Brightware

Implementation Readiness Guide

Version 8.1.4

edocs

Trademark Acknowledgements

Table of Contents

About edocs

edocs provides guided selling and service software that maximizes time with customers – assessing needs, configuring complex products and solutions, generating proposals — along with powerful eCustomer service — to turn opportunities into lifetime customers.

edocs's award-winning and patented Brightware software helps companies dramatically increase their eService levels and sales revenues by ensuring all online interaction channels (email, online chat, web self-service) translate into exceptional customer satisfaction and retention, while reducing costs. Brightware software leverages proven automation technology to deliver unparalleled ROI and an exceptional eCustomer experience.

The Brightware Suite consists of three, tightly integrated multi-channel communications applications: automated email, self-servicing Web pages, and instant messaging. All three applications are managed through a completely integrated Contact Center and response library database. Driven by intelligence engines and automation technologies, Brightware products preserve the quality of customer service operations by allowing companies to replicate best practices across a variety of issues, and replicate knowledge across multiple channels. With Brightware products handling routine and mundane inquiries automatically, your CSR staff is available to concentrate on more interesting challenges, increasing overall job satisfaction and decreasing turnover.

edocs's software suite helps companies cost-effectively handle today's Internet customers with advanced technology that spans both website routing and customer contact channel management.

Product Overview

edocs is the first in the industry to deliver its collaborative Brightware application on a non-proprietary Java-based business platform and to apply J2EE standards. Powered by BEA WebLogic, edocs's Brightware business platform delivers peerless support of high-volume, high-performance interactions. Open, internet-centric technology keeps edocs customers ahead of the curve, eliminating the need for constant technology updates and reducing total cost of ownership. Brightware streamlines the work of developers, administrators, and customer service agents to ensure effective, efficient, and economical business operation.

The Brightware Contact Center is an intelligent information center that supports Brightware products to streamline customer communications. Feature-rich, it ensures that your customer service agents and supervisors have the end-to-end information they need to deliver superior and consistent customer interactions throughout the sales and service cycle to foster customer satisfaction and loyalty. Contact Center is an intelligent information center that utilizes customer history and information from Web, email, and chat interactions to ensure that service agents have complete and timely information to deliver seamless customer assistance across email and chat channels. Contact Center's single-click workflow represents intelligent automation to help your service agents work smarter — by combining advanced message understanding, accurate classification, automatic response selection, and a host of productivity tools, Contact Center ensures that agents work at peak performance.

To cover e-mail interactions, Contact Center communicates with various email servers, routing and responding to electronic inquiries. When Contact Center is fully implemented, it uses a rules-based knowledge repository defined with an internal set of editors or "Managers", to identify emails, process them, and send appropriate action. If Contact Center cannot determine the intent of a request with a specific percentage of certainty, the request is routed to the Service/Default queue and then waits for an "agent" to receive the request and reply.

The Contact Center software package routes electronic inquiries to the most appropriate queues containing customer service representatives or agents with respective expertise. Supervisors and Agents, working together, monitor and respond to messages as they flow into an email system.

edocs Professional Services

edocs Professional Services provides education, consulting, and technical support services for our enterprise customers worldwide. We offer a range of packages and services focused on delivering business value through proven technical and application expertise, focused methodologies, industry domain experience, and commitment to customer success.

Overview and Benefits

edocs Professional Services utilizes a unique automation design and implementation methodology to facilitate rapid deployment of an automated electronic response system. This approach is focused on *practical deliverables and knowledge transfer* and results in a solution quickly deployed within the customer environment. edocs Professional Services consultants work jointly with customer staff to facilitate knowledge transfer from an organization singly dedicated to developing eService solutions for customers across all industries.

Joint-Success

The edocs Professional Services Organization brings extensive expertise in developing automated assistance solutions across many client environments. Our customers provide their knowledge of the business requirements, technical knowledge of the system infrastructure, commitment of resources to help implement and then maintain the edocs solution, and ability to best prioritize the scope of the project across time, resources, and system functionality.

Implementation Readiness

This document serves as a readiness guide and should be used as both a planning tool and a checklist for configuring your system environment in preparation for installing your edocs Brightware software. Prior to a edocs consultant beginning the implementation, the various system requirements and configuration settings outlined in this document must be completed. The tasks identified in this guide, as well as those that will be performed at installation and during the ongoing maintenance of the edocs system, will require expertise specific to your environment in the areas of System Administration, Web Server Administration, and Database Administration. The appropriate resource(s) for these areas of responsibility will need to be available and/or on-hand during the implementation. Upon completion of the tasks identified in this readiness guide, you should return the completed guide/checklist to edocs in order to confirm your scheduled implementation. (**Email or fax your completed readiness guide/checklist to your edocs Account Manager**).

Note: You should refer to the Installation Guide and Release Notes included on the edocs software media for more detailed information and instruction on the areas and specific tasks covered in this guide.

System Requirements

For each of the following components please indicate the hardware and software configuration being provided. Please review the Installation Guide, located on the product CD (under \Docs), for specific requirements on each system component.

+Email Server	
We recommend that you create two additional email accounts to utilize for testing purposes – one to utilize as a sample client, and one to utilize as an inbox for a test business unit.	
Inbound Email Server Name	ex. mail.company.corp
Email Account Username	ex. answer*
Email Account Password	
Outbound Email Server Name	ex. gateway.company.com (may be the same as Inbound)
Test (Client) Account Username	ex. customer*
Test (Client) Account Password	
Test (Inbox) Account Username	ex. dev*
Test (Inbox) Account Password	

You may need to provide the domain and login account as well as the mailbox name in order to be able to access the mailbox contents. For example, this may need to be: edocs\smithr\answer (<domain>\<username>\<mailbox>). Verify these parameters by setting up a connection via Outlook Express.

+Contact Center (Transactional) Database Server	
Beyond the recommendations of the Installation Guide, we recommend the following: RAM: 1 GB minimum for 3000 messages per day 1.5 GB minimum for 5000 messages per day edocs 8.x Supports the following database management systems and versions: • Microsoft SQL Server 2000 (service pack 3) • Oracle 8i (8.1.7.4) and Oracle 9i (9.2.0.4)	
Actual Specs	
Estimated Messages per Day:	
RAM:	
Hard Drive Size:	
--Available Drive Space:	
Processor(s), Speed:	

Reporting (Datamart) Database Server

Beyond the recommendations of the Installation Guide, we recommend the following:

RAM: 1 GB minimum for 3000 messages per day
           1.5 GB minimum for 5000 messages per day

In addition, you can assume that your datamart database will be approximately 1.5 times the size of the transactional database.

edocs 8.x Supports the following database management systems and versions:

- SQL Server 2000 (service pack 3)
- Oracle 8i (8.1.7.4) and Oracle 9i (9.2.0.4)

Actual Specs	
RAM:	
Hard Drive Size:	
--Available Drive Space:	
Processor(s), Speed:	

[+]edocs Server	
Actual Specs	
RAM:	
Hard Drive Size:	
--Available Drive Space:	
Processor(s), Speed:	

Agent Desktop and Contact Center Console
We strongly recommend a screen resolution (screen area) of at least 1024x768. Screen resolution may be reviewed and modified by accessing Display properties in the Control Panel (Windows systems only).

[+] **It is recommended that a separate and dedicated computer be allocated to this component.**

Network Requirements

The Brightware Email Assistance servers are designed to work on a 10Mbps, or faster, Ethernet network. The database, mail, and edocs server computers should all be connected via a local area network (LAN). While it is recommended that the agent and supervisor desktops also be connected to the database, mail, and edocs application servers via a LAN, it is possible to have these computers communicate remotely via a wide area network (WAN) connection provided adequate bandwidth is available. The LAN and WAN bandwidth requirements are as follows:

- **Local Area Network Environment** – The database, mail and edocs servers should all be connected via a *MINIMUM 10 mbps* connection. The recommended connectivity for these machines is 100 mbps.

- **Remote/Wide Area Network Environment** – Environments in which supervisors and agents will access the system remotely, i.e. via a WAN connection, they should have enough bandwidth that will not only ensure adequate performance for this application, but also test of other applications don't have degraded performance.

Describe the network environment that has been enabled for the edocs system:

Connection Between:	Connection speed		
	10 mbps	*100 mbps*	*Other (specify)*
Email Server and edocs Server			
edocs Server and Database Server			
Knowledge Manager Computer(s) and edocs Server			
Knowledge Manager Computer(s) and Database Server			

Database Administration

Setting up the Customer Profile database is basically a two-step process:

1. Allocating resources and sizing the database
2. Modifying and running the appropriate customer profile script.

Additionally, the database administrator should review the following related items:

- **Database Servers** – Ensure that adequate memory and processing resources are available for the edocs databases. It is generally recommended that a database server be dedicated to supporting the edocs application. However if sufficient memory and processing resources are available the edocs database(s) can be installed on a shared database server.

- **Database Backups** – Ensure that a regular and systematic backup process is in place, and verify that you can successfully restore and use backup copies of the database(s). It is recommended that the database backup process be run daily at a minimum. It is also necessary to truncate the transaction log after a successful backup.

- **Database Creation, Configuration, and Tuning –** The following settings should be configured to ensure peek system performance. (Note: If you are installing the edocs database on a shared database server, verify the recommended settings are appropriate for your particular environment prior to implementing.)

Please review the Installation Guide, located on the product CD (under \Docs), for instructions to create the Brightware and Datamart databases.

Create edocs Mailbox

A policy decision needs to be made as to whether an existing corporate inbox or mail account can serve as the gateway for email routing, or if you will need to set up another inbox/account specifically for this purpose. If an existing inbox is to be utilized, a temporary or staging inbox will still need to be created for use in testing the installation prior to the system going into production. *To prevent internal users on your network from accidentally emailing this mailbox, we recommend that you hide the mailbox from the email system's address book.*

- ☐ Create a edocs Mailbox, this mailbox will be used to send and receive all mail from the system. *The address of this account will be used as the default outbound email address for all responses sent from the edocs system.*

- ☐ Identify any additional outbound addresses/domains, which need to be supported and determine the business rule(s) for using each additional outbound address.

- ☐ The NT user, or login id, used on the edocs Server machine is the owner of the new (edocs) mailbox.

- ☐ *The new mailbox's **name**, **password** properties are required as part of the configuration. You will also need to know the **server name** of the email server hosting the mailbox account.* This information has been obtained and will be available for the edocs consultant during implementation.

Installation/Configuration of the edocs Software

To be performed jointly between the edocs consultant and the appropriate customer resource(s) at implementation.

☐ *Operating system administrative privileges (i.e. local machine admin) will be required during the installation of the application server components.* Access to an account (username and password) with administrative privileges is available for these servers.

☐ *A list of all Agents and Supervisors, and their Usernames/Login ID's will be required for the configuration of Agents/Supervisors in the database.* This information has been obtained and will be available to the edocs consultant at implementation time.

☐ *A copy of the company-approved responses to customer messages will be required in order to populate the Response Library.* This information has been obtained and will be available to the edocs consultant at implementation time.

☐ *IIS will be used to host the reports.* Internet Information Services has been installed on the Reporting Server.

**Additionally, edocs will request a sampling of typical email messages that are being taken by your appropriate customer service area. It would be beneficial to have this email sample collected as part of your readiness plan.