



Siebel Chat Guide

Version 8.1, Rev. B

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1

What's New in This Release

What's New in Siebel Chat, Version 8.1, Rev. B

No new features have been added to this guide for this release. This guide has been updated to reflect the following product name change: *Oracle Contact Center Anywhere* has changed to *Oracle Contact On Demand*.

What's New in Siebel Chat, Version 8.1, Rev. A

No new features have been added to this guide for this release. This guide has been updated to:

- Include information about the Siebel_Extensions_8.1.1.23.tar.gz file.
- Reflect only product name changes.

What's New in Siebel Chat, Version 8.1

Siebel Chat Version 8.1 is the first release of this new product. [Table 1](#) lists the major features of the product described in this version of the documentation.

Table 1. Product Features in Siebel Chat, Version 8.1

| Topic | Description |
|---|--|
| Chapter 2, "Overview of Siebel Chat" | Provides general background about Siebel Chat, including information about: <ul style="list-style-type: none">■ Siebel Chat features■ Siebel Chat users■ Siebel Chat workflows |
| Chapter 3, "Setting Up Siebel Chat" | Describes how to plan, install, and configure your Siebel Chat setup. |
| Chapter 4, "Working with Siebel Chat" | Describes how an agent works with Siebel Chat, including how to do the following: <ul style="list-style-type: none">■ Log in to Siebel Chat■ Process Siebel Chat interactions■ Accept and respond to incoming Siebel Chat requests■ Release Siebel Chat sessions■ Wrap up Siebel Chat sessions |
| Chapter 5, "Managing Siebel Chat" | Describes how administrators and supervisors manage and monitor Siebel Chat using Oracle Contact On Demand. |

Table 1. Product Features in Siebel Chat, Version 8.1

| Topic | Description |
|---|---|
| Chapter 6, "Siebel Chat Localization" | Describes how to set up Siebel Chat for languages supported by default by Oracle Contact On Demand. |
| Appendix A, "Siebel Chat Deployment Using Third-Party Chat Solutions" | Describes the tasks involved if deploying Siebel Chat using a third-party chat solution instead of the Oracle Contact On Demand solution. |

2

Overview of Siebel Chat

This chapter describes Siebel Chat, its features, and the Siebel Chat workflows in a typical contact center. It includes the following topics:

- [About Siebel Chat on page 9](#)
- [Siebel Chat Workflows on page 13](#)

About Siebel Chat

Siebel Chat is a customer contact channel whereby users in real-time can chat with, for example, a customer service representative (otherwise known as an agent) if they encounter a problem, with a view to troubleshooting that problem and solving that.

Siebel Chat is a Web-based application for handling secure chat communications, including the following:

- Handling Siebel Chat interactions using chat-related buttons on the communications toolbar of the Siebel Call Center application.
- Conducting Siebel Chat conversations with a customer by using frequently used text, the URL library, and by searching the knowledge base and sharing resolutions.
- Creating activities and service requests from Siebel Chat interactions.
- Transferring Siebel Chat interactions to workgroups.
- Wrapping up and terminating Siebel Chat sessions.

No programming experience is required to set up and use Siebel Chat. However, basic Siebel application navigation knowledge is required to effectively use the Siebel Chat client. Some planning and information gathering are necessary to set up your Siebel Chat application and have it running quickly and smoothly.

This guide includes information about how to:

- Plan and set up Siebel Chat.
- Configure a communications driver for the Siebel Chat channel using Siebel Communications Server.
- Use the Siebel Chat application to handle chat requests.
- Use the Oracle Contact On Demand Administration Manager application to administer and configure Siebel Chat.
- Use the Oracle Contact On Demand Supervision Manager application to supervise Siebel Chat.

This guide describes the features of Siebel Chat that are available to a contact center agent, and where relevant provides guidelines for supervisors and administrators. To learn more about setting up, administering, configuring, and supervising Siebel Chat, review “[Setting Up Siebel Chat](#)” on page 17 and “[Managing Siebel Chat](#)” on page 83. In addition, refer to the following Oracle Contact On Demand documents on the Siebel Bookshelf:

- *Oracle Contact On Demand Installation and Upgrade Guide*
- *Oracle Contact On Demand Administration Manager Guide*
- *Oracle Contact On Demand Supervision Manager Guide*

Refer to the following Siebel server-side documents on the Siebel Bookshelf:

- *Siebel System Requirements and Supported Platforms* on Oracle Technology Network
- *Siebel Installation Guide* for the operating system you are using
- *Siebel System Administration Guide*
- *Siebel Communications Server Administration Guide*
- *Configuring Siebel Business Applications*

NOTE: The *Siebel Bookshelf* is available on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Siebel Chat Features

Common features of Siebel Chat include the following:

General Siebel Chat Features

The following general features are available for Siebel Chat:

- **Communications Toolbar Enhancements.** Using the communications toolbar, agents can sign in to Siebel Chat and make themselves available for incoming chat requests, put chats on hold, transfer chats, release chat sessions, and wrap-up chat interactions.
- **Customer Dashboard Enhancement.** The customer dashboard alerts the agent if a customer requesting a chat provides profile information that does not match the contact record.
- **Siebel Chat Interaction Tracking.** Every incoming chat interaction is tracked as an Activity under either a Contact or Service Request record. The chat transcript is also attached to the Activity record.
- **Workspace Persistence.** During multiple simultaneous Siebel Chat sessions where the agent can switch between chat sessions, the application holds the context for each customer. In addition, the customer dashboard persists with the chat session.
- **Agent Anonymity.** This feature enables agents to have an alias (or use a different first name).
- **Anonymous Chat.** This feature allows a customer to chat with an agent anonymously.
- **Activity Wrap-Up.** This feature gives agents the ability to conduct Siebel Chat disposition activities, such as, capture critical data, alert the supervisor, or create follow up tasks.

Siebel Chat Dashboard Features

The following features are available on the Siebel Chat dashboard:

- **Smart Knowledge Management Integration.** Siebel Chat is integrated with Oracle's Siebel Knowledge Base system (such as, solutions). The customer-facing application (for example, Oracle's Siebel E-Support) remembers the knowledge base articles that the customer reviews and uses this information when suggesting further articles (Have you tried this?) to review. The knowledge base visited (KB Visited) feature, available in the Siebel Chat dashboard, allows the agent to view the list of knowledge base articles that the customer has already viewed.
- **Quick Actions.** Agents can perform popular actions quickly (for example, create and view service requests, view activities and contacts) by selecting them from the Action drop-down menu in the Siebel Chat dashboard. Actions performed this way are contextual and smart.

Siebel Chat Message Features

The following message features are available for Siebel Chat:

- **Smart Search Integration.** Siebel Chat is integrated with Oracle's Siebel Search framework, called Search Center. A search executes automatically when the agent accepts a chat. In addition, the agent can use Smart Search (available in the chat pane) to automatically execute a search using highlighted text as keywords.
- **Smart Share.** Clicking Smart Share allows the agent to share highlighted text, service request details, and solution details with the customer.
- **Frequently Used Text.** Agents have a global list of predefined message responses at their disposal to send to customers, as required, when handling Siebel Chat interactions.

Siebel Chat Push URL Features

The following push URL features are available for Siebel Chat:

- **Push URL.** This feature enables the agent to share a Uniform Resource Locator (URL) with a customer, which is automatically displayed in the customer's browser. The customer does not have to manually copy and paste the URL in to a browser window.
- **URL Library.** Agents have a global list of URLs at their disposal to share with customers using push URL technology.

Other Features

Other features available for Siebel Chat include the following:

- **Business Intelligence.** Supervisors and agents can use Oracle Business Intelligence (formerly known as Siebel Business Analytics), if installed, against the Siebel Chat data.
- **Oracle Contact On Demand Integration.** Siebel Chat is fully integrated with the communications technology of Oracle Contact On Demand. Administrators and supervisors can set up Oracle Contact On Demand Administration Manager and Supervision Manager applications to manage and monitor Siebel Chat interactions.

NOTE: Siebel Chat agents do not use Oracle Contact On Demand Administration Manager or Supervision Manager applications.

Siebel Chat Users

The following types of users are involved in the setup and usage of Siebel Chat:

- Agents who use Siebel Chat to handle chat requests. Agents log in to Siebel Chat using the communications toolbar in the Siebel Call Center application.
- Administrators who mainly use Oracle Contact On Demand Administration Manager to set up companies, projects, workgroups, agents, skills, and routing for Siebel Chat.
Administrators can also log in to Siebel Chat.
- Supervisors who monitor agent activities and workloads using Oracle Contact On Demand Supervision Manager.

For information about setting up accounts for agents, administrators, and supervisors, see ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager" on page 87](#).

Table 2 outlines the main access level permissions for agents, administrators, and supervisors.

Table 2. Access Level Permission for Siebel Chat Users

| User | Access Level Permission |
|---------------|---|
| Agent | Agents can: <ul style="list-style-type: none"> ■ Log in to the Siebel Call Center application and Siebel Chat ■ Accept and respond to Siebel Chat requests ■ Transfer Siebel Chat interactions to other workgroups ■ Release, wrap-up, and close Siebel Chat sessions ■ Create inbound Siebel Chat activities and service requests |
| Administrator | Administrators can: <ul style="list-style-type: none"> ■ Log in to Siebel Chat and Oracle Contact On Demand Administration Manager ■ Manage critical data to set up and configure Siebel Chat ■ Manage user accounts for agents and supervisors ■ Create and run reports |
| Supervisor | Supervisors can: <ul style="list-style-type: none"> ■ Log in to Oracle Contact On Demand Supervision Manager ■ Monitor agent statistics, workgroups, projects, and Siebel Chat interactions ■ Set alarms ■ Create and run reports |

Siebel Chat Workflows

Siebel Chat workflows consist of customer-facing and agent-facing activities. Customer facing activities are conducted within a customer-facing application, such as, Siebel E-Support. Siebel Chat, by default, provides an API which can be used to integrate the customer-facing application with the Siebel Chat functionality. This API also contains a chat window to be embedded inside the customer-facing application. As such, the customer-facing Siebel Chat interface is a public Web-based interface and the means through which a customer requests a chat with an agent. By using browser-based controls on the customer-facing chat interface, a customer can send text to and receive text from an agent, as well as review content pushed by the agent.

Agent-facing interactions are conducted using the Siebel Chat application that is embedded inside the Siebel Call Center application. The agent-facing Siebel Chat interface is the means through which an agent accepts and conducts a chat conversation with a customer. Through the agent-facing Siebel Chat interface, the agent can send and receive text, push URLs to, and select frequently used text to send to the customer.

For more information about the customer and agent workflows for a chat, see the following:

- [“Customer-Facing Workflow for a Chat” on page 13](#) describes a typical customer-facing workflow for a chat.
- [“Agent-Facing Workflow for a Chat” on page 15](#) describes a typical agent-facing workflow for a chat.

Customer-Facing Workflow for a Chat

The steps involved in a typical customer-facing workflow for a chat are shown in [Figure 1 on page 14](#) as follows:

- 1** A customer, looking for an answer to a problem, requests a chat with an agent from Siebel E-Support.

The customer can request a chat as an anonymous user, or can log in to Siebel E-Support first and then request a chat (for example, as a follow up to a service request). In both cases, the customer can do one of the following to request a chat:

- Click Contact Us, then Chat (or navigate to Support, Contact Us, and then Chat).
 - Click the *Chat with a Live Agent* shortcut in the Need more Help? frame.
- 2** The customer fills out the chat request form by entering personal information (name, contact number, email address), product type details (product name or product category), problem summary, problem description, then clicks Submit and waits in the queue. For identified customers, Siebel E-Support pre-populates as many of these values as possible. An example chat request form is shown in [Figure 2 on page 15](#).
 - 3** Using the information on the chat request form as search parameters, Siebel E-Support executes a search against the Oracle Knowledge Base, and returns a list of suggested knowledge base articles and solutions for the customer to review.

Customers can review these articles without losing their position in the queue.

4 If still not satisfied, the customer clicks Chat and waits to be connected to an agent.

If configured during chat project setup in Oracle Contact On Demand, customers can be pushed Oracle Contact On Demand predefined URLs under the following circumstances:

- While waiting to be connected to an agent
- When no agent is available
- When the contact center is closed
- When the customer connects to an agent
- When the agent disconnects from the customer

Based on configuration, pushed URLs are visible to the customer in one of the following ways:

- In a frame alongside the customer’s chat UI in the same browser, or
- In a new browser window

For more information about push URL configuration and chat project setup, see [“Configuring the Behavior of Push URL” on page 80](#) and [“Setting Up a Chat Project in Oracle Contact On Demand Administration Manager” on page 88](#).

5 When the customer is connected to an agent, the customer engages in a chat conversation with the agent.

6 The customer releases the chat session.

If configured for Siebel Chat, when a customer releases a chat session, the customer can:

- Be prompted to fill out a feedback form
- Receive an email from the agent with the chat transcript attached

Figure 1 describes a customer-facing workflow for chat.

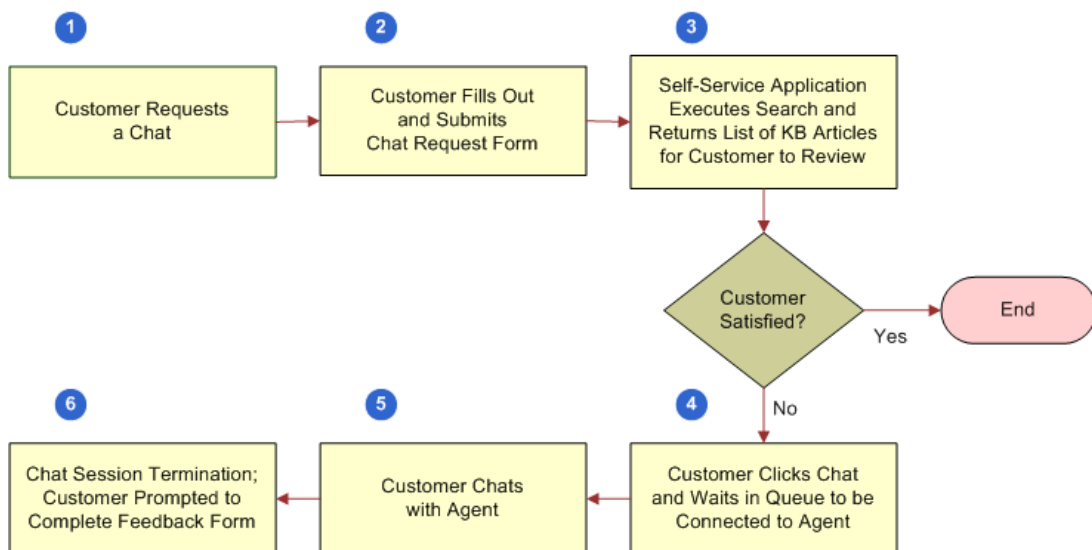


Figure 1. Customer-Facing Workflow for a Chat

Explanation of Callouts

Figure 2 shows an example of a chat request form, as follows:

- Profile information (first name, last name, phone number, email address) is pre-populated, if the user is logged in to the self-service Web application.
- Service request information (SR number, product name, problem summary, problem description) is pre-populated, if the chat is requested from an SR Detail page.

Figure 2. Example Chat Request Form

Agent-Facing Workflow for a Chat

The steps involved in a typical agent-facing workflow for a chat are shown in Figure 3 on page 16 as follows:

- 1 The agent logs in to the Siebel Call Center application.
- 2 The agent logs in to Siebel Chat by clicking the Log in button on the communications toolbar.

To use Siebel Chat, agents must be set up for the application, as follows:

- a A user account must be set up for each agent in Oracle Contact On Demand, see ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager"](#) on page 87.
- b Each agent must be added to at least one chat communications configuration.

For more information, see ["Configuring Communications in Siebel Call Center for Siebel Chat"](#) on page 27 and ["Adding Agents to the Communications Configuration for Siebel Chat"](#) on

page 30. See also *Siebel Communications Server Administration Guide* for more information about configuring agents after an agent has been added to a communications configuration.

- 3 The agent clicks the flashing Accept Work Item button on the communications toolbar, then the Accept Chat button to accept an incoming chat request.

For more information about accepting a chat, see ["Accepting an Incoming Chat" on page 56](#).

- 4 Siebel Call Center attempts to identify the customer requesting a chat using the information provided on the chat request form.

The information on the chat request form determines whether an *activity event* or a *service request* is created, and consequently the *application view* that the agent is directed to in the Siebel Call Center application. For example, if the customer provides only a Contact ID on the chat request form, then the agent is directed to the Contact screen in Siebel Call Center. However, if the customer provides a valid Service Request ID that Siebel Call Center can identify, then the agent is directed to the Service Requests screen in Siebel Call Center.

For more information about how Siebel Call Center identifies the customer requesting a chat, see ["Workflow for Accepting Siebel Chat Requests" on page 45](#).

- 5 The agent is directed to an appropriate application view in Siebel Call Center and engages in a chat conversation with the customer. For more information about how an agent handles a chat, review the following:

- ["Responding to an Incoming Chat" on page 56](#)
- ["Reviewing Inbound Siebel Chat Activities" on page 59](#)
- ["Handling Siebel Chat Sessions" on page 61](#)

- 6 The agent releases the chat session, see ["Releasing Siebel Chat Sessions" on page 64](#).

- 7 The agent wraps up the chat session, provided wrap-up is configured for Siebel Chat.

Wrapping up a chat session involves recording, for example, the outcome of the chat session and agent satisfaction with the outcome. For more information about wrap-up, see ["Wrapping Up Siebel Chat Sessions" on page 66](#).

Figure 3 describes an agent-facing workflow for chat.

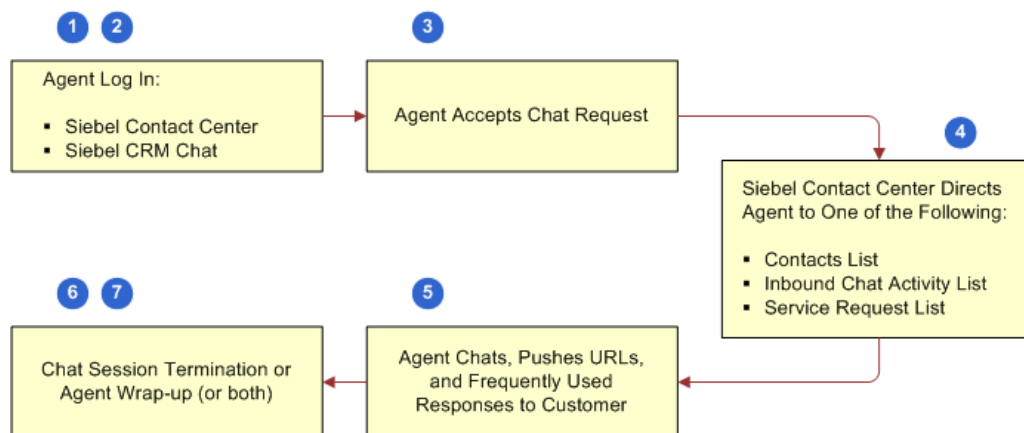


Figure 3. Agent-Facing Workflow for Chat

3

Setting Up Siebel Chat

This chapter outlines how to set up Siebel Chat, including what aspects to consider when planning your setup and deploying your application. The installation guidelines refer to Oracle Contact On Demand components and Siebel Call Center components. This chapter includes the following topics:

- [Planning Your Siebel Chat Set Up on page 17](#)
- [Installing Customer-Facing Components on page 20](#)
- [Process of Setting Up Siebel Chat for Self-Service Web Applications on page 20](#)
- [Process of Configuring Oracle Contact On Demand for Siebel Chat on page 21](#)
- [Roadmap for Configuring Siebel Call Center for Siebel Chat on page 24](#)
- [Process of Setting Up an Email Profile in Siebel Call Center on page 41](#)

Planning Your Siebel Chat Set Up

No programming experience is required to set up Siebel Chat. However, some planning and information gathering are necessary to set up your Siebel Chat application and have it running quickly and smoothly. This topic includes information about the following:

- [“Deployment Model and Topology” on page 17](#)
- [“Capacity Planning for Siebel Chat” on page 18](#)
- [“Calculating Chat Session Capacity for Siebel Chat” on page 19](#)

Deployment Model and Topology

Siebel Chat is deployed as a hosted (subscription model) application. In a Siebel Chat hosted deployment, Siebel Call Center is located on customer premises, but Oracle Contact On Demand is hosted elsewhere either by Oracle or an Oracle Partner in a single or multitenant fashion. In addition, the host service provider is responsible for providing all information that is required to set up and configure chat in a hosted style. For a hosted solution:

- Deploy agent users behind the firewall if supporting internal agent users only.
- Deploy agent users in Customer-Facing Applications (or Tier One) if supporting external agents over the Internet.

Capacity Planning for Siebel Chat

Capacity planning is typically a process to predict the type, quantity, and availability as well as timing of resource capacities that are needed within a deployment (in this case, a Siebel Chat deployment) to meet accurately forecasted usage.

To support your Siebel Chat deployment, one Web server and a maximum of seven application servers are required as follows:

- Oracle Contact On Demand Web server
- Chat server
- Interaction Manager (IM) server
- Stats server
- ACD server
- License Manager server
- Host Manager
- TCP/IP Bus

NOTE: For information about installing and configuring Oracle Contact On Demand components, see *Oracle Contact On Demand Installation and Upgrade Guide*.

The capacity limiting factor for Siebel Chat deployment is the Web server. All application servers (Chat, IM, Stats, ACD, License, TCP/IP Bus, Host Manager) can run on a single computer and support up to 2000 sessions. To scale up, it is recommended that Chat and IM servers be decoupled and paired together on a single computer which will support up to 1000 sessions. Similarly, Stats and License servers can be decoupled and paired together that will support up to 1000 sessions. The ACD server alone on a single computer can support up to 1000 sessions.

Note that the total number of sessions refers to the total number of the following sessions combined:

- Customer chat sessions
- Simultaneous agent sessions
- Communications toolbar or Oracle Contact On Demand Administration Manager sessions
This is the number of Communication Session Manager sessions multiplied by the number of Oracle Contact On Demand instances.
The Communication Session Manager server component logs information about all communication sessions.
- Oracle Contact On Demand Administrator Manager sessions, not including reports
- Oracle Contact On Demand Supervisor Manager sessions

Calculating Chat Session Capacity for Siebel Chat

To estimate how many agents and supervisors will be supported and how many Web servers and application servers are required based on the example chat session capacities of 600, 1000, and 3000, review the calculations in [Table 3](#). In reviewing the calculations in [Table 3](#), note the following:

- Calculations are based on 100 concurrent agents, each handling up to a maximum of 3 simultaneous chat sessions
- Agents are assumed to be new agents
- One agent with one chat session represents two chat sessions
- If agents already handle voice interactions, then remove 200 from the session calculation

You should deduce your own final capacity number based on your own unique situation.

NOTE: The recommended server configurations in [Table 3](#) are for a single company deployment and do not consider master and backup redundancy, which would require additional hardware. In multi-tenancy mode, dedicated application servers must be configured on a company by company basis. For high interactivity mode, clustering is recommended where ideally every physical server would be replicated.

Table 3. Capacity of Chat Session for Siebel Chat

| Number of Chat Sessions | Level of Support | Recommended Server Configuration |
|-------------------------|--|--|
| 600 Chat Sessions | <ul style="list-style-type: none"> ■ 200 agents ■ 1 administrator session (with 300 users for each session) ■ 5 supervisors (40 users for each supervisor) ■ 8061 total sessions | <ul style="list-style-type: none"> ■ 2 Web Servers ■ 1 Application Server |
| 1000 Chat Sessions | <ul style="list-style-type: none"> ■ 333 agents ■ 2 administrator sessions ■ 9 supervisors (40 users for each supervisor) ■ 1344 total sessions | <ul style="list-style-type: none"> ■ 4 Web Servers ■ 2 Application Servers, split as follows: <ul style="list-style-type: none"> ■ Application Server 1: IM, Chat, Stats, License Manager, Host Manager, TCP/IP Bus ■ Application Server 2: ACD, TCP/IP Bus |

Table 3. Capacity of Chat Session for Siebel Chat

| Number of Chat Sessions | Level of Support | Recommended Server Configuration |
|-------------------------|--|--|
| 3000 Chat Sessions | <ul style="list-style-type: none"> ■ 1000 agents ■ 4 administrator sessions ■ 25 supervisors ■ 4029 sessions | <ul style="list-style-type: none"> ■ 9 Web Servers ■ 3 Application Servers, split as follows: <ul style="list-style-type: none"> ■ Application Server 1: Chat, IM, TCP/IP Bus ■ Application Server 2: ACD, License Manager, Host Manager, TCP/IP Bus ■ Application Server 3: Stats, TCP/IP Bus |

Installing Customer-Facing Components

Siebel E-Support is integrated with Siebel Chat. However, the self-service Web application that customers use can be any third-party or in-house Web application to which Siebel Chat is integrated. Installing customer-facing components involves completing either one of the following:

- Install the Siebel E-Support application.

Complete this step only if you decide to use Siebel E-Support, which provides a Web portal where users can access service information and a knowledge base. For more information about installing and using Siebel E-Support, see *Siebel E-Support Administration Guide*.
- Install the non-Siebel self-service Web application.

Complete this step only if you decide to integrate Siebel Chat with a non-Siebel self-service Web application. For more information about non-Siebel self-service Web applications, see the documentation that accompanies that product.

After you have installed your self-service Web application, you must set it up for Siebel Chat, see [“Process of Setting Up Siebel Chat for Self-Service Web Applications” on page 20](#).

Process of Setting Up Siebel Chat for Self-Service Web Applications

To set up Siebel Chat to work with self-service Web applications, you must complete several setup tasks in the Siebel application (for example, the Siebel Call Center application). The most essential tasks for connecting it to your self-service Web application are listed here. Additionally, you must enable Siebel Chat-specific features in your self-service Web application, and connect to the Siebel Chat instance from your self-service Web application.

To set up Siebel Chat for Self-Service Web applications, perform the following tasks:

- 1 In the Siebel application (for example, Siebel Call Center):
 - a Set up chat communications configuration, see ["Configuring Communications in Siebel Call Center for Siebel Chat" on page 27](#).
 - b Set up chat parameters routing, see ["Setting Up Parameters and Routing in Siebel Call Center for Siebel Chat" on page 30](#).
 - c Set up chat system preferences, see ["Setting Up System Preferences in Siebel Call Center for Siebel Chat" on page 40](#).
- 2 Modify the configuration parameters of your self-service Web application to:
 - a Connect with Siebel Chat.

For example, if using Siebel E-Support, you need to modify the `SelfServiceConfiguration.properties` file so that the `CHAT_URL` property is set to a URL pointing to a valid Oracle Contact On Demand Web installation.
 - b Enable Siebel Chat-specific features in your self-service Web application.

For example, if using Siebel E-Support, you need to set the `ENABLE_CHAT` parameter in the `SelfServiceConfiguration.properties` file.

For more information about setting up Siebel Chat for Siebel E-Support, see *Siebel E-Support Administration Guide*.

Process of Configuring Oracle Contact On Demand for Siebel Chat

To configure Oracle Contact On Demand for Siebel Chat, perform the following tasks:

- ["Installing Parameter Extensions for Siebel Chat" on page 21](#)
- ["Deploying Oracle Contact On Demand Web Application" on page 22](#)
- Set up Oracle Contact On Demand applications for Siebel Chat, see ["About Setting Up Oracle Contact On Demand Applications for Siebel Chat" on page 24](#)

Installing Parameter Extensions for Siebel Chat

This task is a step in ["Process of Configuring Oracle Contact On Demand for Siebel Chat" on page 21](#).

When installing Oracle Contact On Demand, you must ensure that proper parameter extensions for chat are seeded in the Oracle Contact On Demand database. This task involves editing the db patch script during database installation (when installing Oracle Contact On Demand), then executing the scripts. For more information about this task, see 727972.1 (Article ID) on My Oracle Support.

NOTE: [Table 15 on page 109](#) describes some of the seeded parameter extensions for chat.

Deploying Oracle Contact On Demand Web Application

This task is a step in ["Process of Configuring Oracle Contact On Demand for Siebel Chat"](#) on page 21.

The Oracle Contact On Demand Web application is called from the self-service Web application to request a chat, and it hosts the WebServiceChat servlet, which is used to provide communications between the customer browser and the Oracle Contact On Demand communication servers. You must deploy the Oracle Contact On Demand Web application so that customer Web pages and libraries are installed for Siebel Chat.

Deploy the Oracle Contact On Demand Web application and Siebel Chat Extensions before creating any chat projects in Oracle Contact On Demand Administration Manager. To deploy Siebel_Extensions_8.1.1.23.tar.gz, complete the steps in one of the following procedures:

- ["Deploying Oracle Contact On Demand Web Application on Oracle WebLogic"](#) on page 22
- ["Deploying Oracle Contact On Demand Web Application on Oracle Application Server 10g"](#) on page 23

NOTE: Download Siebel_Extensions_8.1.1.23.tar.gz from My Oracle Support (the Article ID is 1088194.1). You must deploy Siebel Chat Extensions before creating any chat projects in Oracle Contact On Demand Administration Manager.

Deploying Oracle Contact On Demand Web Application on Oracle WebLogic

Use the following procedure to deploy the Oracle Contact On Demand Web application on Oracle WebLogic.

To deploy the Oracle Contact On Demand Web application on Oracle WebLogic

- 1 From the Oracle Contact On Demand installation package, copy the Siebel_Extensions_8.1.1.23.tar.gz file to, for example, the Oracle WebLogic domain applications directory.

For example:

```
c:\bea\user_projects\domains\mydomain\applications
```

- 2 Under the applications directory, create a directory called TAW and extract the Siebel_Extensions_8.1.1.23.tar.gz file into this directory.
- 3 Delete the Siebel_Extensions_8.1.1.23.tar.gz file.
- 4 Under the Siebel Server bin folder, copy the Siebel_Extensions_8.1.1.23.tar.gz file to the Oracle WebLogic domain applications directory.

For example:

```
c:\bea\user_projects\domains\mydomain\applications
```

- 5 Under the applications directory, extract the Siebel_Extensions_8.1.1.23.tar.gz file into the TAW directory that you created in Step 2. Select Yes if prompted to overwrite existing files.
- 6 Delete the Siebel_Extensions_8.1.1.23.tar.gz file.

- 7 Edit the web.xml file to include your system information.

For information about which parameters to modify, see the topic about deploying Oracle Contact On Demand Web applications on Oracle WebLogic in *Oracle Contact On Demand Installation and Upgrade Guide*.

- 8 Connect to the Web based Oracle WebLogic console.

For example:

```
http://server_name/console
```

- 9 Navigate to Deployments, Web Application Modules, and select the Deploy a new Web Application Module link.
- 10 In the Deploy a Web Application Module page, select the Applications directory link.
- 11 From the Select an archive for this Web application module page, select TAW and then click Target Module.
- 12 From the Review your choices and deploy page, click Deploy.
- 13 Check log files created in log path to verify that no errors were reported during the application deployment.

Deploying Oracle Contact On Demand Web Application on Oracle Application Server 10g

Use the following procedure to deploy the Oracle Contact On Demand Web application on Oracle Application Server (OAS) 10g.

To deploy the Oracle Contact On Demand Web application on Oracle Application Server 10g

- 1 Copy the files located in Siebel_Extensions_8.1.1.23.tar\light\chat to \j2ee\home\applications\TAW\TAW\light\chat.
- 2 Apply the content located in the scripts\Integration.js file to \j2ee\home\applications\TAW\TAW\light\chatscripts\Integration.js by copying the following:

```
if(window.redirectEndChatURL && /function/i.test(typeof(redirectEndChatURL))){
    redirectEndChatURL();
}
```

in to the related function in \j2ee\home\applications\TAW\TAW\light\chatscripts\Integration.js.
- 3 Copy the TAWBundle_*_*_CHATAPP.properties file located in Siebel_Extensions_8.1.1.23.tar\WEB-INF\classes to \j2ee\home\applications\TAW\TAW\WEB-INF\classes.
- 4 Copy the chat folder in Siebel_Extensions_8.1.1.23.tar\WEB-INF\classes\com\taw\web to j2ee\home\applications\TAW\TAW\WEB-INF\classes\com\taw\web.

- 5 Add the following element to the web.xml file located in
\\j2ee\home\applications\TAW\TAW\WEB-INF:

```
<context-param>
  <param-name>SiebelChatPushedURLASPopup</param-name>
  <param-value>on</param-value>
</context-param>
```

About Setting Up Oracle Contact On Demand Applications for Siebel Chat

You must set up Oracle Contact On Demand Administration Manager and Supervision Manager applications to manage and monitor Siebel Chat interactions. As a prerequisite to using Oracle Contact On Demand Administration Manager, administrators must contact the system administrator and request that an administrator account be set up for them. Administrators can then log in to Oracle Contact On Demand and set it up.

NOTE: Before you set up Oracle Contact On Demand for Siebel Chat, it is recommended that you test the chat functionality using Oracle Contact On Demand first. This helps to ensure that everything in Oracle Contact On Demand is working properly, prior to setting up Siebel Chat integration.

For more information about setting up Oracle Contact On Demand applications for Siebel Chat, see the following processes:

- ["Process of Setting Up Oracle Contact On Demand Administration Manager" on page 85.](#)
- ["Process of Setting Up Oracle Contact On Demand Supervision Manager" on page 94.](#)

Roadmap for Configuring Siebel Call Center for Siebel Chat

You must log in with administrator access to Siebel Call Center to configure it for Siebel Chat. To configure Siebel Call Center for Siebel Chat, perform the following tasks and process:

- ["Verifying Organization Access Control" on page 25](#)
- ["Setting Up Agent Responsibilities and Views in Siebel Call Center" on page 25](#)
- ["Configuring Communications in Siebel Call Center for Siebel Chat" on page 27](#)
- ["Adding Agents to the Communications Configuration for Siebel Chat" on page 30](#)
- ["Setting Up Parameters and Routing in Siebel Call Center for Siebel Chat" on page 30](#)
- ["Setting Up an Alias for Siebel Chat Users in Siebel Call Center" on page 33](#)
- ["Setting Up Frequently Used Text in Siebel Call Center for Siebel Chat" on page 34](#)
- ["Extending Wrap-Up LOVs in Siebel Call Center for Siebel Chat" on page 36](#)
- ["Setting Up a Global URL Library in Siebel Call Center for Siebel Chat" on page 36](#)
- ["Configuring Search in Siebel Call Center for Siebel Chat" on page 37](#)

- ["Configuring the Communications Toolbar" on page 38](#)
- ["Configuring Workgroups in Siebel Call Center for Siebel Chat" on page 38](#)
- ["Setting Up Outbound Email Communications in Siebel Call Center" on page 39](#)
- ["Setting Up System Preferences in Siebel Call Center for Siebel Chat" on page 40](#)
- ["Process of Setting Up an Email Profile in Siebel Call Center" on page 41](#)

NOTE: The tasks listed here assume that you have already set up a company, user accounts, and chat projects in Oracle Contact On Demand as outlined in ["About Setting Up Oracle Contact On Demand Applications for Siebel Chat" on page 24](#).

Verifying Organization Access Control

Siebel Chat supports multitenancy, so access to data in general is restricted to those records belonging to the agent's Position Organization. The Position Organization is the organization to which the agent's current position belongs. To verify an agent's position and position organization, complete the steps in the following procedure. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat" on page 24](#).

To verify an agent's position and position organization

- 1 Navigate to the Administration - User screen, then the Employees view.
- 2 From the Employees list, select (or query for) the agent whose position and position organization you want to verify.
- 3 Scroll to the bottom of the page. Notice the agent's Position (for example, Siebel Administrator) and Position Organization (for example, Default Organization).

Only records belonging to the Position Organization will be displayed for this agent. For more information about organization access control, see *Siebel Security Guide*.

Setting Up Agent Responsibilities and Views in Siebel Call Center

To handle chat interactions, each user of Siebel Chat must be given access to certain views and responsibilities. By default, the Universal Agent responsibility in Siebel Call Center is already set up for Siebel Chat. However, if you want to use a different responsibility (other than Universal Agent), then you must set up a new agent responsibility in Siebel Call Center, and add the appropriate chat views and users to that responsibility. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat" on page 24](#).

To set up agent responsibilities and views in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Application screen, then the Responsibilities view.
A list of responsibilities displays with the responsibilities tab open.

- 2 Click New to create a new universal agent responsibility, and complete the fields as described in the following table.

| Name | Description | Example Value |
|----------------|--|-------------------------|
| Responsibility | Enter a name for the universal agent responsibility that you want to create. | Universal Agent B2B+B2C |
| Description | Enter a description for the responsibility. | Siebel Universal Agent |
| Organization | Click the single select button, and select the organization to which the responsibility will belong. | Active Systems |

- 3 In the Views section of the page, click Add and add the following views to your agent responsibility:
 - Chat View
 - Chat Activity View
 - Chat Language Mapping View
 - Chat Parameter and Routing Administration View
 - Chat Popup Base View
 - Service Request Detail View
 - All Service Requests List View
 - Persistent Customer Dashboard View
 - Contact Details View
 - Contact Details View, Detail Tab
 - Visible Contact List View
 - Solution Resolution Documents View
 - Activity Attachment View
 - Activity Wrap-up View
 - Search View
 - Basic Search View
 - Basic Search Results View
 - Advanced Search View
 - Advanced Search Results View
 - Search Selection View
 - Search Looking View
- 4 In the Users section of the page, click Add and add your chat users to the agent responsibility.

Configuring Communications in Siebel Call Center for Siebel Chat

To configure communications in Siebel Call Center for Siebel Chat, you must configure a communications driver, add agents to the chat communications configuration, configure chat routing, and finally set up an email profile for your chat communications so that an email will be sent to users when they release a chat session.

For Oracle Contact On Demand integration, you must configure the Oracle Contact On Demand communications driver. The purpose of this driver is to provide a mechanism through which chat messages are exchanged with the Oracle Contact On Demand server. For more information about the Oracle Contact On Demand communications driver, see *Siebel Communications Server Administration Guide*.

If using a custom communications driver for a third-party product, then see *Siebel Communications Server Administration Guide* for more information about how to create and configure a custom driver for third-party products using the Adaptive Communications API.

This task is a step in the following process and roadmap:

- “Process of Setting Up Siebel Chat for Self-Service Web Applications” on page 20
- “Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 24

To configure communications in Siebel Call Center for Siebel Chat

- 1 Locate the multichannelC.def file.

This communication file is delivered with your Siebel Call Center software, and defines all configuration details (parameters, profiles, commands, event handlers) for your application. It is usually located in the following directory:

```
<Siebel_Build>\ses\siebsrvr\bin\language_code
```

NOTE: You can (optionally) make a copy of multichannelC.def and modify it using a text editor before importing it in to your communications configuration record.

If you cannot locate multichannelC.def, contact your system administrator or Oracle account support representative.

- 2 Configure chat communications and a communications driver for your company:
 - a Navigate to the Administration - Communications screen, then the All Configurations view.
 - b Click New to set up a new configuration record, enter a name for the record, enter a comment (this is optional), then save the record by clicking Ctrl+S.
 - c Import the configurations defined in the multichannelC.def file:
 - Select the configuration record that you created, click Import Configuration, then Next.
 - On the Import Configuration window, specify the communications configuration elements to import. Choose from the following options: Configuration Parameters, Drivers and Profiles, Commands, or Events.
 - Browse to the location of your multichannelC.def file, and click OK.

The import process can take several minutes. When complete, the Import Configuration window closes. When complete, the Parameters, Profiles, Commands, and Event Handlers tabs are now populated with communication configuration information.

For example, clicking the Event Handlers tab displays a list of available chat-related event handlers (such as, ChatAccepted, ChatMessageReceived, ChatSuspended, and so on). You can add or delete Parameters, Profiles, Commands, and Event Handlers, as required.

d Configure a driver for your company to communicate with the Oracle Contact On Demand server:

- Select the configuration record that you created, and click the Profiles tab.
- Click the Driver name.

The particular name of the driver that you configure for Oracle Contact On Demand integration is TaW.

NOTE: If you want to configure a new driver to communicate with the Oracle Contact On Demand server, click **New**, select a communication profile from the list that is displayed, then click **Driver name**.

- On the Communications Drivers screen, scroll down to the Profile Parameter Overrides section, and set the driver parameters, as required.

NOTE: If no profile exists for the driver, then one must be created. If one does exist but it is not the profile that you wish to configure, then a new one can be added at this point.

The following table briefly describes some important driver parameters that can be configured. For more information about all driver parameters that can be configured, see *Siebel Communications Server Administration Guide*.

| Driver Parameter | Value |
|----------------------------|--|
| Driver:CompanyName | Required. Set to the company alias as defined in Oracle Contact On Demand Administration Manager. |
| Driver:AdminUserName | Required. Set to the administrator name, as defined in Oracle Contact On Demand Administration Manager. |
| Driver:AdminPassword | Required. Set to the administrator password (of AdminUserName). |
| Driver:URL | Required. Set to the location of Oracle Contact On Demand services, for example, as follows: http://east/cod/services/ |
| Driver:ProxySupport | Optional. Set to script if you want to use wpad.dat to access Oracle Contact On Demand services using an HTTP proxy. Set to Disabled if you do not want to use a proxy. |
| Driver:ProxyScriptLocation | Optional. If Driver:ProxySupport is set to script, then set this parameter to the location of the script, for example, as follows: http://wpad.us.oracle.com/wpad.dat |

| Driver Parameter | Value |
|------------------------|---|
| Driver:EnableSOAPTrace | Optional. Set to true to log all communications between the driver and Oracle Contact On Demand, and set to false to ignore all communications. |
| Driver:LogFile | Optional. Specify a name for the driver log file. |
| Driver:LogSOAPFile | Optional. Specify a name for the log file, into which all messages between the driver and Oracle Contact On Demand are written. |

3 Add agents to the chat communications configuration record.

This step involves mapping an agent’s details as defined in Oracle Contact On Demand Administration Manager to the corresponding agent (user) in the Siebel Call Center application. For more information about adding agents, see [“Adding Agents to the Communications Configuration for Siebel Chat” on page 30](#).

4 If required, save the chat configuration record so that you can readily access it in the future, if you want to update and amend it.

This step is optional. If changes have been made to the configuration, driver parameters, or profile parameters, then save the communications configuration to another file as follows:

- a** Navigate to the Administration - Communications screen, then the All Configurations view.
- b** Select the chat configuration record that you want to save, and click Export Configuration.
- c** On the Export Configuration window, specify the communications configuration elements to export. Choose from the following options:
 - Configuration Parameters
 - Drivers and Profiles
 - Commands
 - Events
- d** When prompted, save the communications configuration file to a suitable location.

5 Configure chat routing parameters.

This step involves configuring the routing for chat data, see [“Setting Up Parameters and Routing in Siebel Call Center for Siebel Chat” on page 30](#).

6 Configure an email profile for chat communications, see [“Process of Setting Up an Email Profile in Siebel Call Center” on page 41](#).

Adding Agents to the Communications Configuration for Siebel Chat

When adding agents to the communications configuration for Siebel Chat in Siebel Call Center, it is important that you use the same Agent Login and Password that were set up for the agent in Oracle Contact On Demand. To add agents to the communications configuration set up in Siebel Call Center, complete the steps in the following procedure. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat"](#) on page 24.

To add agents to the Siebel Chat communications configuration in Siebel Call Center

- 1** Navigate to the Administration - Communications screen, then the All Configurations view.
- 2** Select the (chat) communications configuration record for which you want to add agents, and click the Agents tab.
- 3** Click New to add an agent.
- 4** On the Add Agents window, select or query for the agent that you want to add, and then click OK.
- 5** Specify the Agent Login and Password that the agent must use to log in to Oracle Contact On Demand:
 - a** Click on the agent name to go to the Agent General Profile page.
 - b** Enter the Login and Password in the Agent Login and Password fields respectively.The value you specify for Agent Login and Password must correspond to the agent's user name and password, as defined in Oracle Contact On Demand Administration Manager.
- 6** Assign a teleset to each agent:
 - a** Click an Agent, then the Telesets tab, then New.
 - b** On the Add Telesets window, select or query for the teleset that you want to assign, and click OK.

For information about configuring agents after an agent has been added to a communications configuration, see *Siebel Communications Server Administration Guide*.

Setting Up Parameters and Routing in Siebel Call Center for Siebel Chat

Oracle Contact On Demand uses the following parameters in order to route chat requests to the right workgroup:

- Company Alias, which Oracle Contact On Demand uses to differentiate companies.
- Project ID, which Oracle Contact On Demand uses to differentiate projects.

In Siebel Call Center, chat administration parameters (Chat:SiebelOrg and Chat:DefaultProjectID), chat routing parameters (Route Key and Route Value), and the chat system preference TAW:DefaultChatCompanyAlias are used to help resolve to the right Company Alias and Project ID, as follows:

- 1 First, the Company Alias is determined in one of the following ways (in order of precedence):
 - a It is passed by the customer on the chat request form.
 - b The Siebel Organization value, if passed by the customer on the chat request form, is used to look up the alias by comparing it with the Chat:SiebelOrg parameter value.

Chat:SiebelOrg corresponds to the name of the Siebel Call Center organization with which the Oracle Contact On Demand company is associated.
 - c If no Company Alias or Siebel Organization value is passed by the customer on the chat request form, then the default chat company alias defined by the chat system preference, TAW:DefaultChatCompanyAlias, is used.

TAW:DefaultChatCompanyAlias corresponds to the company alias defined in Oracle Contact On Demand.
- 2 Then the Project ID is determined in one of the following ways (in order of precedence):
 - a It is passed by the customer on the chat request form.
 - b The Routing Key or Value, if passed by the customer on the chat request form, is used to look up the project ID by comparing it with the Route Key or Route Value parameter value.

Route Key and Route Value correspond to parameter extension values in the Oracle Contact On Demand database.
 - c If no Project ID or Routing Key or Value is passed by the customer on the chat request form, then the Chat:DefaultProjectID parameter value is used.

Chat:DefaultProjectID corresponds to the project ID to which you want to route chat requests.

To configure the routing of chat data in Siebel Call Center, complete the steps in the following procedure. This task is a step in the following process and roadmap:

- ["Process of Setting Up Siebel Chat for Self-Service Web Applications" on page 20](#)
- ["Roadmap for Configuring Siebel Call Center for Siebel Chat" on page 24](#)

To configure routing parameters in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Communications screen, then the Chat Parameter and Routing Administration view.
- 2 Select your company from the Chat Communication Company list.

NOTE: If you do not see your company in the Chat Communication Company list, make sure you have configured your communications driver correctly. For more information about configuring a communications driver, see ["Configuring Communications in Siebel Call Center for Siebel Chat" on page 27](#).
- 3 Click Add Chat Parameters in the Chat Administration Parameters section, and set the chat administration parameters that display. Chat administration parameters that must be set are described in the following table.

NOTE: The parameters listed in the following table are all required parameters, even when no routing rules are defined.

| Parameter | Description | Value |
|-----------------------|---|---|
| Chat:DefaultLangID | A numeric language ID that maps to a language ID in Oracle Contact On Demand. NOTE: If no language code is provided when the user requests a chat, then the language as defined by this parameter is used. | Some valid values for the default language are: <ul style="list-style-type: none"> ■ 1, ENU (English) ■ 2, FRE (French) ■ 3, SPA (Spanish) |
| Chat:DefaultProjectID | The project ID (for this company), to which you want to route chat requests. NOTE: If no project ID is provided with a chat request, or if none can be determined from the chat routing data, then the project ID as defined by this parameter is used. | Enter a project ID value. NOTE: To see a list of available project ID values as defined in Oracle Contact On Demand, scroll down to the Chat Route Administration section, click New, and then Single Select in the Project Name field. |
| Chat:SiebelOrg | Name of the Siebel Call Center organization with which the Oracle Contact On Demand company is associated. NOTE: This parameter is used to map the Siebel Call Center organization, provided when a chat is requested, to an Oracle Contact On Demand company so that the chat interaction can be routed correctly. | Enter a value for your Siebel Call Center organization. |

4 Configure the routing for chat data:

- a** Scroll down to the Chat Route Administration section, and click New.
- b** In the Project Name field, click Single Select.
- c** In the Chat Web Projects window, select a project from the list to which you want to route data, and click OK.
- d** Enter the appropriate routing key and routing value for your chosen project.

All chat routing parameters are described in the following table. Repeat these [Step a](#) to [Step d](#) for each chat enabled project to which you want to route chat requests.

| Parameter | Description |
|--------------|--|
| Project Id | <p>Project ID, as defined in Oracle Contact On Demand (for example, 115 or 126).</p> <p>NOTE: The Chat Web Projects window lists all chat enabled projects available for your company. From the list, make a note of the Project Id values. You can set one of these as your default project ID (see the Chat:DefaultProjectID chat parameter in the previous table).</p> |
| Project Name | Project name, as defined in Oracle Contact On Demand. |
| Route Key | <p>The routing key must match one of the parameter extension values that are seeded in the Oracle Contact On Demand database. Only some keys, such as, Product Name, Product Category, and Area, can be used for routing.</p> <p>NOTE: Parameter extensions for chat are seeded in the Oracle Contact On Demand database when installing Oracle Contact On Demand (see "Installing Parameter Extensions for Siebel Chat" on page 21).</p> |
| Route Value | <p>Set this parameter to a possible value that can be passed with the parameter extension value of an incoming chat request.</p> <p>For example, if providing support for computer hardware, you might have SR Areas of Printer, Desktop, and Laptop. To route chat requests that are related to each SR Area to a specific Oracle Contact On Demand project that is staffed by appropriately skilled agents, then you can use Area as the Route Key, and one of the Route Values (Printer, Desktop, or Laptop) to map to the appropriate project.</p> |

Setting Up an Alias for Siebel Chat Users in Siebel Call Center

For each Siebel Chat user, it is important to set the Alias value on the Person record within Siebel Call Center to the corresponding First Name value provided for the user account in Oracle Contact On Demand Administration Manager. This is the name that the customer requesting the chat sees in the chat transcript, and you want it to be the same in the agent transcript. If no alias value is specified in Siebel Call Center, the user’s log in name is used in the transcript that is emailed to the customer, and it might not match the name that the customer sees during the chat session.

For example, if you set up a user account for John Doe in Oracle Contact On Demand Administration Manager where First Name is JohnD, then set Alias to JohnD in John Doe’s corresponding Person record in Siebel Call Center. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat"](#) on page 24.

To set the alias in Siebel Call Center for Siebel Chat users

- 1 Navigate to the Administration - User screen, then the Persons view.
- 2 Select the person record for which you want to set an alias.
- 3 Enter an alias value in the Alias field.

NOTE: The alias value that you enter in this field for the user must correspond to the First Name value that is defined for the user account in Oracle Contact On Demand Administration Manager. For more information about Oracle Contact On Demand user accounts, see ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager"](#) on page 87.

Setting Up Frequently Used Text in Siebel Call Center for Siebel Chat

Administrators can set up a library of message response templates (or frequently used text) for chat in Siebel Call Center where each template holds a predefined message response, which agents can choose to send to customers as required. When responding to chat requests, agents can access this library of predefined message responses by clicking the Frequently Used Text button in the message area of the chat pane. For more information about responding to chat requests, see ["Responding to an Incoming Chat"](#) on page 56.

To set up predefined message responses for chat in Siebel Call Center, complete the steps in the following procedure. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat"](#) on page 24.

To set up a library of frequently used text templates in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Communications screen, then the All Templates view.
- 2 Click New to create a frequently used text template and on the Simple tab, specify the following:

| Field | Description |
|--------------|--|
| Name | The name of your text template. |
| Channel Type | Select Chat as the channel type from the drop-down list. |

| Field | Description |
|---|---|
| Template Type (Optional) | <p>Select Greeting, Body, or Closing as required:</p> <ul style="list-style-type: none"> ■ A <i>Greeting</i> template type response can be: Hello. How may I help you? ■ A <i>Body</i> template type response can be: A new version of Performance Test (PTE) is available, which must be used with Oracle Siebel builds starting from 10599. Get the new version of PTE from the following location: \\perfap05\Files\PerfBin\PTE\PerfTools.zip. Unzip PerfTools.zip to a folder on your local drive (for example, PerfTools). Note that Templates and Scripts folders are empty in the zip file, so you need to copy your templates to a Template directory, and generated scripts to a Scripts directory. You must also copy your PTE.cfg to a bin directory. ■ A <i>Closing</i> template type response can be: Thank you. Good bye. |
| Language | Specify the language to be used in your text template. |
| Locale | Specify the Locale Code for your country. |
| Public (Optional) | <p>Select this check box if you want the template to be made available to everyone outside the creator's organization.</p> <p>NOTE: This check box is selected by default for chat.</p> |
| Pick Available Substitutions (Optional) | <p>Select the Chat UI substitution object from the object drop-down list if you want to use any of the available Chat UI data substitutions when composing your text response. The available Chat UI data substitutions are:</p> <ul style="list-style-type: none"> ■ [Chat UI.Customer First Name] ■ [Chat UI.Customer Last Name] ■ [Chat UI.Employee Alias] ■ [Chat UI.InputText] ■ [Chat UI.Primary Owner Id] |

3 Enter the text for your template into the Text area; the subject line is not used for templates.

Extending Wrap-Up LOVs in Siebel Call Center for Siebel Chat

You can extend the wrap-up list of values (LOVs) in Siebel Call Center for Siebel Chat. “[Wrapping Up a Chat](#)” on page 67 describes the wrap-up values that are set up by default for Siebel Chat. To add a new wrap-up LOV or modify an existing one, complete the steps in the following procedure. For more information about LOVs, see *Siebel Applications Administration Guide*.

Use the following procedure to extend wrap-up LOVs in Siebel Call Center for Siebel Chat. This task is a step in “[Roadmap for Configuring Siebel Call Center for Siebel Chat](#)” on page 24.

To extend wrap-up LOVs in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 Click New to create a new record, and:
 - a Enter the list-of-values type in the Type field, which can be one of the following:
 - WRAPUP_REASON
 - WRAPUP_OUTCOME
 - WRAPUP_FEEDBACK
 - b Enter a value in the Display Value field.
 - c Enter a value in the Language Independent Code field.
 - d If required, enter a number in the Order Field.

Alternatively, query for the list-of-value type, then edit the fields as required.

Setting Up a Global URL Library in Siebel Call Center for Siebel Chat

Administrators can make a list of URLs, save it, and store it in a URL library so that an agent can push the URLs to users when required. In Siebel Call Center, resolution documents of type URL are used to populate the URL library list. To set up a URL library for chat in Siebel Call Center, complete the steps in the following procedure. This task is a step in “[Roadmap for Configuring Siebel Call Center for Siebel Chat](#)” on page 24.

CAUTION: Ensure that URLs can be reached by users who are outside your company firewall.

To set up a URL library in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Resolution Documents screen.
- 2 Click New to add a new (URL) resolution to the library:
 - a In the File Name field, click the single select button to add a resolution attachment.
 - b Enter the URL address (starting with http://) of the URL that you want to share with customers.
 - c Click Add.

When handling chat interactions, agents can access a list of available URLs. For more information, see ["Accepting an Incoming Chat" on page 56](#) and ["Responding to an Incoming Chat" on page 56](#).

Configuring Search in Siebel Call Center for Siebel Chat

You can configure search in Siebel Call Center so that when agents click Smart Search in the chat message area of the chat pane, the following objects are searched:

- Existing service requests for matching criteria.
- The knowledge base (Siebel Knowledge Base) for resolution documents, or solutions.

Configuring search in Siebel Call Center for Siebel Chat involves defining indexes for both resolutions and service requests. For more information about search, see *Siebel Search Administration Guide*.

To configure search in Siebel Call Center, complete the steps in the following procedure. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat" on page 24](#).

To configure search in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Search screen.
- 2 Activate your search engine by selecting the appropriate Default Flag check box in the Search Engine Settings view.
- 3 Set up search connector settings in the Search Connector Settings view, as required.
- 4 Set up a search definition in the Search Definition view, as required.
- 5 In the Search Index Settings view:
 - Click New to create a new business component object for which new fields will be indexed.
 - In the Available Fields section of the page, click New to define the fields for the new business component object. For each field you define, complete the fields as described in the following table.

| Field | Description |
|------------------|--|
| Display Name | Enter a display name for the field. |
| Field Name | Enter the actual name of the field. |
| Navigate | Select this check box if you want this field to be enabled as a navigable field. |
| Searchable | Select this check box if you want this field to be included in searches. |
| Weighting Factor | Specify a weighting factor for the field. This will determine the field's ranking in search results. |

- 6 Click Menu, and select Save Record to save the new business component object record.
Service request and resolution business components must be indexed in order for search to work properly.

Configuring the Communications Toolbar

The communications toolbar displays the functions related to chat that are available for Siebel Chat. “Working with Siebel Chat” on page 43 describes the chat-related behavior of the functions on the communications toolbar. The communications toolbar is defined and configured within Siebel Tools, like other toolbars in Siebel applications. For information about configuring the communications toolbar in Siebel Tools, including object definitions, toolbar items, commands, and bitmaps, see the following:

- *Configuring Siebel Business Applications*
- *Siebel Developer’s Reference Guide*

For information about modifying the communications toolbar, including modifying the appearance of existing toolbar buttons, and moving, adding, or removing a toolbar button, see *Siebel Communications Server Administration Guide*.

This task is a step in “Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 24.

Configuring Workgroups in Siebel Call Center for Siebel Chat

Configuring workgroups in Siebel Call Center for Siebel Chat involves first creating the data type WORKGROUP in Siebel CRM, then adding the workgroup records and associated list of values (LOVs). For more information about LOVs, see *Siebel Applications Administration Guide*. Use the following procedure to create the data type WORKGROUP in Siebel Call Center.

This task is a step in “Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 24.

To create the data type WORKGROUP in Siebel Call Center for Siebel Chat

- 1 Log in to Siebel Call Center as system administrator.
- 2 Navigate to the Administration - Data screen, then the List of Values Explorer view.
- 3 Click New to create a new LOV data type called WORKGROUP.

Use the following procedure to add workgroup records and associated LOVs.

To add workgroup records and associated LOVs in Siebel Call Center for Siebel Chat

- 1 Log in to Siebel Call Center as system administrator.
- 2 Navigate to the Administration - Data screen, then the List of Values view.
- 3 Click New to create a new LOV record of type WORKGROUP, and:
 - a Enter the list-of-value type in the Type field: WORKGROUP
 - b Enter a value in the Display Value field. For example, Quality.
 - c Enter a value in the Language Independent Code field. For example, 106.

- d If required, enter a number in the Order Field. For example, 1.

Alternatively, query for the WORKGROUP LOV type, then edit the fields as required.

Setting Up Outbound Email Communications in Siebel Call Center

If the Chat: Auto Email Mode system preference is set to POPUP or SEND, then outbound email communications must be set up for Siebel Chat so that an email response is correctly sent to customers when chat sessions are released. If Chat: Auto Email Mode is set to NONE, then setting up chat outbound communication in Siebel Call Center is optional.

Use the following procedure to set up outbound email communications in Siebel Call Center. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat" on page 24](#).

To set up outbound email communications in Siebel Call Center for Siebel Chat

- 1 Navigate to the User Preferences screen, then the Outbound Communications view.
- 2 Set up outbound communications as follows:
 - a In the Send Email section, set the following options, as required:
 - Default Profile
 - Default Recipient Class
 - Email Client
 - Siebel/Outlook Form
 - Siebel/Lotus Form
 - Default Message Format

NOTE: Default Profile must be set to the email profile that is used to send emails to users (for example, when users release a chat session). You must set up this email profile first. For more information about email profile setup, see ["Process of Setting Up an Email Profile in Siebel Call Center" on page 41](#).
 - b In the Email Response section, set the following options, as required:
 - Default Greeting Template—options include Formal Greeting, and Informal Greeting.
 - Default Closing Template—options include Address Verification Closing, Formal Info Closing, Formal Support Closing, Informal Info Closing, and Informal Support Closing.
 - Default Message Format
 - Include Original Message in Reply
 - Remain on Same View After Send (Cancel)
 - c In the Advanced Features section, set the following options, as required:
 - Language
 - Locale

For more information about each of these options, about setting up outbound email communications, and configuring the Internet SMTP/POP3 server driver, see *Siebel Communications Server Administration Guide*.

Setting Up System Preferences in Siebel Call Center for Siebel Chat

There are a number of system preferences that can optionally be set in Siebel Call Center for Siebel Chat. The following procedure describes these system preferences and how to set them. This task is a step in the following process and roadmap:

- ["Process of Setting Up Siebel Chat for Self-Service Web Applications"](#) on page 20
- ["Roadmap for Configuring Siebel Call Center for Siebel Chat"](#) on page 24

To set the system preferences in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Query for **Chat** to get a list of all the chat-related system preferences that can be set up.
- 3 For each Siebel Chat system preference that you want to set up, specify the system preference name, value, and description, as defined in the following table.

| System Preference Name | System Preference Value | Description |
|------------------------------|--|---|
| TAW:DefaultChatCompanyAlias | NOTE: Change this value to the company alias (defined in Oracle Contact On Demand), which you want Siebel Chat to use by default. | Alias of the company, as defined in Oracle Contact On Demand. |
| Chat: Default Email Template | NOTE: You must define the default email template first, and then specify it in this field. For more information, see "Process of Setting Up an Email Profile in Siebel Call Center" on page 41. | Name of the default email template used to automatically generate the email that is sent when a user releases a chat session. |
| Chat: Auto Search Mode | ON | Determines the mode used to automatically perform a search when agents accept a chat request. Valid values are ON or OFF. |

| System Preference Name | System Preference Value | Description |
|------------------------------|-------------------------|---|
| Chat: AutoCreate Service Req | FALSE | <p>Flag that determines whether a service request is created automatically when agents accept a chat request. Valid values are TRUE or FALSE.</p> <p>A service request is automatically created for anonymous users, regardless of this setting.</p> |
| Chat: Auto Email Mode | POPUP | <p>Determines the mode used for automatically sending an email when a chat is released. Valid values are POPUP, SEND, and NONE:</p> <ul style="list-style-type: none"> ■ POPUP automatically displays the email, allowing the agent to modify it before sending. ■ SEND automatically sends the email, without prompting the agent. ■ NONE does not send an email. |

Process of Setting Up an Email Profile in Siebel Call Center

You must set up an email profile in Siebel Call Center for Siebel Chat so that an email is sent to each customer when a chat session is released. To set up an email profile in Siebel Call Center, complete the following tasks. This process is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat"](#) on page 24.

- 1 Set up an email profile in Siebel Call Center.

For more information about how to set up an email profile in Siebel Call Center, see *Siebel Communications Server Administration Guide*.

- 2 When you have set up an email profile in Siebel Call Center, set up the following:

- a Outbound email communications for chat, so that an email response is correctly sent when a chat session is released.

For more information about outbound communications, see ["Setting Up Outbound Email Communications in Siebel Call Center"](#) on page 39.

- b** The following system preferences, see ["Setting Up System Preferences in Siebel Call Center for Siebel Chat" on page 40](#).
 - **Chat: Default Email Template.** Set this to the name of the (chat) email profile that you set up in Siebel Call Center.
 - **Chat: Auto Email Mode.** Set this to POPUP, SEND, or NONE.

4

Working with Siebel Chat

This chapter describes how an agent works with Siebel Chat, which is supported only in high interactivity mode. This chapter includes the following topics:

- [Siebel Chat Interface on page 43](#)
- [Processing Siebel Chat Requests on page 45](#)
- [Verifying That Siebel Chat Is Installed for Siebel Call Center on page 51](#)
- [About the Communications Toolbar on page 54](#)
- [Logging in to Siebel Chat on page 54](#)
- [Receiving a New Chat on page 55](#)
- [Accepting an Incoming Chat on page 56](#)
- [Responding to an Incoming Chat on page 56](#)
- [Reviewing Inbound Siebel Chat Activities on page 59](#)
- [Handling Siebel Chat Sessions on page 61](#)
- [Siebel Chat Dashboard on page 69](#)
- [Changing Agent Status on page 72](#)
- [Agent and Siebel Chat Interaction States on page 72](#)
- [Setting Up Logging and Tracing for Siebel Chat Components on page 75](#)
- [Customizing Siebel Chat on page 77](#)
- [Specific ActiveX Controls Distributed with Siebel Chat on page 82](#)

Siebel Chat Interface

The Siebel Chat interface resides inside an action pane on the right-hand side of your Siebel Call Center application. To the left of the chat pane is the main Siebel Call Center application area.

Agents can show, hide, and resize the chat pane (shown in [Figure 4 on page 44](#)) during the course of a chat session, and without losing the content in the chat pane, if more screen space is required to perform actions in the main Siebel Call Center application content frame.

Agents can engage in multiple chat sessions with many users simultaneously. If more than one chat session is open, the chat sessions are represented by tabs across the top of the chat pane, where each chat tab shows the first name of the customer. For more information about handling and moving between multiple chat sessions, see ["Handling Multiple Simultaneous Siebel Chat Sessions" on page 62](#).

Explanation of Callouts

Figure 4 shows the Siebel Chat interface (chat pane), which contains the following areas:

- **Dashboard.** The chat dashboard in the chat pane displays details about the problem that the customer is having. Agents can carry out a number of popular actions quickly using the chat dashboard. For more information about the chat dashboard, see [“Siebel Chat Dashboard” on page 69](#).
- **Transcript area.** The transcript area in the chat pane is where agents view the transcript of the chat conversation so far. Each part of the chat conversation is clearly labelled with either the agent’s or the customer’s name, is dated, and time stamped. The transcript area also captures any interactions performed using the functions available on the communications toolbar or URLs pushed to the customer. When a chat session ends, the chat transcript is attached to an activity. For more information about accessing chat transcripts and attachments, see [“Reviewing Inbound Siebel Chat Activities” on page 59](#).
- **Message area.** The message area in the chat pane is where an agent enters the responses to a chat request, executes a search, and smart shares service request and solution information. For more information about these tasks, see [“Responding to an Incoming Chat” on page 56](#).
- **Push URL area.** The push URL area in the chat pane is where an agent can enter a Web URL to share with a customer, which is then automatically displayed in the customer’s browser. Entering a URL in this region automatically pushes the URL to the customer, and eliminates the need for the customer to manually copy and paste the URL into a browser window. Agents can also click the URL Library button to access a global list of predefined URLs, which they can push to customers as required. For more information about push URL, see [“Pushing a Web URL” on page 58](#).

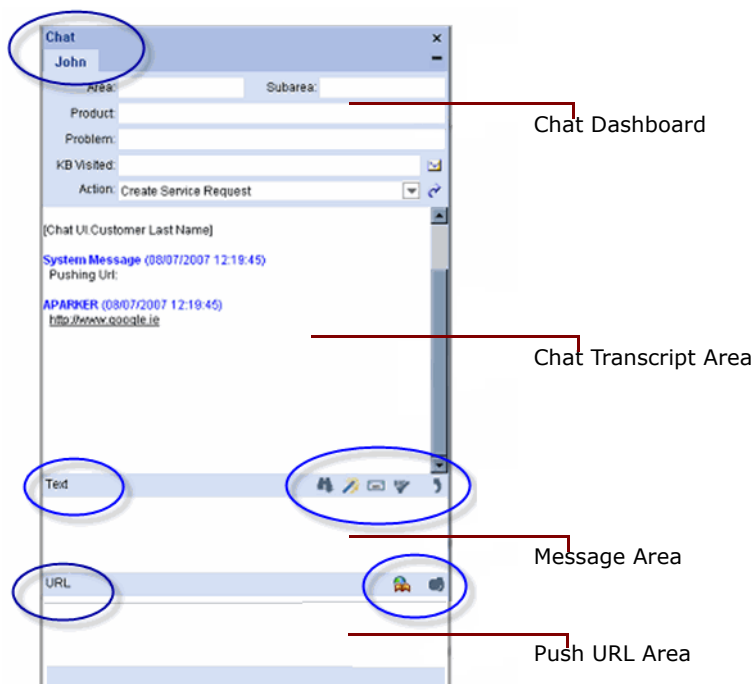


Figure 4. Siebel Chat Interface (Chat Pane)

Processing Siebel Chat Requests

The processing of Siebel Chat requests involves identifying the customer requesting a chat, then creating one or more activity records linked to a contact record or a service request. An activity is always created when a chat is accepted by an agent, and each time a chat is transferred.

This topic includes information about the following:

- [“Workflow for Accepting Siebel Chat Requests” on page 45](#)
- [“Siebel Call Center Behavior When Processing Siebel Chat Requests” on page 47](#)
- [“Guidelines for Processing Siebel Chat Requests” on page 51](#)

Workflow for Accepting Siebel Chat Requests

When an agent accepts an incoming chat, Siebel Call Center attempts to identify the customer requesting the chat from the information provided on the chat request form. This information determines whether an activity event or a service request is to be created, and consequently the application view that the agent is directed to in the Siebel Call Center application.

The workflow for accepting an incoming chat is summarized in [Figure 5 on page 46](#) as follows:

- 1 When an agent accepts a chat, an activity is created for the service request (new or existing) or contact record.
- 2 If possible, the chat UI business service identifies the contact.
- 3 If necessary, the chat UI business service creates a service request.
NOTE: If the chat system preference *AutoCreate Service Req* is set to *Y*, then a service request is created automatically each time that an agent accepts a chat, including an anonymous chat. For more information about system preferences, see [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 40](#).
- 4 Next, the chat UI business service updates the chat activity with the identified contact (if any) and service request (if any).
- 5 Finally, the chat UI business service directs the agent to the appropriate view (service request detail view, contact detail view, or search results view) in the Siebel Call Center application.

Figure 5 describes a workflow for accepting Siebel chat requests.

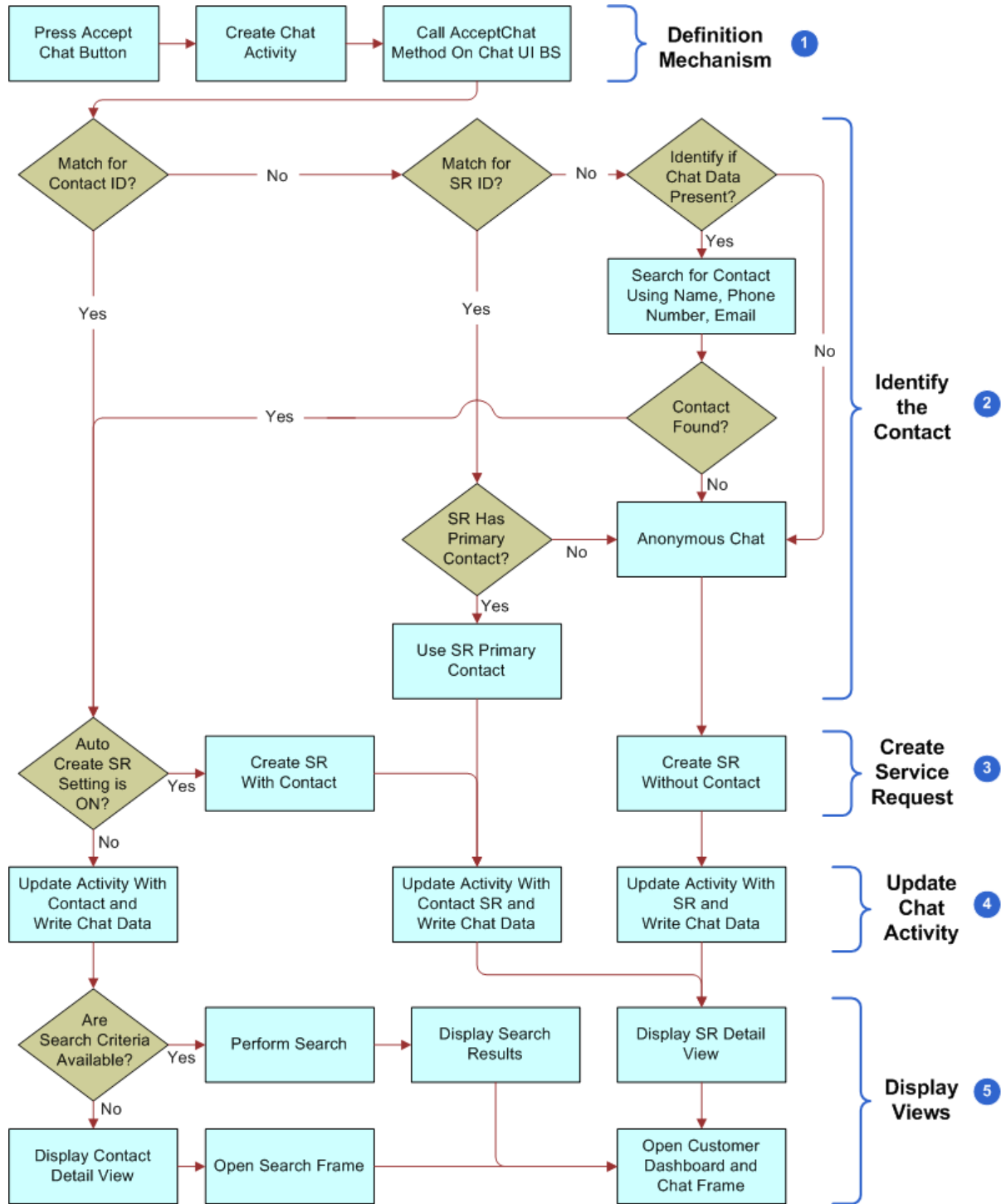


Figure 5. Workflow for Accepting Siebel Chat Requests

Siebel Call Center Behavior When Processing Siebel Chat Requests

Table 4, Table 5 on page 48, Table 6 on page 48, and Table 7 on page 49 further summarize the workflow for accepting Siebel Chat requests by describing what happens in Siebel Call Center when various conditions are met (or not, as the case might be). Depending on the information that the customer provides on the chat request form, and the ability of Siebel Call Center to identify that customer, the workflow for accepting an incoming chat can vary.

Table 4 describes what happens in Siebel Call Center when the user’s contact ID only is identified, along with the presence or absence of various other conditions.

Table 4. Accept Chat Request - Workflow Where Contact ID Is Identified

| SR ID Present | Contact ID Present | Auto Create SR On | Identify Chat Data Present | Other Chat Data Present | Actions in Siebel Call Center Application | | |
|---------------|--------------------|-------------------|----------------------------|-------------------------|---|---|--|
| No | Yes | Yes | Yes | Yes | Creates a new service request using the contact ID and other chat data present, such as, area, subarea, or problem description. Shows the service request detail view. Opens the search frame and searches using other chat data present, such as, problem description or product category. | Populates the customer dashboard using the contact ID, and identify chat data (if any), such as, contact first name, contact last name, email address, or phone number. | Creates a new activity with the contact ID. Updates the activity with the service request ID when the service request is created. |
| No | Yes | Yes | No | Yes | | | |
| No | Yes | Yes | Yes | No | Creates a new service request using the contact ID. Shows the service request detail view. | Populates the customer dashboard using the contact ID, and identify chat data (if any), such as, contact first name, contact last name, email address, or phone number. | Creates a new activity with the contact ID. |
| No | Yes | Yes | No | No | Opens the search frame with no search criteria. | | |
| No | Yes | No | Yes | Yes | Shows the contact detail view. Opens the search frame and searches using other chat data present. | | |
| No | Yes | No | Yes | No | Shows the contact detail view. | Populates the customer dashboard using the contact ID, and identify chat data (if any), such as, contact first name, contact last name, email address, or phone number. | Creates a new activity with the contact ID. |
| No | Yes | No | No | No | Opens the search frame with no search criteria. | | |

Table 5 describes what happens in Siebel Call Center when the user’s service request ID and contact ID are both identified, along with the presence or absence of various other conditions.

Table 5. Accept Chat Request - Workflow Where Service Request ID and Contact ID Are Identified

| SR ID Present | Contact ID Present | Auto Create Service Request On | Identify Chat Data Present | Other Chat Data Present | Actions in Siebel Call Center Application | | |
|---------------|--------------------|--------------------------------|----------------------------|-------------------------|---|---|---|
| Yes | Yes | Yes | Yes | Yes | Shows the service request detail view. | Populates the customer dashboard using the contact ID, and identify chat data (if any), such as, contact first name, contact last name, email address, or phone number. | Creates a new activity with the service request ID, and contact ID. |
| Yes | Yes | Yes | Yes | No | | | |
| Yes | Yes | Yes | No | Yes | | | |
| Yes | Yes | Yes | No | No | | | |
| Yes | Yes | No | Yes | Yes | | | |
| Yes | Yes | No | Yes | No | | | |
| Yes | Yes | No | No | Yes | | | |
| Yes | Yes | No | No | No | | | |

Table 6 describes what happens in Siebel Call Center when the user’s service request ID only is identified, along with the presence or absence of various other conditions.

Table 6. Accept Chat Request - Workflow Where Service Request ID Is Identified

| SR ID Present | Contact ID Present | Auto Create Service Request On | Identify Chat Data Present | Other Chat Data Present | Actions in Siebel Call Center Application | | |
|---------------|--------------------|--------------------------------|----------------------------|-------------------------|---|--|--|
| Yes | No | No | Yes | Yes | Shows the service request detail view. | Searches for the contact using the service request ID and identify chat data (if any), such as, problem description or product category. Populates the customer dashboard. | Creates a new activity with the service request ID. |
| Yes | No | No | Yes | No | | | |
| Yes | No | No | Yes | Yes | | | |
| Yes | No | No | Yes | No | | | |
| Yes | No | Yes | No | Yes | | Searches for the contact using the service request ID. Populates the customer dashboard. | Updates the activity with the contact ID when the contact is determined. |
| Yes | No | Yes | No | No | | | |
| Yes | No | No | No | Yes | | | |
| Yes | No | No | No | No | | | |

Table 7 describes what happens in Siebel Call Center when neither the user’s service request ID nor the contact ID are identified, but various other conditions are either present or absent.

Table 7. Accept Chat Request - Workflow Where Neither Contact ID Nor Service Request ID Is Identified

| SR ID Present | Contact ID Present | Auto Create Service Request On | Identify Chat Data Present | Other Chat Data Present | Actions in Siebel Call Center Application | | |
|---------------|--------------------|--------------------------------|----------------------------|-------------------------|---|---|---|
| No | No | Yes | Yes | Yes | <p>Opens the search frame and searches using other chat data present, such as, problem description or product category.</p> <p>Searches for the contact using identifying chat data present, such as contact first name, contact last name, email address, or phone number.</p> <p>Creates a new service request (with the contact if one is found, otherwise without a contact).</p> <p>Shows the service request detail view.</p> | <p>If one contact is found, populates the customer dashboard using the contact information and identifying chat data.</p> <p>If no contact could be identified, populates the customer dashboard with the identifying contact data, and flags it as an unknown contact, such as, contact email address or contact phone number.</p> | Creates a new activity with the service request ID and contact ID (if found). |
| No | No | Yes | Yes | No | <p>Opens the search frame with no search criteria.</p> <p>Searches for the contact using the identifying chat data present, such as contact first name, contact last name, email address, or phone number.</p> <p>Creates a new service request (with the contact if one is found, otherwise without a contact).</p> <p>Shows the service request detail view.</p> | | |

Table 7. Accept Chat Request - Workflow Where Neither Contact ID Nor Service Request ID Is Identified

| SR ID Present | Contact ID Present | Auto Create Service Request On | Identify Chat Data Present | Other Chat Data Present | Actions in Siebel Call Center Application | | |
|---------------|--------------------|--------------------------------|----------------------------|-------------------------|---|---|---|
| No | No | Yes | No | Yes | <p>Opens the search frame, and searches using other chat data present, such as, problem description or product category.</p> <p>Creates a new service request without the contact information.</p> <p>Shows the service request detail view.</p> | <p>This is an anonymous chat, where the customer dashboard is not populated with any information.</p> | <p>Creates a new activity with the service request ID.</p> |
| No | No | Yes | No | No | <p>Opens the search frame, with no search criteria.</p> <p>Creates a new service request without the contact information.</p> <p>Shows the service request detail view.</p> | | |
| No | No | No | Yes | Yes | <p>Opens the search frame and searches using other chat data present, such as, problem description or product category.</p> <p>Searches for the contact using identifying chat data present, such as contact first name, contact last name, email address, or phone number.</p> <p>Shows the contact detail or contact list view.</p> | <p>If one contact is found, populates the customer dashboard using the contact information and identifying chat data.</p> <p>If a contact could not be identified, populates the customer dashboard with the identifying chat data, and flags it as an unknown contact, such as, contact email address or contact phone number.</p> | <p>Creates a new activity with the contact ID (if found).</p> |
| No | No | No | Yes | No | <p>Opens the search frame with no search criteria.</p> <p>Searches for the contact using the identifying chat data present, such as contact first name, contact last name, email address, or phone number.</p> <p>Shows the contact detail or contact list view.</p> | | |

Table 7. Accept Chat Request - Workflow Where Neither Contact ID Nor Service Request ID Is Identified

| SR ID Present | Contact ID Present | Auto Create Service Request On | Identify Chat Data Present | Other Chat Data Present | Actions in Siebel Call Center Application | | |
|---------------|--------------------|--------------------------------|----------------------------|-------------------------|---|--|--|
| No | No | No | No | Yes | Opens the search frame, and searches using other chat data present, such as, problem description or product category. | This is an anonymous chat, where the customer dashboard is not populated with any information. | Creates a new activity without the contact ID. |
| No | No | No | No | No | Opens the search frame with no search criteria. | | |

Guidelines for Processing Siebel Chat Requests

Consider the following guidelines for processing chat requests whether deploying Siebel Chat as an on-premise enterprise application, or as a hosted application:

- To create a new service request for every incoming chat request and execute an automatic search when the agent accepts a chat, then set the following system preferences:
 - Set Chat: AutoCreate Service Req to TRUE
 - Set Chat: Auto Search Mode to ON
- To create a new service request for every incoming chat request and go directly to that service request when the agent accepts a chat, then set the following system preference:
 - Set Chat: AutoCreate Service Req to TRUE
- To support anonymous chats by creating a service request for every incoming chat request, then set the following system preference:
 - Set Chat: AutoCreate Service Req to TRUE

For more information about system preference setup for chat, see ["Setting Up System Preferences in Siebel Call Center for Siebel Chat"](#) on page 40.

Verifying That Siebel Chat Is Installed for Siebel Call Center

Before allowing agents to log in and start working with Siebel Chat, it is recommended that administrators verify the following:

- That Siebel Chat has been installed for Siebel Call Center. For more information, see ["Checking That Siebel Chat Is Installed for Siebel Call Center"](#) on page 52.

- That all server component groups from Siebel Call Center are started. Server component groups must be started so that agents can receive inbound chats. For more information, see ["Checking That All Server Component Groups are Started for Siebel Call Center"](#) on page 52.

Checking That Siebel Chat Is Installed for Siebel Call Center

The presence of the Chat button on the global toolbar of Siebel Call Center indicates that Siebel Chat has been installed and set up for the application. The Chat button appears only if the IsChatEnabled configuration parameter is set to TRUE in Siebel Call Center. To check that Siebel Chat has been installed for Siebel Call Center, complete the steps in the following procedure.

To check that Siebel Chat has been installed for Siebel Call Center

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the appropriate chat configuration record, then query for the IsChatEnabled parameter.
If IsChatEnabled is set to TRUE, Siebel Chat has been installed for Siebel Call Center.

Checking That All Server Component Groups are Started for Siebel Call Center

To enable agents to receive inbound chats, administrators must ensure that all relevant server component groups are up and running for Siebel Call Center. If server component groups are not started, then administrators must start them from either Siebel Call Center or the command line, as described in the following procedures.

Starting Server Component Groups from Siebel Call Center

To start the server component groups from Siebel Call Center, complete the steps in the following procedure.

To start the server component groups from Siebel Call Center

- 1 Navigate to the Administration - Server Configuration screen, then the Enterprises view, and click the Component Groups tab.
- 2 Query for the following component groups one at a time, then click the Enable button and ensure that there is a check mark in the Enabled on Server? Component Group Assignment panel.
 - a Communication Management
 - b Workflow Management
 - c Enterprise Application Integration (EAI)

d Siebel Remote.

Starting Siebel Remote is optional, as it is only needed when agents are using a remote client to connect to the Siebel application.

NOTE: Without enabling the Communication Management, Workflow Management, and EAI, Siebel Chat agents will not be able to receive inbound chats.

- 3** Click the Synchronize tab, then the Synchronize button.
- 4** Restart the Siebel Server.

Starting Server Component Groups from the Command Line

Use the following procedure to start server component groups from the command line.

To start server component groups from the command line

- 1** Log in to the Siebel Server to connect to the application database:

```
<Siebel_build>\ses\siebsrvr\bin >smgr
```

- 2** Enable the server component groups:

```
srvrmgr> enable compgrp CommMgmt  
Command completed successfully.
```

```
srvrmgr> enable compgrp EAI  
Command completed successfully.
```

```
srvrmgr> enable compgrp workflow  
Command completed successfully.
```

```
srvrmgr> exit
```

```
\\ Use the following when setting environment parameters in WINDOWS:  
\\ <Siebel_build>\ses\siebsrvr\bin>Set SIEBEL_DEBUG_FLAGS=16
```

```
\\ Use the following when setting environment parameters in UNIX:  
\\ <Siebel_build>\ses\siebsrvr\bin >setenv SIEBEL_DEBUG_FLAGS 16
```

- 3** Connect back to the application database:

```
<Siebel_build>\ses\siebsrvr\bin>smgr
```

- 4** To synchronize:

```
srvrmgr>sync
```

- 5** Restart the Siebel Server.

About the Communications Toolbar

The communications toolbar in Siebel Call Center displays the functions related to chat that are available for Siebel Chat. Installing and setting up Siebel Chat updates the functionality of the communications toolbar to start supporting chat interactions.

The communications toolbar is defined and configured in Siebel Tools, like other toolbars in Siebel applications. For more information about configuring the communications toolbar and about the functions available on the communications toolbar, see *Siebel Communications Server Administration Guide*.

Using the communications toolbar, agents can sign in to the Siebel Chat channel and make themselves available for incoming chat requests, put chats on hold, transfer, release, and wrap-up chats. For more information about these tasks, see the following:

- [“Logging in to Siebel Chat” on page 54](#)
- [“Accepting an Incoming Chat” on page 56](#)
- [“Responding to an Incoming Chat” on page 56](#)
- [“Handling Siebel Chat Sessions” on page 61](#)
- [“Transferring Siebel Chat Interactions to Others” on page 63](#)
- [“Releasing Siebel Chat Sessions” on page 64](#)
- [“Wrapping Up Siebel Chat Sessions” on page 66](#)
- [“Closing Siebel Chat Sessions” on page 68](#)
- [“Changing Agent Status” on page 72](#)

NOTE: Most functions available on the communications toolbar support voice, email, and chat.

Logging in to Siebel Chat

When you have successfully installed Siebel Chat, you can launch it from your Siebel Call Center application. To log in to Siebel Chat, complete the steps in the following procedure.

To log in to Siebel Chat

- 1 Log in to your Siebel Call Center application.
- 2 Click the Log in button on the communications toolbar to log in to the chat channel.

You are now ready to:

- Receive, accept, and respond to inbound chat requests
- Transfer, release, and wrap up chat interactions
- Change your status from ready to not ready (and conversely)

You can perform all of these actions using the functions related to chat that are available on the communications toolbar. For more information about the communications toolbar, see [“About the Communications Toolbar” on page 54](#).

Receiving a New Chat

Generally, a customer requests a chat by completing a chat request form. This form can include the following information:

- **Product Type.** The Product Name or Serial Number.
- **Problem Summary.** A short description of the problem.
- **Problem Description.** A detailed description of the problem, including the steps or activities that led up to the problem's occurrence.
- **Name.** The customer's first name and last name.
- **Email Address.** The customer's email address.
- **Phone Number.** The customer's contact phone number.

Siebel Chat uses the information that the user provides on the chat request form to route the chat interaction to a particular workgroup queue. For more information about routing chat interactions, see ["Planning Routing Strategy for Siebel Chat" on page 85](#).

When an agent (using the Siebel Call Center application) receives a new chat:

- The Accept Work Item button on the communications toolbar flashes to notify that a chat request has been queued.
- At the same time, the communications toolbar displays a message to identify the user requesting a chat, for example, as follows:
Chat Request from customer@company.com
- When the agent accepts the chat, the customer dashboard automatically pre-populates with the following information, if provided by the customer on the chat request form:

Customer Name
Phone Number
Email Address

For anonymous chat users, the customer dashboard remains blank. For more information about the customer dashboard, see ["About the Customer Dashboard" on page 70](#).

- If a known customer provides a new phone number or email address on the chat request form, then this information is flagged as new to the agent when displayed on the customer dashboard.

Agents can then update the customer's contact information, as described in ["Updating Customer Contact Details Using the Siebel Chat Dashboard" on page 71](#).

Accepting an Incoming Chat

Agents accept an incoming chat that has been queued to them by clicking the Accept Work Item button, when it flashes, on the communications toolbar of the Siebel Call Center application followed by the Accept Chat button. By default, when an agent accepts a chat, the agent automatically becomes *not ready* (or unavailable) for other channels.

If an agent does not accept an incoming chat:

- The status of that agent automatically changes to not ready, and no further incoming chats are queued to that agent until that agent changes the status back to ready. Agent status is indicated by the status button (State: ready or State: not ready) on the communications toolbar. For more information about agent status, see ["Changing Agent Status" on page 72](#).
- Depending on workgroup setup in Oracle Contact On Demand, the customer requesting the chat is either disconnected if no agents are available, or waits in the queue for the next available agent.

The length of time that a customer waits can be configured during workgroup setup. For more information about workgroups, see ["Setting Up Workgroups in Oracle Contact On Demand Administration Manager" on page 90](#).

While the customer waits, Web pages can be pushed to the customer according to chat project setup in Oracle Contact On Demand. For more information about projects, see ["Setting Up a Chat Project in Oracle Contact On Demand Administration Manager" on page 88](#).

To accept an incoming chat

- 1 Click the flashing Accept Work Item button on the communications toolbar, then the Accept Chat button.

NOTE: Clicking the Accept Work Item button expands it to reveal a number of further buttons, including Accept Call, Accept Email, and Accept Chat. You must click the Accept Chat button to accept the incoming chat.

A chat pane opens in an action pane to the right of your Siebel Call Center application and its dashboard is pre-populated with the information provided by the user on the chat request form. The customer dashboard in Siebel Call Center also opens, showing customer information.

- 2 Respond to the incoming chat as described in ["Responding to an Incoming Chat" on page 56](#).

Responding to an Incoming Chat

When an agent accepts an incoming chat as described in ["Accepting an Incoming Chat" on page 56](#), the agent can respond to the chat in several different ways as described in the following procedure.

To respond to an incoming chat

- 1 Accept the incoming chat as described in ["Accepting an Incoming Chat" on page 56](#).
- 2 In the message area of the chat pane, respond to the incoming chat using one or a combination of the following:

- a** Send a message to the customer as described in [“Sending a Message” on page 57](#).
 - b** Push a Web URL to the customer as described in [“Pushing a Web URL” on page 58](#).
 - c** Search for information to handle the chat as described in [“Executing a Search Using Smart Search” on page 58](#).
 - d** Share information with the customer as described in [“Sharing Information Using Smart Share” on page 59](#).
- 3** Depending on the information provided by the customer on the chat request form (contact ID, service request ID), do one of the following:
 - Create a new activity, where a service request already exists
 - Create a new service request (if configured), where no service request exists
 - Otherwise, create a new activity for the contact

For anonymous chats, a service request is always created and also a corresponding activity.

An activity is created either under a Service Request or a Contact record. For more information about activities, see [“Reviewing Inbound Siebel Chat Activities” on page 59](#). For more information about manually creating a service request, see [“Creating a Service Request Manually” on page 70](#).

- 4** Release the chat as described in [“Releasing Siebel Chat Sessions” on page 64](#).
- 5** If configured, wrap-up the chat.

You can only wrap up a chat after the chat session has been released by either the agent or the customer. For more information about wrapping up a chat session, see [“Wrapping Up Siebel Chat Sessions” on page 66](#).

Sending a Message

Agents have a global list of predefined message responses at their disposal to send to customers, as required, when handling chat interactions. In responding to chat requests, agents can type a message response or they can send a predefined message response, as described in the following procedure.

To use predefined message responses, you must set up frequently used text for Siebel Chat first, see [“Setting Up Frequently Used Text in Siebel Call Center for Siebel Chat” on page 34](#).

To send a message

- 1** In the message area of the chat pane, type in the message response, then click Send.
- 2** If required, send a predefined message response as follows:
 - a** In the message area of the chat pane, click the Frequently Used Text button.
 - b** Pick a frequently used text (FUT) option from the list that displays, then click OK.

Agents can formulate a message response using any combination of frequently used text and typed in text. Agents can also manually edit frequently used text before sending it. All responses that you send to a customer appear in the transcript area of the chat pane.

Pushing a Web URL

Agents have a global list of Uniform Resource Locators (URLs) at their disposal to share with customers using push URL technology. When agents share a URL with a customer, it is automatically displayed in the customer's browser; the customer does not have to manually copy and paste the URL in to a browser window.

In responding to an incoming chat, agents can type the URL address of a page that they want to share or they can push a predefined URL, as described in the following procedure.

To push predefined Web URLs, you must set up a global URL library for Siebel Chat first.

For more information about URL library setup, see ["Setting Up a Global URL Library in Siebel Call Center for Siebel Chat" on page 36](#).

To push a Web URL

- 1 In the push URL area of the chat pane, enter the URL address of the page you want to send, then click the Push URL button.
- 2 If required, push a predefined Web URL as follows:
 - a In the push URL area of the chat pane, click the URL Library button.
 - b Pick a URL option from the list that displays, then click OK.

NOTE: Pushed URLs can either appear in a frame within the customer's chat window, or in a completely new browser window, depending on configuration. Where a new browser window is launched, subsequent URL pushes simply refresh the same window. For more information about push URL configuration, see ["Configuring the Behavior of Push URL" on page 80](#).

All URLs that you send to a customer appear in the transcript area of the chat pane.

Executing a Search Using Smart Search

Siebel Chat is integrated with Oracle's Siebel Search framework. A search executes automatically when an agent accepts a chat. In addition, agents can use the Smart Search button in the chat pane to execute a search using text highlighted inside the transcript window.

To execute a search using Smart Search as described in the following procedure, search must be configured in Siebel Call Center first. For more information about search configuration, see ["Configuring Search in Siebel Call Center for Siebel Chat" on page 37](#).

To execute a search using Smart Search

- 1 In the chat transcript area of the chat pane, highlight the text that you want to use as the search criteria.
- 2 In the message area of the chat pane, click the Smart Search button to automatically search the Oracle Knowledge Base. Review the results that display.

Sharing Information Using Smart Share

Using the Smart Share button in the chat pane, agents can share highlighted text, service request details, and solution details with customers.

To share information using Smart Share

- In the message area of the chat pane, click the Smart Share button to do one of the following:
 - Copy the selected text in an attribute field from the currently active Siebel Call Center view into the message area.
 - Paste the service request number and summary of a selected Service Request into the message area; that is, where a single service request record is selected from either a Siebel Call Center list or form view
 - Paste the solution ID and description of a selected Solution into the message area; that is, where a single solutions record is selected from either a Siebel Call Center list or form view.

Reviewing Inbound Siebel Chat Activities

Agents can review inbound chat activities, and inbound chat activities associated with individual contacts, and service requests.

- To review inbound chat activities, complete the steps in the following procedure.
- To review inbound chat activities associated with individual contacts and service requests, see the following:
 - [“Reviewing Inbound Siebel Chat Activities Associated with Service Requests” on page 60](#)
 - [“Reviewing Inbound Siebel Chat Activities Associated with Contacts” on page 61](#)

To review inbound chat activities

- 1 Navigate to the Activities - Activities List view.
- 2 Click Query and select Chat - Inbound from the Type drop-down list to display a list of inbound chat activities.
- 3 Click an inbound chat activity to open and review it. In the Chat - Inbound screen that opens:
 - a Go to the Chat Info tab, and review the chat-related information associated with the inbound chat activity.

The following table describes the fields within the Chat Info tab.

| Field Name | Description |
|------------------------|---------------------|
| Name Provided | User name. |
| Email Address Provided | User email address. |

| Field Name | Description |
|---------------------|---|
| Phone Provided | User telephone number. |
| Product | The product that the user is using. |
| Problem Description | Description of the problem encountered by the user. |
| Area | The product area where the problem occurred. |
| Sub Area | The product subarea where the problem occurred. |
| SR Number | The service request number associated with this inbound chat activity, if any. Click SR Number to drill down on a detailed view of the service request. |
| SR Description | A brief description of the service request associated with this inbound chat activity. |

- b** Go to the Attachments tab and click the chat_transcript file to open and review the entire transcript of the inbound chat activity.
Click any other file attachment to open up, and review the solution content.
- c** Go to the Wrap-Up tab, and review activity outcome, feedback, and reason. For more information about wrap-up, see ["Wrapping Up a Chat" on page 67](#).

Reviewing Inbound Siebel Chat Activities Associated with Service Requests

Agents can review inbound chat activities associated with individual service requests. To review inbound chat activities associated with a service request, complete the steps in the following procedure.

To review inbound chat activities associated with a service request

- 1** Navigate to the Service screen, then the Service Requests List view.
- 2** Click or query for the service request that you want to review.
- 3** Go to the Activities tab, click Query, select Chat - Inbound from the Type drop-down list, then click Go to display the inbound chat activities associated with this service request.
- 4** Click an inbound chat activity to open and review it. In the Chat - Inbound screen that opens:
 - a** Go to the Chat Info tab and review the chat-related information associated with the inbound chat activity. For a description of the fields within the Chat Info tab, see ["Reviewing Inbound Siebel Chat Activities" on page 59](#).
 - b** Go to the Attachments tab and click the chat_transcript file to open and review the entire transcript of the inbound chat activity. Click any other file attachment to open up, and review the solution content.
 - c** Go to the Wrap-Up tab and review wrap-up outcome, feedback, and reason. For more information about wrap-up, see ["Wrapping Up a Chat" on page 67](#).

Reviewing Inbound Siebel Chat Activities Associated with Contacts

Agents can review inbound chat activities and solutions associated with individual contacts. To review inbound chat activities associated with a contact, complete the steps in the following procedure.

To review inbound chat activities associated with a contact

- 1** Navigate to the Contacts screen, then the Contacts List view.
- 2** Click or query for the contact that you want to review.
- 3** Go to the Activities tab, click Query, select Chat - Inbound from the Type drop-down list, then click Go to display the inbound chat activities associated with this contact.
- 4** Click an inbound chat activity to open and review it. In the Chat - Inbound screen that opens:
 - a** Go to the Chat Info tab and review the chat-related information associated with the inbound chat activity. For a description of the fields within the Chat Info tab, see ["Reviewing Inbound Siebel Chat Activities" on page 59](#).
 - b** Go to the Attachments tab and click the chat_transcript file to open and review the entire transcript of the inbound chat activity. Click any other file attachment to open up, and review the solution content.
 - c** Go to the Wrap-Up tab and review wrap-up outcome, feedback, and reason. For more information about wrap-up, see ["Wrapping Up a Chat" on page 67](#).

Handling Siebel Chat Sessions

This topic includes information about the following:

- ["Showing and Hiding the Siebel Chat Pane" on page 62](#)
- ["Handling Multiple Simultaneous Siebel Chat Sessions" on page 62](#)
- ["Transferring Siebel Chat Interactions to Others" on page 63](#)
- ["Handling Transferred Siebel Chat Interactions" on page 64](#)
- ["Releasing Siebel Chat Sessions" on page 64](#)
- ["Wrapping Up Siebel Chat Sessions" on page 66](#)
- ["Closing Siebel Chat Sessions" on page 68](#)
- ["Guidelines for Handling Unsuccessful Siebel Chat Interactions" on page 69](#)

Showing and Hiding the Siebel Chat Pane

Use the following procedure to show (open) and hide (close) the chat pane. Closing the chat pane does not destroy any active chat sessions.

To show and hide the chat pane

- Click Chat on the global toolbar of Siebel Call Center to open (show) and close (hide) the chat pane, as required.

NOTE: To close the chat pane, agents can also click the Close button in the upper right-hand corner of the chat pane. For more information, see ["Closing Siebel Chat Sessions" on page 68](#).

Handling Multiple Simultaneous Siebel Chat Sessions

Agents can handle multiple chat sessions simultaneously, up to a limit set by the administrator in Oracle Contact On Demand Administration Manager. For more information about setting the maximum number of simultaneous chat sessions for an agent (the default is 5), see ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager" on page 87](#).

Where multiple chat sessions are ongoing, agents can move between each chat session without losing context. If multiple chat sessions are open, they are represented by tabs across the top of the chat pane where:

- Each chat tab shows the first name of the customer.
- A number appears after the customer name (for example, John: 3) representing the number of messages sent by the customer since the chat was last viewed by the agent.
- If you hover the mouse over the tab, the last message received is shown without making the agent switch to the chat.

If multiple chat sessions are ongoing, you can switch between chat sessions using either the chat tabs or the communications toolbar; however, the behavior in each case is different as described in the following procedures:

- ["Switching Between Chat Sessions Using Chat Tabs" on page 62](#)
- ["Switching Between Chat Sessions Using the Communications Toolbar" on page 63](#)

NOTE: It is recommended that you use chat tabs to switch between chat sessions and avoid using the communications toolbar, which is less efficient and prone to error.

Switching Between Chat Sessions Using Chat Tabs

By default, all open chat sessions are automatically put on hold except for the chat session that is currently active. When an agent moves away from the currently active chat session by clicking another chat tab, the previously active chat is automatically placed on hold and the previously suspended chat is resumed.

Where all chat sessions are on hold and an agent accepts a new incoming chat, then that new chat becomes the active chat session and all other chat sessions remain on hold.

To switch between chat sessions using chat tabs

- 1 In the chat pane, click the chat tab belonging to the chat session that you want to move to.
- 2 Resume work on the active chat session as described in, for example, [“Responding to an Incoming Chat” on page 56](#) and [“Reviewing Inbound Siebel Chat Activities” on page 59](#).

Switching Between Chat Sessions Using the Communications Toolbar

Agents can manually switch between chat sessions using the drop-down list of currently open chats, the Hold Work Item button, and the Resume Work Item button on the communications toolbar. If you put a chat session on hold using the communications toolbar, then you must use the communications toolbar to resume another chat session as well. Switching between chat sessions using the communications toolbar is a two-step process described in the following procedure.

To switch between chat sessions using the communications toolbar

- 1 Put the active chat session on hold by selecting it from the drop-down list of currently open chats, then click the Hold Work Item button.

At this point, all chat sessions are on hold because no chat has been resumed yet. In addition, all chat tabs are disabled and will remain disabled until you resume another chat session using the communications toolbar.

- 2 Resume a different chat session by selecting it from the drop-down list of currently open chats, then click the Resume Work Item button.

Transferring Siebel Chat Interactions to Others

It is possible for an agent to transfer (or reassign) a chat, which the agent has already accepted, to another workgroup. Currently, agent to agent transfer is not supported by Siebel Chat. Transferred chats are processed exactly the same way as other incoming chats. However, it is possible to monitor the total number of interactions transferred into a workgroup and transferred out of a workgroup by setting up a Workgroup Statistics View in Oracle Contact On Demand Supervision Manager. For more information about setting up views in Oracle Contact On Demand, see [“About Setting Up Views in Oracle Contact On Demand Supervision Manager” on page 95](#).

When a chat is transferred, the *chat transferred* activity created by the transferring agent is updated to associate the receiving agent with the activity, and the chat transcript is attached to the activity. While a chat is being transferred, the customer is not able to submit any messages to the agent until the (new) receiving agent accepts the transferred chat.

To transfer a chat to another workgroup, complete the steps in the following procedure.

To transfer a chat to another workgroup

- 1 Select the chat that you want to transfer:
 - In the Siebel Chat interface, click the tab of the chat interaction that you want to transfer.
- 2 Click the Get Transfer List button on the communications toolbar of Siebel Call Center.

- 3 Click a workgroup record on the Begin Blind Transfer to: list to select a destination for the chat that you want to transfer, and click OK.

NOTE: Any messages that the customer sends while the agent is transferring a chat are lost; that is, they are not captured in the chat window or transcript.

Handling Transferred Siebel Chat Interactions

Agents handle transferred chats more or less the same way as other incoming chats. When a chat is transferred, the only way to distinguish it from a new incoming chat is by the presence of a chat transcript (that is, by the presence of the chat exchanges that took place between the previous agent and the customer) in the transcript area of the chat pane. To handle a transferred chat, complete the steps in the following procedure.

To handle a transferred chat

- 1 The receiving agent receives the transferred chat interaction, see ["Receiving a New Chat" on page 55](#), and clicks the Accept Work Item button, then the Accept Chat button on the communications toolbar.
- 2 The receiving agent reviews the chat transcript (if there is one) in the transcript area of the chat pane, and the activity linked to the transferred chat by selecting View Activity from the Action drop-down menu in the chat dashboard.

For more information about how agents review chat activities and transcripts, including inbound chat activities associated with service requests and contacts, see ["Reviewing Inbound Siebel Chat Activities" on page 59](#).

- 3 The receiving agent responds to the transferred chat, see ["Responding to an Incoming Chat" on page 56](#).

Releasing Siebel Chat Sessions

When agents or customers release a chat session, they are ending the chat session. Agents use the communications toolbar of Siebel Call Center to release a chat and, if configured, wrap-up the chat session. Customers click the Terminate (or similar) button in their browser window to release a chat.

When an agent or customer releases a chat session, a follow-up email can be sent to the customer with a transcript of the chat session attached, provided the system preference Chat: Auto Email Mode is set, and that outbound email communications and an email profile are set up in Siebel Call Center. This practice, however, is separate from wrapping up a chat session. You can decide not to configure wrap-up for Siebel Chat but to always send an email when a chat session is released. In the case where a chat is transferred several times, the follow-up email is sent only upon final release of the chat session.

- For information about email profile setup in Siebel Call Center, see ["Process of Setting Up an Email Profile in Siebel Call Center" on page 41](#).
- For information about outbound email communications setup in Siebel Call Center, see ["Setting Up Outbound Email Communications in Siebel Call Center" on page 39](#).

- For information about chat session wrap-up, see [“Wrapping Up Siebel Chat Sessions” on page 66](#).

Releasing a Chat

To release a chat where wrap-up is not configured for Siebel Chat, complete the steps in the following procedure.

To release a chat where wrap-up is not configured

- 1 Select the chat session that you want to release.
- 2 Click the Release Work Item button on the communications toolbar to release the chat session.

Doing this removes the chat tab from the chat pane, and makes the agent immediately available for the next chat request. Depending on configuration, a follow-up email is sent to the customer as follows:

- If the system preference Chat: Auto Email Mode is set to POPUP, agents are automatically prompted to send a follow-up email to customers with the chat transcript attached.
- If system preference Chat: Auto Email Mode is set to SEND, then an email is automatically sent to customers, without prompting the agent, with the chat transcript attached.
- If Chat: Auto Email Mode is set to NONE, then no follow-up email is sent to the customer.

For more information about setting system preferences for chat, see [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 40](#).

Releasing a Chat Where Wrap-Up Is Configured

Wrap-up must be configured for Siebel Chat for agents to release and wrap-up chat sessions. To release a chat where wrap-up is configured, complete the steps in the following procedure.

To release a chat where wrap-up is configured

- 1 Select the chat session that you want to release.
- 2 Start wrap-up by clicking the Release Work Item button on the communications toolbar to release the chat session.

Doing this starts the wrap-up clock. Where wrap-up is configured and a customer ends a chat, then this also starts the wrap-up clock. For information about how to configure the amount of time that agents have to wrap up a chat session, see [“Configuring Wrap-Up for Siebel Chat” on page 66](#).

- 3 Wrap-up the chat session, see [“Wrapping Up a Chat” on page 67](#).
- 4 End wrap-up by clicking the End Wrapup button on the communications toolbar.

NOTE: This is the Release Work Item button in [Step 1](#), but with a different label.

Doing this stops the wrap-up clock, removes the chat tab from the chat pane, and makes the agent available for the next chat request. Depending on configuration, a follow-up email is sent to the customer as follows:

- If the system preference Chat: Auto Email Mode is set to POPUP, agents are automatically prompted to send a follow-up email to customers with the chat transcript attached.
- If system preference Chat: Auto Email Mode is set to SEND, then an email is automatically sent to customers, without prompting the agent, with the chat transcript attached.
- If Chat: Auto Email Mode is set to NONE, then no follow-up email is sent to the customer.

NOTE: If the wrap-up clock runs out before an agent has finished wrapping up a chat session, then this also ends wrap-up, removes the chat tab from the chat pane, makes the agent available for the next chat request, and sends a follow-up email to the customer if so configured.

Wrapping Up Siebel Chat Sessions

When a chat session is released by either an agent or a customer, agents can wrap up the interaction provided that wrap-up is configured for Siebel Chat. If wrap-up is configured for Siebel Chat, agents can record wrap-up details for the chat interaction in Siebel Call Center.

For more information about wrapping up a chat session, see the following:

- ["Configuring Wrap-Up for Siebel Chat" on page 66](#)
- ["Wrapping Up a Chat" on page 67](#)
- ["Wrapping Up a Transferred Chat" on page 68](#)

Configuring Wrap-Up for Siebel Chat

To configure wrap-up for Siebel Chat, you must enable wrap-up for user accounts in Oracle Contact On Demand Administration Manager, and specify the amount of time that agents will be given to wrap-up chats.

To enable wrap-up for a user account in Oracle Contact On Demand

- 1 Navigate to the Options screen, then the Agents view in Oracle Contact On Demand Administration Manager, and select an agent.
- 2 Go to the Controls and Restrictions tab, and enable wrap-up for the user account:
 - a Select the Allow Wrap-up Time After Call check box.
 - b Specify the amount of time (in seconds) that the agent will be given to wrap-up an interaction. After this specified time, wrap-up ends and the agent is available for the next chat request.

NOTE: Wrap-up starts from when a customer or agent releases a chat, and continues until either the agent ends the wrap-up or the wrap-up time runs out. For more information about releasing and wrapping up a chat session, see ["Releasing a Chat Where Wrap-Up Is Configured" on page 65](#).
 - c Click OK or the Apply button to save the changes.

For more information about user accounts, see ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager" on page 87](#).

Wrapping Up a Chat

Wrap-up can be performed by the agent handling a chat interaction when the chat session is released, provided wrap-up is enabled for the agent's user account in Oracle Contact On Demand (described in ["Configuring Wrap-Up for Siebel Chat" on page 66](#)).

To wrap up a chat in Siebel Call Center

- 1 When a chat session is released (see ["Releasing a Chat Where Wrap-Up Is Configured" on page 65](#)), point your mouse to the center of the screen to set focus, then press the Alt-W hot key to navigate to the Wrap-up tab for the corresponding inbound chat activity.

By default, the multichannelC.def file defines the hot key (Alt-W) that is used to navigate the agent's screen to the Wrap-up tab. This default hot key can be changed by modifying multichannelC.def, then importing the new file in to your communications configuration. The hot key combination that you set must be unique. For more information about multichannelC.def, see ["Configuring Communications in Siebel Call Center for Siebel Chat" on page 27](#).

NOTE: Agents can access the Wrap-up tab at any time by navigating to the Activities - Activities List view, selecting an inbound chat activity, and then the Wrap-up tab. The Wrap-up tab is a generic Siebel applications applet, which can be modified using Siebel Tools.

- 2 On the (Wrap-up tab of the) Chat - Inbound screen that opens, specify the following:
 - a Activity Outcome: The result of handling the inbound chat request
 - b Activity Feedback: Satisfaction with the outcome
 - c Activity Reason: The area where the inbound chat interaction applies

The following table describes the default LOVs available within the Wrap-up tab. These values can be modified, using Siebel Tools, to fit your specific business needs. To add a new wrap-up LOV or modify an existing one, see ["Extending Wrap-Up LOVs in Siebel Call Center for Siebel Chat" on page 36](#).

| Field Name | Description |
|-------------------|---|
| Activity Outcome | Record the result of handling the inbound chat request. Options are: <ul style="list-style-type: none"> ■ No answer ■ Problem solved ■ Left a message ■ Payment taken |
| Activity Feedback | Record satisfaction with handling the chat request. Options are: <ul style="list-style-type: none"> ■ Satisfied ■ Unsatisfied ■ Somewhat satisfied |

| Field Name | Description |
|-----------------|--|
| Activity Reason | Specify the area where the chat request applies. Options are: <ul style="list-style-type: none"> ■ General inquiry ■ Customer support ■ Technical support ■ Other reason |

Wrapping Up a Transferred Chat

If an agent reassigns a chat interaction to another workgroup, both the transferring and the receiving agent can perform wrap-up on the interaction, if configured to do so. In such a case, the sequence of events is as described in the following procedure.

To wrap up a transferred chat in Siebel Call Center

- 1 The transferring agent reassigns the chat to another workgroup. For more information about how to reassign a chat, see ["Transferring Siebel Chat Interactions to Others" on page 63](#).
- 2 The transferring agent is prompted to wrap up the chat that is reassigned. For more information about wrapping up a chat, see ["Wrapping Up a Chat" on page 67](#).
- 3 When the receiving agent accepts the reassigned chat, a new chat activity is created.
This new chat activity has the same interaction ID as the reassigned chat from [Step 1](#). Transferred chats also retain their links to service requests and contacts.
- 4 The receiving agent is prompted to wrap-up when the chat session is released. For more information about wrapping up a chat, see ["Wrapping Up a Chat" on page 67](#).

Closing Siebel Chat Sessions

Typically, when an agent or customer releases a chat session, all action buttons within the chat pane are disabled, but agents can still read a transcript of the chat interaction in the chat transcript area. To close the chat session, agents must do one of the following:

- Where only one chat session is open, agents must close the chat pane.
- Where multiple chat sessions are open and the current chat session is released, agents must either close the chat pane belonging to the current chat session, or switch to another chat tab to close the chat pane belonging to the current chat session.
- Where multiple chat sessions are open, and a chat session in the background is released, the chat pane belonging to the released chat session is automatically closed.

Use the following procedure to manually close a chat pane.

To close a chat pane

- Click the Close button in the upper right-hand corner of the chat pane.

Guidelines for Handling Unsuccessful Siebel Chat Interactions

If an agent cannot find a satisfactory solution for an inbound chat request, then the agent can do one or more of the following:

- Search for and review other shared solutions to see if one might be useful.
- Create a new predefined message response capturing the information, see ["Setting Up Frequently Used Text in Siebel Call Center for Siebel Chat" on page 34](#).
- Create a new solution and add it to the URL library, see ["Setting Up a Global URL Library in Siebel Call Center for Siebel Chat" on page 36](#).
- Associate the (new) solution with the appropriate activity, contact, or service request. Agents can associate solutions with:
 - Inbound chat activities by navigating to the Activities - Activities List view.
 - Service requests by navigating to the Service screen, then the Service Requests List view.
 - Contact records by navigating to the Contacts screen, then the Contacts List view.

For more information about inbound chat activities, see ["Reviewing Inbound Siebel Chat Activities" on page 59](#).

- Reassign the chat interaction to another workgroup, see ["Transferring Siebel Chat Interactions to Others" on page 63](#).

Siebel Chat Dashboard

The Siebel Chat dashboard in the chat pane displays details about the problem that the customer is having based on information passed by the customer on the chat request form, including the following:

- **Area.** The area where assistance is needed.
- **Subarea.** The subarea within the area where assistance is needed.
- **Product.** The Product ID of the area or subarea where assistance is needed.
- **Summary.** A summary of the problem (if provided).
- **KB Visited.** A list of knowledge base articles that the customer has viewed prior to requesting a chat with an agent. The agent can choose an item from the list and navigate to its detail page.
- **Action.** The Action drop-down menu contains a number of quick actions that the agent can perform on an incoming chat, including the following:
 - ["Creating a Service Request Manually" on page 70](#)
 - ["Viewing Service Requests, Activities, and Contacts Using the Siebel Chat Dashboard" on page 71](#)
 - ["Updating Customer Contact Details Using the Siebel Chat Dashboard" on page 71](#)

Related Topics

["About the Customer Dashboard" on page 70](#)

["Minimizing the Siebel Chat Dashboard" on page 71](#)

About the Customer Dashboard

The customer dashboard in Siebel Call Center automatically shows customer contact information (Customer Name, Phone Number, and Email Address), if provided on the chat request form. The purpose of the customer dashboard is to alert the agent if the customer requesting a chat provides profile information which does not match the contact record. For example, if the phone number or email address provided by a known customer does not match the contact record on file, then an exclamation mark (!) appears next to these fields indicating to the agent that this information is new. Agents can then update the customer's contact information as described in ["Updating Customer Contact Details Using the Siebel Chat Dashboard" on page 71](#). For more information about configuring the customer dashboard, see *Configuring Siebel Business Applications*.

Creating a Service Request Manually

To manually create a service request using the chat dashboard in the chat pane, complete the steps in the following procedure.

NOTE: An activity can be linked to only one service request at any given time.

To manually create a service request

- 1 Click the Action drop-down menu in the chat dashboard.
- 2 Select Create Service Request to manually create a new service request for an incoming chat.

If this is the first service request that is created for the chat, then the inbound chat activity is associated with it. If this is not the first service request, then this subsequent service request is regarded as standalone - which means that the inbound chat activity is not associated (or linked) to this service request.

NOTE: Once a new service request is created, the agent can associate it with the current chat activity record by navigating to Tools, then Communications in Siebel Call Center, and clicking the Associate button.

By default, the Create Service Request action is contextually smart. It pre-populates the new service request form with data displayed in the customer dashboard and chat dashboard.

Viewing Service Requests, Activities, and Contacts Using the Siebel Chat Dashboard

To view service requests, activities, and contacts using the Siebel Chat dashboard in the chat pane, complete the steps in the following procedure.

To view service requests, activities, and contacts using the chat dashboard

- 1** Click the Action drop-down menu in the chat dashboard.
- 2** Select one of the following, as required:
 - a** Select View Service Requests to view the service requests linked to the incoming chat.
 - b** Select View Activities to view the activities linked to the incoming chat.
 - c** Select View Contact to view the contact details for the incoming chat. This option applies to existing contacts only, not to anonymous chat users.

Updating Customer Contact Details Using the Siebel Chat Dashboard

If an exclamation mark (!) appears next to the phone number or email address fields on the customer dashboard of Siebel Call Center, then this indicates to the agent that the customer's contact information has changed and needs to be updated. For more information about the customer dashboard, see ["About the Customer Dashboard" on page 70](#).

To update customer contact details, use the chat dashboard in the chat pane as described in the following procedure.

To update customer contact details using the chat dashboard

- 1** Select View Contact from the Action drop-down menu in the chat dashboard.
- 2** Update the user's email address or phone number, as required.

Minimizing the Siebel Chat Dashboard

Use the following procedure to show and hide the chat dashboard in the chat pane.

To minimize the chat dashboard

- Click the - window control located in the upper right-hand corner of the chat pane.

Changing Agent Status

When an agent logs into Siebel Chat from the Siebel Call Center application, the agent's status is automatically set to State: ready as indicated by the status button on the communications toolbar. If agents want to change their status from State: ready (available) to State: not ready (unavailable), then they must click the status button on the communications toolbar.

To change agent status

- 1 Log in to your Siebel Call Center application.
- 2 Click the Log in button on the communications toolbar to log in to the chat channel.

Notice that your status, as indicated by the status button on the communication toolbar, is set to State: ready by default.

- 3 Click the status button on the toolbar, as required, to change your status from State: ready to State: not ready (and conversely).

Agent and Siebel Chat Interaction States

Table 8 lists the different chat interaction states that exist for Siebel Chat, which have a visible effect for the agent. Some of these states are automatically forced by Siebel Chat and others are manually triggered by the agent.

Table 8. Agent and Siebel Chat Interaction States

| Interaction State | Description and Siebel Call Center Behavior | Automatic or Manual? |
|-------------------|--|--|
| Active | <p>The chat session is currently active, whereby the agent is actively chatting with the customer.</p> <ul style="list-style-type: none"> ■ The corresponding chat tab (in the chat pane) is in the foreground. ■ The communications toolbar shows this chat as the active chat interaction in the drop-down list of currently open chats. ■ The Chat Activity has a status of In Progress. | Automatic. |
| On Hold | <p>The chat is on hold.</p> <ul style="list-style-type: none"> ■ The corresponding chat tab (in the chat pane) is in the background. ■ The communications toolbar shows another interaction as the active one in the drop-down list of currently open chats. ■ The Chat Activity still has a status of In Progress. | Manual. Agents can place the currently active chat session on hold by clicking another chat tab, or they can use the communications toolbar to switch between chats. For more information, see "Handling Multiple Simultaneous Siebel Chat Sessions" on page 62. |

Table 8. Agent and Siebel Chat Interaction States

| Interaction State | Description and Siebel Call Center Behavior | Automatic or Manual? |
|-------------------|---|--|
| Transferred | <p>The chat has been transferred.</p> <ul style="list-style-type: none"> ■ When the chat is accepted by another agent, the interaction state changes to In Progress. ■ The transferring agent's chat tab is removed once the agent moves onto another chat, or closes the chat pane. ■ The Chat Activity has a status of Transferred. ■ When the transferred chat is accepted by the receiving agent, a new activity is created with a status of In Progress. | <p>Manual. Agents must click the Get Transfer List button on the communications toolbar to transfer a chat interaction that they are currently working on to another workgroup. For more information, see "Transferring Siebel Chat Interactions to Others" on page 63.</p> |
| Wrapping Up | <p>The chat is being wrapped up.</p> <ul style="list-style-type: none"> ■ The agent is no longer able to send or receive messages but can see the chat transcript. However, some functions are still active; for example, smart search and create service request. ■ The chat tab (in the chat pane) is removed once the agent moves onto another chat, or closes the chat pane. | <p>Manual. Provided wrap-up is configured for chat, agents can manually trigger this mode by clicking the Release Work Item button on the communications toolbar.</p> <p>Provided wrap-up is configured for chat, customers can also manually trigger this mode by clicking the Terminate button in their browser window. For more information about wrap-up, see "Wrapping Up Siebel Chat Sessions" on page 66.</p> |
| Terminated | <p>The chat session is released.</p> <ul style="list-style-type: none"> ■ The chat tab (in the chat pane) is removed once the agent moves on to another chat, or closes the chat pane. ■ The Chat Activity has a status of Done. | <p>Manual. Agents can manually release a chat session by clicking the Release Work Item button on the communications toolbar.</p> <p>Customers can also manually release a chat session by clicking the Terminate button in their browser window. For more information about releasing a chat, see "Releasing Siebel Chat Sessions" on page 64.</p> |
| Idle | <p>There has been no activity within a chat session from either the agent or the customer for over two minutes.</p> <p>NOTE: Currently, you cannot configure this two-minute time limit.</p> | <p>Automatic.</p> |

Table 8. Agent and Siebel Chat Interaction States

| Interaction State | Description and Siebel Call Center Behavior | Automatic or Manual? |
|-------------------|---|----------------------|
| Aborted | Either the agent or customer ends the chat session by means other than clicking the Release Work Item or Terminate buttons (for example, a browser is killed or a network mains is unplugged), bypassing wrap-up if configured. | Automatic. |

Table 9 lists the different agent states that exist for Siebel Chat agents. Some of these states are automatically forced by Siebel Chat and others are manually triggered by the agent.

Table 9. Agent States

| Agent State | Description | Automatic or Manual? |
|-------------|--|--|
| Chatting | The agent is engaged, or actively chatting, in at least one chat session. | Automatic. |
| Working | The agent is available to handle chat requests. | Manual. Agents must click the Status button on the communications toolbar to set their status to available (State: Ready). For more information about agent status, see "Changing Agent Status" on page 72 . |
| On Break | The agent is currently unavailable to handle chat requests. | Manual. Agents must click the Status button on the communications toolbar to set their status to unavailable (State: Not Ready). For more information about agent status, see "Changing Agent Status" on page 72 . |
| In Wrap-Up | The agent is busy wrapping up a chat session. | Automatic. This agent state is automatically triggered when just one of an agent's chat sessions is in wrap-up mode. For more information about wrap-up, see "Wrapping Up Siebel Chat Sessions" on page 66 |
| Idle | There has been no activity within any of an agent's active chat sessions for over two minutes. NOTE: Currently, you cannot configure this two-minute time limit. | Automatic. |

Setting Up Logging and Tracing for Siebel Chat Components

Logging and tracing can be set up for the following Siebel Chat components:

- **Oracle Contact On Demand Web Application.** For more information, see [“Turning on Error Logging for the Oracle Contact On Demand Web Application” on page 75.](#)
- **Siebel Communications Server.** For more information, see [“Siebel Communications Server Logging” on page 76.](#)
- **Siebel Server.** For more information, see [“Setting Siebel Server Logging Parameters” on page 76.](#)
- **Siebel Call Center.** For more information, see [“Siebel Chat Logging” on page 77.](#)

Turning on Error Logging for the Oracle Contact On Demand Web Application

Turn on logging for the Oracle Contact On Demand Web application so that you can review any messages that have been logged from the siebel_chat_page.jsp page and its java components. You can turn on logging for the Oracle Contact On Demand Web application, using the web.xml configuration file for the Web application, as described in the following procedure.

To turn on error logging for the Oracle Contact On Demand Web application

- 1 Add the following parameter definition to the web.xml configuration file:

```
<context-param>
  <param-name>debugTraceLevel</param-name>
  <param-value>DEBUG</param-value>
</context-param>
```

The following table describes all the valid logging parameter values that can be set in the web.xml configuration file for the Oracle Contact On Demand Web application.

| Value | Description |
|-------|---|
| FATAL | Logs all fatal message errors. |
| ERROR | Logs all standard message errors. |
| WARN | Logs all warning messages. |
| INFO | Logs all information messages. |
| DEBUG | Enables debugging for the Oracle Contact On Demand Web application. |

- 2 Specify the name of the log file and the location where the log file will be created using the following parameter definition:

```
<context-param>
  <param-name>debugLogFile</param-name>
```

```
<param-value>/WEB-INF/logs/taw.log</param-value>
</context-param>
```

- 3 Review any messages that have been logged by searching for *siebel_chat_page.jsp* in the log file.

NOTE: Customers can choose to turn on logging when submitting a chat request using the chat request test page. This allows messages written from the JavaScript running in the browser to be viewed in a separate browser window.

Siebel Communications Server Logging

Siebel Communications Server logging is carried out using the following mechanisms:

- **Communications Session Logging.** Logs information and errors related to the processing of chat interactions in the Siebel Communications Server and components.

Communications session logging can be turned on by setting the LogFile and LogDebug parameters in the Communication Session Manager server component.

All Chat UI Business Service messages (for example, in relation to Siebel Chat commands and events) are logged to this file.

- **Driver Logging.** Logs any Oracle Contact On Demand driver-specific information and errors.

Driver logging can be turned on during driver configuration, using the Driver:LogFile parameter at the Profile Parameter Override level. For more information about driver configuration, see ["Configuring Communications in Siebel Call Center for Siebel Chat" on page 27](#).

For more information about Siebel Communications Server session logging and driver logging, see *Siebel Communications Server Administration Guide*.

Setting Siebel Server Logging Parameters

Set Siebel Server logging parameters as described in the following procedure.

To set Siebel Server logging parameters

- 1 Navigate to the Administration - Server Configuration screen, then the Servers view.
- 2 Select your Siebel Server, and then its Call Center Object Manager component.
- 3 Set the following parameters to the value specified:

| Parameter | Value |
|-------------------|--|
| Log Debug Message | Set to True. |
| Log File | Set to the name of your log file. |
| Log Level | Set to a value between 1 and 5, where 1 represents the least logging and 5 the most logging (debug). |

Siebel Chat Logging

In Siebel Call Center, chat logging is carried out using the standard application logging mechanisms:

- **CCF Logging.** Logs information and errors related to the processing of chat interactions in the Siebel Call Center application components.
- **SARM Logging.** Logs performance profiling messages from the chat application components.

The standard client-side logging capabilities of Siebel Call Center are also used for customer Siebel Chat logging, whereby logging is set up and controlled from the customer's workstation using the environment variables described in [Table 10](#).

Table 10. Logging Environment Variables

| Environment Variable | Description |
|------------------------|---|
| SEBLCL_TRACEMODE | Controls the log mode/device choice. Set this variable to 2 to log to file. |
| SEBLCL_TRACEUNICODE | Enables tracing in Unicode mode. This variable is useful for tracing international language data, and is disabled by default. |
| SEBLCL_LOGDIR | Specifies the location on client disk where the log file is created. |
| SEBLCL_LOGFILESIZE | Specifies the maximum size of the log file. |
| SEBLCL_LOGARCHIVECOUNT | Specifies the maximum number of logs archived file count. |
| SEBLCL_ALLOWCHATTRACE | Enables Siebel Chat UI logging from the UI ActiveX control if set to TRUE. |

Customizing Siebel Chat

Administrators can configure the appearance of the Siebel Chat interface, the appearance of transcript attachments, and the behavior of the push URL functionality. However, some Siebel Call Center and Siebel Chat-related applets that are configured in Siebel Tools, and called from a custom chat ActiveX control, must not be changed.

For more information about customizing Siebel Chat, see the following:

- ["Process of Configuring the Siebel Chat Interface" on page 78](#)
- ["Configuring the Siebel Chat Customer-Facing Interface" on page 79](#)
- ["Configuring the Appearance of Transcript Attachments" on page 80](#)
- ["Configuring the Behavior of Push URL" on page 80](#)
- ["Siebel Call Center and Siebel Chat-Related Applets" on page 81](#)

Process of Configuring the Siebel Chat Interface

The following steps are involved in the process of configuring the Siebel Chat interface:

- 1 Create a chat.css stylesheet containing the appropriate default parameter definitions for the chat interface, see ["Creating a Chat.css Stylesheet" on page 78](#).
- 2 Modify the chat.css stylesheet to get the required look and feel for the Siebel Chat interface, see ["Modifying the Chat.css Stylesheet" on page 79](#).

Creating a Chat.css Stylesheet

Administrators can configure the appearance of the Siebel Chat interface (chat dashboard, transcript, and message area) by first creating a chat.css stylesheet containing appropriate default parameter definitions for the chat interface, then modifying the chat.css stylesheet as required. To create a chat.css stylesheet, complete the steps in the following procedure.

To create a chat.css stylesheet

- 1 Open up a text editor.
- 2 Add the following default parameter definitions for the chat interface:

```
.chatAxLayout
{
  MinAxHeight:400;
  MinAxWidth:300;
  TitleBarHeight:24;
  TabBarHeight:22;
  ButtonBarHeight:24;
  TextInputHeight:75;
  UrlInputHeight:24;
}

.styleChatAxNormal
{
  TextColor:#000000;
  UrlColor:#000000;
  TimestampColor:#0000FF;
  CustomerTimestampColor:#FF3300;

  CtrlBackgroundColor:#D5E0F4;
  LabelTextBackgroundColor:#EEEEEE;
  ButtonHotColor:#B0C4DE;

  CtrlFont:Arial;
  CtrlFontSize:9;
}

.styleTitleTabBar
{
  TextColor:#123783;
  CtrlBackgroundColor:#ADBEE4;
  TabItemColor:#EFEFEF;
```

```

    TabSelectedColor:#D5E0F4;
    TabHighlightColor:#FF0000;
    ButtonHotColor:#B0C4DE;
}

```

- 3 Save the file as chat.css.

Modifying the Chat.css Stylesheet

You can modify the chat.css stylesheet to get the required look and feel for your Siebel Chat interface. To modify the chat.css stylesheet, complete the steps in the following procedure.

NOTE: The chat.css stylesheet must be created first. For more information, see “Creating a Chat.css Stylesheet” on page 78.

To modify the chat.css stylesheet

- 1 Open the chat.css file.
- 2 Modify the parameters, as required.
- 3 Save the chat.css file to the following location on Siebel Server for the changes to take effect:

```
<Siebel_Build>\siebel\eapps\public\enu\files
```

NOTE: At run time, chat.css is not overwritten by files being updated from the Siebel Server. However, chat.css can be overwritten if the server is upgraded, so save any modifications that you make to chat.css prior to upgrade.

Configuring the Siebel Chat Customer-Facing Interface

You can configure the appearance of the Siebel Chat customer-facing interface by modifying the siebel_chat.css stylesheet, which is part of the Oracle Contact On Demand Web application. This style sheet is located in the deployment directory of the Oracle Contact On Demand Web application:

```
<Deployment Directory>\light\chat
```

To configure the Siebel Chat customer-facing interface, complete the steps in the following procedure.

To configure the Siebel Chat customer-facing interface

- 1 Open the siebel_chat.css file.
- 2 Modify the parameters, as required.
- 3 Save the siebel_chat.css file to the following location for the changes to take effect:

```
<Deployment Directory>\light\chat
```

NOTE: At run time, siebel_chat.css is not overwritten by files being updated from the Siebel Server. However, siebel_chat.css can be overwritten if the server is upgraded, so save any modifications that you make to siebel_chat.css prior to upgrade.

Configuring the Appearance of Transcript Attachments

When a chat session is released, a transcript of the chat session is attached to the activity and also to the email that is sent to the customer at the end of the chat session. Chat transcripts are stored in XML format, but before a transcript is sent as an attachment, it is transformed in to HTML using the chat.xsl file. This file is located in the following directory:

```
<Siebel_Build>\siebel\webtemp1
```

Administrators can configure the appearance of transcript attachments by modifying the chat.xsl file. This file contains parameters that can be modified to get the required look and feel for transcript attachments. To configure the appearance of transcript attachments, complete the steps in the following procedure.

To configure the appearance of transcript attachments

- 1 Open the chat.xsl file.
- 2 Modify the parameters, as required.
- 3 Save the chat.xsl file to the following location on Siebel Server for the changes to take effect.

```
<Siebel_Build>\siebel\webtemp1
```

NOTE: At run time, the chat.xls is not overwritten by files being updated from the Siebel Server. However, chat.xls might be overwritten if the server is upgraded, so save any modifications that you make to chat.xls prior to upgrade.

Configuring the Behavior of Push URL

You can configure the behavior of the push URL functionality for Siebel Chat, whereby pushed content can appear to the user in either one of the following ways:

- In a frame alongside the customer chat UI in the same browser.

This is the default setup for Siebel Chat.

CAUTION: Some Web sites (for example, hotmail.com) with heavy scripting and other background processes might prompt the user with something similar to the following:

You are about to leave the application. Clicking OK will take you away from the chat application, and terminate the chat interaction.

- In a completely new browser (or popup) window.

If you want your pushed content to display in a completely new browser window, then you must modify the Oracle Contact On Demand Web application web.xml configuration file, as described in the following procedure.

If this option is configured, the first URL pushed opens in a new browser window, and subsequent URLs pushed refresh the original browser window.

NOTE: This approach requires that an ActiveX control be downloaded on to the user’s computer. Failure of this ActiveX control to download results in the deactivation of this option, and the activation of the default option (where pushed content appears in a frame alongside the customer chat UI). Popup blockers can also prevent the pushed content from being shown.

To configure the behavior of the push URL functionality for Siebel Chat, complete the steps in the following procedure.

To configure the behavior of the push URL functionality

- 1 Open the Oracle Contact On Demand Web application web.xml configuration file.
- 2 Modify the following option in web.xml:

```
<context-param>
  <param-name>SiebelChatPushedURLASPopup</param-name>
  <param-value>off</param-value>
</context-param>
```

- a Set this option to *on* if you want pushed content to display in a new browser window.
- b Set this option to *off* if you want pushed content to display in a frame alongside the customer chat UI.

- 3 Save the web.xml file.

NOTE: It is not necessary to shut down and restart the servers for this change to take effect, nor for the cache to be cleaned.

Siebel Call Center and Siebel Chat-Related Applets

Some Siebel Call Center and Siebel Chat-related applets are configured in Siebel Tools, and called from a custom chat ActiveX control. The names of these applets, which are listed in [Table 11](#) and called from the chat ActiveX control, must not be changed because they might not function correctly.

Table 11. Siebel Call Center and Siebel Chat-Related Applets

| Applet Name | Description | Business Component |
|--|--|------------------------------------|
| Chat UI Frequently Used Text Pick Applet | Shows a list of frequently used text (FUT) templates to the agent. | Chat Frequently Used Text |
| Chat UI KB Visited Pick Applet | Shows a list of the knowledge base items visited (by a customer requesting a chat) to the agent. | Chat UI KB Visited |
| Chat UI URL Library Pick Applet | Shows a list of the available URLs to push to a customer during a chat. | Chat UI URL Library |
| Chat Web Projects Pick List Applet | Shows a list of Oracle Contact On Demand projects to which a chat interaction can be routed. | Chat Web Projects Pick List Applet |

Specific ActiveX Controls Distributed with Siebel Chat

Table 12 lists the ActiveX controls that are distributed and used with Siebel Chat. Control names reflect the names of the files that are created in the Downloaded Program Files directory when each control is deployed.

Table 12. Siebel Chat-Specific ActiveX Controls

| ActiveX Control Name | Function |
|---------------------------------|--|
| SiebelAx_ChatUI_<<version>>.dll | <p>Provides the user interface for chat (including chat tabs, chat dashboard, and chat transcript and message areas) and is the control through which all chat interactions are processed.</p> <p>It receives and processes the events passed from the communications toolbar to render the current state for all active chat interactions to the agent.</p> |

5

Managing Siebel Chat

This chapter describes how administrators and supervisors set up and work with Oracle Contact On Demand Administration Manager and Oracle Contact On Demand Supervision Manager to manage Siebel Chat interactions. This chapter includes the following topics:

- [Example of Using Oracle Contact On Demand on page 83](#)
- [Process of Setting Up Oracle Contact On Demand Administration Manager on page 85](#)
- [Process of Setting Up Oracle Contact On Demand Supervision Manager on page 94](#)
- [About Running Reports with Oracle Contact On Demand on page 101](#)
- [Managing Agents and Workgroup Queues on page 103](#)

Example of Using Oracle Contact On Demand

This topic gives one example of how a contact center might be set up and used. You might set up and use a contact center differently, depending on your business model.

A company has a family of products and related services for two different, distinct industries. Each industry offering has two major brand names. Each brand name in turn has multiple products, each requiring special agent skills to support the products. [Figure 6 on page 84](#) illustrates how to set up Oracle Contact On Demand for this scenario, as follows:

- Set up a company for each industry. For example:
 - (Industry1)
 - (Industry2)
 - Define projects for each service or brand area within each industry to which chats can be routed. For example:
 - (Industry1-Brand1, Industry1-Brand2)
 - (Industry2-Brand1, Industry2-Brand2)
 - Define workgroups for each project to handle chats for that project. For example:
 - (Industry1Brand1-Product1, Industry1Brand1-Product2)
 - (Industry1Brand2-Product1, Industry1Brand2-Product2)
 - (Industry2Brand1-Product1, Industry2Brand1-Product2)
 - (Industry2Brand2-Product1, Industry2Brand2-Product2)
- Define also the skill set to support each workgroup.
- Assign agents, with the appropriate skill level or expertise, to workgroups accordingly.

Figure 6 shows an example of company, project, workgroup, and skills setup in Oracle Contact On Demand.

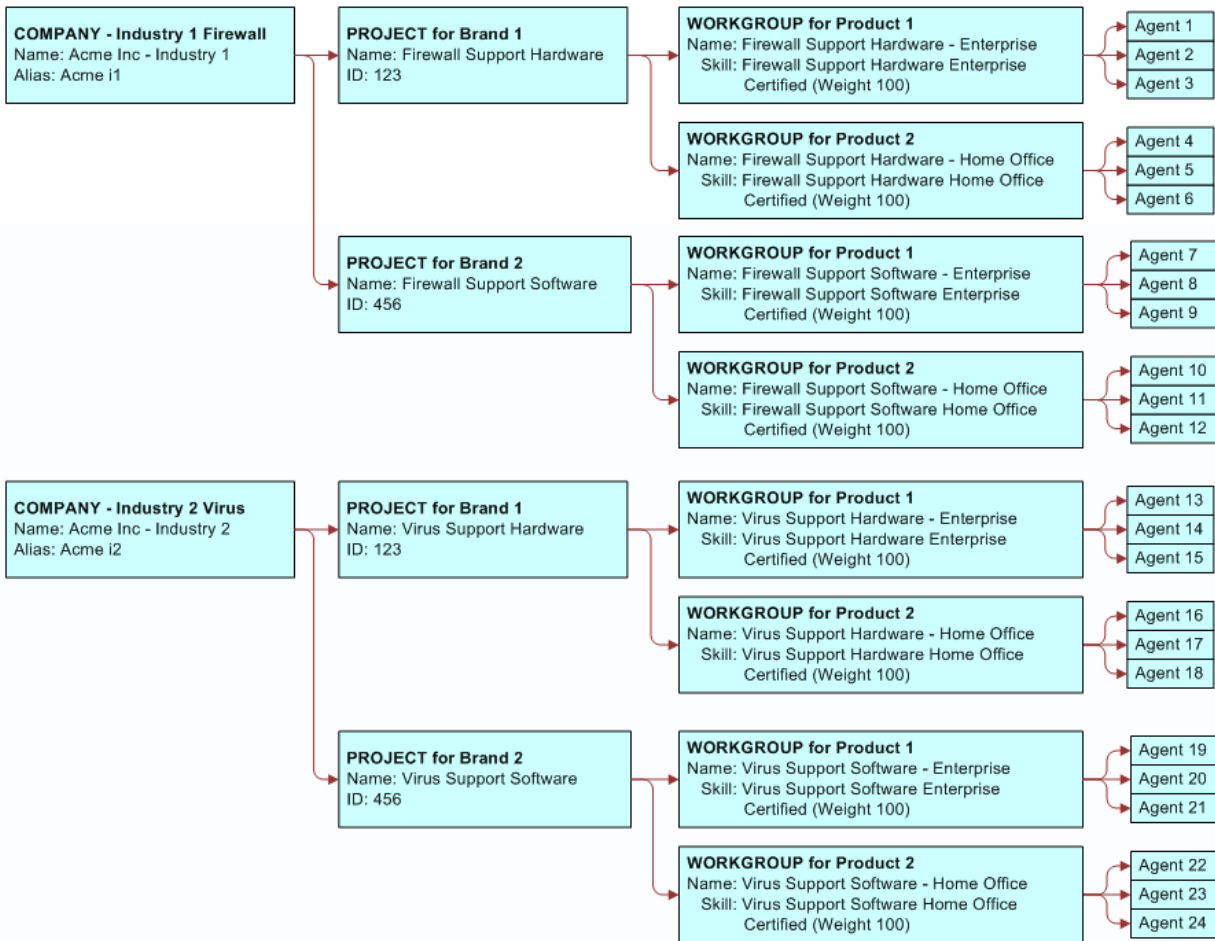


Figure 6. Company, Project, Workgroup, and Skills Setup in Oracle Contact On Demand

Process of Setting Up Oracle Contact On Demand Administration Manager

The Oracle Contact On Demand Administration Manager is a browser-based application that allows the administrator to set up a contact center consisting of companies, user accounts (for agents, administrators, and supervisors), projects, workgroups, skills, and URL libraries. Defining projects, workgroups, and skills for a company helps Oracle Contact On Demand to efficiently route chat interactions to the workgroup with the most qualified agent to handle the interaction.

To set up Oracle Contact On Demand Administration Manager to manage Siebel Chat activity, it is recommended that administrators review ["Example of Using Oracle Contact On Demand" on page 83](#) and complete the following tasks in the following sequence:

- 1 ["Planning Routing Strategy for Siebel Chat" on page 85](#)
- 2 ["Setting Up a Company in Oracle Contact On Demand Administration Manager" on page 86](#)
- 3 ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager" on page 87](#)
- 4 ["Setting Up a Chat Project in Oracle Contact On Demand Administration Manager" on page 88](#)
- 5 ["Setting Up Workgroups in Oracle Contact On Demand Administration Manager" on page 90](#)
- 6 ["Setting Up Skills in Oracle Contact On Demand Administration Manager" on page 91](#)
- 7 ["Creating a Company Package in Oracle Contact On Demand Administration Manager" on page 92](#)
- 8 ["Creating a URL Library in Oracle Contact On Demand Administration Manager" on page 93](#)

Planning Routing Strategy for Siebel Chat

This task is a step in [Process of Setting Up Oracle Contact On Demand Administration Manager on page 85](#).

Routing can be carried out on any of the extended values that are passed by a customer on the chat request form. Options to consider include service request Area, Sub Area, Product Name, or Product Category. Siebel E-Support, which is integrated with Siebel Chat, implements product-based routing (using the product name).

Oracle Contact On Demand uses the Company Alias parameter and the Project ID parameter in order to route chat requests to the most suitable workgroup. Default routing can be set up to a single company and project using system preferences and company level chat parameters in Siebel Call Center. For more information about routing, see the following:

- ["Setting Up Parameters and Routing in Siebel Call Center for Siebel Chat" on page 30](#)
- ["Setting Up System Preferences in Siebel Call Center for Siebel Chat" on page 40](#)

Setting Up a Company in Oracle Contact On Demand Administration Manager

If using Siebel Chat enterprise edition, then you are responsible for setting up and administering your own contact center. You must log in to Oracle Contact On Demand Administration Manager as administrator, and create a company definition to hold all the settings and definitions for your contact center.

If using Siebel Chat hosted edition, then you must contact the Application Service Provider (ASP) hosting your contact center and request that they set up a company for you. ASPs set up at least one company for each customer for whom they are providing contact center application services. Oracle Contact On Demand also supports multitenancy for large and complex deployments.

In both cases, when a company has been set up for a contact center:

- Administrator, supervisor, and agent user accounts must be created for the company.
- Projects must be set up for the company.
- Workgroups and skills must be defined for the company.

Use the following procedure to set up a company in Oracle Contact On Demand Administration Manager for Siebel Chat. One company must be set up for each organization in Siebel Call Center that uses Siebel Chat. This task is a step in ["Process of Setting Up Oracle Contact On Demand Administration Manager" on page 85](#).

To set up a company in Oracle Contact On Demand Administration Manager for Siebel Chat

- 1** Log in to Oracle Contact On Demand Administration Manager as network administrator, navigate to the List of Companies screen, then click the Wizard button.

The New Company screen opens with the Profile area.

- 2** In the Profile area, specify the Company Name, Address, Company Alias, Display Name, and the Web Site address of the company.

NOTE: Make a note of the Company Alias that you set. You need this when setting up the Oracle Contact On Demand (chat communication) driver parameters in Siebel Call Center. It is used as the value for the Driver:CompanyName parameter. For more information about communication configuration, see ["Configuring Communications in Siebel Call Center for Siebel Chat" on page 27](#).

- 3** Click Next to navigate to the list of Existing Packages.

Select the package that contains the feature set for your company. Web chat media must be enabled for the company package that you select. For more information about company packages, see ["Creating a Company Package in Oracle Contact On Demand Administration Manager" on page 92](#).

- 4** Click Next to navigate to the Licensing information.

Set a limit or reserve slots for chat interactions as follows:

- **Interactions Limitations.** This sets a limit or reserves license slots for online, offline, and chat interactions.

- **Maximum Number of Logged in Users.** This sets the maximum number of users that a company can have logged in at the same time (excluding supervisors and administrators).
 - **Maximum Number of Logged in Supervisors.** This sets the maximum number of supervisors that a company can have logged in at the same time (excluding agents and administrators).
- 5 Click Next to navigate to the Regional Settings information.
Set regional settings (Date Format, Time Zone, and Language) for the company, as required.
 - 6 Click Next to navigate to the Business Hours information.
Set the operational hours for the company, as required.
 - 7 Click Next until the Finish screen opens.
To set up the company, click the Create Company button on the Finish screen. When done, the List of Companies screen opens and includes the new company's name and information in the list.

For more detailed information about setting up a company for a contact center, see *Oracle Contact On Demand Administration Manager Guide*.

Setting Up User Accounts in Oracle Contact On Demand Administration Manager

Siebel Chat can be used by administrators, supervisors, and agents. An account must be set up in Oracle Contact On Demand for each administrator, supervisor, and agent user of Siebel Chat. This task is a step in "[Process of Setting Up Oracle Contact On Demand Administration Manager](#)" on page 85.

To set up user accounts in Oracle Contact On Demand Administration Manager for Siebel Chat

- 1 Log in to Oracle Contact On Demand Administration Manager as administrator, and navigate to the List of Companies screen.
- 2 On the company list page, click the row of the company for which you want to set up user accounts, then click Edit.
- 3 Navigate to the Options screen, then Agents view, and click Add.
The Agents screen opens to the Profile tab.
 - a On the Profile tab, specify the First Name, Last Name, Username, Password, and Access Permission level for the account. [Table 2 on page 12](#) outlines the main access permission levels for Siebel Chat users.

NOTE: When setting up user accounts in Oracle Contact On Demand Administration Manager, the First Name value provided is the name that is seen by customers who are chatting with the agent. If using aliases for your agents, make sure that you set the value of First Name to an alias that you want the customer to see. The First Name value that you set here corresponds to the agent's Alias value on the Person record in Siebel Call Center. For more information about setting an alias, see "[Setting Up an Alias for Siebel Chat Users in Siebel Call Center](#)" on page 33.

- b** Go to the Controls and Restrictions tab, enable available options as required, then click Apply.
 - For example, enable wrap-up for all user accounts:

Specify the amount of wrap-up time (in seconds) that the agent will be given to wrap-up an interaction. After this specified wrap-up time, the chat session is released, and the agent is available for another interaction.
 - If creating or editing a supervisor account, specify the level of access in the Supervisor Permissions section.
 - If you want to allow agents to handle more than one chat interaction at a time, set the maximum number of simultaneous interactions for chat by specifying a value on this tab.
- c** Go to the Regional Settings tab, specify the time zone and date format, then click Apply.
- d** Go to the Email tab, specify the agent's email address, then click Apply. This is a required Oracle Contact On Demand setting.
- e** Go to the Phone tab, specify the phone data (agent extension number and type of phone) for the agent, then click apply. This is a required Oracle Contact On Demand setting.
- f** Depending on the type of account that you are creating, go to the Administration Configuration tab, Agents to Supervise tab, or Supervisors tab, as required:
 - If creating an administrator account, go to the Administration Configuration tab, and specify the options to be made available to this administrator account.
 - If creating a supervisor account, go to the Agents to Supervise tab, and specify the agents that this supervisor will supervise.
 - If creating an agent account, go to the Supervisors tab, and specify the supervisor that will supervise this agent.
- g** Go to the remaining tabs as required (for example, Skills, Workgroups, Follow Me, and so on), and configure the available options, as required.

NOTE: You must define workgroups and skills for your company first, and then associate agents with them.

- 4** Click OK.

For more information about creating user accounts in Oracle Contact On Demand, see *Oracle Contact On Demand Administration Manager Guide* and also ["Setting Up Supervisor Accounts in Oracle Contact On Demand" on page 95](#).

Setting Up a Chat Project in Oracle Contact On Demand Administration Manager

Projects in Oracle Contact On Demand are organized under entities called companies. Setting up a project in Oracle Contact On Demand Administration Manager enables you to control:

- How to route chat requests
- The Web pages to display to the user while Oracle Contact On Demand handles the request
- The Web page content to provide to agents, which they can send to users

A project set up for chat can be associated with only one workgroup, so that the incoming chat request can be routed to its destination. To set up a chat project in Oracle Contact On Demand for Siebel Chat, you must create a project definition and then enable it to handle chat interactions, as described in the following procedure. This task is a step in ["Process of Setting Up Oracle Contact On Demand Administration Manager"](#) on page 85.

To set up a chat project in Oracle Contact On Demand Administration Manager for Siebel Chat

- 1** Navigate to the Options screen, then Projects view in Oracle Contact On Demand Administration Manager, and click Add.
- 2** On the Projects screen that opens on the General tab, enter a name and description for the chat project, then click Apply.
- 3** Go to the Chat tab and:
 - a** Select the Enable Chat Project (Use Default Project Language) check box. Doing this enables the project for chat media.
 - b** From the Route Chat to Workgroup drop-down list, select the workgroup to which you want to route the chat requests from this project.

Workgroups must be set up first. For more information about workgroups, see ["Setting Up Workgroups in Oracle Contact On Demand Administration Manager"](#) on page 90.

- c** Go to the Push Pages subtab, and do the following:
 - From the First Push Page, Connected, Disconnected, If No Agent Available, and If Contact Center is Closed drop-down lists, select the Web pages to send to the user.

If required, define a chat push page sequence.

NOTE: To set values for the available options here, a URL library must be set up first. For more information about URL library setup, see ["Creating a URL Library in Oracle Contact On Demand Administration Manager"](#) on page 93.

- Select Siebel Chat Extensions from the Parameter Extensions drop-down list.

This option must always be selected for Siebel Chat. However, if you want to customize the customer and agent chat UI, contact your system administrator or Oracle account support representative for more information.
- If you want to perform a test to ensure that all setups in Oracle Contact On Demand have been carried out correctly, click Create Page to generate a Chat Request Form for your chat project, then use this page to test Oracle Contact On Demand chat communications.

NOTE: Siebel Chat provides a universal chat page (`siebel_request_chat.jsp`) with an API to pass the data included in a chat request form. Your self-service Web application must implement this page to call the Siebel Chat chat page (`siebel_chat_page.jsp`).

- Click Apply to save your changes.
- 4** Click OK when finished setting up your chat project.

For more information about setting up projects in Oracle Contact On Demand, see *Oracle Contact On Demand Administration Manager Guide*.

Setting Up Workgroups in Oracle Contact On Demand Administration Manager

Workgroups in Oracle Contact On Demand are organized under entities called projects. In Oracle Contact On Demand, incoming interactions are routed to a workgroup first, before being assigned to an agent. One or more agents can be assigned to a workgroup.

You can specify the agent skills that are important for agents in a workgroup to possess, and assign weights to each skill; this helps Oracle Contact On Demand to route incoming requests to the agent most qualified to receive them.

NOTE: A single workgroup queue can be used to handle chat, email, and phone calls in Oracle Contact On Demand.

This task is a step in ["Process of Setting Up Oracle Contact On Demand Administration Manager"](#) on page 85.

To set up a workgroup in Oracle Contact On Demand Administration Manager

- 1 Navigate to the Options screen, then Workgroups view in Oracle Contact On Demand Administration Manager, and click Add.
- 2 On the Workgroups screen that opens with the Name tab, enter a name and description for the chat workgroup.
- 3 Go to the Agents tab, and select the agents that you want to add to this workgroup.
- 4 Go to the Association tab, and specify the *routing associations* for this workgroup, as required. Normally, Oracle Contact On Demand routes new interactions to the first available agent in the workgroup.
- 5 Go to the Skills tab, and assign skills to this workgroup, and a weight to each skill.

Oracle Contact On Demand uses agent skills to identify and route requests to the agent in the workgroup most qualified to receive them.

NOTE: When Oracle Contact On Demand routes a call requiring a specific agent skill to a workgroup, it chooses an agent based on a formula that considers both the agent's score for the required skill and the weight that is assigned to that skill for agents in this workgroup.

For more information about setting up skills, see ["Setting Up Skills in Oracle Contact On Demand Administration Manager"](#) on page 91.

- 6 Go to the Overflow tab, and define workgroup overflow conditions.

The purpose of defining workflow overflow conditions is to make sure that interactions that are waiting too long for an agent response are given immediate attention. Oracle Contact On Demand handles two workgroup overflow conditions:

- Interaction wait-time exceeded
- Number of queued interactions exceeded

- 7 Go to the Options tab, and set the following options:

- Set the Initial Wait Time to at least one minute.
 - Select Stay in the Queue if you want chat requests to remain in the queue until an agent becomes available, or until an agent logs in and becomes available.
 - Select Disconnect if you want to release chat requests when no agents are logged in.
- 8** Go to the Service Level tab, and set workgroup service levels.
- A workgroup service level lets a supervisor monitor whether online interactions (in this case, chat interactions) are being accepted at a specific rate.
- 9** Click OK.

For more information about setting up workgroups in Oracle Contact On Demand Administration Manager, see *Oracle Contact On Demand Administration Manager Guide*.

Setting Up Skills in Oracle Contact On Demand Administration Manager

Skills in Oracle Contact On Demand are associated with agents. Skills are the abilities that each agent possesses, allowing the agent to handle requests coming into the contact center. Oracle Contact On Demand matches the requirements of the incoming request with the skills of the available agents, and routes the request to the agent most qualified to handle it. You can also associate skills with workgroups.

This task is a step in ["Process of Setting Up Oracle Contact On Demand Administration Manager" on page 85](#).

To set up and assign skills in Oracle Contact On Demand Administration Manager

- 1** Navigate to the Options screen, then Skills view in Oracle Contact On Demand Administration Manager, and click Add.
- 2** On the Skills screen, enter a name and description for the skill, and click OK.
- 3** To assign this skill to an agent:
 - a** Navigate to the Options screen, then Agents view.
 - b** Select an agent, and click Edit.
 - c** Go to the Skills tab, and define the skill level for this agent.
 - d** Click OK.
- 4** To assign this skill to a workgroup:
 - a** Navigate to the Options screen, then Workgroup view.
 - b** Select a workgroup, and click Edit.
 - c** Go to the Skills tab, assign skills to the workgroup, a weight to each skill, and click OK.

For more information about defining skills for your company, see *Oracle Contact On Demand Administration Manager Guide*.

Creating a Company Package in Oracle Contact On Demand Administration Manager

Some features of Oracle Contact On Demand Administration Manager are not supported by Siebel Chat, "[Unsupported Oracle Contact On Demand Administration Manager Features](#)" on page 94. To hide these features from your agents, it is recommended that you set up a company package definition specifically for your company in Oracle Contact On Demand. This task is a step in "[Process of Setting Up Oracle Contact On Demand Administration Manager](#)" on page 85.

To create a company package in Oracle Contact On Demand Administration Manager

- 1** Navigate to the Company List view in Oracle Contact On Demand Administration Manager.
- 2** Click Go To, then select Package Creator from the drop-down list.
The Company Package screen opens listing all existing packages.
- 3** Click Add to define a new (chat) company package for your company.
On the Add Company Package screen that opens:
 - a** Enter a name and a description for your package.
 - b** Select or deselect the check box next to each listed feature to include or remove it from your company package.
For example, make sure that the Web Chat feature is enabled for the company package.
 - c** Click OK.
- 4** Apply the new (chat) company package to your company:
 - a** Navigate to the Options screen, then Company view in Oracle Contact On Demand Administration Manager, and select the company you want to edit.
 - b** Go to the Company Configuration tab, then select the appropriate company package from the Package drop-down list. For more information about company setup, see "[Setting Up a Company in Oracle Contact On Demand Administration Manager](#)" on page 86.
- 5** Make sure that all company projects are enabled for Web chat.
For more information about enabling a project for chat, see "[Setting Up a Chat Project in Oracle Contact On Demand Administration Manager](#)" on page 88.

For more information about creating company packages, see *Oracle Contact On Demand Administration Manager Guide*.

Creating a URL Library in Oracle Contact On Demand Administration Manager

Oracle Contact On Demand lets you compile a library of URLs or Web pages containing content that agents can use when assisting customers. For example, to give agents the option of pushing a URL to customers who are waiting for an agent, you must add the URL to the URL library, then make the URL available as a Chat Push Page.

To create a URL library containing content that agents can use when assisting customers, complete the steps in the following procedure. This task is a step in ["Process of Setting Up Oracle Contact On Demand Administration Manager" on page 85](#).

To create a URL library in Oracle Contact On Demand Administration Manager

- 1** Navigate to the Libraries screen, then URL view in Oracle Contact On Demand Administration Manager, and click Add.
- 2** On the URLs screen:
 - a** Enter the URL name, description, and address.
 - b** Specify the application that this URL will serve.

For example, select the Chat Push Page check box to make this URL available to agents handling chat customers, or to make this URL available for automatically pushing to a chat customer waiting for an agent.

NOTE: Other applications that you can choose for this URL to serve include FAQ, Script, Intelligent Chat, Intelligent Email, and Web Callback. For more information about these options and about creating a URL library, see *Oracle Contact On Demand Administration Manager Guide*.
 - c** Click OK.
- 3** Set this URL as a push page for a chat project:
 - a** Go to the Push Pages tab of a chat project:

Navigate to the Options screen, then Projects view in Oracle Contact On Demand Administration Manager, select a chat project, click Edit, and then select the Push Pages tab.
 - b** Select the push pages to display to users.
 - c** If required, define a chat push page sequence.

For more information about chat projects, see ["Setting Up a Chat Project in Oracle Contact On Demand Administration Manager" on page 88](#).

Unsupported Oracle Contact On Demand Administration Manager Features

The following features of Oracle Contact On Demand Administration Manager are not supported by Siebel Chat:

- Creating an intelligent chat template library in Oracle Contact On Demand
- Creating project menus
- Creating a custom workgroup message
- Campaigns
- Recording interaction history in Oracle Contact On Demand

Process of Setting Up Oracle Contact On Demand Supervision Manager

The Oracle Contact On Demand Supervision Manager is a Web-based application that allows the supervisor to monitor agent activity in real-time. As a prerequisite to using Oracle Contact On Demand Supervision Manager, supervisors must contact the Oracle Contact On Demand administrator and request that a supervisor account be set up.

Setting up Oracle Contact On Demand Supervision Manager to monitor Siebel Chat activity involves multiple tasks that supervisors perform in the following sequence:

- 1** Contact the Oracle Contact On Demand administrator, and request that a supervisor account be set up.
For more information about supervisor accounts, see ["Setting Up Supervisor Accounts in Oracle Contact On Demand" on page 95](#).
- 2** Set up agent, workgroup, and project views in Oracle Contact On Demand for Siebel Chat.
For more information about views, see ["About Setting Up Views in Oracle Contact On Demand Supervision Manager" on page 95](#).
- 3** Set up alarms in Oracle Contact On Demand for Siebel Chat.
For more information about alarm setup, see ["About Setting Up Alarms in Oracle Contact On Demand Supervision Manager" on page 99](#).

When supervisors have set up suitable views and alarms for the company, they can view reports (provided they have been given permission) that have been created by administrators. For more information about reports, see ["About Running Reports with Oracle Contact On Demand" on page 101](#).

Setting Up Supervisor Accounts in Oracle Contact On Demand

Administrators must set up supervisor accounts in Oracle Contact On Demand Administration Manager before supervisors can log in to Oracle Contact On Demand Supervision Manager. This task is a step in ["Process of Setting Up Oracle Contact On Demand Supervision Manager" on page 94](#). Administrators can create supervisor accounts in Oracle Contact On Demand with limited or full access.

- With limited access, supervisors can monitor only the activity of agents that an administrator assigns to them.
- With full access, supervisors can monitor the activity of agents that an administrator assigns to them as well as view statistics for all workgroups.

For more information about account set up in Oracle Contact On Demand, see ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager" on page 87](#).

About Setting Up Views in Oracle Contact On Demand Supervision Manager

The purpose of creating views in Oracle Contact On Demand Supervision Manager is to allow you to display and review real-time and historical contact center statistics, and monitor agent activity.

A view is a grouping of contact center statistics, such as agents, interactions, and workgroup statistics. Each view that you create in Oracle Contact On Demand Supervision Manager contains a specific list of real-time statistics and information fields.

Setting Up Views in Oracle Contact On Demand Supervision Manager

It is recommended that supervisors set up at least one each of the following types of views in Oracle Contact On Demand Supervision Manager to help monitor agent activity and chat interaction activity, and make decisions in relation to agent and queue management. This task is a step in ["Process of Setting Up Oracle Contact On Demand Supervision Manager" on page 94](#). [Table 13 on page 97](#) describes each of these views in more detail.

- Agent Statistics
- Interaction Statistics
- Workgroup Statistics
- Project Statistics
- Project Media Totals Statistics
- Workgroup Media Totals Statistics

To set up views in Oracle Contact On Demand Supervision Manager, complete the steps in the following procedure.

To set up a view in Oracle Contact On Demand Supervision Manager

- 1 Log in to Oracle Contact On Demand Supervision Manager, and select the Supervision tab.
- 2 Navigate to the Panels screen, then Panel *N* (for example, Panel A).

NOTE: Before creating a view, it is recommended that you select a Panel first because you cannot move a view to another panel after you create it.

- 3 Navigate to the Views screen, then *View Selection*, where *View Selection* can be one of the following:

- View Agents
- View Interactions
- View Project Statistics
- View Project Media Totals
- View Workgroup Statistics
- View Workgroup Media Totals

A configuration dialog box (for example, the Workgroup Statistics Configuration dialog box) opens with the General tab:

- a On the General tab, specify a name for your view, and describe the purpose of the view as required.
 - b Go to the Columns tab, and specify the fields that you want to see displayed in your view. If required, change the order of the fields using the Move Up and Move Down buttons.
 - c Depending on the view you are setting up, go to the Workgroups tab, Users tab, or Projects tab as required:
 - If setting up a workgroup view, go to the Workgroups tab and from the list of accessible workgroups, select the workgroup that you want to see displayed in your view.
 - If setting up an agents view, go to the Users tab and from the list of all agents that you can monitor, select the agents that you want to see displayed in your view.
 - If setting up an interaction view, go to the Projects tab and from the list of all projects that you can access, select the projects that you want to see displayed in your view.
- 4 Click OK to display your view in the workspace.

NOTE: When you navigate to the Panels screen, then Panel *N*, a shadow appears in the Panel *N* icon indicating that a view exists for this panel.

Table 13 describes the types of views that you can set up in Oracle Contact On Demand Supervision Manager. For more information about creating views in Oracle Contact On Demand Supervision Manager, see *Oracle Contact On Demand Supervision Manager Guide*.

Table 13. View Types in Oracle Contact On Demand Supervision Manager

| View Name | Description |
|------------------------------|---|
| Agent Statistics View | This view monitors the real-time activity for the agents that you supervise. |
| Interactions Statistics View | <p>This view enables you to see how chat interactions are flowing through the application. This information helps you to determine the number of interactions your agents are currently handling and the number of interactions that are backing up in the queues.</p> <p>NOTE: Flow tracking begins when interactions enter Oracle Contact On Demand, continues while Oracle Contact On Demand routes them to an agent, and ends when Oracle Contact On Demand disconnects them.</p> |
| Workgroup Statistics View | <p>This view enables you to view chat interaction activity in monitored workgroups with a high level of granularity. For example, you can monitor the following real-time statistics related to workgroup activity, all of which are of vital importance to supervisors responsible for managing agents and queues:</p> <ul style="list-style-type: none"> ■ Track the current and total interactions for chat interactions. ■ Display the average talk time, average handle time, and average wrap-up time for chat interactions. ■ Display the maximum wait time and maximum talk time for chat interactions. ■ Display the average speed to answer statistics for chat interactions. ■ Monitor the total number of interactions transferred in to the workgroup and transferred out of the workgroup. |

Table 13. View Types in Oracle Contact On Demand Supervision Manager

| View Name | Description |
|--|---|
| Project Statistics View | <p>This view evaluates the success of a specific project. There are many different values to choose from to customize your view, including the following:</p> <ul style="list-style-type: none"> ■ The average handle time for chats ■ The average speed of answering chats ■ The average talk time for chats ■ The average time for all chats from start to finish ■ The average chat wrap-up time ■ The total number of daily chats ■ The longest time a customer waited before an agent accepted a chat request from this project ■ The longest time spent on a chat ■ The total number of workgroup chats currently in the queue and being handled |
| Project Media Totals Statistics View | <p>This view tracks the following activities in real-time:</p> <ul style="list-style-type: none"> ■ Total number of abandoned chats ■ Total number of answered chats ■ Total number of chats in the queue ■ Total number of chats ■ Total number of chats that reached overflow criteria |
| Workgroup Media Totals Statistics View | <p>This view tracks answered and abandoned statistics, as well as queued and overflowed chat interactions. There are many statistics to choose from for your view, including the following:</p> <ul style="list-style-type: none"> ■ The total number of abandoned chats in a workgroup. ■ The total number of chat requests for the workgroup that are received from the Web and answered by the agent. ■ The total number of chats queued. ■ The total number of chat requests for the workgroup received from the Web. |

About Setting Up Alarms in Oracle Contact On Demand Supervision Manager

In a busy contact center, supervisors and administrators need to know immediately when agents are spending too much time on chat interactions, if chat requests are holding for too long before being connected to an agent, or if a chat workgroup queue is continuously full. Oracle Contact On Demand Supervision Manager allows supervisors to configure alarms that will alert them to issues immediately, so that they can address the issues quickly.

Configuring the alarms feature in Oracle Contact On Demand Supervision Manager means that Oracle Contact On Demand will automatically notify you whenever your alarm conditions are met. You can select from three different types of alarms, and set up to five severity levels within each. Each severity level corresponds to a different color, as follows:

- Very Low (Green)
- Low (Blue)
- Medium (Yellow)
- High (Orange)
- Very High (Red)

Setting Up Alarms in Oracle Contact On Demand Supervision Manager

It is recommended that supervisors set up at least one each of the alarm types described in [Table 14](#) to help them monitor and make decisions in relation to agent and queue management. This task is a step in ["Process of Setting Up Oracle Contact On Demand Supervision Manager"](#) on page 94.

Table 14. Alarm Types in Oracle Contact On Demand Supervision Manager

| Alarm Name | Description |
|-----------------------|--|
| Status Duration Alarm | This type of alarm notifies you when an agent holds the same status for too long. This information is critical in managing queue hold times. Agents chatting for longer than the reasonable expectations set for the interaction can cause the queue to back up. Knowing when the backlog is occurring is essential for proactive queue management. |
| Media Duration Alarm | This type of alarm notifies you each time that an agent works on a chat interaction and for how long. As a result, a supervisor can better determine whether agents are spending too much time on a chat interaction. Knowing this information can help a supervisor decide if more training is required for specific chat interaction types, or if stronger action is required for the individual agents. |
| General Alarm | This type of alarm creates alarms for specific columns of information (such as login duration, total interactions, and so on) from one or more views (including agents, interactions, and workgroup statistics views). As a result, you can track project-, agent-, and workgroup-specific information (such as calls overflowing out of workgroups) and more actively manage workloads and agents. |

As soon as you create an alarm, it takes effect and remains defined in Oracle Contact On Demand Supervision Manager until you disable or delete it entirely. Alarms use a 24-hour clock that resets at midnight. When alarm conditions are met, the alarm is activated. To view all activated alarms in your workspace, complete the steps described in [“Viewing Alarms in Oracle Contact On Demand Supervision Manager” on page 100](#). To set up an alarm in Oracle Contact On Demand Supervision Manager, complete the steps in the following procedure.

To set up alarms in Oracle Contact On Demand Supervision Manager

- 1** Log in to Oracle Contact On Demand Supervision Manager, and select the Supervision tab.
- 2** Navigate to the Alarms screen, then New Alarm.
- 3** On the New Alarm Definition dialog box, select one of the following:
 - Status Duration
 - Media Duration
 - General
- 4** Click Next to continue defining the conditions for your alarm.

For more information about setting up alarms in Oracle Contact On Demand, see *Oracle Contact On Demand Supervision Manager Guide*.

Viewing Alarms in Oracle Contact On Demand Supervision Manager

To view a list of all the activated alarms in Oracle Contact On Demand, complete the steps in the following procedure.

To view all activated alarms in the Oracle Contact On Demand Supervision Manager

- 1** Log in to Oracle Contact On Demand Supervision Manager, and click the Supervision tab.
- 2** Navigate to the Alarms screen, then Current Alarms to display a list of all alarms that have either been triggered or are inactive.

For more information about setting up alarms, viewing activated alarms, and about enabling and disabling alarms, see *Oracle Contact On Demand Supervision Manager Guide*.

Unsupported Oracle Contact On Demand Supervision Manager Features

The following features of Oracle Contact On Demand Supervision Manager are not supported by Siebel Chat:

- Sending messages, including broadcasting to all agents and sending a message to one agent
- Supervisor-to-agent chat
- Viewing and taking over an agent’s chat session
- Recording an agent’s chat session

NOTE: When a chat session is released, you can access the chat transcript which is attached to the activity record (in Siebel Call Center). For more information about accessing chat transcripts and attachments, see [“Reviewing Inbound Siebel Chat Activities” on page 59](#).

About Running Reports with Oracle Contact On Demand

Standard and advanced reports can be set up to run in Oracle Contact On Demand. They provide concrete performance statistics about the following:

- Agent activity, performance, and efficiency
- Chat interaction statistics
- Weekly project schedules

Oracle Contact On Demand reports can be customized. Provided that you have the proper user privileges, you can choose (for example) to display as much or as little data as needed and in the format that makes the most sense to you, as well as control which administrators and supervisors can access reports, or schedule reports to run automatically.

The topic includes information about the following:

- [“Standard Reports” on page 101](#)
- [“Advanced Reports” on page 102](#)

NOTE: Supervisors can view reports only, they cannot create or edit reports. If you are a supervisor and need a new report, contact your administrator.

Standard Reports

Standard reports are created in the Oracle Contact On Demand Supervision Manager. It is recommended that administrators set up some of the following types of standard reports in Oracle Contact On Demand:

- **Agent Profile and Productivity.** Example reports to set up include the following:
 - Set up an Agent Interaction report that displays information about the number and duration of chat interactions for the selected agent.
 - Set up an Agent Skills report that displays all skills defined for your company, indicates which agents possess that skill, and the agent’s rating for the skill.

NOTE: This report is particularly useful if you have skills based routing configured for chat.
 - Set up an Agent Utilization report that displays the amount of time each agent spends handling chat interactions.
- **Project.** An example project report to set up includes the following:
 - Set up a Project Segments report that displays a set of chat interaction statistics.

- **Workgroup Productivity.** Example reports to set up include the following:
 - Set up a Workgroup Segments report that displays a set of chat interaction statistics.
 - Set up a Workgroup Interval Time report that displays how workgroups are performing at specific times of the day.
 - Set up a Workgroup Interval Time by Media report that displays how many chat interactions are received at specific times of the day.
- **Call Center Operations.** Example reports to set up include the following:
 - Set up a Workgroup Skills report that displays the skills assigned to a workgroup and the rating assigned to each skill.

NOTE: This report is particularly useful if you have skills based routing configured for chat.

For more information about standard reports, see *Oracle Contact On Demand Supervision Manager Guide*.

Advanced Reports

Advanced reports are created in the Oracle Contact On Demand Administration Manager only, but can be run in both Oracle Contact On Demand Administration Manager and Oracle Contact On Demand Supervision Manager. It is recommended that administrators set up some of the following types of advanced reports in Oracle Contact On Demand Administration Manager:

- **Daily Project Performance.** Set up a Daily Project Performance report to monitor chat interaction activity. You can use this report to determine project volume and other service factors, which will help identify the *busy hour* and staffing requirements based on volume of chat interactions.
- **Interval Workgroup Performance.** Set up an Interval Workgroup Performance report to display workgroup activity and total number of agents logged in. You can use this report to track chat interaction statistics, and service level statistics.
- **User Login/Logout.** Set up a User Login/Logout report to display agent log in and log out activity by date, time, event, and reason. You can use this report to monitor how one agent spends time in comparison with other agents.
- **Daily User Performance.** Set up a Daily User Performance report to review daily agent activity. You can use this report to monitor agent performance against reasonable expectations.
- **Peak Interactions.** Set up a Peak Interactions report to track the peak number of chat interactions in 15-minute intervals. You can use this report to determine peak interaction activity for all projects, or for individual projects.
- **System Peaks Interactions.** Set up a System Peaks Interactions report to track the maximum peak number of chat interactions handled by the company. You can use this report to determine when additional resources might be needed to handle high volumes of chat interactions.

Restricted Reports

The following restricted reports are useful for tracking changes made to Oracle Contact On Demand setup and troubleshooting security related events affecting chat users. These reports are only available to specific system and network administrators:

- **Admin Audit Report.** The Admin Audit report shows historical data for system sensitive information changes in Administration Manager. The report includes changes effecting all company pages, agent configuration, workgroup configurations, and project changes. It also identifies the user who made the change.
- **Security Audit Report.** The Security Audit report shows all system security violations of failed log in attempts and system actions, in compliance with known company Privacy Requirements.

For more information about advanced reports, see *Oracle Contact On Demand Administration Manager Guide*.

Managing Agents and Workgroup Queues

This topic includes information about the following:

- ["Guidelines for Managing Agents" on page 103](#)
- ["Guidelines for Managing Workgroup Queues" on page 104](#)

Guidelines for Managing Agents

Guidelines for administrators and supervisors who are responsible for managing agents involved in handling Siebel Chat interactions are described in this topic.

Guidelines for Administrators

It is recommended that administrators follow these guidelines:

- 1 Do not display the names of your agents to users, use aliases for your agents instead.
 Make sure that the First Name value used for each agent when setting up user accounts in Oracle Contact On Demand corresponds to the alias that you use for the same agent on the agent's Person record in the Siebel Call Center application.
 For more information, review the following:
 - ["Setting Up an Alias for Siebel Chat Users in Siebel Call Center" on page 33](#)
 - ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager" on page 87](#)
- 2 Make sure that skills are assigned to agents appropriately, and that weights are attached to skills within workgroups accordingly.

For more information, review the following:

- ["Setting Up Skills in Oracle Contact On Demand Administration Manager" on page 91](#)
- ["Setting Up Workgroups in Oracle Contact On Demand Administration Manager" on page 90](#)

- 3 To assist agents in the handling of inbound chat interactions:
 - Set up URL libraries in Oracle Contact On Demand, then link the URLs as push pages to a chat project.
 - Where possible, hide the features of Oracle Contact On Demand Administration Manager that are unsupported by Siebel Chat from your agents by setting up a company package for your company.
- 4 Set up and run reports that provide concrete performance statistics about agents.

Related Topics

["Creating a URL Library in Oracle Contact On Demand Administration Manager" on page 93](#)

["Creating a Company Package in Oracle Contact On Demand Administration Manager" on page 92](#)

["About Running Reports with Oracle Contact On Demand" on page 101](#)

Guidelines for Supervisors

It is recommended that supervisors follow these guidelines:

- 1 Make sure that appropriate views are defined in Oracle Contact On Demand Supervision Manager to monitor and review agent and chat interaction activity.
- 2 Make sure that appropriate alarms are set up in Oracle Contact On Demand Supervision Manager to monitor and review agent and chat interaction activity.
- 3 Review reports that provide concrete performance statistics about agents.

Related Topics

["About Setting Up Views in Oracle Contact On Demand Supervision Manager" on page 95](#)

["About Setting Up Alarms in Oracle Contact On Demand Supervision Manager" on page 99](#)

["About Running Reports with Oracle Contact On Demand" on page 101](#)

Guidelines for Managing Workgroup Queues

Using Oracle Contact On Demand Administration Manager and Oracle Contact On Demand Supervision Manager, you can monitor chat interactions in workgroup queues and see the real-time status of chat interactions, which allows you to adjust the workflow management and improve response time. Guidelines for administrators and supervisors who are responsible for managing workgroup queues are described in this topic.

Guidelines for Administrators

It is recommended that administrators follow these guidelines:

- 1 Decide what criteria you will use to route inbound chat requests to appropriate workgroup queues, and set up the underlying mechanisms to support the criteria.
 - Assign skills to workgroups, and attach weights to skills within workgroups appropriately.
 - Define an appropriate routing association for each workgroup.
 - Define appropriate workgroup overflow conditions for each workgroup.
 - Define an appropriate workgroup service level for each workgroup.

For more information, review the following:

- [“Planning Routing Strategy for Siebel Chat” on page 85](#)
- [“Setting Up Skills in Oracle Contact On Demand Administration Manager” on page 91](#)
- [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 90](#)

- 2 Review workgroup queue utilization and activity on a regular basis.

If workgroup queues are adequately utilized but not overburdened, no further action is required. However, if workgroup queues are overflowing, then do one or more of the following:

- Consider creating further workgroup queues (for example, *overflow* workgroups) or modifying existing ones.
- Reassign available agents to handle interactions in the high-traffic workgroup queues.
- Reassign interactions from the overloaded workgroup queues to less-loaded queues.

For more information, review the following:

- [“Adding Agents to the Communications Configuration for Siebel Chat” on page 30](#)
- [“Transferring Siebel Chat Interactions to Others” on page 63](#)
- [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 90](#)

- 3 Set up and run reports that provide concrete performance statistics about workgroup queues.

Related Topic

[“About Running Reports with Oracle Contact On Demand” on page 101](#)

Guidelines for Supervisors

It is recommended that supervisors follow these guidelines:

- 1 Make sure that appropriate project and workgroup views are defined in Oracle Contact On Demand Supervision Manager to monitor and review workgroup queues and project activity.
- 2 Make sure that appropriate alarms are set up in Oracle Contact On Demand Supervision Manager to monitor and review chat interaction and workgroup activity.
- 3 Review workgroup queue performance on a regular basis.

If there are many workgroup queues where the service levels have been breached and that appear to be overloaded, then do one or more of the following:

- Bring this to the attention of the administrator.
- Reassign available agents to handle interactions in the high-traffic workgroup queues. Supervisors can only do this if they have administrative rights.
- Reassign interactions from the overloaded workgroup queues to less-loaded workgroup queues. Supervisors can only do this if they belong to the workgroup in question.

For more information, review the following:

- [“Adding Agents to the Communications Configuration for Siebel Chat” on page 30](#)
 - [“Transferring Siebel Chat Interactions to Others” on page 63](#)
 - [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 90](#)
- 4 Review reports that provide concrete performance statistics about workgroup queues.

Related Topics

[“About Setting Up Views in Oracle Contact On Demand Supervision Manager” on page 95](#)

[“About Setting Up Alarms in Oracle Contact On Demand Supervision Manager” on page 99](#)

[“About Running Reports with Oracle Contact On Demand” on page 101](#)

6

Siebel Chat Localization

This appendix describes Siebel Chat localization. It contains the following topics:

- [Setting Up Siebel Chat for Languages Supported by Default by Oracle Contact On Demand on page 107](#)
- [Setting Up Siebel Chat for Languages Not Supported by Default by Oracle Contact On Demand on page 108](#)

Setting Up Siebel Chat for Languages Supported by Default by Oracle Contact On Demand

Siebel Chat currently supports all languages supported by Siebel applications. For a complete list of languages supported by Siebel applications, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

All Siebel Call Center-to-Oracle Contact On Demand language mappings are seeded for Siebel Chat. The Chat Language Mapping view in Siebel Call Center is used to map Oracle Contact On Demand language IDs to standard Siebel Call Center language code values.

To set up Siebel Chat for languages supported by default by Oracle Contact On Demand, map the correct Oracle Contact On Demand language ID to the appropriate Siebel Call Center language code, as described in the following procedure.

To set up default chat language mapping

- 1 Navigate to the Administration - Communications screen, then the Chat Language Mapping view in Siebel Call Center.
- 2 Map the correct Oracle Contact On Demand language ID to the appropriate Siebel Call Center language code.

Adding New Language Mappings in Siebel Call Center

To add a new language mapping in Siebel Call Center (for example, if translating Siebel Chat to a new language), complete the steps in the following procedure.

To add a new language mapping in Siebel Call Center

- 1 Navigate to the Administration - Communications screen, then the Chat Language Mapping view in Siebel Call Center.
- 2 Click Menu and then New record to add a new language mapping.

Setting Up Siebel Chat for Languages Not Supported by Default by Oracle Contact On Demand

The following tasks need to be carried out if setting up Siebel Chat for languages not supported by default by Oracle Contact On Demand:

- 1** Localize the unshipped language for Siebel Call Center, if necessary.
For more information about adding an unshipped language to Siebel applications, see the topic about localizing an unshipped language in *Siebel Global Deployment Guide*.
- 2** Localize the Siebel Customer Chat UI in Oracle Contact On Demand. This involves the following subtasks:
 - Translate the resource file used by the Customer Chat UI
 - Add the new language mappings to the Oracle Contact On Demand language-locales table
- 3** Map the Oracle Contact On Demand Language ID to the appropriate Siebel applications language code.

For more information about each of these tasks and subtasks, see 556344.1 (Article ID) on My Oracle Support.

A

Siebel Chat Deployment Using Third-Party Chat Solutions

This appendix describes how to deploy Siebel Chat using a third-party chat solution instead of the Oracle Contact On Demand solution. It contains the following topics:

- [Deployment of Siebel Chat Using Third-Party Chat Solutions on page 109](#)

Deployment of Siebel Chat Using Third-Party Chat Solutions

Several additional tasks need to be carried out if deploying Siebel Chat using a third-party chat solution instead of the Oracle Contact On Demand solution. In particular, third-party chat server vendors must integrate with Siebel Chat by addressing the following tasks:

- Create or extend an existing Siebel Communications API (SCAPI) driver.
This task involves adding Siebel Chat to an existing driver, or creating a new driver for a non-Oracle Contact On Demand chat communication server. For information about developing and testing a new communications driver, see *Siebel Communications Server Administration Guide*.
- Take the existing third-party customer chat client and modify it to support the passing of Siebel Chat extended parameters. [Table 15](#) lists the chat parameter extensions, Field Name and Field Size, that must be set up for proper integration with the Siebel Call Center application.
- Integrate with the Chat UI Business Service in order to process chat events from the agent-facing chat UI. The Chat UI business service is responsible for handling all Siebel Chat commands and events, and manages the state of all active chats.

For more information about deploying Oracle's Siebel Chat using a third-party chat solution, see 556298.1 (Article ID) on My Oracle Support.

Table 15. Siebel Chat Parameter Extensions

| Field Name | Description | Field Size |
|-------------|--------------------------|------------|
| ContactId | Contact Identifier | 15 |
| SRIId | Service Request ID | 15 |
| SRNumber | Service Request Number | 30 |
| ProblemDesc | Problem Description | 100 |
| Area | Service Request Area | 30 |
| SubArea | Service Request Sub Area | 30 |
| ProductID | Product Identifier | 15 |
| ProductName | Product Name | 100 |

Table 15. Siebel Chat Parameter Extensions

| Field Name | Description | Field Size |
|---------------------|---------------------|------------|
| ProductCategory | Product Category | 100 |
| KBItemVisitedNum1 | KBItemVisitedNum1 | 30 |
| KBItemVisitedDesc1 | KBItemVisitedDesc1 | 100 |
| KBItemVisitedURL1 | KBItemVisitedURL1 | 100 |
| KBItemVisitedNum2 | KBItemVisitedNum2 | 30 |
| KBItemVisitedDesc2 | KBItemVisitedDesc2 | 100 |
| KBItemVisitedURL2 | KBItemVisitedURL2 | 100 |
| KBItemVisitedNum3 | KBItemVisitedNum3 | 30 |
| KBItemVisitedDesc3 | KBItemVisitedDesc3 | 100 |
| KBItemVisitedURL3 | KBItemVisitedURL3 | 100 |
| KBItemVisitedNum4 | KBItemVisitedNum4 | 30 |
| KBItemVisitedDesc4 | KBItemVisitedDesc4 | 100 |
| KBItemVisitedURL4 | KBItemVisitedURL4 | 100 |
| KBItemVisitedNum5 | KBItemVisitedNum5 | 30 |
| KBItemVisitedDesc5 | KBItemVisitedDesc5 | 100 |
| KBItemVisitedURL5 | KBItemVisitedURL5 | 100 |
| KBItemVisitedNum6 | KBItemVisitedNum6 | 30 |
| KBItemVisitedDesc6 | KBItemVisitedDesc6 | 100 |
| KBItemVisitedURL6 | KBItemVisitedURL6 | 100 |
| KBItemVisitedNum7 | KBItemVisitedNum7 | 30 |
| KBItemVisitedDesc7 | KBItemVisitedDesc7 | 100 |
| KBItemVisitedURL7 | KBItemVisitedURL7 | 100 |
| KBItemVisitedNum8 | KBItemVisitedNum8 | 30 |
| KBItemVisitedDesc8 | KBItemVisitedDesc8 | 100 |
| KBItemVisitedURL8 | KBItemVisitedURL8 | 100 |
| KBItemVisitedNum9 | KBItemVisitedNum9 | 30 |
| KBItemVisitedDesc9 | KBItemVisitedDesc9 | 100 |
| KBItemVisitedURL9 | KBItemVisitedURL9 | 100 |
| KBItemVisitedNum10 | KBItemVisitedNum10 | 30 |
| KBItemVisitedDesc10 | KBItemVisitedDesc10 | 100 |
| KBItemVisitedURL10 | KBItemVisitedURL10 | 100 |

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