
- Document Conventions
- Acronyms and Initialisms
- Other Learning Resources

Welcome to Cisco® Interaction Manager™, 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 Interaction Manager 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 Chat and Collaboration Resources introduces you to chat and collaboration infrastructure within the application. It includes instructions on how to set up template sets and entry points.

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
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.

Document conventions

Acronyms and Initialisms

The following acronyms and initialisms are used in this document.

- ACD: Automatic Call Distributor
- ARM: Agent Reporting and Management
- CSA: Cisco Security Agent
- CTI: Computer Telephony Integration
- EAAS: External Agent Assignment Service

- ICM: Intelligent Contact Manager
- IPCC: Internet Protocol Contact Center
- IPTA: ICM-picks-the-agent
- JDBC: Java Database Connectivity
- MR: Media Routing
- MRD: Media Routing Domain
- ODBC: Open Database Connectivity
- PG: Peripheral Gateway
- PIM: Peripheral Interface Manager
- SNMP: Standard Network Management Protocol
- UI: User Interface

Other Learning Resources

Various learning tools are available within the product, as well as on the product CD and our website. 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	Topics in *Cisco Unified Web and E-Mail Interaction Manager Help*; the Help button appears in the console toolbar on every screen.
F1 keypad button	Context-sensitive information about the item selected on the screen.

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:

- *Cisco Unified Web and E-Mail Interaction Manager Hardware and System Software Specification*
- *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 Chat and Collaboration Basics

This chapter deals with the basics of using the Administration Console to set up the chat and collaboration infrastructure.

Key Terms and Concepts

- **Chat activities:** An activity created for a chat session between a customer and an agent. A chat is a real time interaction between an agent and a customer where they exchange text messages. As part of a chat, agents can also push web pages to customers. Based on how chat activities are routed to agents, they can be categorized as Standalone chats and Integrated chats.
  - A standalone chat is routed to a standalone queue. Based on the queue configuration, the activity is either routed to, or pulled by a standalone agent.
  - An integrated chat is routed to an integrated queue, and a message is sent to Unified CCE. Unified CCE processes the activity and assigns the chat to an available IPTA agent. If there is no IPTA agent available at that time, Unified CCE informs Cisco Interaction Manager to route the activity to an available NIPTA agent.
- **Blended collaboration activities:** An activity created for a blended chat and phone session between an agent and a customer. In blended collaboration activities, the customer provides personal details (including the phone number) in a customized web form, and the system automatically generates a call and creates a chat activity and assigns the activity to an agent. The agent provides both phone and page sharing (through chat) assistance to the customer.
- **Callback activities:** An activity created for a web callback session between an agent and a customer. In callback activities, the customer provides personal details (including the phone number) in a customized web form, and the system automatically generates a call activity and assigns the activity to an agent.
- **Delayed callback activities:** An activity created for a delayed web callback session between an agent and a customer. In delayed callback activities, customer provides the personal details (including the phone number and a delay time, after which he wants to receive the call) in a customized web form, and the system automatically creates a call activity after the specified delayed time and assigns the activity to an agent.
- **Template sets:** Template sets consist of CSS (cascading style sheets) and JSP (JavaServer pages) files. The CSS files control the look and feel of the Chat Console. The JSP files contain the business logic used to render data in the Chat Console. Templates are also used to determine the type of information collected on the web form and used to identify the customer (e.g. name, email address, phone number). You can also compose messages that the customer will see under certain circumstances (e.g. if they request a chat session out of hours). For more details, see “Template Sets” on page 15.
- **Entry points:** An entry point defines the starting point from which customers initiate chat, blended collaboration, and web callback interactions. Every help link on a website is mapped to an entry point. Each entry point has a queue and a template set associated with it. The queue is used to route activities to agents while the template set determines the look and feel of the different pages displayed to chat customers. For more details, see “Entry Points” on page 25.

Important Tasks

This guide describes how to set up your system for chat (both standalone and integrated), blended collaboration, callback, and delayed callback activities. For each type of activities, you need to create a different set of objects in the system. This section lists the objects needed for each type of activity.

For Chat and Blended Collaboration Activities

To be able to set up your system for these activities, you need to create the following objects:

- An email address (A valid email address on your Mail server): Contact your system administrator to get this configured.
- Articles (From the Knowledge Base Console, Content node): For details, see the *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author's Guide.*
- Users (From the Administration Console, User node): For details, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console.*
- Queues (From the Administration Console, Workflow node): For details, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Routing and Workflows.*
- Templates (From the Administration Console, Chat node): For details, see Chapter 2, "Template Sets".
- Entry points (From the Administration Console, Chat node): For details, see Chapter 3, "Entry Points".

For Callback and Delayed Callback Activities

To be able to set up your system for these activities, you need to create the following objects:

- Users (From the Administration Console, User node): For details, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console.*
- Queues (From the Administration Console, Workflow node): For details, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Routing and Workflows.*
- Templates (From the Administration Console, Chat node): For details, see Chapter 2, "Template Sets".
- Entry points (From the Administration Console, Chat node): For details, see Chapter 3, "Entry Points".

Services for Chat and Collaboration

Make sure that the following services in the System Console are configured properly and are in running state. For details about configuring these services, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to System Console.*

- Agent Assignment Service (AAS)
- External Agent Assignment Service (EAAS) (For integrated chats, blended collaboration, callback, and delayed callback activities only. Not required for standalone chat activities.)

- Listener service (For integrated chats, blended collaboration, callback, and delayed callback activities only. Not required for standalone chat activities.)

Settings for Chat and Collaboration

Make sure that the following partition and department level settings are configure properly. For details about these settings, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console.*

Settings at the Partition Level

- Application Instance

Settings at the Department Level

- Chat - User max load
- Chat - Override user max load setting for pull
- Chat - My Monitor - Max join load
- Chat - My Monitor - Activity refresh interval (seconds)
- Chat - Automatic case creation
- Chat - Inbox sort column
- Chat - Inbox sort order
- Chat - Force resolution code
- Chat - Force activity categorization
- Chat - Display timestamp in customer chat console
- Chat - Display timestamp in agent chat console
- Chat - Display timestamp in completed chat transcript
- Chat - Automatic session closure interval (seconds)
- Chat - Customer intermittent interval (seconds)
- Chat - Customer offline interval
- Chat - Restore agent console when a message arrives
- Chat - Restore customer console when a message arrives
- Chat - Customer chat message maximum length
- Chat - Agent chat message maximum length
- Chat - Agent availability choice enabled
- Chat - MeadCo download on customer console

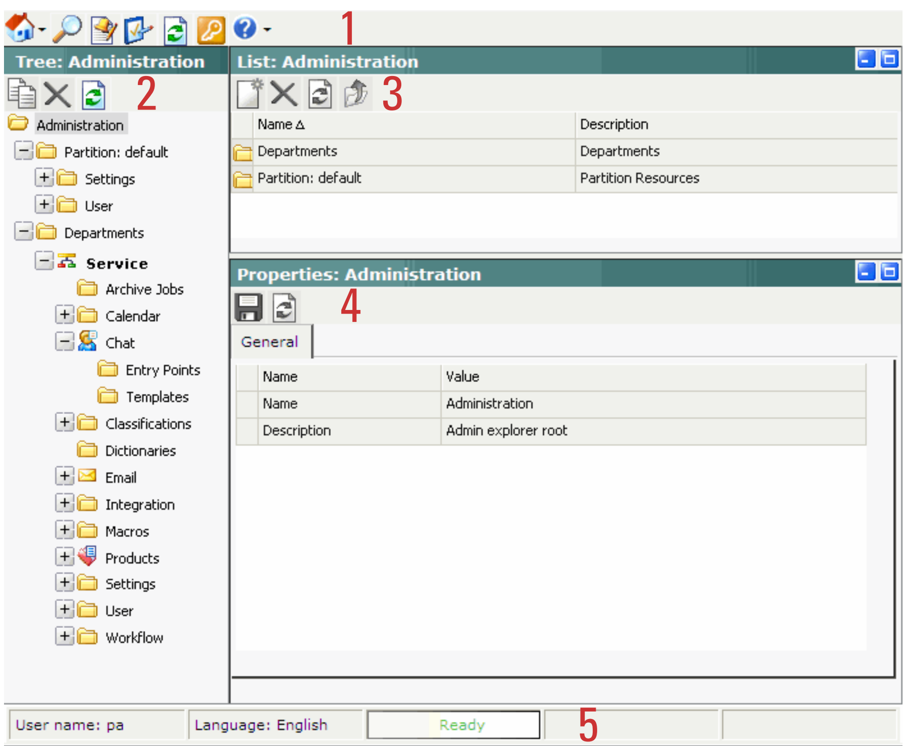
- Chat - MeadCo download on agent console
- Chat - Disable typing area and web collaboration area on customer exit
- Chat - SLA threshold interval (seconds)
- Chat - Daily service level sample set definition
- Chat - Auto block check
- Chat - Auto spellcheck
- Chat - Notification mail dispatching from address

Elements of the Consoles

The components of chat and collaboration are available in the Administration Console.

Administration Console

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



Elements of the Administration Console user interface

1. **Console toolbar:** The main toolbar of the console appears at the top of the screen. Each button on this toolbar allows you to perform a specific function. Some of these are: navigate to other consoles, send and receive internal messages, log out of the system, and access the online help for the Administration Console.

2. **Tree pane:** The Tree pane lists all the business objects in the application, 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, press SHIFT and 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 the 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 business object 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 the system.
   - The language currently in use.
   - The status of the system (**Loading, Ready,** etcetera).

2 Template Sets

This chapter will assist you in understanding how to set up chat and collaboration template sets.

About Template Sets

Template sets consist of CSS (cascading style sheets) and JSP (JavaServer pages) files. The CSS files control the look and feel of the Chat Console. The JSP files contain the business logic used to render data in the Chat Console. Templates are also used to determine what information is requested to identify the customer (e.g. name, email address, phone number). You can also compose messages that the customer will see under certain circumstances (e.g. if they request a chat session out of hours).

Each entry point must be mapped to a template set and multiple entry points can use the same template set. Two template sets - Classic Olive and Classic Gray are shipped with the application and can readily be mapped to any number of entry points.

Important: **The system supplied templates cannot be deleted.**

For every template set created, a directory with the same name is created in the file system. You can create a new template set and then customize the individual templates (.css files) for the desired look and feel.

Do I need to create new templates or just use the default ones?

Two template sets - Classic Olive and Classic Gray are shipped with the application. You may want to create a new one that is customized to look like your website.

You can choose to use one template set for all your chat entry points for a consistent look and feel. Alternatively, you can use different templates for each entry point, so that the look and feel of each one is targeted towards a specific audience.

How easy are the templates to modify?

The templates are easy to modify. It is possible to make a number of layout and wording changes through the Administration Console. You can also make branding changes to the templates to match them with the look and feel of your website. For details, see "Customizing Template Sets" on page 23.

Creating Template Sets

Create a separate template set for each of the following types of activities:

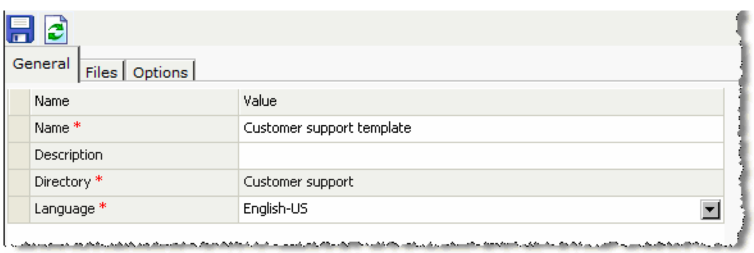
- Standalone chat activities
- Integrated chat activities
- Blended collaboration activities
- Callback activities
- Delayed callback activities

To create a new template set:

1. In the Tree pane, browse to **Department >** *Department Name* **> Chat > Templates.**
2. In the List pane toolbar, click the **New** button.
3. In the Properties pane, on the General tab, provide the following details:
   - **Name:** Type a name for the template set. This is required information.
   - **Description:** Type a brief description for the template set.
   - **Directory:** Type a name for the directory. This is required information.

   Important: **A directory with this name gets created in the file system. You cannot change the directory once you save the template set.**

   - **Language:** From the dropdown list, select a language for the template. The login page and all the system and template messages are shown in the language selected. The following seven languages are available:
     - **Dutch**
     - **English (US)**
     - **French**
     - **German**
     - **Italian**
     - **Portuguese-BR**
     - **Spanish**

   Set the general properties

   If you are changing the language of a template set that is already in use, then make sure that the chat agents, who are servicing the entry points where the template set is used, are not logged in to the system. If there are any chat agents logged in, they would need to log out and log in again.

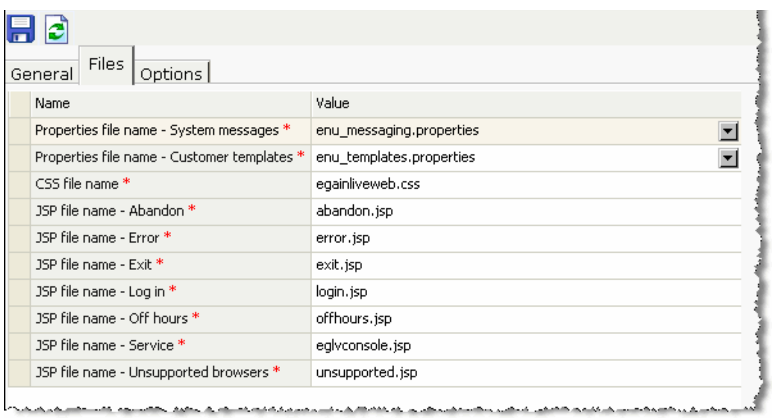
4. Click the **Save** button.

   Important: **The Options and Files tab are enabled only after you click the Save button.**

   ---

5. Next, go to the Files tab. Here you can view the names of the `jsp` and `css` that are part of the template set. Make sure that you do not change the names of these files.
   - **Properties file name - System messages:** The value in the field changes automatically based on the language selected in the **Language** field on the General tab.

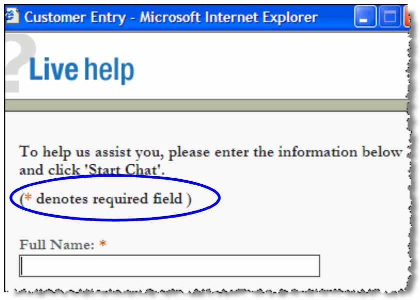
- **Properties file name - Customer messages:** The value in the field changes automatically based on the language selected in the **Language** field on the General tab.
- **CSS file name:** This is the primary Cascading Style Sheet (CSS) file for the template. All styles in the chat template are defined in this file. The default value is *egainliveweb.css*.
- **JSP file name - Abandon:** This file is executed to show the message configured to be displayed when a customer abandons a chat session. The default value is *abandon.jsp*.
- **JSP file name - Error:** This file is executed to show the message configured to be displayed when an error occurs during the chat session. The default value is *error.jsp*.
- **JSP file name - Exit:** This file is executed to show the message configured to be displayed when a customer exits the chat session. The default value is *exit.jsp*.
- **JSP file name - Login:** This file is executed to show the login page configured to be displayed when a customer clicks the chat help link or button. The default value is *login.jsp*.
- **JSP file name - Off hours:** This file is executed to show the message configured to be displayed when the chat entry point is accessed when an agent is not available or it is accessed during non-business hours. The default value is *offhours.jsp*.
- **JSP file name - Service:** This file is executed to display the customer chat console during the chat session. The default value is *eglvconsole.jsp*.
- **JSP file name - Unsupported browsers:** This file is executed to show the message configured to be displayed when a chat session is initiated from an unsupported browser. The default value is *unsupported.jsp*.



Provide the names of the files available in the template directory

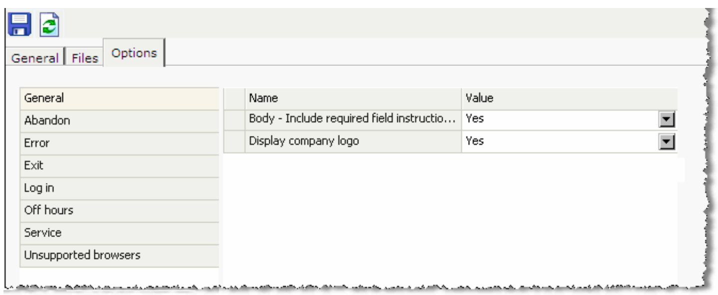
6. On the Options tab, go to the General section. Provide the following details:

- **Body - Include required field instruction text:** Specify if you want to show the required field instruction with the fields. By default **Yes** is selected. Select **No**, if you do not want to show the required field instruction text.



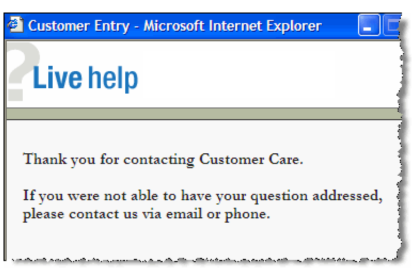
Sample template set

- **Display company logo:** This field is not in use and can be ignored.



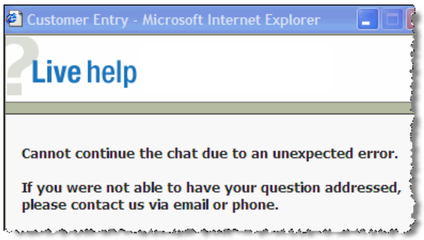
Configure the general properties of the login page

7. Next, on the Options tab, go to the Abandon section. Set up the text to be displayed when a customer cancels the chat request before an agent joins the chat session. For callback activities, this message is shown if the call is not generated by the cut-off time configured in the system. For delayed callback activities, the abandoned message is not displayed to the customer as the call is generated after a delay.



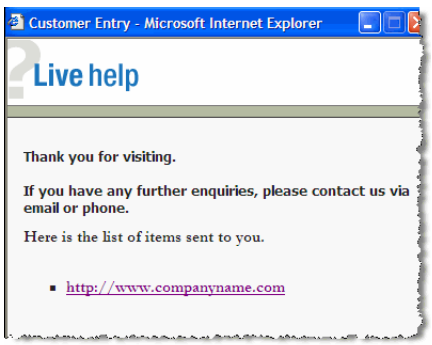
Sample abandon message

8. Next, on the Options tab, go to the Error section. Type the message to be displayed to customers when an error occurs during the chat. For blended collaboration activities, this message is shown when an error occurs while generating or routing a call, or if an error occurs during the chat session. For callback activities, this message is shown when an error occurs while generating or routing a call. For delayed callback activities, the abandoned message is not displayed to customers as the call is generated after a delay.



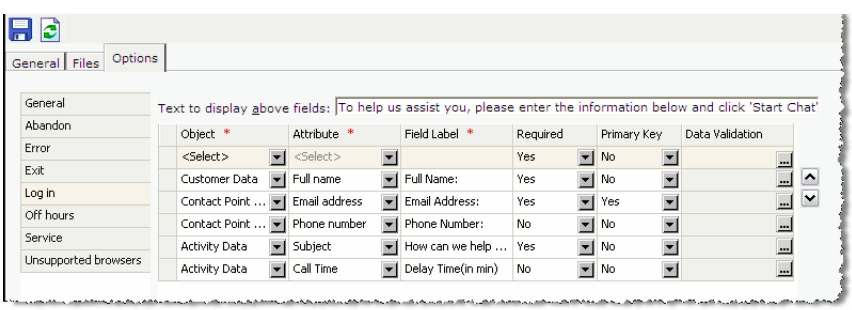
Sample error page

9. Next, on the Options tab, go to the Exit section. Type the message to display to customers at the end of a successful session. For callback and delayed callback activities, the exit message is not displayed to customers.



Sample exit page

10. Next, on the Options tab, go to the Log in section. Build the web form which customers must fill in to initiate a chat, blended collaboration, or web callback interaction. The system uses the customer's contact details (for example, email address, phone number, etc.) to identify existing customers and add the chat session to their customer records automatically. It also creates customer record for new customers. Provide the following details.



Configure the various properties of the fields to be displayed on the login page

- **Text to display above fields:** Type the text you want to display above the login form. The default value is *To help us assist you, please enter the information below and click 'Start Chat'*.

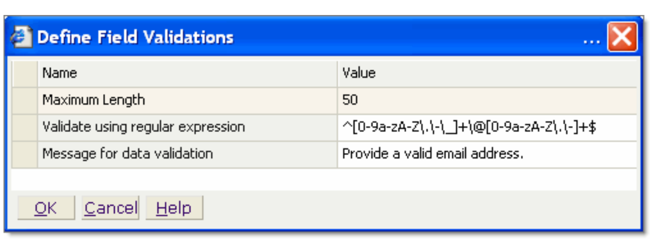
- **Object:** From the dropdown, select an object. This is required information. The following options are available.
  - **Customer Data**
  - **Contact Point Data**
  - **Activity Data**
- **Attribute:** Select the attributes you want customers to provide values for at the time of login. This is required information. The same attribute cannot be selected twice. The following options are available.
  - For Customer Data: **Full name**
  - For Contact Point Data: **Email address, Phone number**
  - For Activity Data: **Subject, Call Time**

  Phone number is a required attribute for callback and delayed callback activities. Call time is a required attribute for delayed callback activities and should be selected only for templates configured for delayed callback activities.
- **Field Label:** Type the name of the field to be presented on the login page. This is required information.
- **Required:** Select **Yes** to make a field mandatory.
- **Primary Key:** With this option you can decide which field is to be marked as the primary key. By default the email address is set as the primary key. At least one attribute has to be set as the primary key, and the attribute set as primary key should also be marked as required. Select **Yes** to make a field the primary key.

Important: **The attribute Subject cannot be selected as the primary key.**

- **Data validation:** Use this option to validate the information provided by customers in the login page. Click the **Assistance** button. In the Define Field Validations window that appears, provide the following details.
  - **Maximum Length:** Type the maximum number of characters the customer can enter in the field.
  - **Validate using regular expression:** Provide the expression against which the information provided by the customer is to be checked. For example, for phone number you can give an expression like, ^\s*\(?\s*\d{3}\s*\)?\s*[-.]?\s*\d{3}\s*[-.]?\s*\d{4}\s*$. And, for email you can use the expression like, ^[0-9a-zA-Z\.\-\_]+\@[0-9a-zA-Z\.\-]+$ - this expression refers to the format X@Y. Z (john@mycompany.com).
  - **Message for data validation:** Type the message you want to show to customers when the information provided does not match the validation parameters set by you.

  Click the **OK** button.



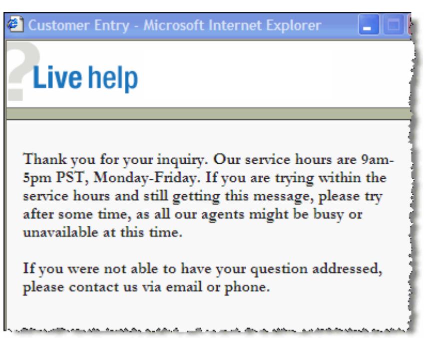
Define field validation properties

You can rearrange the order of attributes. By default, the fields appear in the following order - Full name, Phone number, Email address, and Subject. To rearrange the fields, click on the left side of the row of the attribute you want to move. The row gets selected. Click the **Move up** or **Move down** button to move the attribute to the required position.

You can also remove fields from the login page. To remove an attribute, click on the left side of the row of the attribute you want to remove. The row gets selected. Press the Delete key on the keyboard. The field is removed.

Sample login page

11. Next, on the Options tab, go to the Off hours section. Set up the text to be displayed when no agents are available. For callback and delayed callback activities, the off hours message is not displayed to customers.

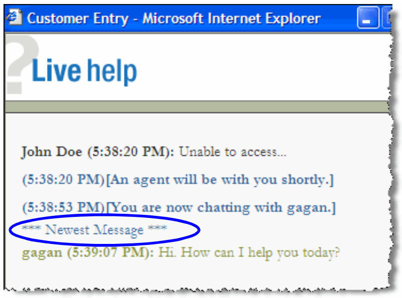


Sample off hours message

12. Next, on the Options tab, go to the Service section. With this setting you can decide how the messages should appear. The following options are available.

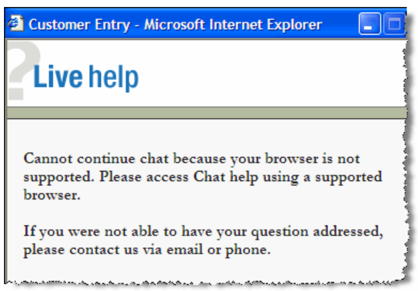
- **Newest message at bottom - with separator**
- **Newest message at bottom- without separator**
- **Newest message at top- with separator**
- **Newest message at top- without separator**

In these options, separator is the text “Newest message” used to differentiate the latest messages from the rest of the chat transcript.



Configure the display properties of chat messages

13. Lastly, on the Options tab, go to the Unsupported browser section. Type the message you want to show to customers when they try to access the help link from a browser that is not supported.



Sample message shown on unsupported browsers

14. Click the **Save** button.

Customizing Template Sets

If you will be using branded CSS or image files, copy them to the directory for this template set on the server after you have configured the template set. This cannot be done from the Administration Console; someone with direct access to the file server must copy the files into the directory.

- The CSS file should be added at: *Cisco_Home*`\eService\web\css\live\templates\`*Template_Set_Folder*
- The header image files should be added at: *Cisco_Home*`\eService\web\css\live\templates\`*Template_Set_Folder*`\images.` Replace the `egainlive_header_logo.gif` (size: 300 pixel X 70 pixel) and `egainlive_header_background.gif` (size: 2 pixel X 70 pixel) images. Do not change the names of the images.
- The header image file should be added at: *Cisco_Home*`\eService\web\image\live\templates\`*Template_Set_Folder.* Replace the `header.jpg` image available in the folder. Do not change the name of the image.

- And, the company logo image file should be added at *Cisco_Home*`\eService\web\image\platform\misc.` Replace the `poweredby_egain.gif` image available in the folder. Do not change the name of the image. All templates in an installation will have the same company logo.

Deleting Template Sets

> Important: **System provided template sets and the template sets used in entry points cannot be deleted.**

To delete a template set:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Templates.**
2. In the List pane, select the template set you want to delete.
3. In the List pane toolbar, click the **Delete** ✕ button.

3

Entry Points

This chapter will assist you in understanding how to set up chat and collaboration entry points.

About Entry Points

An entry point defines the starting point from which customers initiate chat, blended collaboration, and web callback interactions. Every help link on a website is mapped to an entry point. Each entry point has a queue and a template set associated with it. The queue is used to route chats to agents while the template set determines the look and feel of the different pages displayed to chat customers. A default entry point is provided in each department.

> Important: **Multiple chat help links on a website can point to the same entry point.**

Creating Entry Points

Before creating an entry point, create the queues and template sets to be used for the entry points. For details on creating queues, see *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Routing and Workflows*. For details on creating templates, see "Template Sets" on page 15.

You need to create separate entry points for each of the following types of activities:

- Standalone chat activities (page 26)
- Integrated chat activities (page 29)
- Blended collaboration activities (page 29)
- Callback activities (page 31)
- Delayed callback activities (page 32)

Creating Entry Points for Standalone Chats

To create an entry point for standalone chats:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Entry Points.**
2. In the List pane toolbar, click the **New** button.
3. In the Properties pane, on the General tab, provide the following details.
   - **Name:** Type the name of the entry point. This is required information.
   - **Description:** Type a brief description.
   - **Active:** Select **Yes** to make the entry point active.

> Important: **Customers can initiate chats only from active entry points. If the entry point is inactive, a no service available page is displayed to customers.**

- **Subactivity:** From the dropdown list, select **Chat.**
- **Routing type:** From the dropdown list, select **Cisco Interaction Manager.**
- **CTI Strategy:** The value in the field is set to **AgentReserved** and cannot be changed.
- **Queue:** Select a standalone queue. This is required information. To select a queue, click the **Assistance** button. From the Select Queue window, select a queue. The queues available in this window are decided based on the subactivity and routing type configured for the queue. For example, when the subactivity selected is chat and the routing type selected is Cisco Interaction Manager, only standalone queues are displayed. The queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.

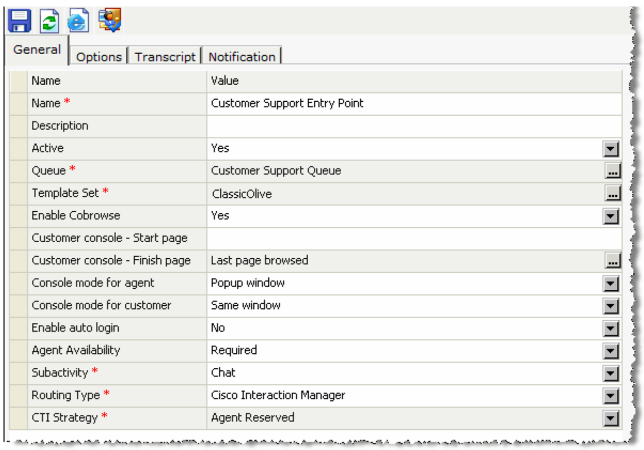
Important: **An active entry point cannot be mapped to an inactive queue.**

- **Template:** Select a template set created for chats. This is required information. To select a template, click the **Assistance** button. From the Select Template Set window, select a template set.
- **Enable Cobrowse:** Select **Yes** to enable cobrowse for the entry point. By default **No** is selected. If the installation does not include Cobrowse, this field is disabled.
- **Customer console - Start page:** This setting defines the first page to be displayed in the customer's viewport, when a chat session begins. If it is left blank, the customer's viewport shows the page from which chat was invoked. If the installation does not include Cobrowse, the start page is displayed only on the agent side, and not on the customer side. Type the URL of the page you want to set as the customer console start page. For example, http://www.mycompany.com.
- **Customer console - Finish page:** This setting defines the page to be displayed in the customer's viewport, when a chat session is completed. This page is displayed only when the viewport is already open on the customer side and the customer clicks the **Exit** button on the exit page of the chat. Click the **Assistance** button in the field and from the Finish page window, select from one of the following options – Last browsed page, Referrer page, and Pre-configured URL. If you select the **Pre-configured URL** option, type the URL of the page you want to set as the customer console finish page. For example, http://www.mycompany.com. The default value is **Last browsed page**.
- **Console mode for agent:** This setting defines the mode for the agent viewport. The options available are – Popup window and Same window. If the Same window option is selected, the viewport opens in the Cobrowse section of the Information pane of the Agent Console. If the Popup window option is selected, a new window with the viewport opens for each chat session. By default **Popup window** is selected.

Important: **When you change this setting, ensure that there are no active chats going on at that moment, else it can result in errors in page pushing.**

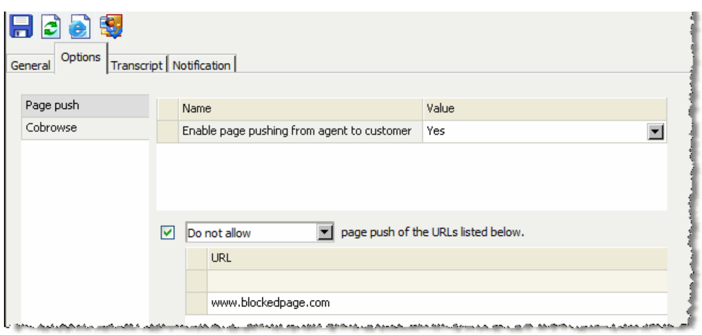
- **Console mode for customer:** This setting defines the mode for the customer viewport. The options available are – Popup window and Same window. If the installation does not include Cobrowse, this field is disabled and the value is set to **Popup window.** If the installation includes Cobrowse, and if cobrowse is enabled for the entry point, then this field is enabled and the default value is set to **Same window.**
- **Enable auto login:** From the dropdown list, select **Yes** to enable auto login. By default **No** is selected. Enable this feature to automatically log in users to chat sessions who have already been authenticated once. The customer information is passed from the source page to Cisco Interaction Manager and the user is not displayed the login page.

- **Agent Availability:** With this option you can decide if the agent availability is to be checked when a customer initiates a chat session. There are two options available:
    - **Required:** Customers will be able to initiate a chat session only if an agent is available (Availability setting from the Agent Console is selected) for handling chats. If no agent is available, the No Service message is shown to customers.
    - **Not required:** Customers will be able to initiate chat sessions even when no agent (Availability setting from the Agent Console is not selected) is available for handling chats. Customers are not shown the No Service message.



Set general properties

4. In the Properties pane, on the Options tab, go to the Page push section to enable page pushing. It allows agents to send web pages to customers.
    - **Enable page pushing from agent to customer:** Enable this option to allow agents to send web pages to customers. By default **Yes** is selected. Select **No** to disable it. When page pushing is not allowed, the Cobrowse section of the Information pane of the Agent Console is disabled.



Configure page pushing settings

You can also control the URLs allowed for page pushing.

a. Select the **page push of the URLs listed below** option.

b. From the dropdown list, select one of the following options.
    - **Do not allow:** The listed URLs will not be allowed for page pushing.
    - **Allow:** Only the listed URLs will be allowed for page pushing.

c. In the field, type the URL. Press Enter and type the next URL.

5. In the Properties pane, on the Options tab, the Cobrowse section is enabled only if the installation includes Cobrowse, and if cobrowse is enabled for the entry point.

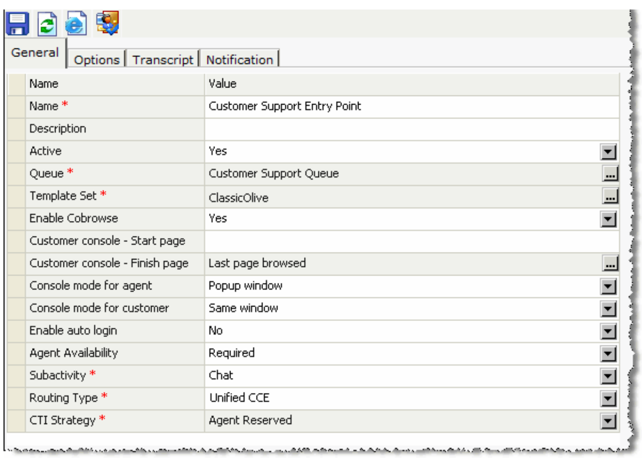
6. Click the **Save** button.

   After creating the entry point, set the notifications and transcript emails (page 35), test the entry point (page 34), and add the help link to your website (page 38).

Creating Entry Points for Chats Integrated with Unified CCE

To create an entry point for chats integrated with Unified CCE:

- Follow all the steps in the “Creating Entry Points for Standalone Chats” on page 26. In Step 3, for the Routing type and Queue fields, make sure you set the following values:
  - **Routing type:** From the dropdown list, select **Unified CCE.**
  - **Queue:** Select a queue mapped to a Unified CCE Media Routing Domain that belongs to CIM_WIM Media Class. This is required information. To select a queue, click the **Assistance** button. From the Select Queue window, select a queue. The queues available in this window are decided based on the subactivity and routing type configured for the queue. When the subactivity selected is chat and the routing type selected is Unified CCE, only the queues mapped to a Unified CCE Media Routing Domain that belong to CIM_WIM Media Class are displayed. The queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.



Set general properties

Creating Entry Points for Blended Collaboration

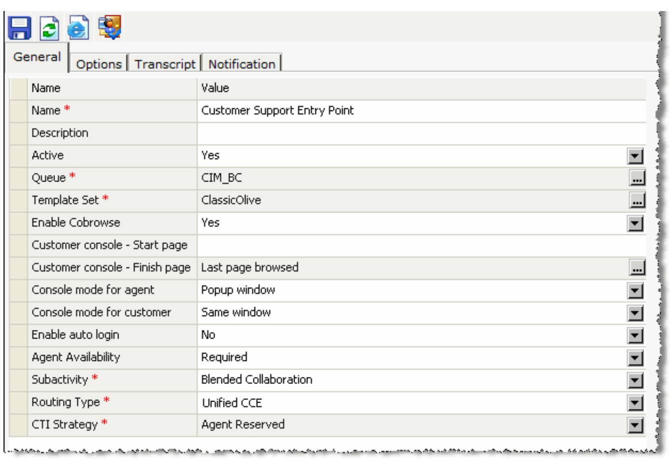
To create an entry point for blended collaboration:

- Follow all the steps in the “Creating Entry Points for Standalone Chats” on page 26. In Step 3, for the following eight fields, make sure you set the following values:
  - **Subactivity:** From the dropdown list, select **Blended Collaboration.**
  - **Routing type:** From the dropdown list, select **Unified CCE** or **Automatic Call Distributor.**

- **CTI Strategy:** If the routing type is set to Unified CCE, the value in this field is set to **AgentReserved** and cannot be changed. If the routing type is set to Automatic Call Distributor, then select one of the following options.
  - **Agent Reserved**
  - **Predictive**
  - **PhantomWaitRelease**
  - **PhantomWaitNoRelease**
  - **PhantomNoCallRelease**
  - **PhantomNoCallNoRelease**
  - **PhantomNoCallOnHold**
- **Queue:** Select a queue mapped to a Unified CCE Media Routing Domain that belongs to CIM_BC Media Class. This is required information. To select a queue, click the **Assistance** button. From the Select Queue window, select a queue. The queues available in this window are decided based on the subactivity and routing type configured for the queue. When the subactivity selected is blended collaboration and the routing type selected is Unified CCE or Automatic Call Distributor, only the queues mapped to a Unified CCE Media Routing Domain that belong to CIM_BC Media Class are displayed. The queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.

Important: **An active entry point cannot be mapped to an inactive queue.**

- **Template:** Select a template set created for blended collaboration. This is required information. To select a template, click the **Assistance** button. From the Select Template Set window, select a template set.
- **Enable auto login:** For blended collaboration, auto login should not be enabled as you need to obtain the customers phone number to generate a phone call. From the dropdown list, select **No.**



Set the general properties

Creating Entry Points for Callback

To create an entry point for callback:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Entry Points.**
2. In the List pane toolbar, click the **New** button.
3. In the Properties pane, on the General tab, provide the following details.
   - **Name:** Type the name of the entry point. This is required information.
   - **Description:** Type a brief description.
   - **Active:** Select **Yes** to make the entry point active.

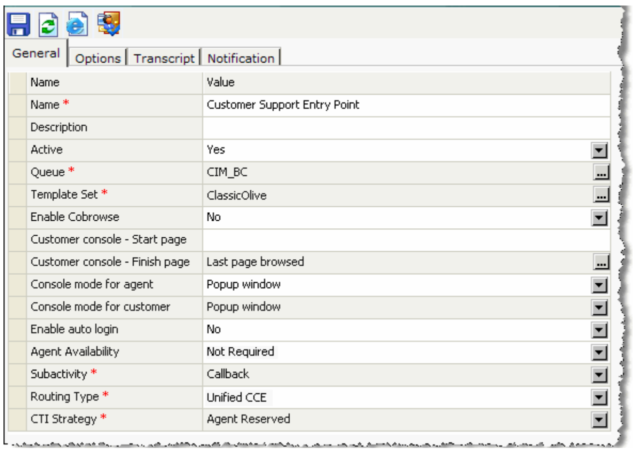
   > Important: **For a customer to be able to chat, the entry point mapped to the help link should be made active, else the customer would be displayed a no service page.**

   - **Subactivity:** From the dropdown list, select **Callback.**
   - **Routing type:** From the dropdown list, select **Unified CCE** or **Automatic Call Distributor.**
   - **CTI Strategy:** If the routing type is set to Unified CCE, the value in this field is set to **AgentReserved** and cannot be changed. If the routing type is set to Automatic Call Distributor, then select one of the following options.
     - **Agent Reserved**
     - **Predictive**
     - **PhantomWaitRelease**
     - **PhantomWaitNoRelease**
     - **PhantomNoCallRelease**
     - **PhantomNoCallNoRelease**
     - **PhantomNoCallOnHold**
   - **Queue:** Select a queue mapped to a Unified CCE Media Routing Domain that belongs to Cisco_Voice Media Class. This is required information. To select a queue, click the **Assistance** button. From the Select Queue window, select a queue. The queues available in this window are decided based on the subactivity and routing type configured for the queue. When the subactivity selected is callback and the routing type selected is Unified CCE or Automatic Call Distributor, only the queues mapped to a Unified CCE Media Routing Domain that belong to Cisco_Voice Media Class are displayed. The queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.

   > Important: **An active entry point cannot be mapped to an inactive queue.**

   - **Template:** Select a template set created for callback. This is required information. To select a template, click the **Assistance** button. From the Select Template Set window, select a template set.
   - **Enable Cobrowse:** This setting enables cobrowse. Do not configure this field for callback.
   - **Customer console - Start page:** This setting defines the first page which will be displayed in the customer's viewport, when chat session starts. Do not configure this field for callback.

- **Customer console - Finish page:** This setting defines the page which will be displayed in the customer's viewport, when the chat session is closed. Do not configure this field for callback.
- **Console mode for agent:** Do not configure this field for callback.
- **Console mode for customer:** Do not configure this field for callback.
- **Enable auto login:** For callback, auto login should not be enabled as you need to obtain the customers phone number to generate a phone call. From the dropdown list, select **No.**
- **Agent Availability:** With this option you can decide, if the agent availability (Availability setting in the Agent Console) is to be checked, when the customer initiates a session. There are two options available - **Required** and **Not required**. For callback entry points, the value should be set it to **Not required** because agents do not need to be logged in to Cisco Interaction Manager for handling phone calls.



Set the general properties

4. Click the **Save** button.

   After creating the entry point, test it (page 34) and add the help link to your website (page 38).

Creating Entry Points for Delayed Callback

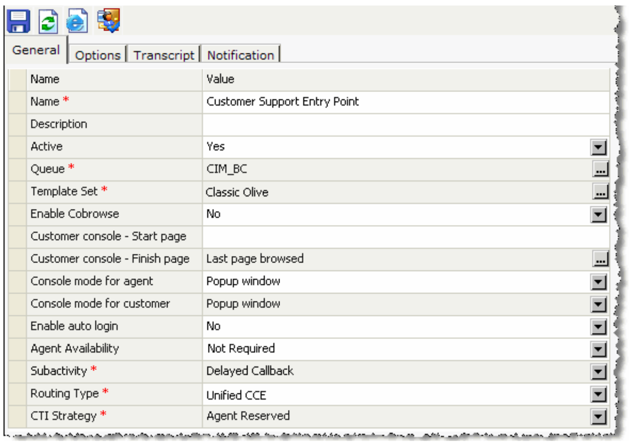
To create an entry point for delayed callback:

- Follow all the steps in the "Creating Entry Points for Callback" on page 31. In Step 3, for the Subactivity, Queue, and Template fields, make sure you set the following values:
  - **Subactivity:** From the dropdown list, select **Delayed Callback.**
  - **Queue:** Select a queue mapped to Unified CCE Media Routing Domain that belongs to Cisco_Voice Media Class. This is required information. To select a queue, click the **Assistance** button. From the Select Queue window, select a queue. The queues available in this window are decided based on the subactivity and routing type configured for the queue. When the subactivity selected is delayed callback and the routing type selected is Unified CCE or Automatic Call Distributor, only the queues mapped to a Unified CCE Media Routing Domain that belong to Cisco_Voice Media Class are displayed. The

queues available can be active or inactive. If the entry point is marked as active, then an active queue must be selected for the entry point.

Important: **An active entry point cannot be mapped to an inactive queue.**

- **Template:** Select a template set created for delayed callback. This is required information. To select a template, click the **Assistance** button. From the Select Template Set window, select a template set.



Set the general properties

Deleting Entry Points

Before you delete the entry point make sure you remove all the help links related to the entry point from your website.

Important: **The default entry point and active entry points cannot be deleted.**

To delete an entry point:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Entry Points.**
2. In the List pane, select the entry point you want to delete.
3. In the List pane toolbar, click the **Delete** button.

   If you attempt to delete inactive and active entry points together, the inactive entry points get deleted, and a message appears telling that the active entry points cannot be deleted.

Testing Entry Points

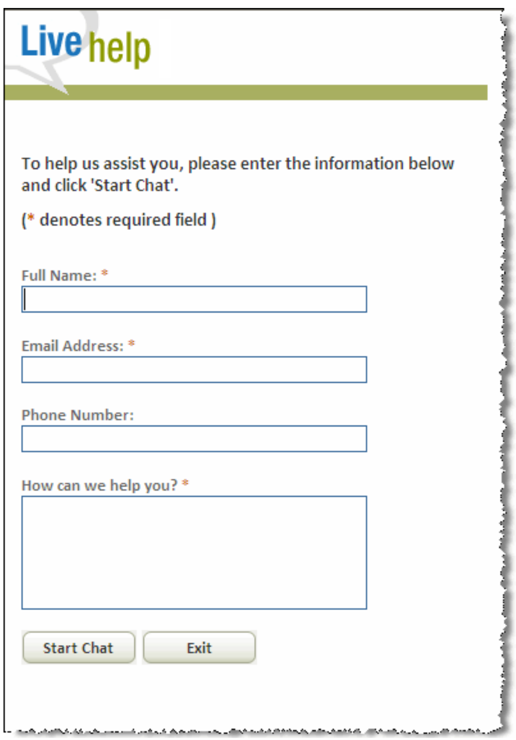
After configuring an entry point, you can test it immediately to see how the entry point looks like. Entry points for which auto login is enabled, cannot be tested using the test URL. You must turn off auto-login to be able to test the entry point.

To test an entry point:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Entry Points.**
2. In the List pane, select an entry point.
3. In the Properties pane toolbar, click the **Test Entry Point** button.

   A web page opens showing how your entry point looks like.

> Important: **If you are creating a new entry point and want to test it, you have to save the entry point to be able to test it.**



A sample entry point

Setting Up Transcripts and Notifications

Important: **These features are not available for callback and delayed callback activities.**

Sending Serviced and Abandoned Chat Transcripts

You can email chat transcripts to customers. Transcripts can be sent for both serviced and abandoned chats. Serviced chats are those chat sessions where the agent joins the chat session at least once (activity substatus changes to “In Progress”) before the customer exits the session. Serviced chats also include chats that were not completed successfully because of some error. Abandoned chats are those chat sessions where the customer exits the chat before the activity substatus changes to “In Progress” at least once. This means the customer leaves the chat before an agent could attend to him.

In the transcript email that is sent, the chat transcript is placed between the greeting article and the signature article.

Important: **Before you start, make sure you create the header, footer, signature, and greeting KB articles to be used in the chat transcript email. The articles need to be created from the Knowledge Base Console.**

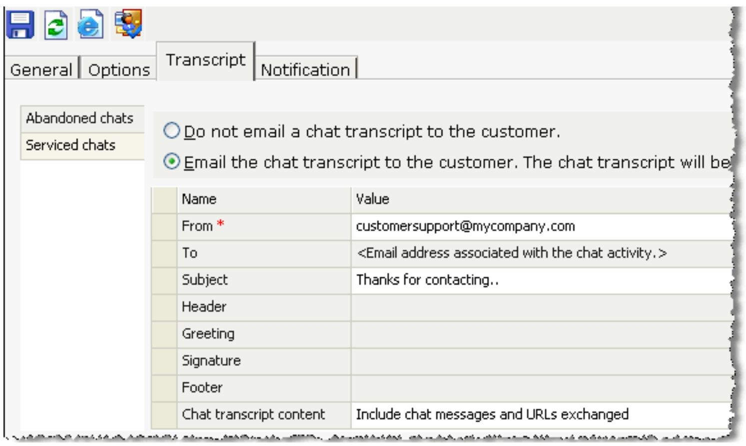
To email transcripts of serviced and abandoned chats:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Entry Points.**
2. In the List pane, select an entry point.
3. In the Properties pane, on the Transcript tab, go the Abandoned chats or Serviced chats section and provide the following details.
   - If you want to send the chat transcript select the **Email the chat transcript to the customer** option. If you select the **Do not email a chat transcript to the customer** option, all other options will be disabled.
   - **From:** Type the email address to be displayed in the **From** field of the transcript emails sent to customers. This is required information. Any replies sent by customers, in response to the chat transcript emails, go to this address.
   - **To:** The transcript emails are sent to the email address provided by customers while initiating chats.

Important: **This field cannot be edited.**

   - **Subject:** Type the subject of the email.
   - **Header:** To select a header, click the **Assistance** button. From the Select Article window that appears, select the header article you want to use.
   - **Greeting:** To select a greeting, click the **Assistance** button. From the Select Article window that appears, select the greeting article you want to use.

- **Signature:** To select a signature, click the **Assistance** button. From the Select Article window that appears, select the signature article you want to use.
- **Footer:** To select a footer, click the **Assistance** button. From the Select Article window that appears, select the footer article you want to use.
- **Chat transcript content:** Specify what you want to include in the transcript. The following options are available.
  - **Include chat messages and URLs exchanged** (default value)
  - **Include only chat messages exchanged**
  - **Include only URLs exchanged**



Configure the transcript options for chats

4. Click the **Save** button.

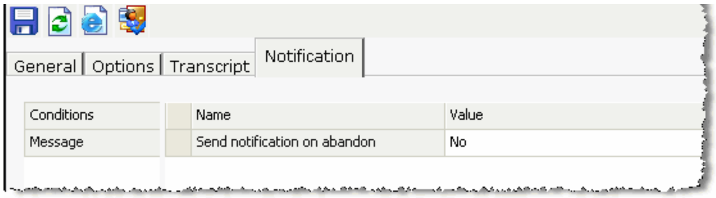
Setting Up Notifications

Send notifications to managers every time a customer abandons a chat session. An abandoned chat session is one where the customer leaves the chat session before an agent joins in. Notifications can be sent to internal users, using the messaging infrastructure, or to external email addresses. Along with notifications, the transcript of the chat can also be sent. You can choose to create an entry point without selecting the option of sending notifications.

The difference between a transcript and a notification is that transcripts are sent to customers, while notifications are sent to internal users of the organization when a chat is abandoned.

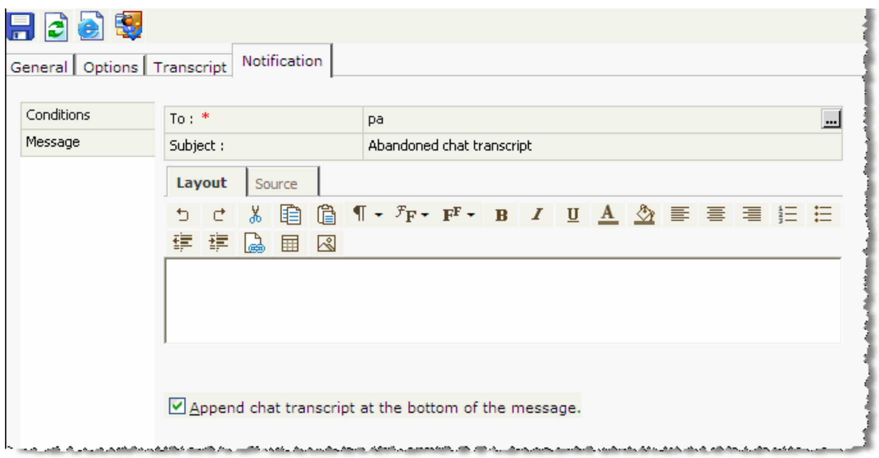
To send a notification:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Entry Points.**
2. In the List pane, select an entry point.
3. In the Properties pane, on the Notification tab, go the Conditions section and specify if you want to send notifications for abandoned chats.



Set the conditions for sending notifications

4. Next, on the Notification tab, go to the Message section, and provide the following details.
   - **To:** Select to whom you want to send the notifications. You can send notification to internal users and to external email addresses. This is required information.
   - **Subject:** Type a subject for the notification to be sent.
   - **Text box:** Type a message in the text box. Use the text box toolbar to format the text.
   - **Append chat transcript at the bottom of the message:** Select this option if you want to send the chat transcript with the notification.



Set the message for sending notifications

5. Click the **Save** button.

Turning Off Active Entry Points

Use this option to temporarily turn off all entry points for your department.

To turn off active entry points:

1. In the Tree pane browse to **Department >** *Department Name* **> Chat > Entry Points.**

   The List pane shows the list of entry points.

2. In the List pane toolbar, click the **Turn off entry points** button.

   All the active entry points are turned off.

3. Click the **Turn on entry points** button, to turn on the entry points. When you click the button, it turns on the active entry points.

Adding Chat and Collaboration Help Links to Websites

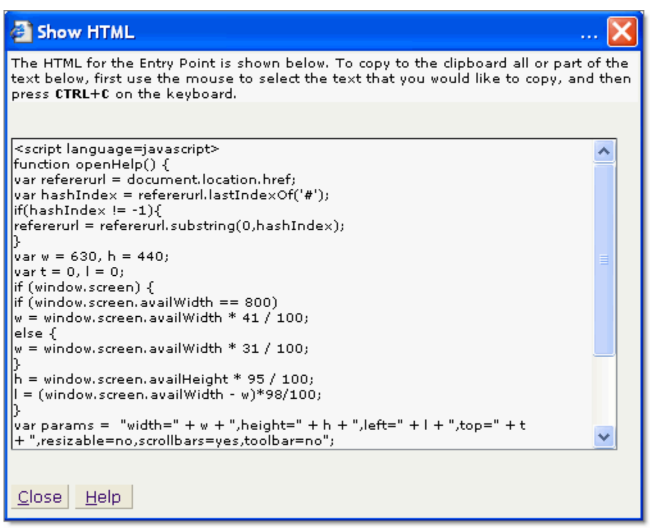
For each entry point, the system provides the HTML code that can be used to add chat and collaboration help links to websites. In a web page, the help can be invoked from either a hyperlink or from a form button. The system provides code for both these cases.

To add a chat and collaboration help link to a website:

1. In the Tree pane, browse to **Administration > Departments >** *Department Name* **> Chat > Entry Points.**
2. In the List pane, select an entry point.
3. In the Properties pane toolbar, click the **Show HTML** button.

   The Show HTML window appears. Here you can view the HTML code of the entry point.

   Important: **You can only view or copy the HTML. It cannot be edited or deleted. If you are creating a new entry point and want to view its HTML, you have to first save it to enable the Show HTML button.**



View the HTML code

4. Edit the following parameters of the entry point code:

   a. Look for the parameter `eglvrefname=`. By default, the parameter value is blank. Type in a name that describes the page that the hyperlink will appear in. In the following example, the name of the page is “Support.”

```
window.open( 'http://Server_Name/system/LiveCustomerServlet.egain?
eglvcmd=CustEntry&entryPointName=Default Entry Point
&eglvepid=1000&departmentid=999&eglvpartid=1&eglvrefname='Support ,'',params)
```

b. Edit the following line to change the text that appears in the hyperlink. By default, it is “Test”. Substitute the word “Test” for wording which you deem appropriate, such as “Click here to chat with one of our agents.”

```
<a href="#" onClick="openHelp()" style=cursor:hand>Test</a>
```

5. Before adding the code to your website, ensure that you replace the server name in the following line of the code with the fully qualified domain name of the server.

```
window.open(
'http://Server_Name/system/LiveCustomerServlet.egain?eglvcmd=CustEntry&entryPoint
Name=Customer Support
EntryPoint&eglvepid=1003&departmentid=999&eglvpartid=1&referer='+refererurl+'&e
glvrefname='+refererName,'',params)
```

Change it to:

```
window.open(
'http://Server_Name.Domain_Name.com/system/LiveCustomerServlet.egain?eglvcmd=CustE
ntry&entryPointName=Customer Support
EntryPoint&eglvepid=1003&departmentid=999&eglvpartid=1&referer='+refererurl+'&e
glvrefname='+refererName,'',params)
```

6. If auto-login is enabled for an entry point, you need to modify the entry point code so that the customer information collected at the time of login to the website is passed on to the Cisco Interaction Manager application when the customer initiates a chat session.

In the chat link, you need to add the customer details, which are provided by the customer.

For example, if the entry point is mapped to a template set which has Name, email ID, and phone number as the login page fields, the following parameters should be added to the URL:
`&fieldname_1=<value1>&fieldname_2=<value2>&fieldname_3=<value3>`

Locate the following lines in the code:

```
(
'http://Server_Name/system/LiveCustomerServlet.egain?eglvcmd=CustEntry&entryPoint
Name=Default Entry
Point&eglvepid=1003&departmentid=1002&eglvpartid=1&referer='+refererurl+'&eglvr
efname='+refererName,'',params)
```

Modify the URL to look like:

```
('http://Server_Name/system/LiveCustomerServlet.egain?eglvcmd=CustEntry&entryPoin
tName=Default
EntryPoint&eglvepid=1003&departmentid=1002&eglvpartid=1&referer='+refererurl+'&
eglvrefname='+refererName&fieldname_1=Name&fieldname_2=EmailID&fieldname_3=Phone-
number,'',params)
```

where *Name*, *EmailID*, *Phone-number* are the customer details collected at the time of login to the website.

7. Open the code view of the host web page and add the link code at the appropriate point. You may need to ask your webmaster to perform this task.