



SIEBEL eCOLLABORATION ADMINISTRATION GUIDE

VERSION 7.5, REV. A

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Introduction

This guide provides information necessary to deploy Siebel eCollaboration as a feature in your Siebel eBusiness Applications environment.

This book will be useful primarily to people whose title or job description matches one of the following:

| | |
|--|---|
| Call Center Administrators | Persons responsible for setting up and maintaining a call center. Duties include designing and managing elements such as communications integration, SmartScripts, and message broadcasts. |
| Communications Administrators | Persons responsible for setting up and maintaining communications integrations such as those supported by Siebel Communications Server, including creating communications configurations and communications profiles. |
| Siebel Application Administrators | Persons responsible for planning, setting up, and maintaining Siebel applications. |
| Siebel Application Developers | Persons who plan, implement, and configure Siebel applications. |
| Siebel System Administrators | Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications. |
| Database Administrators | Persons who administer the database system, including data loading; system monitoring, backup, and recovery; space allocation and sizing; and user account management. |

Technical users of this guide should possess skills in application development or server configuration. Expertise in collaborative communications systems would be a useful asset.

How This Guide Is Organized

This guide includes sections that provide:

- **Understanding of Siebel eCollaboration components and processes.** These sections include background on the end users' experiences, server architecture and processes, and client components.
- **Instructions for setting up Siebel eCollaboration architectural components.** These sections include material on installing and configuring the eCollaboration server, integrating eCollaboration into a communications configuration.
- **Configuring and Administering Siebel eCollaboration.** These sections include instructions about configuring eCollaboration and about administering server parameters and Web collaboration templates, allowing agents to accept Web calls, and tracking session data.

Revision History

Siebel eCollaboration Administration Guide

Version 7.5, Rev. A

Table 1. Changes Made in Version 7.5, Rev A

| Topic | Revision |
|--|---------------------|
| “Updating the JRun Classpath” on page 49 | Added this section. |
| Chapter 3, “Siebel eCollaboration Server Load Balancing” | Added this chapter. |

This chapter provides conceptual and procedural information about the caller and agent experiences using Siebel eCollaboration and about the architecture and processes that are active during a collaboration session.

This chapter covers the following topics:

- [“About Siebel eCollaboration” on page 12](#)
- [“Siebel eCollaboration End User Overview” on page 13](#)
- [“Siebel eCollaboration Architecture Overview” on page 34](#)
- [“Siebel eCollaboration Client Overview” on page 38](#)

About Siebel eCollaboration

Siebel eCollaboration allows customer care agents and callers to “meet on the Web” and use a variety of visual and verbal communication tools. They see the same desktop image, as if they were sitting at the same computer.

When a caller requests a Web collaboration session by clicking Contact Us on most Siebel customer applications, a session is created automatically. When an agent accepts the caller’s Web call, the agent and the caller both see the last page the caller was on prior to clicking Contact Us. The agent and caller are also connected by the caller’s choice of verbal interaction—voice over IP, phone, or Web chat.

With Follow-me browsing, the agent and caller virtually share a browser. When either one navigates to another page, the other’s browser also displays the new page. The agent and caller can also use this functionality to jointly complete a Web form.

In addition to touring different Web pages, the agent and caller can display applications to each other. Either participant can display the entire desktop to the other, even if the other does not have the application being displayed.

Because the agent can see what the caller sees, the agent is better equipped to guide the caller to Web pages to find information, perform demonstrations, or to help the caller complete a task. The caller is better equipped to convey the service issue and to understand the solution that the agent communicates.

NOTE: Because of the nature of eCollaboration, some types of advanced browser capabilities are not available. Advanced client-side browser technologies do not make use of typical server connectivity. Some Siebel products, including but not limited to Siebel eAdvisor and Siebel applications in high interactivity state, make extensive use of client-side Java scripting. Because these Javascripts are executed in the client (the browser), the server never receives the commands and cannot pass these commands between browsers.

Siebel eCollaboration End User Overview

A caller seeking service can request and participate in a Siebel eCollaboration session. An agent can accept an eCollaboration session request and controls the means of interaction during the session.

Typically, the agent and the caller are using one of two principal modes at any given time: Follow-me browsing or Present/Attend mode.

In Follow-me browsing mode, when either the agent or the caller navigates to any Web page, the other's browser goes to the same Web page automatically.

In Present and Attend modes, either the agent or the caller presents desktop imagery while the other views passively.

Both the caller and the agent can use the following features, but the agent controls when several of these features are available to the caller.

- Use Follow-me browsing
- Pause Follow-me browsing so that either participant can go to any Web page without the other browser following
- Use Present and Attend modes
- Use dynamic joint Web form filling
- Converse using Web chat
- Converse using voice over IP
- Pause transmission of desktop imagery
- Go back to the last Web page visited
- Go forward to the Web page from which the Back button was last used
- Refresh the current Web page
- Go to the last Siebel application Web page visited
- End the session

Only the caller can take the following actions:

- Request a session
- Request the communication mode for the session
- Cancel a requested session

Only the agent can take the following actions:

- Accept a session
- Transfer a session to another agent
- While the agent is in Attend mode, end a caller's transmission of desktop imagery

NOTE: Functionality that is available with Siebel eCollaboration may not be available with other Web collaboration technologies you integrate with Siebel applications.

For information about browsers supported by Siebel eCollaboration, see *Siebel System Requirements and Supported Platforms*.

The eCollaboration Toolbar

The Siebel eCollaboration toolbar resides in the agent's eCollaboration cobrowser and in the caller's cobrowser. eCollaboration allows the agent to control the session, so the agent's toolbar provides more options.

Figure 1 shows the main panel of buttons in the agent's eCollaboration toolbar. The caller has the subset of buttons to the left of the divider line. The End Session button is on the right end of the agent's and the caller's toolbar, separated from the main panel.

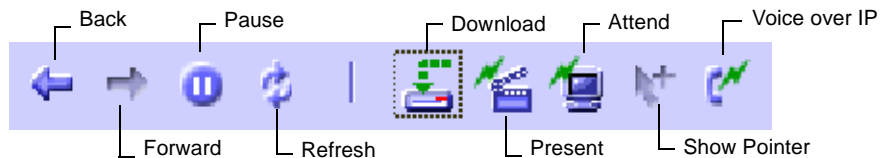


Figure 1. Siebel eCollaboration Toolbar

The following eCollaboration toolbar buttons are provided to the agent and to the caller:

- **Back.** Go to the last Web page visited.
- **Forward.** Go to the Web page from which the Back button was last clicked.
- **Pause.** Suspend page-pushing to the other party. Click again to resume.
- **Refresh.** Update the current Web page.
- **End Session.** End the eCollaboration session.

The following eCollaboration toolbar buttons are provided only to the agent:

- **Download.** Download Present mode plug-in to the caller. The download plug-in checks both on the caller's and the agent's machines for an existing installation of eCollaboration client software. If a previous installation is not found, then the caller, the agent, or both are prompted to confirm acceptance of the download.

- **Present.** Assume Present mode. The agent and the caller view the agent's desktop imagery only. A capture frame controlled by the agent determines what imagery is viewed. Click again to end Present mode.
- **Attend.** Assume Attend mode, so that the caller can present. The agent regains Present mode by clicking the attend button again.
- **Show Pointer.** The cursor on the current presenter's desktop appears. Click again to end cursor display.
- **Voice over IP.** Invoke Voice over IP mode so both participants can communicate through the computers' microphones and speakers. This icon appears only if the caller requests a voice over IP session.

The Caller's Experience of eCollaboration

We will look at the following features of the caller's experience of eCollaboration

- [“Requesting a Virtual Meeting with eCollaboration” on page 17](#)
- [“Requesting an eCollaboration Session” on page 18](#)
- [“Follow-Me Browsing in Siebel eCollaboration” on page 19](#)
- [“Dynamic Joint Web Form Filling in Siebel eCollaboration” on page 20](#)
- [“Present and Attend Modes in Siebel eCollaboration” on page 21](#)
- [“Chatting in Siebel eCollaboration” on page 22](#)
- [“Using Voice over IP in Siebel eCollaboration” on page 22](#)
- [“Ending an eCollaboration Session” on page 23](#)

Requesting a Virtual Meeting with eCollaboration

A Web site visitor can request a real time virtual meeting with an agent by clicking Contact Us, a button that is present on many Siebel customer application Web pages.

Besides the Java applets that are downloaded for each session, Siebel eCollaboration requires browser plug-ins to be on the caller's computer if the caller requests voice over IP or the collaboration includes a presentation session. The caller is offered a download of these plug-ins if they are not detected when the caller requests an collaboration session.

After one download, the caller does not typically have to download these plug-ins for subsequent sessions. However, if you upgrade your eCollaboration server, a newer version of these utilities may become standard, and a caller who has the previous version may need to download the new software. Siebel eCollaboration detects the version of client software and downloads new software when appropriate.

Requesting an eCollaboration Session

When a caller requests an eCollaboration session with an agent, the caller chooses a verbal communication mode and can choose to share desktop imagery with the agent.

To request an eCollaboration session

- 1 The caller clicks Contact Us, present on most Siebel customer application Web pages.

The Contact Us page appears, with hyperlinks for invoking available communication channels.

- 2 The caller clicks the Contact a customer care representative hyperlink.

The Live Web Assistance form appears. If the caller is a registered user, the telephone number populates the appropriate field automatically.

- 3 The caller completes the form, describing the service issue, editing the telephone number if necessary, and choosing one of the following session options:

- **Chat & Collaboration.** The session uses eCollaboration technology for Follow-me browsing and sharing desktop imagery. The caller and the agent converse by using Web chat.
- **Chat Only.** The caller and the agent converse using Web chat only. A cobrowser is provided for the chat.
- **Call Back.** The agent contacts the caller at the telephone number specified in the request.
- **Call Back & Collaboration.** The session uses eCollaboration technology for Follow-me browsing and sharing desktop imagery. The agent contacts the caller at the available telephone number specified in the request.
- **Voice Over IP & Collaboration.** The session uses eCollaboration technology for Follow-me browsing and sharing desktop imagery. The caller and the agent converse over the same connection using voice over IP technology.

For a session to use voice over IP, the caller and the agent must both have a microphone and speakers installed on their computers.

- If the caller does not have a microphone or speakers, the caller can initiate a voice over IP session, but cannot use the mode properly.

- If the caller chooses voice over IP and the caller's browser does not have the necessary plug-ins required for voice over IP, the voice over IP software is offered to the caller to download. A small pop-up browser appears with the message "Please wait. Downloading in progress." When the download is complete, the message changes to "If you close this window, your request and meeting will be cancelled." The caller must allow a short interval for the agent to join the session.

Follow-Me Browsing in Siebel eCollaboration

Follow-me browsing is the default mode when a Web collaboration session starts. When either the agent or the caller goes to a Web page in the eCollaboration cobrowser, the other sees the same Web page. [Figure 2](#) shows the caller's cobrowser window.



Figure 2. Caller's eCollaboration Cobrowser Window

The caller can pause Follow-me browsing mode by clicking the pause button on the eCollaboration tool bar. The button changes to its resume state. The caller can then navigate to any Web page without the agent's browser following. When the caller clicks the resume button, the agent's browser goes to the caller's current Web page.

Dynamic Joint Web Form Filling in Siebel eCollaboration

An agent and a caller can fill out a form on a Web page together. When Follow-me browsing is active, both participants can type entries into text fields, toggle check boxes or radio buttons, or select from picklists.

Changes appear, as they are made, in both participants' cobrowsers. The person who types first sees the changes immediately. The other person sees the changes after a slight delay.

Either participant can further edit the form.

The agent and the caller must be aware of the following principles when using joint Web form filling:

- If both participants fill out the same field at the same time, both participants' keystrokes are captured, resulting in jumbled text.
- You cannot use joint Web form filling on attachment fields. Attachment fields are read only and cannot be surveyed by the Java applet that controls form filling.
- When a caller or an agent adds an attachment through a cobrowser, only the person who adds the attachment can see that the attachment is added. The form to which the attachment is added can be successfully submitted only by the person who adds the attachment to the form. An error results if the other participant tries to submit the form. If there is an error, the person who added the attachment must navigate to the appropriate view without using the Back button, reattach the file, and resubmit the form.
- Any field that is controlled by client-side Java scripting cannot be populated by joint form filling. For example, you cannot form fill the fields that are associated with the calendar pop-up dialog box or the calculator pop-up dialog box on the Register a Product Web page because the calendar and calculator pop-up dialog boxes use client-side Java script to fill their fields. When a field is filled using, for example, the calculator keys, the fields do not jointly fill in both cobrowsers. However, if you fill out the fields manually, the fields will jointly form fill.

Present and Attend Modes in Siebel eCollaboration

At the agent's discretion, either participant can present desktop imagery while the other participant observes. The presenter can display desktop applications or any other imagery present on the desktop.

When the agent initiates Present mode, an attending window opens on the caller's desktop. The window's interior is black until the agent presents desktop imagery to the caller. When the agent presents, the caller can only see the portion of the desktop contained within the agent's capture frame.

The caller can end the presentation session by clicking on the close button on the window's title bar. If the agent ends the presentation session, the attending window also closes.

If the agent allows the caller to present, the caller sees one or both of the following dialog boxes:

- The caller is offered a download of the Present mode plug-in. This only occurs in the following cases:
 - If the caller has never used Present mode.
 - If the caller's Present mode plug-in must be updated because the eCollaboration server has been updated and requires a newer version of the client software.
- The Moderator Request Received dialog box allows the caller to click Ok to allow the agent to view the caller's desktop or click Cancel to decline.
 - If the caller clicks Ok, the dialog box disappears, and the agent can see the caller's entire desktop.
 - If the caller clicks Cancel, the Moderator Request Received dialog box disappears and the agent cannot see the caller's desktop.

CAUTION: If the caller closes the eCollaboration cobrowser, the Web collaboration session ends. Instead, the caller should minimize the cobrowser if it is not intended to be part of the presentation.

Chatting in Siebel eCollaboration

The Web Chat frame is available during both chat-only and collaboration session.

At any time during a session, a participant can type a chat message into the Web Chat frame, and then click Send or press Enter to send it to the other participant.

Using Voice over IP in Siebel eCollaboration

Voice over IP allows the caller to use the microphone and speakers on the computer to converse with an agent.

Voice over IP is invoked in a session only if the caller chooses voice over IP as the communication mode when he or she requests the collaboration session.

During an active voice over IP session, the caller can use options associated with the audio control button in the task bar's system tray to change audio settings or terminate voice over IP.

NOTE: It is recommended that you do not change the audio settings for low bandwidth conditions (128 kbaud or slower).

To change audio settings during a voice over IP session

- 1 The caller right-clicks the audio control button in the task bar's system tray.

The audio control menu appears.

- 2 The caller does one of the following:

- To toggle between turning compression of IP packets sending audio data on and off, the caller chooses Compression.
- To improve the audio quality by changing the sampling frequency, the caller chooses Audio Quality and an appropriate frequency.
- To toggle the microphone on and off, the caller chooses microphone.

The caller can control volume levels for the microphone and the speakers.

To control volume levels

- 1 The caller double clicks the audio control button in the task bar's system tray.

An audio level control appears.

- 2 The caller can change the sound level for the microphone or the speakers.

The caller can terminate voice over IP during a collaboration session. Follow-me browsing and chat remain active.

To terminate voice over IP

- Right-click the audio control icon and choose Close from the menu.

The agent can turn the microphone and speakers of either participant on or off.

Ending an eCollaboration Session

By ending an eCollaboration session, all collaboration activity ceases, including voice over IP.

The caller can end an eCollaboration session in one of the following ways:

- Click End Session on the eCollaboration toolbar.
- Close the eCollaboration cobrowser.
- In a chat only session, the caller must use the close window control on the window's title bar to end the session.

The Agent's Experience of eCollaboration

Siebel eCollaboration uses Siebel Universal Queuing to route Web calls and other caller-initiated communication to agents. Siebel eCollaboration uses the communications toolbar to notify agents of waiting Web calls and other requests.

NOTE: If you implement another Web collaboration technology, it may or may not use Siebel Universal Queuing or the communications toolbar to notify agents of Web calls. For information about the means by which agents accept Web calls, you must consult the documentation of the vendor that provides the queuing functionality.

Before a Web call can be routed to an agent, the agent must be defined to the Communications Server as eligible to receive Web calls.

An agent must click the login button on the communications toolbar to log in to Universal Queuing. On each login, the application determines whether the agent's machine has the eCollaboration software for voice over IP and Present mode. If the software is not detected, the agent is prompted to download the software. A download prompt is not displayed if the agent has the software. If the agent is not a Web agent as defined in the Universal Queuing administrative screens, the download is not offered to the agent.

NOTE: When the agent clicks the download button during a collaboration session, the Present mode software is downloaded to the agent's desktop, if it is not already present, and to the caller's desktop at the same time.

For more information about making it possible for an agent to receive Web calls, see [“Setting Up Agents to Receive Web Calls” on page 63](#).

For information about administering Siebel Universal Queuing, see *Siebel Universal Queuing Administration Guide*.

Accepting an eCollaboration Session Request

An agent accepts a Web call request from a caller by clicking the accept work item button on the communications toolbar.

NOTE: When a caller requests a call-back, the activity type listed in the Web Collaboration Activity form informs the agent that this is a required call-back.

To accept an eCollaboration session request

- 1 When the accept work item button on the communications toolbar blinks, an agent accepts an incoming Web collaboration request in one of the following ways:
 - The agent clicks the accept work item button.
 - The agent clicks the right arrow button to the right of the accept work item button to see the media type for one or more waiting communications, and then clicks the accept incoming Web call button if it is active.
 - The agent uses a hot key that is defined for accepting work items.

For information about implementing hot keys, see *Siebel Communications Server Administration Guide*.

The Web Collaboration Activity form appears, showing contact identification information, a history of the contact's activities, and the data the caller entered in the Live Web Assistance form. The eCollaboration cobrowser also appears in a separate window.

- 2 The agent does one of the following:
 - If the caller requests to speak by telephone, the agent places a telephone call to the caller manually or by clicking the make call button on the communications toolbar. If the line is busy, the agent initiates communication by typing a chat message, and then clicks Send or presses Enter on the keyboard.
 - If the caller requests to speak by voice over IP, the agent clicks the voice over IP button (telephone icon) on the eCollaboration toolbar to initiate voice over IP and uses the microphone to greet the caller.

- If the caller requests to chat, the agent greets the caller by typing a chat message, and then clicks Send or hit the Enter key on the keyboard.

Follow-Me Browsing in Siebel eCollaboration

Follow-me browsing is the default mode when an eCollaboration session starts. When either the agent or the caller goes to a Web page in the eCollaboration cobrowser, the other sees the same Web page.

The agent can pause Follow-me browsing mode by clicking the pause button on the eCollaboration tool bar. The button changes to its resume state. The agent can then navigate to any Web page without the caller's browser following. When the agent clicks the resume button, the caller's browser goes to the agent's current Web page.

The following must be true for Follow-me browsing to be active:

- The cobrowser is not minimized.
- Neither the Present mode nor the Attend mode is active.

Dynamic Joint Web Form Filling in Siebel eCollaboration

An agent and a caller can fill out a form on a Web page together. When Follow-me browsing is active, both participants can make entries to the same form.

Changes appear, as they are made, in both participants' cobrowsers. The person who types first sees the changes immediately. The other person sees the changes after a slight delay.

Either participant can further edit the form.

The agent and the caller must be aware of the following principles when using joint Web form filling:

- If both participants fill out the same field at the same time, both participants' keystrokes are captured, resulting in jumbled text.
- You cannot use joint Web form filling on attachment fields. Attachment fields are read only and cannot be surveyed by the Java applet that controls form filling.

- When a caller or an agent adds an attachment through a cobrowser, only the person who adds the attachment can see that the attachment is added. The form to which the attachment is added can be successfully submitted only by the person who adds the attachment to the form. An error results if the other participant tries to submit the form. If there is an error, the person who added the attachment must navigate to the appropriate view without using the Back button, reattach the file, and resubmit the form.
- Any field that is controlled by client-side Java scripting cannot be populated by joint form filling. For example, you cannot form fill the fields that are associated with the calendar pop-up dialog box or the calculator pop-up dialog box on the Register a Product Web page because the calendar and calculator pop-up dialog boxes use client-side Java script to fill their fields. When a field is filled using, for example, the calculator keys, the fields do not jointly fill in both cobrowsers. However, if you fill out the fields manually, the fields will jointly form fill.

Present and Attend Modes in Siebel eCollaboration

At the agent's discretion, either participant can present desktop imagery while the other participant observes. The presenter can display desktop applications or any other imagery present on the desktop.

When an agent presents, the agent controls what is seen by sizing and moving a capture frame. When the caller presents, the caller's entire desktop is displayed.

CAUTION: If the agent closes the eCollaboration cobrowser, the Web collaboration session ends. Instead, the agent should minimize the cobrowser if it is not intended as part of the presentation.

In either Present or Attend mode, the agent can turn on the mouse pointer by selecting the mouse pointer button. The button changes color to represent that the pointer is turned on, and the agent and the caller see the location of the mouse. In Present mode, the mouse does not track while the capture frame is paused or when the mouse cursor is not within the capture frame.

To use Present and Attend modes

- 1 The agent minimizes or closes all windows on the desktop that are not intended for caller viewing.

- 2 The agent clicks the present button (clapboard icon) in the eCollaboration toolbar.

A red capture frame appears, indicating that data is not being presented. The agent can resize the capture frame to contain the information that the agent wants to display to the caller.

- 3 The agent clicks the play button on the capture frame to toggle from the paused state to an active state.

The play button changes to a pause button. The capture frame turns green or, depending on network traffic, yellow first, and then green. Green indicates that all the information in the capture frame has been sent to the caller. Yellow indicates that transmission of some material is not complete. The agent does not see the caller's desktop.

NOTE: The agent can pause the capture frame at any time by clicking the pause button.

- 4 The agent moves or resizes the capture frame as appropriate.
- 5 If the agent allows the caller to present, then the agent must take the following actions:
 - a The agent must make sure that the caller has the Present mode software by verifying verbally with the caller or by clicking the download button (dotted down arrow to CPU icon) in the eCollaboration toolbar to download the software to the caller.

If the agent clicks the download button and the caller does not have the Present mode browser plug-in, a dialog box is displayed to the caller offering to download the plug-in.

- b** The agent clicks the attend button (monitor icon).

An attending window opens on the agent's desktop. A dialog box warns the caller that his or her entire desktop will be visible to the agent, with an option to Cancel. If the caller clicks Cancel, the agent receives a message stating that the caller is declining to present the desktop, and the attending window closes.

The agent should maximize the cobrowser so that the caller's desktop imagery can be seen.

- 6** To reclaim Present mode from the caller, the agent clicks the attend button to stop Attend mode, and then clicks the present button. While in Present or Attend mode, the other button (attend or present) is inactive.
- 7** To exit Present or Attend mode without ending the session, the agent clicks whichever button is active, present or attend, so that both are inactive. Alternatively, the agent can close the Present/Attend mode cobrowser window.

Follow-me browsing resumes.

Changing the Mouse Pointer Icon

The mouse pointer icon used optionally in Present mode is the `present.bmp` file in the `/Program files/eCollaboration client install directory/icons` directory on the client machine. Typically, the client install directory name is `eCollaboration`.

To display a different mouse pointer, modify the current `present.bmp` graphic or create a new `present.bmp`, and then replace the file in the `\icons` directory.

Transferring an eCollaboration Session to Another Agent

There are two kinds of collaboration session transfers:

- **Blind transfer.** An agent transfers a collaboration session without first conferring with the receiving agent.
- **Consultative transfer.** An agent transfers a collaboration session after first conferring with the receiving agent.

When an agent receives a transferred call, it is in Follow-me browsing, whether the session was in Present, Attend, or Follow-me browsing mode when it was transferred. The receiving agent determines the verbal communication mode for the session from the activity type field.

If a transferred session is using Web chat, a separate attachment to the session's activity record is created for each agent's segment of the chat.

To perform a blind transfer of a collaboration session

- 1** (Optional) The agent enters into the text input field on the communications toolbar the contact information, such as the phone extension, of the person to whom the agent wants to transfer the collaboration session.
- 2** The agent clicks Blind Transfer on the communications toolbar.
- 3** If the agent did not specify contact information first, the agent does so now in the pop-up window that appears.

The session is released immediately.

A consultative transfer is performed differently, depending on the mode of verbal communication.

To perform a consultative transfer of a collaboration session using telephone communication

- 1** (Optional) The agent enters into the text input field on the communications toolbar the extension of the person to whom the agent wants to transfer the active phone call.
- 2** The agent clicks Consultative Transfer on the communications toolbar.
- 3** If the agent did not specify the extension first, the agent does so now in the pop-up window that appears.

The current session is suspended, and the transfer recipient is dialed.

- 4** The agent does one of the following:
 - When the transfer recipient answers and indicates acceptance of the transfer, the transferring agent clicks Consultative Transfer again to complete the transfer and release the session.

- If the transfer recipient does not accept the transfer, the agent clicks Retrieve Call to retrieve the session.

To perform a consultative transfer of a collaboration session using chat or voice over IP

- 1 The agent places a telephone call independently to the person to whom the agent wants to transfer the session to get acceptance for the session, and then ends the consultative call.
- 2 (Optional) The agent enters into the text input field on the communications toolbar the contact information, such as the phone extension, of the receiving agent.
- 3 The agent clicks Blind Transfer on the communications toolbar.
- 4 If the agent did not specify contact information first, the agent does so now in the pop-up window that appears.

The session is released immediately.

Chatting in Siebel eCollaboration

The Web Chat frame at the bottom of the cobrowser is persistent during a collaboration session. Chat mode is always available.

At any time during a session, a participant can type a chat message into the Web Chat frame, and then click Send or press Enter to send it to the other participant.

Using Voice Over IP in Siebel eCollaboration

The voice over IP button appears only if the caller requests voice over IP during the initial request for a collaborative session. An agent clicks the voice over IP button on the eCollaboration toolbar to activate voice over IP at any time during the session. The button toggles to turn voice over IP on or off.

When the agent turns on voice over IP, the agent's microphone and speakers are activated to allow communication with the caller. When they are turned off, nothing is transmitted between the caller and the agent using Voice over IP mode.

During an active voice over IP session, the agent can use options associated with the audio control button in the task bar's system tray to change audio settings or terminate voice over IP.

NOTE: It is recommended that you do not change the audio settings for low bandwidth conditions (128 kbaud or slower).

To change audio settings during a voice over IP session

- 1 The agent right-clicks the audio control button in the task bar's system tray.

The audio control menu appears.

- 2 The agent does one of the following:

- To toggle between turning compression of IP packets sending audio data on and off, the agent chooses Compression.
- To improve the audio quality by changing the sampling frequency, the agent chooses Audio Quality and an appropriate frequency.
- To toggle the microphone on and off, the agent chooses microphone.

The agent can control volume levels for the microphone and the speakers.

To control volume levels

- 1 The agent double clicks the audio control button in the task bar's system tray.

An audio level control appears.

- 2 The agent can change the sound level for the microphone or the speakers.

The agent can terminate voice over IP during a collaboration session. Follow-me browsing and chat remain active.

To terminate voice over IP

- Right-click the audio control icon and choose Close from the menu.

The agent can turn on or off the microphone and speakers of either participant.

Ending an eCollaboration Session

An agent can end a collaboration session in any of three ways:

- Click End Session on the eCollaboration toolbar.
- Click the release work item button on the communications toolbar.
- Close the eCollaboration cobrowser.

At the end of each collaboration session, the chat transcript is saved as a read-only attachment to the activity. Whether a session is initiated as a chat or not, chat functionality is always active.

Siebel eCollaboration Architecture Overview

The Siebel eCollaboration server is a software suite that supports real-time collaboration between agents and callers. It consists of the following components:

- Web Manager manages Follow-me browsing interaction between the agent's and the caller's cobrowsers.
- Chat Manager manages the chat interface and communication between the cobrowsers.
- Meeting Manager manages the server's database of virtual meeting attributes and routes connection requests from the PictureTalk Meeting application to the Communication Session Server that is hosting the meeting.
- Communication Session Server Manager manages the meetings that are active on a particular server.
- Communication Session Server, a program such as PTKD or PTKHTTPD, is launched when a meeting becomes active. It manages all communication, transcoding, and compression for a particular meeting.
- Moderator synchronizes and keeps track of all of the above components.
- The Web Collab Service business service creates activities, populates views, and allows communication among eCollaboration server components.

The Siebel eCollaboration server components work together as follows to create a Web collaboration session and to join the caller to the session:

- The caller, a Web site visitor, logs in to a Siebel customer application through a Web browser, and then clicks Contact Us, typically at the top of the Web page. On the resulting Contact Us page, the caller clicks the Contact a customer care representative link.
- The caller completes an online form, describing the reason for contacting a representative and specifying the preferred verbal mode.
- When the caller clicks Submit, the request is routed through the Siebel Web Engine to the Siebel Object Manager. The Siebel Object Manager invokes the Web Collab Service business service.

- The business service creates an activity record for the call and a work item to be routed by a queuing engine.
- The service builds an acknowledgement view that appears to the caller. This view contains a JavaScript that opens a new browser on the caller's machine and retrieves initialization JavaScripts from the Siebel database after first providing initialization variables for those scripts.
- An initialization script checks the type of collaboration requested: voice over IP with collaboration, chat, chat with collaboration, call-back, or call-back with collaboration. If the caller requests voice over IP, the script calls an HTML page that determines whether the caller's Web browser's plug-in registry includes the voice over IP client.
 - If the voice over IP client is not listed, the eCollaboration server checks the computer's operating system and downloads the appropriate voice over IP client.
 - If the download fails, an error page appears to the caller. The caller must install the client before any further steps can occur.
- The eCollaboration server sends an HTML page in a new browser window that contains a Java applet and a message asking the caller to not close the new browser window.
- The Java applet polls the Web Manager, waiting for an agent to enter the meeting. When the agent joins the meeting, the applet launches a cobrowser for the caller. The caller is joined to the meeting when the cobrowser is launched.

After the Web collaboration session is created and the caller has joined the session, the Siebel eCollaboration server components work together as follows to join an agent to the session:

- After the agent logs in to a Siebel application, the agent must log in to the Universal Queuing server by clicking on the login button on the communications toolbar.
- When a caller submits a request, the Web Collab Service business service creates a new activity record in the Siebel database and a work item. It sends the work item to Universal Queuing for routing.

- Universal Queuing determines the appropriate agent or agent group, determines whether an agent is available to take the Web call, and sends the request to an available agent.
- The accept work button, on the communications toolbar, notifies the agent that work item is waiting.
- When the agent clicks the accept work button, the Web Collab Service business service does the following:
 - It sends an HTTP request to the eCollaboration server to join the agent to the session.
 - It generates a new page to show the request details and appends a JavaScript on the page that in turn opens agent-side windows.

During a collaboration session, the Java applets on the caller's and agent's cobrowsers communicate through the Web Manager. Each page request is sent to the Web Manager, which distributes it to the cobrowsers.

The agent can invoke a presentation session at any time during the collaboration session.

- When the agent clicks the present button or attend button on the eCollaboration toolbar to start a presentation session, the following events result:
 - The Siebel eCollaboration Web Application passes meeting attributes to the Meeting Manager application to create a meeting for the presentation session.

NOTE: A meeting for a presentation session is the same as a meeting created for a voice over IP session. If the caller requests voice over IP, the meeting is created automatically at the beginning of the Web collaboration session, instead of being invoked by the agent.

- The Meeting Manager application creates a temporary file to store the information passed from the Web application.
- The CSS Manager creates the meeting with the meeting attributes stored in the temporary file by launching the Communication Session Server, and then reports back to the Meeting Manager.

- The Meeting Manager returns a .pts file to both the caller's and the agent's Web browsers. This file launches the Siebel eCollaboration client for the presenter and an attending window for the attending participant.
- The Communicator then connects to the CSS to log in to the meeting.
- The CSS Manager monitors the Communication Session Server's activities. If no communication takes place in the meeting for a period specified in the CSS Manager's configuration file, the CSS Manager shuts down the meeting's Communication Session Server to preserve system resources.

The session ends when the agent clicks the end session button on the communications toolbar or either participant clicks End Session on the eCollaboration cobrowser toolbar.

- If the agent ends the session from the communications toolbar, the Web Collab Service business service releases the work item and notifies the eCollaboration server to end the session. The eCollaboration server sends the chat script to the Siebel Web Engine and logs out the Siebel session for the cobrowser. The eCollaboration server also closes caller-side windows and adjusts agent-side windows.
- If the session is ended from the eCollaboration cobrowser toolbar, the eCollaboration server sends the chat script to Siebel Web Engine, logs out the Siebel session for the cobrowser if applicable, and notifies the agent's Siebel application, such as Siebel Call Center, to release the work item. The eCollaboration server also closes caller-side windows and adjusts agent-side windows.

Siebel eCollaboration Client Overview

The Siebel eCollaboration client consists of software to support browser implementation of Present and Attend modes and voice over IP.

For information about operating systems, browsers, and other platforms supported by Siebel eCollaboration, see *Siebel System Requirements and Supported Platforms*.

Agent Client

When an agent designated as a Web collaboration agent initially logs in on the communications toolbar, eCollaboration does a version check that determines whether the agent has the client. If the agent does not have the client, a security certificate appears offering to download the software required for Present mode and for voice over IP. If the agent accepts, the software is downloaded. If the agent declines, the offer is repeated on subsequent logins until it is accepted.

For information about modifying the mouse pointer icon used in Present mode, see [“Changing the Mouse Pointer Icon” on page 29](#).

Caller Client

A Web site visitor needs only a Java-enabled Web browser to use a Siebel customer application such as Siebel eService. After requesting a Web collaboration session with an agent, a caller must have additional client software in the following situations:

- To use voice over IP during a session
- To use Present mode during a session

If the caller chooses voice over IP and the caller’s browser does not have the plug-in required for voice over IP, the eCollaboration application offers to download the voice over IP software.

If the agent allows the caller to present desktop imagery and the caller’s browser does not have the necessary plug-ins or Java applets required for Present mode, the agent can manually initiate a download of the Present software to the caller’s computer. In the same operation, the software is also downloaded to the agent’s computer if it is not detected there.

Setting Up Siebel eCollaboration

2

The primary components of a Siebel eCollaboration implementation are:

- Siebel eCollaboration server
- Macromedia (Allaire) JRun, a servlet engine
- Web server, including Siebel Web Engine
- Siebel server, including the object manager used by eCollaboration

These components can reside on multiple machines in any combination that adheres to the following requirements:

- The Siebel eCollaboration server and Siebel Web Engine must reside on different machines.
- The Siebel eCollaboration server and JRun must reside on the same machines.

NOTE: If you use eCollaboration for helping your customers who are outside of your firewall, then you must place the eCollaboration server between your external and internal firewalls. If you use eCollaboration to help your employees or individuals who have access to your intranet, then you can place the eCollaboration server inside of your internal firewall.

Siebel eCollaboration is typically administered through a Siebel application such as Siebel Call Center or Siebel Service. Web site visitors typically request Web collaboration sessions through Siebel customer applications such as Siebel eService.

A typical implementation of Siebel eCollaboration also includes the following components:

- Siebel Communications Server, including the communications toolbar
- Siebel Universal Queuing for routing Web call requests

- CTI middleware, in implementations that use computer telephony

Process of Setting Up Siebel eCollaboration

To set up eCollaboration for use by agents and Web site visitors, you perform the following tasks:

- 1 [“Confirming Installation Requirements” on page 41](#)
- 2 [“Installing the Siebel eCollaboration Server and Related Components” on page 42](#)
- 3 [“Setting Server Administration Parameters” on page 58](#)
- 4 [“Integrating Web Collaboration into a Communications Configuration” on page 60](#)
- 5 [“Setting Up Agents to Receive Web Calls” on page 63](#)

Confirming Installation Requirements

The following installations and licensing must be completed before installing Siebel eCollaboration:

- Siebel Gateway
- Siebel Server
- Web server, including Siebel Web Engine
- License for a Siebel employee application, such as Siebel Call Center or Siebel Service
- Siebel CTI license, if agents use CTI
- License for a Siebel customer application, for example Siebel eService
- CTI middleware, if telephone functions are managed by the agent's computer and if agents use Siebel CTI
- Siebel Universal Queuing

Communications Management server component group must be enabled to allow communications session management.

For information about Web servers and operating systems supported by Siebel eCollaboration, see *Siebel System Requirements and Supported Platforms*.

For more information about installing Siebel Server components, see *Siebel Server Installation Guide* for your platform.

For information about enabling session management on Siebel Communications Server, see the section on enabling session management in *Siebel Communications Server Administration Guide*.

Installing the Siebel eCollaboration Server and Related Components

This section provides instructions for installing the Siebel eCollaboration server and related components in the following environment:

- Siebel eCollaboration server on Windows NT or on Windows 2000

For information about Web servers and other platforms supported by Siebel eCollaboration, see *Siebel System Requirements and Supported Platforms*.

You must perform the following tasks to set up the Siebel eCollaboration server and its related components on Windows NT or Windows 2000:

- 1 [“Installing and Configuring Macromedia \(Allaire\) JRun” on page 42](#)
- 2 [“Installing the Siebel eCollaboration Server” on page 46](#)
- 3 [“Configuring Network Address Translation” on page 50](#)
- 4 [“Providing a License Key to the eCollaboration Server” on page 54](#)
- 5 [“Verifying Successful Installation” on page 55](#)

Installing and Configuring Macromedia (Allaire) JRun

Macromedia (Allaire) JRun is the servlet engine used by eCollaboration. eCollaboration supports JRun 3.0.2a.

Before installing the Siebel eCollaboration server, you must install JRun on the same computer.

To use JRun, you must perform the following tasks:

- Uninstall previous versions of JRun if necessary.
- Download and install the Java Runtime Engine (JRE), which includes the Java Developer Kit, if it is not already installed.
- Install JRun.

- Configure JRun through the JRun Management Console.

CAUTION: If you have an earlier version of JRun, you must uninstall it and delete the physical directory from your computer. You may need to restart your machine to remove the physical directory.

You must download and install Java Developer Kit (JDK) 1.2 or higher before installing JRun. One way of doing so is to download Java™ 2 SDK, Standard Edition, at <http://www.sun.com>. The SDK contains JDK.

Installing JRun

You must install JRun on the same machine as the eCollaboration server.

To install JRun 3.0.2a

- 1 Stop IIS Admin service if it is running.
- 2 By default, JRun uses port 8000. Determine whether port 8000 is open. If it is not, determine an open port for JRun to use.
- 3 On the *Windows Server Ancillary Programs* CD-ROM, double-click the `jr302.exe` file in the `Thirdpty\allaire\enu\jrun` directory.

The JRun installation wizard's Welcome screen appears.

- 4 For each of the screens and dialog boxes shown in the following table, make the recommended entry, and then click Next to continue.

| Screen/Dialog Box | Recommended Entry | Comment |
|----------------------------|--|---------|
| Welcome | No entry. | |
| JRun License Agreement | Yes. | |
| JRun Product Serial Number | Enter the serial number JR300E1-5800-6270-1013 from license.txt file in the <code>Thirdpty\allaire\enu\jrun</code> directory on the <i>Windows Server Ancillary Programs</i> CD-ROM. | |

| Screen/Dialog Box | Recommended Entry | Comment |
|--------------------------|---|---|
| JRun Installation Folder | Change the destination folder to a folder at the root level of the server machine, for example C:\JRun. | Click Browse, and then enter a new folder name or navigate to an existing folder. |
| Setup Type | Full installation. | |
| Program Folder | Accept the default or specify another folder. | Setup Status screen is displayed during the subsequent installation. |
| Install JRun Services | Yes, install JRun services. | |
| Select a Java runtime | Select a Java Development Kit (JDK) version 1.2 or later. | |
| JVM Advisor | No entry. | Read the advisory material. |
| JRun Management Console | Accept default port 8000 or enter the number of an open port. | See Step 2 . |
| JRun Management Console | Create and enter an administrative password. | Record this password and the “admin” user name elsewhere for safekeeping. |
| JRun Product Information | Enter your contact information (optional). | |
| JRun Setup Complete | Click the “Start the JRun Management Console, I’ll configure my Web server later” radio button. | Click Finish instead of Next. |

Configuring JRun

You must use the JRun Management Console to define communication between JRun and to your Web server.

Before configuring JRun, determine the following:

- The number of a free port with which JRun can connect to the Web server
- The full path to the scripts directory on the Web server

To configure JRun on Windows platforms with the JRun Management Console

- 1 Make sure the JRun Admin Server is started and your Web server is stopped. To confirm or make changes, choose Start > Settings > Control Panel, and then double-click Services.
- 2 If the JRun Management Console login page is not already displayed, choose Start > Programs > JRun 3.0 > JRun Management Console.

The JRun Management Console login page appears in your browser.

- 3 Log in with user name = admin and password = *the administrative password you created in the [To install JRun 3.0.2a](#) procedure*. If the JRun Quick Start Product Tour browser window appears, close it.

The JRun Application Management Console and Server Administrator page appears.

- 4 Click the connector wizard tab.

The Connector Wizard Step 1 frame appears.

- 5 Make the following entries for Step 1 of the Connector Wizard, and then click Next.

| Field | Description |
|---------------------|---|
| JRun Server Name | Choose JRun Default Server. |
| Web Server Type | Enter your Web server type. |
| Web Server Version | Enter the version of your Web server. The picklist is dependent on your Web server type. |
| Web Server Platform | Select the platform on which your server runs. The picklist is dependent on your Web server type. |

The following dialog box warns you to stop your Web server and the World Wide Web Publishing Service. These services should already be stopped, so click OK.

The Connector Wizard Step 2 frame appears.

- 6 Make the following entries for Step 2 of the Connector Wizard, and then click Next.

| Field | Description |
|----------------------------|--|
| JRun Server IP Address | This is the IP address where JRun resides. The default is the IP address for the local host. If JRun and the Web server are on the same machine, accept the default. If they are on different machines, enter the IP address of the JRun server machine. |
| JRun Server Connector Port | Enter the number of an open port that the JRun server will use to listen for connections from the Web server. |

The Connector Wizard Step 3 frame appears.

- 7 Make the following entries for Step 3 of the Connector Wizard, and then click Next.

| Field | Description |
|--|--|
| PWS Scripts Directory or IIS Scripts Directory | Enter the full path to the scripts directory as it was configured when the Web server was installed, for example C:\inetpub\scripts. |
| Install as a Global Filter | Check. |

The Connector Wizard Step 4 frame appears, indicating successful completion.

- 8 Click Done, and then log out of the JRun Management Console.

Installing the Siebel eCollaboration Server

Installing the Siebel eCollaboration server updates the class path for the WebSurfer in JRun. Each time you reinstall JRun, this class path is lost. If you reinstall JRun, then you must manually update the class path.

For information about updating the JRun classpath, see [“Updating the JRun Classpath” on page 49](#).

NOTE: If you have an existing installation of Pixion’s PictureTalk server or the Siebel eCollaboration (Pixion PictureTalk) server, you must uninstall it before you install the Siebel eCollaboration server.

CAUTION: The Siebel eCollaboration server and Siebel Web Engine must reside on different machines.

Before starting the eCollaboration server installation, do the following:

- Determine and record the IP address of the machine on which you installed JRun. You are required to enter this IP address during the installation.
- HTTP Gateway software allows users to access the eCollaboration server securely through firewall ports configured for HTTP. Because most firewalls are already configured to support HTTP, the HTTP Gateway allows administrators to maintain existing firewalls without having to configure special ports for eCollaboration traffic. If you implement a firewall, and your Web server software supports virtual IPs, you should install the HTTP Gateway to bind to the same port on which the Web server listens, typically port 80. To do so, assign two different IP addresses to the machine that hosts both JRun and the eCollaboration server. Configure the Web server to listen on the port for one IP address and configure the HTTP Gateway, through the following procedure, to listen on the same port for the other IP address.

To install the eCollaboration server

- 1 On the Siebel eCollaboration server computer, close all open applications and then insert the *Windows Server Ancillary Programs* CD-ROM.
- 2 In Windows NT Explorer, double-click the setup.exe file in the
\\Thirdpty\\pixion\\enu\\ecollaboration folder on the CD-ROM.

The Siebel eCollaboration server installation wizard extracts files and its Welcome screen appears.

- 3 Follow the prompts in the following table to complete the installation, using the indicated guidelines for your entries.

| Field | Description |
|------------------------------------|--|
| Destination directory | Accept the default or specify a different folder. |
| Select features | Accept the default, "Complete." |
| Server configuration port settings | Accept the default ports or change to other ports that are open. |
| Instance | Accept the default or enter a name of your choice for the eCollaboration server virtual directory, for example <code>eCollab</code> . |
| HTTP Gateway IP | Enter the IP address of the machine that hosts JRun. If you implement a firewall and assign two IP addresses to the machine, enter the IP address for use by the HTTP Gateway. |
| HTTP Gateway port | This port communicates with the machine that hosts the eCollaboration server. If you implement a firewall and assign two IP addresses to the machine, enter the common port on which the Web server and HTTP Gateway listen, typically the default port 80. If you do not implement a firewall, enter any port that is open. |
| Web Server IP | Enter the IP address for the Web server machine. |
| Domain Name | Enter the domain name for the Web server, for example <code>machinename.companyname.com</code> . |
| Root Alias | Enter the name of the virtual directory that points to the WebSurfer pages. Typically, accept the default value, <code>websurfer</code> . |
| Require Proxy Host | If Web site users access the eCollaboration server through a proxy server, then the proxy settings must be filled in. Check the checkbox to access another dialog box in which to enter the settings. Otherwise, leave the checkbox unchecked. |

The Ready to install the application dialog box appears, and then the Updating system progress dialog box appears.

- 4 In the dialog box indicating successful installation, click Finish.
- 5 After exiting the Siebel eCollaboration installation wizard, click OK in the Install dialog box to restart your computer.

The Siebel eCollaboration server services, PictureTalk CSS Manager, and PictureTalk Meeting Manager are started. The names of the services correspond to the Instance Name entered in [Step 3](#). For example, if the instance name is `ecollab`, the services appear as `ecollab Meeting Manager` and `ecollab CSS Manager`.

Updating the JRun Classpath

Installing the Siebel eCollaboration server updates the class path for the WebSurfer in JRun. Each time you reinstall JRun, this class path is lost. If you reinstall JRun after installing the eCollaboration server, then you must manually update the JRun class path.

To manually update the JRun classpath

- 1 Choose Start > Programs > Jrun 3.0 > JRun Admin Server.
- 2 Choose Start > Programs > Jrun 3.0 > JRun Management Console.

The JRun Management Console appears.

- 3 Choose Jrun Default Server > Java Settings.
- 4 Check Classpath to confirm the following paths exist.
 - *Destination directory/root alias* is in the JRun Java class path, where destination directory and root alias are values you provided in the eCollaboration server installation procedure. *Root alias* is the virtual directory that points to the WebSurfer pages and is typically the default, `websurfer`. For example, an entry here could be `D:/eCollaboration/websurfer`.
 - *Destination directory/PictureTalk/jsp*, for example `D:/eCollaboration/PictureTalk/jsp`.

NOTE: JRun classpaths require that you use the forward slash (/) only. The backward slash (\) is not interpreted equivalently.

- 5 To edit a classpath, drill down on the path name, edit the path, and then click Update.
- 6 Click the JRun Default Server icon in the system tray.
The JRun Default Server dialog box appears.
- 7 Click Restart to restart the JRun default server.
- 8 Log out of the JRun Management Console, and stop the JRun Admin Server.

Configuring Network Address Translation

In an eCollaboration deployment that uses Network Address Translation (NAT), the eCollaboration server machine has two different IP addresses—one for client machines that are outside the external firewall and one for client machines that are either inside the internal firewall or are outside the internal firewall but inside the external firewall.

If your implementation uses NAT, you must make the following changes manually to the eCollaboration server configuration so that Present and Attend modes function properly:

- Edit the `ptkgmgr.ini` file to allow the Meeting Manager to communicate the proper IP address of the eCollaboration server to clients.
- Edit the `ptklmgr.ini` file to allow the HTTP Gateway to connect to the meeting using the internal IP address in all cases.
- Edit the `layout_applet_quick` file and the `framework.template` file to allow the eCollaboration server to be recognized by the same domain name by all clients, independent of the firewall zone they are in.

You must restart the CSS Manager and Meeting Manager services to activate these changes.

A NAT deployment example with the following sample IP addresses is used throughout this section. Your IP addresses may vary.

- 192.168.5.12 is the IP address of the eCollaboration server for client machines inside the internal firewall and for client machines outside the internal firewall but inside the external firewall.

- 206.154.116.227 is the IP address of the eCollaboration server for client machines outside the external firewall.
- IP addresses of all machines that are inside the internal firewall are of the form 10.35.22.xxx.
- IP addresses of all machines that are outside the internal firewall but inside the external firewall are of the form 192.168.5.xxx.
- Machines that are outside the external firewall are all other addresses.

Editing the Ptkgmgr.ini File

The ptkgmgr.ini file must contain several netmask and hnetmask entries to allow the Meeting Manager to communicate the proper IP address to clients based on the clients' network addresses.

To edit the ptkgmgr.ini file

- 1 On the eCollaboration server machine, choose Start > Programs > Siebel eCollaboration > ecollab Server > Configure Meeting Manager.

The ptkgmgr.ini file opens in your default text editor.

- 2 Add the following lines:

```
netmask = 192.168.5.0 255.255.255.0 192.168.5.12
```

```
netmask = 10.22.35.0 255.255.255.0 192.168.5.12
```

```
netmask = 0.0.0.0 0.0.0.0 206.154.116.227
```

These lines specify that machines with IP addresses of 192.168.5.xxx and 10.22.35.xxx connect to a meeting using IP 192.168.5.12, and all other machines connect using IP 206.154.116.227.

- 3 Add the following lines:

```
hnetmask = 192.168.5.0 255.255.255.0 192.168.5.12
```

```
hnetmask = 10.22.35.0 255.255.255.0 192.168.5.12
```

```
hnetmask = 0.0.0.0 0.0.0.0 206.154.116.227
```

These lines specify the same netmasks as in `z XReftap\`. Add the following lines: for the purpose of connecting clients to the HTTP Gateway, if necessary.

- 4 Make sure there is a carriage return at the end of the `ptkgmgr.ini` file, then save and close the file.

Editing the `Ptklmgr.ini` File

The `ptklmgr.ini` file must contain a line that forces the HTTP Gateway to connect to a meeting using the internal IP address for the eCollaboration server, even if the client requests the external address.

To edit the `ptklmgr.ini` file

- 1 On the eCollaboration server machine, choose `Start > Programs > Siebel eCollaboration > ecollob Server > Configure CSS Manager`.

The `ptklmgr.ini` file opens in your default text editor.

- 2 Locate the line that starts with `ptkhttpd_opts =` and add the following flag at the end of the line:

```
-f<internal_ip_address>
```

For example, change the line to:

```
ptkhttpd_opts = -I192.168.5.12 -p8329 -H192.168.5.12 -P80 -f192.168.5.12
```

The parameters in this line represent the following:

- The `-I` parameter is the IP address of the HTTP Gateway.
- The `-p` parameter is the port of the HTTP Gateway.
- The `-H` parameter is the IP address of the Web server.
- The `-P` parameter is the port of the Web server.
- The `-f` parameter forces the HTTP Gateway to contact the eCollaboration server on the IP address that is specified, even though the client may be specifying a different address outside the external firewall.

- 3 Save and close the file.

Editing the Layout_Applet_Quick File

For Follow-me Web browsing to function, the eCollaboration server must be recognized by the same domain name by all clients, independent of the firewall zone they are in.

To edit the layout_applet_quick file

- 1 Open the `PictureTalk\ptk-apps\java\htdocs.ptk\layout_applet_quick` file in a text editor.
- 2 Locate the line that has the following form:

```
hlines += "'http://<ip_address>:<http_gateway_port>/ptkgw/  
ecollab/ptk-apps/java/framework' "
```

- 3 Replace the IP address with the domain name for the eCollaboration server. For example, if the eCollaboration server domain name is `www.siebel.com`, then change

```
hlines += "'http://192.168.5.12:8329/ptkgw/ecollab/ptk-apps/java/  
framework' "
```

to

```
hlines += "'http://www.siebel.com:8329/ptkgw/ecollab/ptk-apps/  
java/framework' "
```

- 4 Save and close the file.

Editing the Framework.template File

For Follow-me Web browsing to function, the eCollaboration server must be recognized by the same domain name by all clients, independent of the firewall zone they are in.

To edit the framework.template file

- 1 Open the `PictureTalk\ptk-apps\java\htdocs.ptk\framework.template` file in a text editor.
- 2 Locate the line that has the following form:

```
hserver_addr=<ip_address>
```

- 3 Replace the IP address with the domain name for the eCollaboration server. For example, if the eCollaboration server domain name is `www.siebel.com`, then change

```
hserver_addr=192.168.5.12
```

to

```
hserver_addr=www.siebel.com
```

- 4 Locate the line that has the following form:

```
user_icon=http://<ip_address>:<http_gateway_port>/ptkgw/ecollab/  
ptk-apps/java/bitmaps/coffeemug.bmp
```

- 5 Replace the IP address with the domain name for the eCollaboration server. For example, if the eCollaboration server domain name is `www.siebel.com`, then change

```
user_icon=http://192.168.5.12:8329/ptkgw/ecollab/ptk-apps/java/  
bitmaps/coffeemug.bmp
```

to

```
user_icon=http://www.siebel.com:8329/ptkgw/ecollab/ptk-apps/  
java/bitmaps/coffeemug.bmp
```

- 6 Save and close the file.
- 7 Restart the CSS Manager and Meeting Manager services.

Providing a License Key to the eCollaboration Server

The `license.ini` file defines for the eCollaboration server the maximum number of concurrent users. Siebel Technical Services provides the `license.ini` file for you to use at your site.

To provide the license key to eCollaboration

- 1 Submit a service request to Siebel Technical Services indicating that you need a `license.ini` file. Provide the following information:

- The IP address of the server that hosts the eCollaboration server. The license key is based on the server's IP address.

NOTE: If you move the eCollaboration server to another machine, you must contact Siebel Technical Services to get another license key, or you must change the IP address of the new machine to match the IP address with which the license key is associated.

- The number of concurrent users you have licensed.
- 2 Save the license.ini file to the \PictureTalk\Mgr folder in the eCollaboration server root directory.

Verifying Successful Installation

You can verify a successful eCollaboration installation by confirming that two participants can use Follow-me browsing.

To verify successful eCollaboration server installation

- 1 Choose Start > Programs > Jrun 3.0 > JRun Admin Server to start the JRun Admin server.
- 2 Choose Start > Programs > Jrun 3.0 > JRun Management Console.
The JRun Management Console appears.
- 3 Choose Jrun Default Server > Java Settings.
- 4 Check Classpath to confirm the following paths exist. Update the paths, if necessary.
 - *Destination directory/root alias* is in the JRun Java class path, where destination directory and root alias are values you provided in the eCollaboration server installation procedure. *Root alias* is the virtual directory that points to the WebSurfer pages and is typically the default, websurfer. For example, an entry here could be D:/eCollaboration/websurfer.

- *Destination directory*/PictureTalk/jsp, for example D:/eCollaboration/PictureTalk/jsp.

For information about updating the JRun classpath, see [“Updating the JRun Classpath” on page 49](#).

5 Open Internet Service Manager.

- In Windows NT, choose Start > Programs > Windows NT Option Pack 4.0 > Microsoft Internet Information Server > Internet Service Manager.
- In Windows 2000, choose Start > Control Panel > Administrative Tools > Internet Service Manager.

The Internet Service Manager dialog box appears.

6 Confirm that the virtual directory for WebSurfer is created and points to the right directory. It should match the name and path in [Step 4](#).

7 Start the IIS Admin Service, World Wide Web Publishing Service, JRun Default Server, eCollab CSS Manager, and eCollab Meeting Manager services if they are not already started.

8 Open a browser and type in `http://ecollaboration server domain name/servlet/CSRLogin?ID=1234`, where “1234” can be any number of arbitrary digits. The eCollaboration server domain name is the value you entered in the Domain field in [Step 3 on page 48](#) (in the procedure [“To install the eCollaboration server.”](#)) The string `servlet/CSRLogin?ID` is case-sensitive.

- To test voice over IP, append `&AUDIO=True` after the number in the URL to activate the voice over IP servlet.
- To test the agent’s eCollaboration tool bar, append `&ADMIN=True` after the number in the URL to add the agent's present, attend, and download buttons on the cobrowser.

A page with Click Here for next Customer appears.

9 Click the Click Here link.

A new browser opens on a page displaying Please Wait.

- 10** Return to the first browser and click the Click Here link again to open another browser.

A new browser opens on a page displaying Please Wait. To make viewing easier, resize and reposition the two browsers so they are side by side. When you type a URL in the address bar of either browser, the other browser should follow to the same Web site.

If verification fails, review the steps of the installation:

- Verify that you have the correct JRun license.
- Verify that the JRun Default Server is started, not the Admin Server.
- Verify that the IIS Admin Service is started on the correct server.
- Verify that the URL uses the correct cases.
- Verify that the same CSRLoginID is used in both browsers.
- You may not be using a valid or open port for either HTTP gateway or JRun. Try different ports.
- Verify that the websurfer directory is mapped to the correct physical directory.
- Verify that both JRun and the eCollaboration server are running on a different machine than the Siebel Web Engine.

Correct any errors or reinstall, if necessary.

Setting Server Administration Parameters

You can set parameters in the Server Administration screen to configure the way Web collaboration is implemented with Siebel employee application object managers, such as those for Siebel Call Center and Siebel Service.

At a minimum, you must set the following parameters to allow Siebel eCollaboration to function for a particular Siebel application:

- For each applicable object manager, set Web Collab Enable Flag to True at the component level.
- Set Web Collab Server to the URL of the server on which eCollaboration is installed. Provide this parameter at either the server, server components group, or component level.

For information about setting Siebel server parameters, see *Siebel Server Administration Guide*.

[Table 2](#) describes the Siebel eCollaboration server parameters.

Table 2. Siebel eCollaboration Server Parameters

| Parameter | Entry |
|------------------------------|--|
| Web Collab Enable | (True or False) Set to True to allow Web collaboration for this object manager. You must set this parameter to True for at least one customer facing application and one employee facing application for eCollaboration to work correctly. |
| Web Collab Enable Simulation | (True or False) Set to True to bypass Siebel Universal Queuing to test Siebel eCollaboration in simulation mode. |
| Web Collab Language Code Map | Specify the name of the language mapping for the Web collaboration package that you use. Different vendors have different maps. For eCollaboration, the default value is PIXION_LANGUAGE_MAP. There is no need to modify this value. |
| Web Collab Log File | Provide the full name and path for the log file, or provide only the name of the log file to place it in the root log directory. The parameter is used only for testing. |

Table 2. Siebel eCollaboration Server Parameters

| Parameter | Entry |
|------------------------------------|---|
| Web Collab Log Level | <p>Set the log level to one of the following, depending on the way you want application errors to be logged:</p> <ul style="list-style-type: none"> 0. No log. 1. All error messages are logged. 2. All error messages and warnings are logged. 3. All error messages, warnings, and parameters are logged. 4. All error messages, warnings, parameters, and Web Collaboration templates are logged. <p>Use this parameter only for testing.</p> |
| Web Collab Package | <p>Specify the package of Web Collaboration commands to use. By default, Siebel eCollaboration uses the predefined package called Siebel eCollaboration. If you define another package, the name you enter here must match the name you give the package in the Web Collaboration Templates view.</p> |
| Web Collab Server | <p>Enter the URL of the server on which eCollaboration is installed. For example, if you installed the eCollaboration server on the server that hosts www.siebel.com, you must enter <code>http://www.siebel.com</code>.</p> |
| Web Collab Using Siebel Session Id | <p>If you use the Siebel Activity ID as the session handle, as is the default for Siebel eCollaboration, enter True; otherwise, enter False.</p> |
| Web Collab Using Siebel UQ | <p>If your implementation uses Siebel Universal Queuing, enter True; otherwise, enter False.</p> |

Integrating Web Collaboration into a Communications Configuration

Communications configurations contain commands and events that are specific to Siebel eCollaboration. Many eCollaboration commands are nested with commands that are not specific to eCollaboration to allow eCollaboration to work in the multichannel communications toolbar.

This section describes the high-level tasks you must do and specific guidelines to use with those tasks to integrate Siebel eCollaboration with Siebel Communications Server and Siebel Universal Queuing. For information about configuring communications channels to work with Siebel Communications Server and Siebel Universal Queuing, see *Siebel Communications Server Administration Guide* and *Siebel Universal Queuing Administration Guide*.

To integrate modes of communication with Siebel Communications Server, you must create and associate drivers, communications profiles, and communications configurations. Following are the tasks in this group that you must perform to integrate a Web collaboration application, including Siebel eCollaboration, with Siebel Communications Server.

NOTE: You must implement a queuing mechanism to use Siebel eCollaboration. Siebel Universal Queuing is one such mechanism.

- **Configure the driver.** Define a driver with channel type Web Collaboration and specify the DLL file with which the communications server interfaces with the Web Collaboration driver.
- **Configure communications profiles.** Define at least one profile for the driver. A profile defines the way a driver is used for a particular purpose. If necessary, define additional profiles for the driver with parameters to override the default parameters.

- **Associate profiles with communications configurations.** Associate profiles for Web collaboration drivers with one or more communications configurations. A communications configuration provides a framework to control one or more types of incoming, outgoing, or interactive communications. You may have one or more communications configurations for different purposes, such as to accommodate communications that use a particular kind of CTI middleware or to accommodate Web collaboration only.
- **Modify communications configurations if necessary.** Provide commands, command data, event handlers, event responses, and event logs related to Web collaboration in configurations, if necessary.

NOTE: Your Siebel application provides seed configurations that support voice, email, and Web collaboration channels. You can modify their commands and event handlers. You should use only the seed configurations or ones derived from them.

To remove the Web Collaboration channel from the configuration, you need to remove the LoginToWebCollab and LogoutFromWebCollab commands from the configuration.

Setting Up a Siebel Universal Queuing Configuration for Web Collaboration

You must do the following high-level tasks to set up a Universal Queuing (UQ) configuration for Web collaboration.

NOTE: For specific information about setting up UQ configurations, see *Siebel Universal Queuing Administration Guide*.

- Create a UQ configuration and designate it as the primary configuration.
- Create a channel of type Web Collaboration and add at least one property, SiebelChannelType, to the channel.
- Create a route of type Web Collaboration and add at least one property with the following field values and one escalation rule:
 - Property Name: SiebelChannelType
 - Relation: ~

- Property value: `Web*`
- Assign employees (agents) to the Web collaboration channel you create.

Setting Up a Communications Configuration for Web Collaboration

You must do the following high-level tasks to set up a communications configuration for Web collaboration.

NOTE: For specific information about setting up communications configurations, see *Siebel Communications Server Administration Guide*.

- Create a communications configuration.
- Create a driver of type Web Collaboration or use the default library `sscmimed.dll`.
- Create a profile for the driver and override the driver parameters if necessary.
- Add the profile to the configuration.
- Specify the name of the UQ configuration as a parameter of the communications configuration.
- Assign agents to the communications configuration.

Default Communications Configurations Related to Web Collaboration

Communications configuration commands and event handlers are configurable. You are provided the following default commands and event handlers for Web collaboration as part of your Siebel applications installation.

Setting Up Agents to Receive Web Calls

To allow an agent to receive Web call requests, you must perform the following tasks.

- **Associate agents with communications configurations that support the Web Collaboration channel.** An agent must be associated with an active communications configuration to receive any type of communication. For the agent to receive Web calls, the configuration must include a profile for a Web collaboration driver.
- **Associate agents with telesets and extensions.** Telephone calls must be routed to hardware used by the agent.
- **Define the agent in Universal Queuing.** Each agent's skills are associated with the communications configuration, and they are defined under UQ. Universal Queuing routes calls and service requests from callers to agents based on agents' skills.
- **Set up routing rules in Universal Queuing.** You can create business rules to determine the agents to whom Web collaboration requests with different attributes are routed.

For more specific information about associating agents with communications configurations, telesets, and extensions, see *Siebel Communications Server Administration Guide*.

For more specific information about defining agents in Siebel Universal Queuing, see *Siebel Universal Queuing Administration Guide*.

Use the following Web collaboration-specific guidelines when you perform these association tasks.

- Define at least one route of channel type Web Collaboration with property `SiebelChannelType ~ Web*`.
- Specify the number of simultaneous sessions of channel type Web Collaboration for the agent to be at least 1.

To associate an agent with a communications configuration

- 1 Choose View > Site Map > Communications Administration > All Configurations.
- 2 Pick the configuration that comprises the current set of drivers you are implementing.
- 3 Click the Agents view-level tab.
- 4 In the Agents list, add a new record.
- 5 Pick one or more users to associate as agents with this communication configuration.
- 6 Click the Parameters view-level tab.
- 7 In the Parameters list, add a new record.
- 8 Complete the record, and then click Save. Use the following guidelines.

| Field | Description |
|--------|--|
| Name | Required. Enter UQConfigurationName. This field is case sensitive. |
| Value | Required. Enter the name of the primary Universal Queuing configuration, as specified in the UQ Administration screen. |
| Active | Check this field to associate the UQ configuration with the selected communication configuration. |

You must also associate an agent with a Siebel Universal Queuing configuration.

To associate an agent with a UQ configuration

- 1 Choose View > Site Map > UQ Administration > Configurations.
- 2 Select the primary configuration.
- 3 From the Show drop-down list, choose Employees.
- 4 Select one of the employees you picked in [“To associate an agent with a communications configuration.”](#)
- 5 In Skills, list any skills. In the Employee Competencies list, enter the associated competencies and skill levels.
- 6 From the Show drop-down list, choose Channels.
- 7 Choose a channel of type Web Collaboration.
- 8 From the Show drop-down list, choose Routes.
- 9 Select a route or add a new route record.
- 10 Create a property for the route.
- 11 In the Escalations list, add a new record and name it. Enter a time out value, the interval at which UQ puts the item back in the queue if it is not picked up.
- 12 In the Escalations Rules list, define the parameters for the escalation, such as routing this to an agent with a specific expertise.

NOTE: An agent cannot control telephone calls with the communications toolbar if CTI middleware is not installed. However, the agent can manually dial a user's telephone number to make a call back. The Call Back and Call Back & Collaboration options are displayed to callers unless you deactivate their display. In the WEB_COLLAB_TYPE list of values, uncheck the Active field in the records with Display Value Call Back and Call Back & Collaboration to remove them from the picklist displayed to callers in the Live Web Assistance form.

This chapter provides information for balancing Web collaboration loads on multiple eCollaboration servers. This strategy allows you to use different eCollaboration servers for different Siebel customer applications through which callers request Web collaboration sessions.

When an agent accepts a Web collaboration session, the agent is joined to the session to which the customer is already joined. The agent is joined to the correct session because the work item associated with the session contains the session ID and the domain name of the eCollaboration server on which the session exists.

The work item determines the eCollaboration server to which the caller is connected from the Web Collab Server parameter of the object manager from which the collaboration session is requested. In a configuration in which load-balancing is not implemented, the Web Collab Server parameter is usually set at the server level.

For load balancing, you must set the Web Collab Server parameter at the component level for the object manager for each customer application that implements Web collaboration. Set each object manager to a specific eCollaboration server, so that different object managers on the same Siebel Server can connect to different eCollaboration servers. For example, you can set the eServiceObjMgr component to use one eCollaboration server and the eSalesObjMgr component to use another server. You can also specify that multiple object managers use the same eCollaboration server.

NOTE: To simplify management of multiple eCollaboration servers, you may want to define all of the server parameters related to eCollaboration at the component level. If you define a parameter at the component level, you should remove it at the server level because a server level setting can override a component level setting.

In addition, you must also set the Web Collab Server parameter for the Siebel employee application object manager, such as CallCenterObjMgr. Then on an agent's initial login to Siebel Universal Queuing on a particular computer, the agent is able to receive a download of client software from the eCollaboration server specified in the parameter.

For information about setting server parameters for Siebel eCollaboration, see "Setting Server Administration Parameters" on page 2-20.

For information about setting Siebel Server parameters in general, see *Siebel Server Administration Guide*.

Configuring the Siebel eCollaboration Server

After installing and setting up the eCollaboration server, you may need to change some of the properties that are defined in the server's config.properties file.

The config.properties file is located in the \eCollaboration\websurfer directory on each eCollaboration server. To modify an eCollaboration server's properties, edit the config.properties file in a text editor.

You can change the following properties:

- **DomainName.** This property defines the domain name of the eCollaboration server. If you have changed the domain of the eCollaboration server, you must change this property value.
- **DefaultURL.** This property lets you pick the initial URL that is displayed in the cobrowser's browsing area prior to loading the last page the caller was on. For faster network bandwidths, this page appears for microseconds and is never seen by either the caller or the agent. On slower networks, this page appears for a few seconds. The page appears based on network bandwidths, and not necessarily the speed at which the caller or agent is connected to the network.
- **Proxyset, proxyhost, and proxyport.** Set these properties if you implement a proxy server configuration.
- **RecordURLs.** This property allows you to toggle listing the URLs in a chat.
- **TruncateURLlen.** Use this property to limit the number of characters for a URL in the chat. Set the property to TRUE to truncate the URL and set the TruncateURLlen to the number of characters that you want to be shown. If a URL is longer than the maximum length, it will be appended with ellipses. When you set the property to FALSE, TruncateURLlen is ignored.

NOTE: You should not change other properties in the config.properties file that are not listed here.

Siebel eCollaboration Server Performance Tuning

This section provides suggestions for tuning the eCollaboration server to improve its performance and response time. However, you do not have to modify the server.

Tuning the eCollaboration server requires that you perform the following tasks:

- Modify Microsoft Internet Information Service (IIS) Server settings
- Modify Macromedia JRun settings

Modifying Microsoft Internet Information Service Server Settings

You must modify several IIS properties on the eCollaboration server.

To modify Microsoft IIS Server settings

- 1 Right click on My Computer, and then select Properties.
- 2 Click the Advanced tab, and then click Performance Options.

NOTE: Set Application response to `Background services`.

- 3 From the Start menu, choose Programs > Administrative Tools > Internet Services Manager.
- 4 Right click on Default Web Site (your Web server), and then select Properties. Make sure that the following parameters have the values shown.

| Parameter | Value |
|------------------|----------------------|
| Connections | unlimited |
| HTTP Keep-Alives | enabled (checked) |
| Enable Logging | disabled (unchecked) |

- 5 Restart the Web server.

Modifying Macromedia JRun Settings

Macromedia JRun 3.1 or later allows you to make the performance tuning settings that are described in this section.

You can download and install JRun 3.1 or later from Macromedia's Web site at <http://macromedia.com>. You can use the same license key that you are provided with JRun 3.0.2 on the Siebel *Windows Server Ancillary Programs* CD-ROM. To complete the JRun 3.1 or later installation, perform the steps described in "Configuring JRun" on page 2-10.

After you complete the initial configuration, you must modify several JRun settings on the eCollaboration server.

To modify JRun 3.1 settings

- 1 From the Start menu, choose Programs > JRun 3.1 > JRun Admin Server to start the JRun Admin server.
- 2 From the Start menu, choose Programs > JRun 3.1 > JRun Management Console.
- 3 Log in as admin.
- 4 Choose JRun Default Server > Java Settings.
- 5 Make sure that the Java Executable path correctly defines the path to the javaw.exe.
- 6 Click on Java Arguments, change the settings to `-server -Xmx512M -Xms128M`, and then click update.
- 7 Choose JRun Default Server > External Web Server. Make sure that the following parameters have the values shown. Click update after making each change.

| Parameter | Value | Comment |
|----------------------|-------|---|
| Minimum Thread Count | 300 | Typically, you should set this to twice the average number of concurrent sessions on this server. |

| Parameter | Value | Comment |
|-----------------------------|-------|---------|
| Maximum Active Requests | 500 | |
| Maximum Concurrent Requests | 2,000 | |

- 8** Choose JRun Default Server > Log File Settings. Make sure that the following parameters have the values shown.

| Parameter | Value |
|-----------|----------------------|
| Info | disabled (unchecked) |
| Warning | disabled (unchecked) |
| Error | enabled (checked) |

- 9** Restart the JRun Default Server.

You can configure Siebel eCollaboration in the following ways:

- [“Configuring Siebel eCollaboration Views” on page 74](#)
- [“Configuring Lists of Values Used with Web Collaboration” on page 76](#)
- [“Configuring Sound on the Communications Toolbar for eCollaboration” on page 78](#)

Screens are provided for you to administer Siebel eCollaboration in the following ways:

- [“Working with Web Collaboration Templates” on page 79](#). You can add, delete, or modify templates used in communications configurations for Web collaboration.
- [“Checking the Status of a Session” on page 80](#). You can check the status of active and completed sessions.
- [“Viewing the Text of a Siebel eCollaboration Chat” on page 81](#). You can view the text of a session’s chat.

Configuring Siebel eCollaboration Views

This section describes specific guidelines you must use if you configure the views used with eCollaboration. For specific information about configuring views and applets, see *Siebel Tools Reference*.

Web Collab All Activities View

The Web Collab All Activities view is the view in which an agent uses Siebel eCollaboration. The Web Collab All Activities view is based on the Action business object and the Action business component.

You can configure the Web Collab All Activities view to display or hide any of the fields in the Action business component. You can also change the fields' locations and display labels.

If you configure the Web Collab All Activities view, follow these specific guidelines:

- If you specify PiggybackScriptTemplate for the communications event response [EventResponse:WebCollabWorkStarted], one and only one of the applets in the view must be based on the CSSSWEFrameCallMe class.
- The default activity list applet in the Web Collab All Activities view is Web Collab User Activity List Applet which is based on the Action business component and the CSSSWEFrameListCallMe class. The records in the list applet are queried by Primary Contact Id and sorted by Created in descending order.

Web Collab Request Form View

The Web Collab Request Form view is the view in which a caller requests a Web collaboration session.

If you configure the Web Collab Request Form view, follow this specific guideline:

- The applet that contains the Submit and Cancel buttons must be based on the CSSSWEFrameCallMe class.

Web Collab Acknowledging View

The Web Collab Acknowledging view contains the thank you message displayed to the caller after the caller submits a request for a collaboration session. If you configure the Web Collab Acknowledging view, follow this specific guideline:

- One and only one of the applets in the view must be based on the CSSSWEFrameCallMe class.

Configuring Lists of Values Used with Web Collaboration

You can modify lists of values in the Applications Administration screen of Siebel employee applications.

For information about modifying lists of values, see *Siebel Tools Reference*.

The following lists of values are associated with Web collaboration:

- **WEB_COLLAB_PACKAGE**. Defines the list of Web collaboration packages.
- **WEB_COLLAB_TYPE**. Defines the Web Collaboration subtypes; that is, Call Types and Contact Methods that are supported.
- **WEB_COLLAB_TOOLBAR_DESP_TMPL**. Defines the template for generating the brief description of the Web collaboration work item on the toolbar. You can use the %1 variable to obtain the caller's name defined by the WebCollab User Name - Toolbar field of the User business component. You can use the %2 variable to obtain the current Web Collaboration subtype.

The following examples illustrate usage of the variables:

| | |
|--|--|
| WEB_COLLAB_TOOLBAR_DESP_TMPL | Web Collaboration with %1 |
| WebCollab User Name - Toolbar | [Full Name] (evaluates to John Doe) |
| Current contact method | Chat & Collaboration |
| Result displayed as description of Web collaboration work item | Web Collaboration with John Doe |
| WEB_COLLAB_TOOLBAR_DESP_TMPL | '%2' from %1 |
| WebCollab User Name - Toolbar | [First Name] (evaluates to John) |
| Current contact method | Chat & Collaboration |
| Result displayed as description of Web collaboration work item | 'Chat & Collaboration' from John |

- **WEB_COLLAB_AGENT_NAME_TMPL.** Defines the template for generating the agent's name as it appears in the chat box. You can use the %1 variable to obtain the agent's name defined by the WebCollab User Name - Chatbox field of the User business component.

The following example illustrates usage of the variable:

| | |
|----------------------------------|-------------------------------------|
| WEB_COLLAB_AGENT_NAME_TMPL | Agent %1 |
| WebCollab User Name - Chatbox | [First Name] (evaluates to John) |
| Result displayed as agent's name | Agent John |

- **WEB_COLLAB_CALLER_NAME_TMPL.** Defines the template for generating the caller's name as it appears in the chat box. You can use the %1 variable to obtain the caller's name defined by the WebCollab User Name - Chatbox field of the User business component.

The following example illustrates usage of the variable:

| | |
|-----------------------------------|--|
| WEB_COLLAB_CALLER_NAME_TMPL | Customer %1 |
| WebCollab User Name - Chatbox | [Full Name] (evaluates to John Doe) |
| Result displayed as caller's name | Customer John Doe |

Configuring Sound on the Communications Toolbar for eCollaboration

You can configure the sound that accompanies a blinking accept work button on the communications toolbar.

For information about configuring the communications toolbar, see *Siebel Communications Server Administration Guide*.

Working with Web Collaboration Templates

The templates provided as seed data in the Web Collaboration Templates view provide vendor-specific URLs and scripts that are used by Siebel applications to communicate with the vendor's Web collaboration server.

For collaboration technologies by vendors other than Siebel Systems, you must modify the communications configuration related to Web collaboration, if necessary, and add all the templates you use. If you plan to implement and switch between different technologies, you can define a set of templates, or package, for each vendor and switch between the packages.

You can access the Web collaboration templates by logging into a Siebel employee application and choosing View > Site Map > Communications Administration > Web Collaboration Templates.

Following are the templates provided as seed data for the default Siebel eCollaboration implementation.

- **AgentLoginScript.** This JavaScript updates and installs plug-ins for voice over IP and presentation on the agent's Windows desktop when the agent logs in to the Web collaboration server.
- **AgentJoinScript.** This JavaScript downloads and starts the agent-side applets when the agent joins a session.
- **AgentJoinURL.** This URL notifies the Web collaboration server when the agent joins a session.
- **AgentReleaseURL.** This URL notifies the Web collaboration server when the agent ends a session from the communications toolbar.
- **AgentTransferURL.** This URL notifies the Web collaboration server when the agent does a blind session transfer from the communications toolbar.
- **CallerSubmitScript.** This JavaScript submits a session request to the Web collaboration server and downloads and starts caller-side applets.

Checking the Status of a Session

An activity is created for each Web collaboration session. The caller is the primary contact of the activity and the agent who accepts the call is the primary owner. You can check the status of a Web collaboration session. The status can have one of the following values:

- **Requested.** The caller has requested the session, but the agent has not yet joined.
- **Cancelled.** Before the agent joins the session, the caller closes the pop-up window that the caller has been cautioned to not close or the meeting will be cancelled.
- **In progress.** Both the agent and the caller are logged in to the session.
- **Done.** The session is terminated.

To check the status of a Web collaboration session

- 1 Choose View > Site Map > Communications.
- 2 From the Show drop-down list, choose My Web Collaboration Activities or All Web Collaboration Activities, if it is available.

The Web Collaboration Activities list appears.

- 3 In the Web Collaboration Activities list, navigate to an activity record.

The record provides statistics for the session, including its status.

Viewing the Text of a Siebel eCollaboration Chat

At the end of a Siebel eCollaboration session or when the session is transferred, the text of its Web chat is saved automatically as an attachment to the activity for the session. If a collaboration session is transferred from the original agent to one or more other agents, a separate chat attachment is saved for each agent's segment of the session.

To view the text of a session's chat

- 1 Choose View > Site Map > Communications.
- 2 From the Show drop-down list, choose My Web Collaboration Activities or All Web Collaboration Activities, if it is available.

The Web Collaboration Activities list appears.

- 3 In the Web Collaboration Activities list, select an activity record.
- 4 Click the Chat Scripts view-level tab.

The Chat Scripts list appears.

- 5 Click the hyperlink for the chat.

A text file containing the chat's text opens in the editor that is associated with the `.txt` extension.

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