

A vertical line is positioned to the left of the text. A horizontal bar with a gradient from dark grey to yellow is positioned below the text.

Siebel Brightware™

Contact Center Console Guide

Version 8.1.6

ORACLE®

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About this Guide

Organization

This documentation provides the information necessary to set up and run Contact Center Console:

- Chapter 2, “Introduction to Contact Center”, on page 5, provides an overview of Contact Center components and processing, including Business Units and the Secure Email Portal. It also describes request flow controls such as request and queue priority, and queue status.
- Chapter 3, “The Console Interface and Controls”, on page 23, introduces the Contact Center Console desktop and its user interface controls and conventions.
- Chapter 4, “Contact Center Console”, on page 35, describes the Contact Center Console screens and functions in detail.

Related Documentation

For more information about Contact Center please refer to these documents included in PDF format on the installation CD:

- *Installation Guide*
- *Knowledge Engineers Handbook*
- *Agent Guide*

Conventions

The following typographic conventions are used in this document:

- Items that you are instructed to click or select, such as button names and hyperlinks, are bold:
 - Select **Add Response**.
 - Click the **OK** button.
- Documents, headings, and chapter titles are italicized:
 - “Refer to the *Reference Manual* for more information.”
- Notes are flagged along the left margin:



This icon indicates noteworthy information.

- Cautions are flagged along the left margin:

This icon indicates critical information.

- Programming code and system messages appear in a fixed-width font:
`Set-request-condition (<condition>)`
- Hyperlinks and Cross References - If viewing a document online, you can navigate through it using hyperlinks, which appear in blue text, and cross references. Although not displayed in blue, the Table of Contents and Index entries are also hyperlinks. Cross references are specific page number references. Click the page number to navigate to that page:
 - Refer to “Help”, on page 2.
- The term Type usually refers to typing information on your keyboard:
 - Type the number of decimal places you want displayed.
- The term Enter typically refers to the “Enter” key on your keyboard:
 - Type the number of decimal places you want displayed and press the **Enter** key.
- When a directory path is given, the hard drive letter is omitted since it is unknown what hard drive the system is installed on. Only the default install path is supported:
 - Documents are available under edocs\Brightware\docs\.

Help

You can access this guide from the Help link on the Contact Center Console. The file is in Adobe Acrobat Portable Document Format (PDF). You need Acrobat Reader installed on your computer to view the file.

To access the Help file:

Select **Help** from the **Applications** view.

If You Need Help

Technical Support is available to customers who have an active maintenance and support contract with Oracle. Technical Support engineers can help you install, configure, and maintain your Oracle application.

This guide contains general troubleshooting guidelines intended to empower you to resolve problems on your own. If you are still unable to identify and correct an issue, contact Technical Support for assistance.

Information to Provide

Before contacting Oracle's Siebel Technical Support, try resolving the problem yourself using the information provided in this guide. If you cannot resolve the issue on your own, be sure to gather the following information and have it handy when you contact technical support. This enables your Oracle support engineer to more quickly assess your problem and get you back up and running more quickly.

Please be prepared to provide Technical Support the following information:

Contact information

- Your name and role in your organization.
- Your company's name
- Your phone number and best times to call you
- Your e-mail address

Product and platform

- In which Siebel product did the problem occur?
- What version of the product do you have?
- What is your operating system version? RDBMS? Other platform information?

Specific details about your problem

- Did your system crash or hang?
- What system activity was taking place when the problem occurred?
- Did the system generate a screen error message? If so, please send us that message. (Type the error text or press the Print Screen button and paste the screen into your email.)
- How did the system respond to the error?
- What steps have you taken to attempt to resolve the problem?
- What other information would we need to have (supporting data files, steps we'd need to take) to replicate the problem or error?

Problem severity

- Clearly communicate the impact of the case (Severity I, II, III, IV) as well as the Priority (Urgent, High, Medium, Low, No Rush).

- Specify whether the problem occurred in a production or test environment.

Contacting Oracle's Siebel Technical Support

You can contact Technical Support online, by email, or by telephone.

Worldwide Support Center

Telephone: 800-214-0400 or 650-341-0700

Oracle's Siebel SupportWeb

<https://ebusiness.siebel.com/supportweb/>

Email Support

mailto: siebelsupport@oracle.com

Introduction to Contact Center

System Overview

Oracle's Siebel Brightware family of applications run on the Siebel Brightware Server, a J2EE-based eBusiness platform that leverages BEA's WebLogic application server. Siebel Brightware includes Contact Center for managing Email, Web, and Chat requests, the Intelligence Engine, and Analytics for comprehensive reporting.

The Intelligence Engine reads and classifies incoming Internet requests. Personalized responses can be automatically dispatched to customers or routed to Contact Center agents for review. Valuable customer and operational information is stored for use in future request processing and Contact Center reports.

Contact Center's Agent Desktop enables agents to respond quickly and easily to customer mail. Using reply templates, Agents can create customized replies, reassign and forward messages, view attached files, view Customer History information, search for specific messages, and view message and queue status.

Contact Center Business Units support a variety of flexible, scalable deployments, including departmentalization, hosting, and outsourcing.

The Analytics reporting package provides a full set of reports to help you understand customer preferences, operational metrics, and online business activity. You can use any of the many Analytics templates written in Crystal Decisions Crystal Reports out-of-the-box, modify them to suit your needs, or create your own.

The Secure Email Portal allows you to send customers an email message containing a link to a Website where users can view private information in a secure environment.

Use the Knowledge Manager to create and maintain Contact Center Knowledge Bases. A Knowledge Base stores language features used to interpret and process customer email, through phrases, regular expressions, features, intents, and rules.

Implementation Overview

During implementation you will work closely with Oracle Professional Service Organization (PSO) to develop your system. Implementation tasks and activities include:

- Analyzing inbound and outbound mail.
- Building, testing, and refining your custom Knowledge Base.
- Creating a Response Library of response templates.
- Setting up Contact Center Business Units, Queues, Supervisors, and Agents.
- Learning to use the Contact Center desktops and reporting tools.

Basic Terms & Concepts

This section introduces some basic Contact Center terms and concepts. Business Units and the Secure Email Portal are described, as well as request flow (the controls and logic that govern the state, location, and movement of requests through the system). Topics include:

- Business Unit basics and deployment options.
- Relationships between Business Units, Queues, and Agents.
- System-defined (default) Business Units and Queues.
- Rules: (Business Unit) Routing and (Queue) Assignment rules.
- Request flow controls:
 - Service Level values.
 - Message and queue condition.
 - Agent status and availability.
 - Queue priority.
 - Request ranking.
 - Message assignment.
- Secure Email Portal.

Business Units

A Business Unit is an organizational entity within a business. Business Units are central to Contact Center processing.

The Contact Center Administrator uses the console to create Business Units and Supervisors (Users). Supervisors in turn create Agents, Queues, and Groups. Agents are assigned to one or more Business Units, then to Queues within that Business Unit. Agents within a Queue can be organized into Groups. To receive mail, an agent must be assigned to a Queue or Group. The relationships between these objects are illustrated in Figure 2-1.

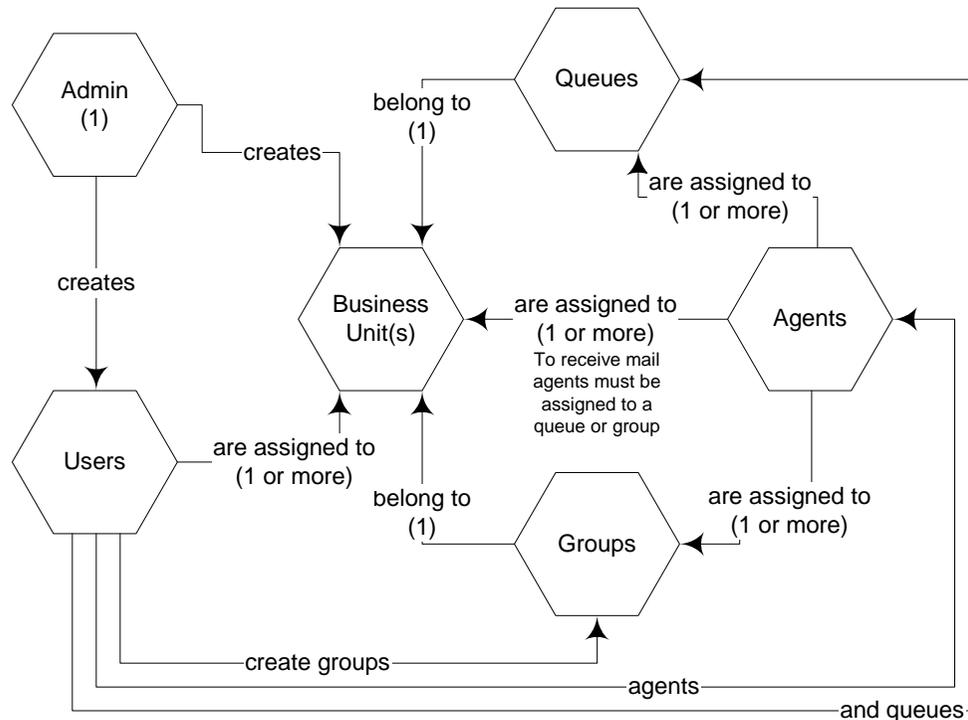


Figure 2-1. Relationships between Contact Center objects.

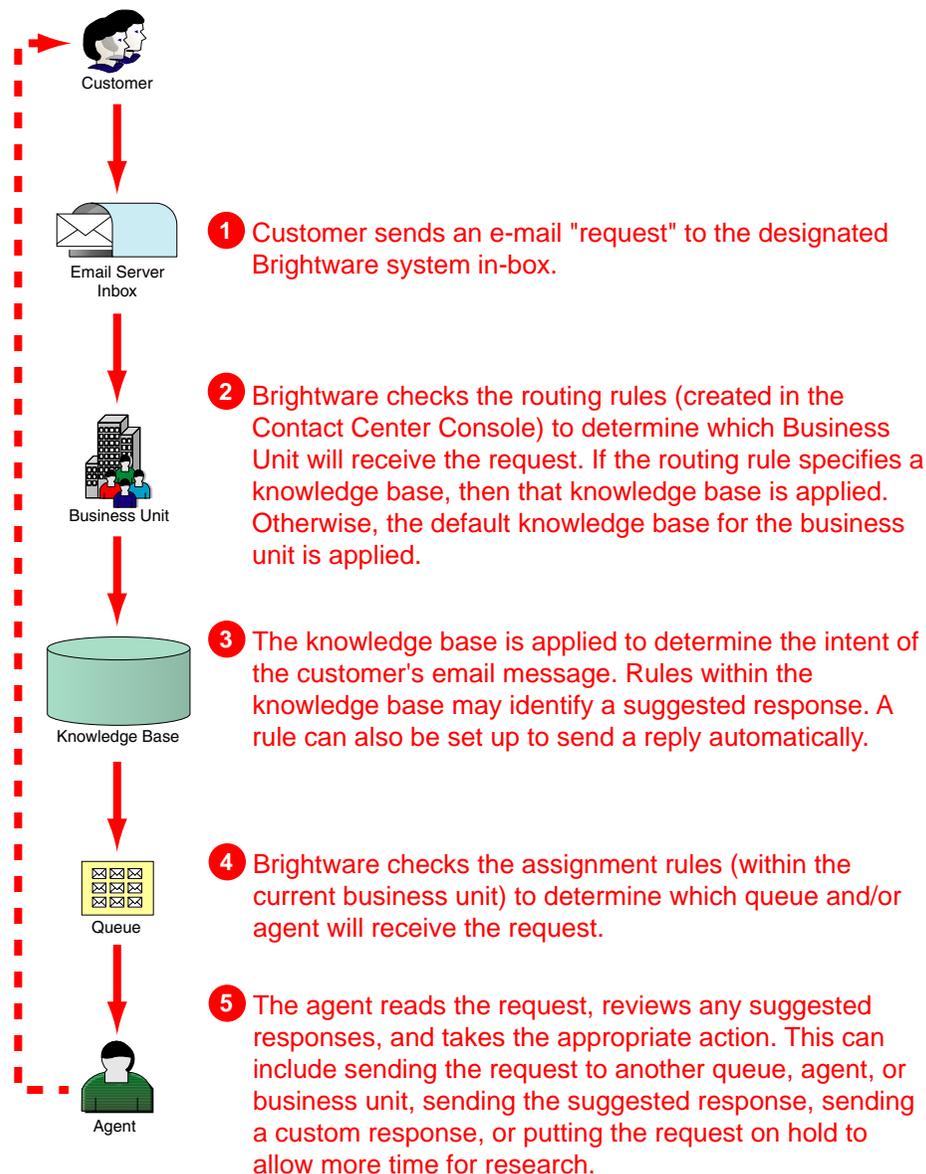
System-Defined Business Units

Contact Center comes with two system-defined (default) Business Units: Initial and Exception. The names of the default Business Units can be changed but not deleted.

- **Initial Business Unit** – If you intend to use a single Business Unit in your implementation, use the Initial Business Unit.
- **Exception Business Unit** – The Exception Business Unit performs Exception error handling (it acts as a holding area for incoming mail if Contact Center cannot determine the Business Unit in which to place a message). This might occur if Contact Center was misconfigured (for example, a Business Unit was inadvertently removed) or the system was being reconfigured during message processing. Other causes for routing to the Exception Business Unit include:
 - From address is invalid or absent.
 - Message body size exceeds the size specified in the Global Inbound Email Server Settings (refer to “Global Inbound Email Server Settings”, on page 43).
 - Message is blank, and there is no attachment. This type of message may also be auto-closed by the system.
 - From address equals the To address and there is no CC address.
 - From address is from a repeat sender (refer to “Global Inbound Email Server Settings”, on page 43).
 - TO, CC or Reply addresses are invalid.

Message Processing Overview

The illustration below shows the Siebel Brightware process for an e-mail “request.”



Configuring Business Units

Business Units allow you to combine Contact Center’s basic building blocks: mailboxes, Natural Language Processing (NLP) functions (message interpretation, scoring, and logic), Supervisors, Agents, Queues, and Response Libraries in the way that best meets your company’s business needs. The following scenarios, based on common customer profiles, illustrate three different implementations.

Profile: Customers Using a Single Default Business Unit

This customer has one Business Unit (Initial BU), one Business Unit inbox, one Knowledge Base, and several Queues with several Agents.

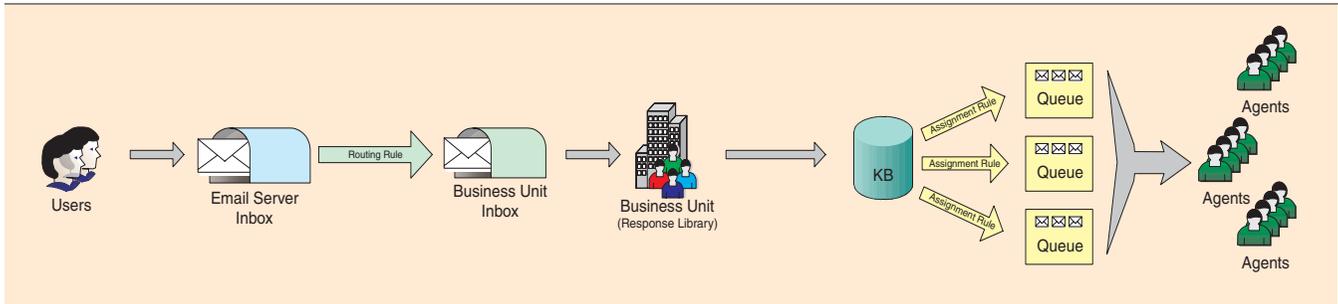


Figure 2-2. Basic Contact Center Configuration, “out of the box”

Profile: Large Company With Departments

This customer is using Business Units to email between different departments. In this instance, each Business Unit represents a single department. They have segregated queues, supervisors, and agents but have retained the option of sharing messages across Business Units.

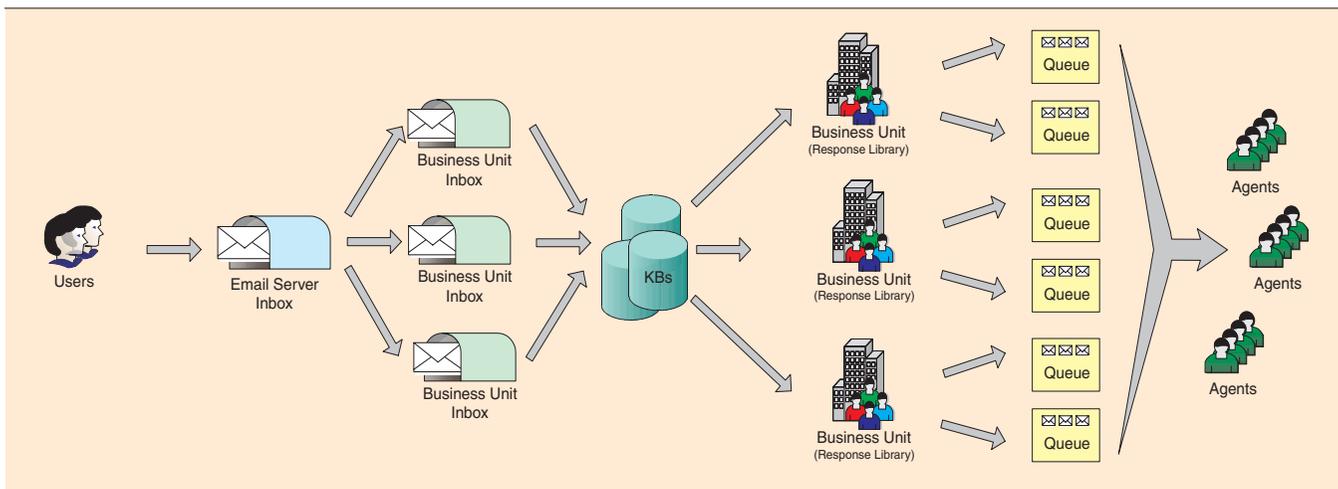


Figure 2-3. Large Company with Departments

This customer has three Business Units, three Business Unit inboxes, several Knowledge Bases, and Queues and Agents associated with each one.

Profile: Outsourcers/Hosters/Application Service Providers

An outsourcer provides email services to one or more other companies. Outsourcers typically use a large pool of agents to handle requests from different companies, and multiple Knowledge Bases to handle each company's email.

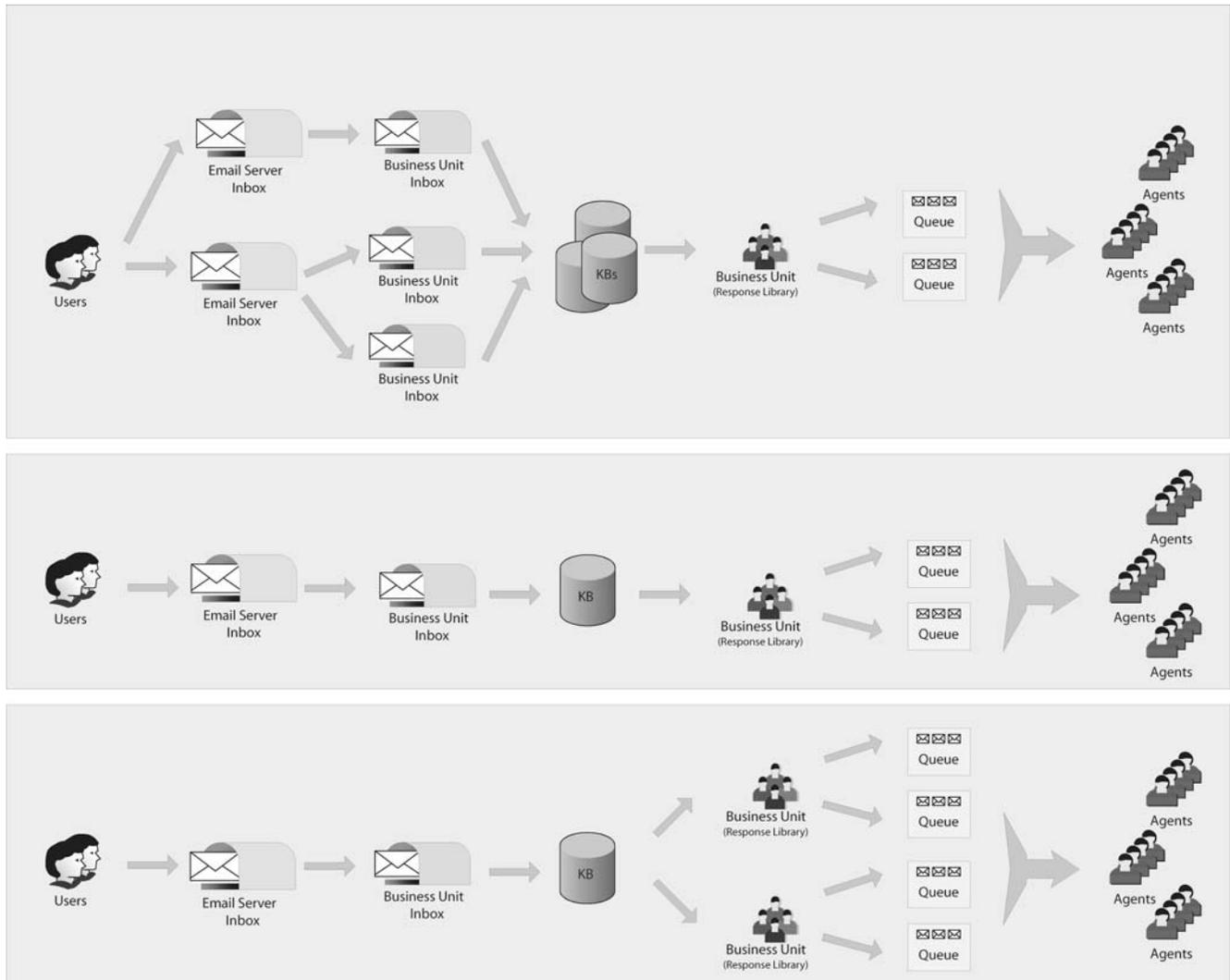


Figure 2-4. A Company with Hosting or Outsourcing Services

This outsourcer has three Business Units, each with one or more inboxes and one or more Knowledge Bases, with Queues and Agents associated with each one.

Considerations When Configuring Business Units

- Can you use Contact Center's default Business Unit configuration, or will you need more than one Business Unit?
- How many inboxes will you require for incoming mail?
- Do any Business Units require more than one inbox?

- What volume of email do you anticipate?
- Is a single Knowledge Base sufficient for all Business Units in your model?
- Will Agents work across all Business Units, or only within one?

Queues

System Defined Queues

Each Contact Center Business Unit contains five system-defined queues: Default, Exception, Review, Inbound, and Outbound. The names of these queues can be changed but not deleted.

- **Default Queue** – All Contact Center messages are routed here unless you create other queues and routing rules to direct messages to them. If you created a rule that routed messages to a non-existent queue, the messages would end up in the Default queue.
- **Exception Queue** – Like the Exception Business Unit, the Exception queue performs Exception error handling. It holds messages Contact Center was unable to deliver, such as messages containing unsupported content (attached audio or video files). Check the Exception queue regularly for undeliverable mail, or assign an agent to the queue that can process the messages. Contact Center typically adds a note to the action history log describing the error. Use the Action History screen to display it. In many cases the problem can be fixed and the message sent on its way.
- **Review Queue** – The Review queues holds messages processed by agents whose responses are under review (i.e. awaiting supervisor approval).
- **Inbound and Outbound Queues** – The Intelligence Engine uses these queues for processing. In the event there is a problem, having these queues visible on the desktop makes evaluation and resolution easier.

Considerations When Creating Queues

Queues play a critical role in determining how incoming mail is routed and processed, and queues structure impacts system performance. It is important to plan your queue structures before you create them. Here are some key points to consider:

- Do you have the right number of queues? Too few or too many? A typical Contact Center installation has 8 to 10 queues.
Don't put all your email in one basket. Consider the auto dealership with a queue called "Vehicle Information"...all kinds of requests could end up here. A more efficient structure might be a queue for each vehicle type: Sport Coupes, Pickup Trucks, Sedans, and SUVs.
- Do your queue names describe the type of request they are designed to handle?
Queue names should be descriptive, specific, and clear. Consider the queue named "Repetitious Customers". Does this queue hold mail from customers who want a lot of product information, or mail from dissatisfied customers?
- Does your queue structure accurately reflect the products and services you sell? Does it reflect your group's existing work flow?

- Will your queues perform efficiently over time and under varying conditions?

Rules

Contact Center rules are used to transport requests to Business Units, Knowledge Bases, and Queues. In their basic form, Contact Center rules express the equation:

If Condition x is True, take action y .

For example this Queue Assignment rule routes incoming requests containing the word “purchase” to the Sales queue. Here are the conditions of this rule (Figure 2-5):

| | |
|-----------|--|
| Field: | Body |
| Operator: | contains |
| Type: | <input checked="" type="radio"/> Key Word <input type="radio"/> Expression |
| Value: | purchase |
| OK | |

Figure 2-5. Conditions of a Queue Assignment Rule

There are three types of Contact Center rules: Routing rules, Assignment rules, and Intelligence Engine rules. Routing rules and assignment rules are created in the Contact Center Console. Intelligence Engine rules are created in the Knowledge Manager. Intelligence Engine rules are discussed in detail in the *Knowledge Engineers Handbook*.

Routing rules direct incoming requests to Business Units. If there is a Knowledge Base associated with a Business Unit the request undergoes Intelligence Engine processing to determine message intent. When intent has been determined, Intelligence Engine rules associate suggested responses with the request and route them to an agent, or dispatch them directly to the customer.

Assignment rules route requests to a specific queue (within a Business Unit), or to a specific agent. There are two types of assignment rules: queue routing rules which send requests to a specific queue or agent, and request rank rules, which can be used to prioritize messages within a queue. Business Unit routing and queue assignment rules take the same parameters and, in incoming requests, look for:

- A specific word (“buy”).
- A specific phrase (“my account number”).
- A regular expression. This can be used to find an embedded string, such as matching “wed” when the word is “wedding”.

If you specify a phrase or keyword, be aware that the system will only match words or phrases that match exactly. The word “wed” will not match a request that contains the word “wedding”. Use a regular expression if you need to accomplish that.

For the most part, “words” are kept separate from white space and punctuation.

The rules for parsing “words” are as follows:

1. Unless mentioned in rules below, all characters are treated as “words” and have break positions on both sides.

2. A “word” is kept together, and consists of a sequence of letters. Certain punctuation marks, such as hyphens and apostrophes, are allowed inside a “word” without causing a break, but only if they are flanked on both sides by letters.
3. A “number” is kept together, and consists of an optional prefix character (such as a period, or currency symbol), followed by a sequence of digits, followed by an optional suffix character (such as a percent sign). The sequence of digits may contain certain punctuation characters (such as commas and periods), but only if they are flanked on both sides by digits.
4. If a “number” and “word” occur in succession without any intervening characters, they are kept together. This allows sequences like “\$30F3” or “ascii2ebcdic” to be treated as single units.
5. Sequences of white space are kept together.
6. The Carriage Return - Line Feed sequence is kept together.

The following characters are treated as “words” (see rule 1).

| | | | |
|---|-------------------|---|----------------------|
| ! | exclamation point | ? | question mark |
| (| left parenthesis | @ | commercial at sign |
|) | right parenthesis | [| left square bracket |
| * | asterisk | \ | back slash |
| + | plus sign |] | right square bracket |
| / | slash | ^ | caret |
| : | colon | ` | acute accent |
| ; | semicolon | { | left curly brace |
| < | less than sign | | vertical bar |
| = | equals sign | } | right curly brace |
| > | greater than sign | ~ | tilde |

Characters allowed within a word (see rule 2).

| | | | |
|---|------------|---|----------------|
| - | hyphen | " | quotation mark |
| _ | underscore | ' | apostrophe |

Characters allowed to precede a number (see rule 3).

| | | | |
|----|-------------|---|--------|
| # | number sign | . | period |
| \$ | dollar sign | | |

Characters allowed within a number (see rule 3).

| | | | |
|---|--------|---|----------------|
| . | period | " | quotation mark |
| , | comma | ' | apostrophe |

Characters allowed at the end of a number (see rule 3)

| | |
|---|--------------|
| % | percent sign |
| & | ampersand |

Determining Knowledge Base for Each Channel

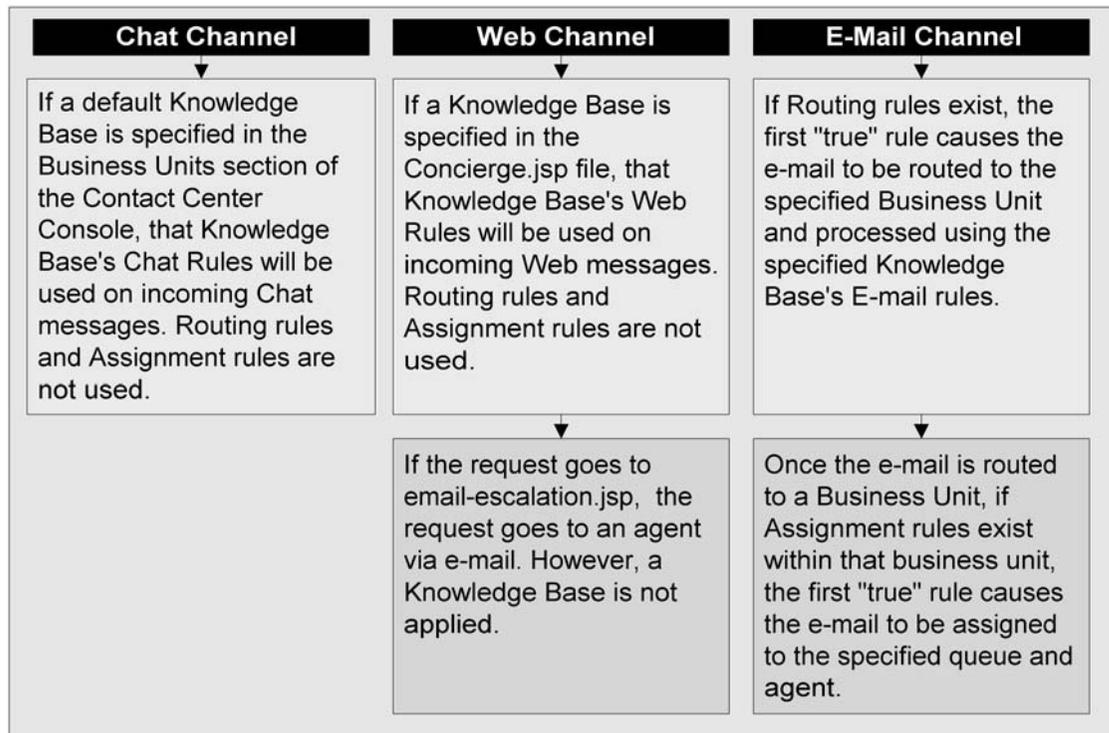


Figure 2-6. How Knowledge Bases are Applied

Regular Expressions (Text Patterns)

A regular expression is a string of characters with a unique signature. Table 2-1, provides some examples.

Table 2-1. Regular Expression Examples

| Name | Example | Pattern |
|--------------------|---------------------|--------------------------------------|
| Phone number | (555) 884-4744 | <code>\(\d{3}\)\ \d{3}-\d{4}</code> |
| Account number | 289302-14 | <code>\d{6}-\d{2}</code> |
| Credit card number | 5268 1987 1245 3412 | <code>\d{4} \d{4} \d{4} \d{4}</code> |

Contact Center uses Perl5 Regular Expressions to specify text patterns. The Regular Expression notation was designed to locate, extract, and manipulate data stored in ASCII character strings. Regular Expressions are described in detail by programming experts on the Internet. Their web sites provide more depth and guidance than could be given here. Offerings include language specifications, tutorials, examples, and a Java application that tests your RegExp code. Here are a few of the best:

- “Perl Regular Expression Tutorial,” by Carl Franklin and Gary Wisniewski.
Web page: <http://virtual.park.uga.edu/humcomp/perl/regex2a.html>.
- “Regular Expressions,” The Single UNIX ® Specification, Version 2, Copyright © 1997 The Open Group.
Web page: <http://www.opengroup.org/onlinepubs/7908799/xbd/re.html>.
- Regular Expression Translator at <http://lightning.prohosting.com/~tbates/regex.html>.
- “PERL5 Regular Expression Description,” by Tom Christiansen.
Web page: <http://virtual.park.uga.edu/humcomp/perl/regexps.html>.

Please use these resources when constructing Regular Expressions.

Request Delivery

Once requests have arrived in the correct Queue, Contact Center uses a specific set of criteria to prioritize them for delivery to agents. These criteria are evaluated for each request in the following order, to determine which request should be sent next for processing.

1. **Request Rank** – Request Rank rules can be used to give priority to requests that contain a specific word, phrase, or regular expression. Request Rank is set on the Request Rank tab of the Supervise: Assignment Rules view.
2. **Queue Priority** – Queue Priority allows you to give preference to requests based on their queue assignment. Queue Priority is a value from 1 to 10, with 1 having the lowest priority and 10 the highest (the default is 1). For example, messages in a queue with a priority of 3 will be delivered to available agents before messages in a queue with the default priority of 1. Queue Priority is set on the Supervise: Queues view.

3. **Queue Condition** – Queue Condition is calculated using the age of the oldest unassigned message in the queue, and the service level values (Warning and Critical) set for the queue on the Supervise: Queues screen. Requests in a queue in Critical condition take precedence over those in a queue in OK or Warning condition. (Message and Queue Condition is discussed later in this chapter).
4. **Agent Assignment** – If a request has been assigned to a particular agent, delivery of that request takes precedence over a message without an Agent Assignment. Direct agent assignments must be made through Assignment Rules in the Supervise: Assignment Rules view. Note that when a message is assigned directly to a particular agent it will wait in the queue until that agent is available (or the request is reassigned by a Supervisor).



Agent Assignment is only considered when the “Consider Pre-assignment When Assigning Requests to Agents” option is enabled on the Admin: Configurations view.

5. **Request Age** – The time elapsed since the request was received.

Another factor that affects how and when messages are delivered is Agent Availability (Contact Center won’t deliver mail to an agent unless that agent is logged in and ready to answer it). Agent Availability is discussed later in this section.

Condition Codes

Contact Center condition codes describe, in a general way, how long a request has been waiting for a response and if that period exceeds your acceptable level of service. The three condition codes apply to both requests and queues. Here’s what Condition means for requests:

- **OK** – Indicates a request has recently arrived and has been waiting an acceptable amount of time. Remember that “acceptable” can be different lengths of time in different queues.
- **Warning** – Indicates a request has been waiting for some time and should be answered soon.
- **Critical** – Indicates the request has been waiting longer than it should and has exceeded the queue’s acceptable level of service.

The following example shows a condition of a message in a queue with a Service Level Agreement (SLA) of 24 hours:

| If a message is: | Its condition will be: |
|-------------------|------------------------|
| 1 - 12 hours old | OK |
| 12 - 18 hours old | Warning |
| 18+ hours old | Critical |

A Queue’s condition is determined by the condition of the oldest request it contains. For example, if nine out of the ten messages in a queue are OK, but one request’s condition is Warning, the queue’s condition will be Warning.

Service Level Values

Service Level values help you meet your organization's response time goals and are set when you create a Queue. Service Level values, in combination with a request's age, determine its Condition. The three Service Level values are:

- **Service Level Agreement (SLA)** – The SLA value represents the response time goal for a particular queue. In other words, your ideal maximum reply time. The default is 24 hours.
- **Service Level Warning** – Determines the maximum length of time a message should wait in a queue before its condition changes from OK to Warning. Requests whose condition is Warning receive higher priority than those whose condition is OK. The default is 12 hours.
- **Service Level Critical** – Determines the maximum length of time a message should wait in a queue before it is flagged Critical. Requests whose condition is Critical receive higher priority than those whose condition is Warning or OK. The default is 18 hours.



Contact Center tracks these as "total elapsed time." In other words, it does not take weekends or holidays (associated with a typical 40-hour work week) into account.

Different queues can have different service level thresholds. For example, at a software company the Corporate Mail Queue may have an SLA of 24 hours, the Technical Support Queue may have an SLA of 4 hours, and the Human Resources Queue could have an SLA of 120 hours (five working days).

If response time values are too low, you can waste resources answering messages that don't need an immediate response. Failing to meet unnecessary deadlines will result in more messages flagged Warning or Critical. Your performance statistics will indicate you didn't meet your service goals when in fact most requests were answered in an appropriate period of time.

If response time values are too high, messages may sit unanswered in queues for long periods of time and important message won't get flagged. Your performance numbers will look great ("We met all our response time goals!") but they won't reflect what's really happening to the requests in your system.

Message Status Codes

A message's status describes if and how it has been processed. Message Status codes are: Working, Pended, Queued, and Closed.

- **Working** – Indicates an agent is currently working on the message. Agents only have one active message in their inbox at a time. Once a message arrives in an agent's inbox, its status is Working until it is closed, reassigned, or pended.
- **Pended** – Indicates an agent has placed a message "on hold" in order to collect more information before responding. Agents can have more than one pended message in their inbox at a time.
- **Queued** – Indicates a message is waiting in a queue. Messages are queued when they come into Contact Center or when a supervisor or an agent reassigns a request.
- **Closed** – Indicates the message has been processed and closed.

Agent Status and Availability

An agent's Status describes whether they are Active or Inactive. An active agent is reporting to work regularly and not on an extended leave or vacation. An Inactive agent is unavailable (for these or other reasons). Make an agent inactive when you know they will be away for an extended period.

An Agent's Availability describes whether or not they are available to process incoming messages. When an agent is active but not logged in, Contact Center Console lists them as "unavailable." When logged in, Agents use the **Go Online/Go Offline** button on their Desktop to temporarily step away from their workstations without logging out. Agents who are Offline don't receive new messages for processing.

- **Inactive** – Indicates an agent is generally unavailable or away.
- **Active** – Indicates an agent is generally available and reporting to work on a regular basis.
- **Offline** – Indicates an agent is logged in but away from their desk at the moment, or otherwise not answering mail.
- **Available** – Indicates an agent is active, logged on, and processing messages.

To summarize: Agents who are active and logged in and available receive requests for processing. Agents who are inactive, or offline, or unavailable, do not receive requests.

The Secure Email Portal

Contact Center's Secure Email Portal provides an environment where customers can review sensitive or confidential information. The Portal can be used to review request responses, submit new requests, or respond to existing requests. Customers can also view and search the history of their request submissions. The Portal UI can be customized for seamless integration into an existing web site.

Only two kinds of outbound messages are sent via the Portal:

- Replies to requests that were submitted via the Portal.
- Replies coming from a Business Unit that has been marked as secure.

To make a Business Unit secure, i.e. to make all outbound responses available from the Portal only, edit the Business Unit's properties on the Contact Center Console. Enable the "Send all the replies only as secure" property and, if desired, modify the secure email notification text that will be sent to your customers to notify them that a secure reply is available.

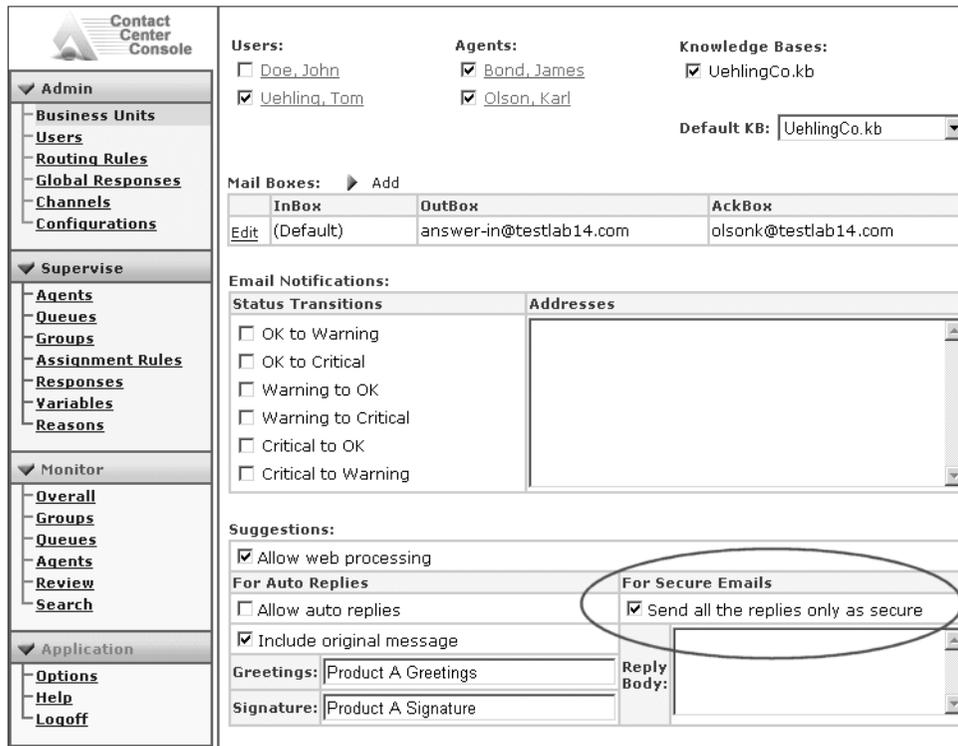


Figure 2-7. Secure Email property

The section below describes the Portal from a customer perspective, including procedures for establishing and using a secure account. Tools for integrating the Portal into your website are described in the *Implementation Guide*.

Portal Overview: A Customer’s Perspective

To register as a new Portal user:

1. Open a Web browser window and enter the following URL to display the login screen.
`http://<server name>:7001/portal`
2. Click on the **Register** link to display the registration screen.
3. Type the required values and click **Submit**.

A new Portal user account will be created, which can then be used to log into the Portal.

To log into the Portal:

1. Open a Web browser window and enter the following URL to display the login screen:
`http://<server name>:7001/portal`
2. Type your user name and password and click **Enter** to log in and display the My History view.

Portal Views

Once you've logged in, the My History screen appears. Buttons for accessing the main views of the Portal appear across the top of the screen.

My History View

The My History view displays your history of requests and replies. The table is sorted by default by the date Received column, but you may sort by another column by clicking on the column header. If more than 20 messages are available, click the **Next** button to display the next 20. Click the **Refresh** button to check for new messages at any time. To view a particular message, click on the subject of the message to display the Message Preview screen.

New Request View

The New Request view allows you to submit a new request.

My Account View

Use the My Account view to change your Portal account password.

Goodbye

Click the **Goodbye** button to log out of the Portal.

The Console Interface and Controls

The Contact Center Console User Interface

This chapter describes the features, elements, and controls of the Contact Center Console user interface. Most of these will be familiar if you have used a Web browser before. User interface controls include hyperlinks, drop-down lists, check boxes, option buttons, data entry fields, and scroll bars.

Views & Roles

The View Bar appears on the left-hand side of every main screen (Figure 3-1). Some Console screens have tab controls. For example, click the tabs on the Overall Monitor screen to view system status information by Business Unit, Queue, or Agent.

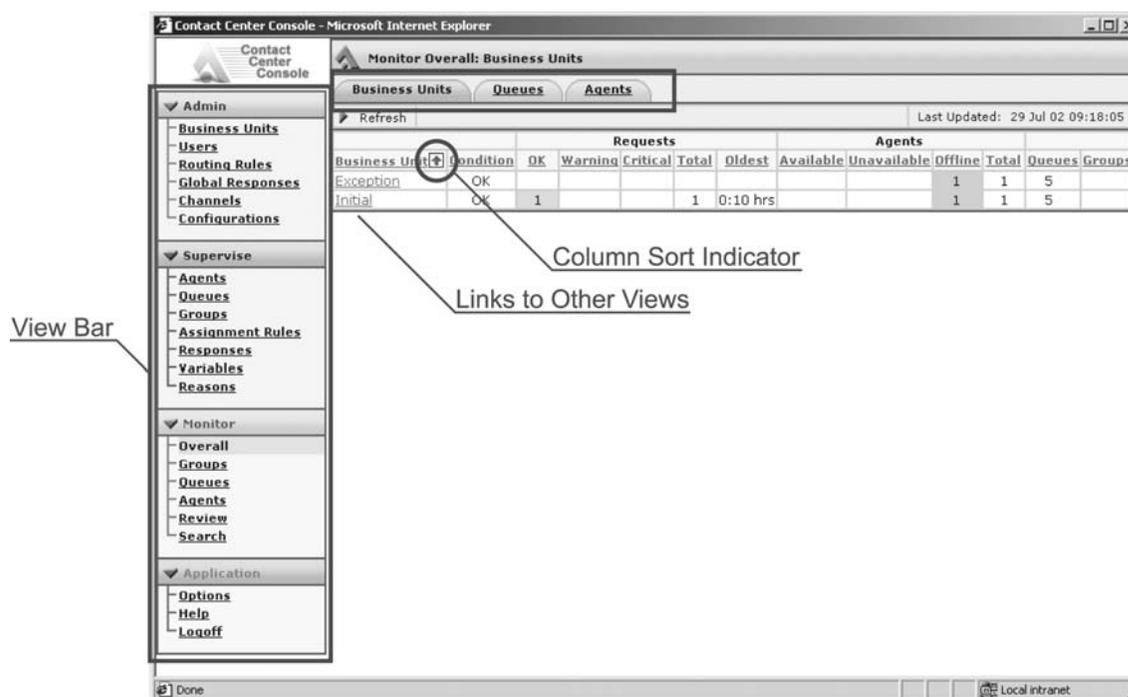


Figure 3-1. The Contact Center Console

The Console screens are color-coded and grouped on the View Bar by role: Administrative views, Supervisory views, Monitoring views, and Applications views (Figure 3-2).

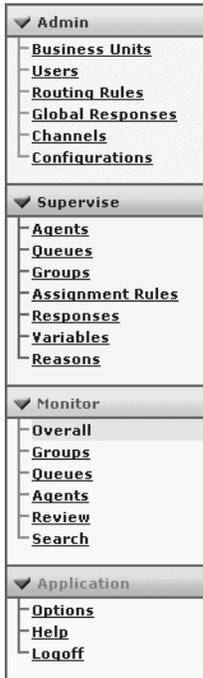


Figure 3-2. The Console View Bar

- Use the Supervise views to perform initial set up and configuration tasks, such as setting up business units, routing rules, administrative staff desktops, and global responses.
- Use the Admin views to create, edit, and delete queues, agents, groups, queue assignment rules, responses, and reason codes.
- Use the Monitoring views to check mail flow, monitor system response, and balance agent and queue loads.
- Use the Application views to set Console options, change a password, view this manual, and log off.

Navigation & Table Controls

Use the View Bar, button controls, and links to move between screens. Button controls are described in detail below. Your browser's Back and Forward buttons will work inconsistently or not at all. Use the [Back](#) and other link controls provided on the screen instead.

Many views display Contact Center data in table format (Figure 3-3). Here are some tips for working with them.

- The green arrow next to the column heading indicates the table is sorted based on that column. Click a column heading to sort the table based on values in that column.
- The direction of the green arrow (up or down) indicates the column sort order (ascending or descending). Click the column heading to reverse the sort order.
- A green arrow at the beginning of a row indicates it is the active row.

Select All and Clear All controls

Column Headings (sort controls)

Previous and Next controls

| Select All | | Clear All | | Column Headings (sort controls) | | | | Previous and Next controls | |
|------------|-------------------------------------|--------------------|-----------|---------------------------------|--------|---------------|-----------------------------|---|--------------------------|
| | | Received | Direction | Thread ID | Status | Business Unit | From | Subject | |
| | <input checked="" type="checkbox"/> | 15 Mar 02 16:31:40 | Incoming | 375 | Open | BU1 | customer22@lab.firepond.com | bu1S2-M015 direct deposit | Previous |
| | <input type="checkbox"/> | 15 Mar 02 16:31:42 | Incoming | 377 | Open | BU1 | customer23@lab.com | bu1S2-M016 Claim #173900 | 61 - 80 |
| | <input type="checkbox"/> | 15 Mar 02 16:31:45 | Incoming | 382 | Open | BU1 | customer24@lab.com | bu1S2-M017 Add account I recently established a | Next |
| | <input type="checkbox"/> | 15 Mar 02 16:31:47 | Incoming | 385 | Open | BU1 | customer25@lab.com | bu1S2-M018 password | |
| | <input type="checkbox"/> | 15 Mar 02 16:31:50 | Incoming | 388 | Open | BU1 | customer26@lab.com | bu1S2-M019 pay bills | |
| | <input type="checkbox"/> | 15 Mar 02 16:31:53 | Incoming | 391 | Open | BU1 | customer27@lab.com | bu1S2-M020 password | |
| | <input type="checkbox"/> | 15 Mar 02 16:31:56 | Incoming | 395 | Open | BU1 | customer28@lab.com | bu1S2-M021 Electronic Payments | |

Check boxes

Links

Figure 3-3. Console Table Controls

Use the **Previous** and **Next** controls to display additional (or proceeding) rows when the record set you're viewing is larger than the screen.

Click a record's checkbox to select it. Use the **Select All** button to select all the records on the screen. Use the **Clear All** button to deselect all selected records on the screen.

Button Controls

Each Console view has a set of button controls, use these to add, edit, and delete Contact Center objects (Figure 3-4).



Figure 3-4. The Controls on the Supervise: Agents Screen

For example, on the Admin: Users view, click **Add** to create a new user; on Admin: Business Unit, click **Edit** to modify a Business Unit; on Supervise: Users, click **Delete** to delete an agent.



Click directly on the text in a button to activate it. The cursor will change from an arrow to a hand when you are directly over the control.

Here's a list of Console button controls and their functions:

- **Add** – Create a new object (queue, business unit, agent).
- **Edit** – Modify an existing object.
- **Delete** – Delete an object.
- **Restore** – Re-activate a previously deleted object.
- **Refresh** – Update the information on the screen with the latest from the database.
- **Reset Password** – Reset User and Agent passwords to blank (empty). Available on Admin: User and Supervise: Agent views only.
- **Save** – Save your work after adding or editing an object.
- **Cancel** – Cancel a modification or addition in progress.

Monitoring View Buttons

The Monitoring screens have a different set of controls (Figure 3-4).



Figure 3-5. The Controls on the Monitoring: Queues Screen

Here's what they do:

- **Preview** – View the contents of a request.
- **Transfer** – Transfer a message to another Business Unit. (For more information see “Transfer”, on page 77.)
- **Reassign** – Reassign a message to a different queue or agent. (For more information see “Reassign”, on page 76.)
- **History** – Display all messages associated with a particular customer. (For more information see “History”, on page 77.)

- **Actions** – Display all actions taken on a particular request (For more information see “Actions”, on page 78.)
- **Rules** – Display rule, feature, intent, and scoring information for the selected request (Figure 3-6).



Figure 3-6. The Rules tab of the Rules Screen

- **Close** – Close the selected message.

The Monitor: Review screen also allows you to:

- Approve messages from agents under review. For more information see “Monitor: Review View”, on page 73.
- **Classify** – Add or change message classification information. For more information see “Supervise: Responses View”, on page 60.

The Customer History screen also allows you to:

- Reopen a previously closed message. For more information see the “History”, on page 77.
- Search for specific set of messages.

Customizing User Desktops

Each Contact Center has one, and only one, Administrator. On the Administrator’s desktop, only the Admin and Applications views appear (Figure 3-7):



Figure 3-7. The Admin Views

The Administrator views are used to:

- Create and configure Business Units.
- Create Contact Center Console users (Supervisors and/or other staff; Supervisors create Agents).
- Create rules for routing incoming requests to Business Units.
- Create global responses (i.e. those visible to all agents regardless of Business Unit).
- Start and stop operations of the Email, Web, and Chat channels.
- Maintain and configure additional Contact Center settings.

The Administrator creates each user’s desktop based on the functions they should have, using the Permissions settings on the Admin: User screen. Each box corresponds to a view on the user’s View bar (Figure 3-8).

| Permissions: | | |
|--|--|---|
| Manage | Admin | Monitor |
| <input checked="" type="checkbox"/> Business Units | <input checked="" type="checkbox"/> Agents | <input checked="" type="checkbox"/> Overall |
| <input checked="" type="checkbox"/> Users | <input checked="" type="checkbox"/> Queues | <input checked="" type="checkbox"/> Groups |
| <input checked="" type="checkbox"/> Routing Rules | <input checked="" type="checkbox"/> Groups | <input checked="" type="checkbox"/> Queues |
| <input checked="" type="checkbox"/> Global Responses | <input checked="" type="checkbox"/> Assignment Rules | <input checked="" type="checkbox"/> Agents |
| <input checked="" type="checkbox"/> Channels | <input checked="" type="checkbox"/> Responses | <input checked="" type="checkbox"/> Review |
| <input checked="" type="checkbox"/> Configurations | <input checked="" type="checkbox"/> Reasons | |

Figure 3-8. Admin: Users Permission Controls

All users automatically get the Applications view. Anyone with Monitoring capabilities also has access to the Search view.

Sample Desktop Configurations

Here are some options for setting up user desktops. This user has Supervise and Monitor functions (Figure 3-9):



Figure 3-9. Supervise and Monitor

This user has permission to monitor only (Figure 3-10):

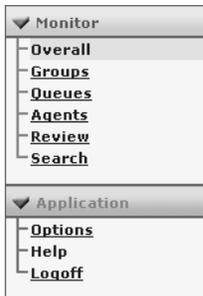


Figure 3-10. Monitoring Only

This user supervises and monitors queues (Figure 3-11):



Figure 3-11. Queue Administration

This user has full permissions, including access to all Admin, Supervise, and Monitor functions (Figure 3-12):

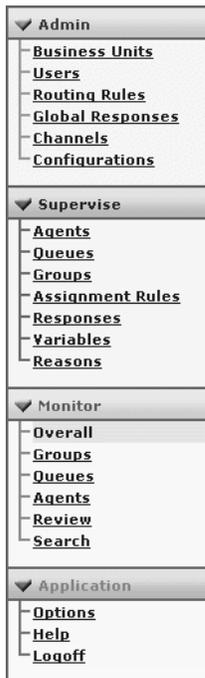


Figure 3-12. Full Permissions

Record Locking

To prevent more than one person from editing the same record, or deleting a record being edited by someone else, Contact Center Console locks the database rows under revision. If you try to edit a record currently locked by someone else, Contact Center Console displays a message, such as:

The Technical Support queue is currently locked by Jerry Gordon, on machine CC04. Please try again later.

Locking works a little differently in the Response Library. Contact Center Console locks the folder you are working in to provide access to all responses and sub-folders in that branch of the library. No other user can edit this data until you release the lock.

Changing the Refresh Rate

You can change the period of time (minutes) Contact Center Console waits to update the information on the Monitor screens. From the Application: Options view, select **Monitor Views Options** to change the Refresh Rate settings screen (Figure 3-13). The controls on this screen are described in Chapter 4, “Application: Options View”, on page 80.

| | |
|--|----------------------------------|
| Refresh Rate(1 - 60): | <input type="text" value="0"/> |
| Maximum number of rows to be retrieved from the database(5 - 999): | <input type="text" value="200"/> |
| Maximum number of rows to be displayed(5 - 200): | <input type="text" value="20"/> |
| <input type="button" value="OK"/> | |

Figure 3-13. Monitor View Options

Creating, Editing and Deleting Objects

Once you’ve mastered the basic controls described in this section you should be able to perform Contact Center Console tasks without the aid of step-by-step instructions. To get you started, the following procedures are given to illustrate the tasks involved in working with Agents and Queues. Chapter 4, “Contact Center Console”, gives additional procedures for specific Contact Center Console objects.

Procedure: Working with Agents



Please note Agent information is cached by the system. Changes made will not go into effect until the next time the Agent logs in.

To add a new agent:

1. In the Supervise: Agents view, select the Business Unit the agent will be assigned to from the Business Unit drop-down list.

2. Click the **Add** button and enter the required information.
3. Click the **Save** button to save your changes.

To edit an agent's settings:

1. In the Supervise: Agents view, select the Business Unit the agent is assigned to from the Business Unit drop-down list.
2. Select the Agent from the Agent drop-down list.
3. Click the **Edit** button.
4. Make your changes and click the **Save** button when you're done.

To assign an agent to a group or queue:

1. In the Supervise: Agents view, select the Business Unit the agent is assigned to from the Business Unit drop-down list.
2. Select the Agent from the Agent drop-down list.
3. Click the **Edit** button.
4. Select the queue or group you want to assign the agent to from the lists displayed.
5. Click the **Save** button to save your changes.

To make an agent inactive:

1. In the Supervise: Agents view, select the Business Unit the agent is assigned to from the Business Unit drop-down list.
2. Select the Agent from the Agent drop-down list.
3. Click the **Edit** button.
4. Click the **Inactive** radio button.
5. Click the **Save** button to save your changes.

To delete an agent:

1. In the Supervise: Agents view, select the Business Unit the agent is assigned to from the Business Unit drop-down list.
2. Select the Agent from the Agent drop-down list.
3. Click the **Delete** button



You cannot delete an agent who has current working or pended messages; the messages must first be reassigned to another agent.

To restore a previously deleted agent:

1. Select the Business Unit the agent was assigned to from the drop-down list.
2. Click **Restore**.
3. Select the agent to restore from the list displayed.

To place messages handled by a particular agent under review:

1. In the Supervise: Agents view, select the Business Unit the agent is assigned to from the drop-down list.
2. Select the Agent from the list displayed and click **Edit**.
3. Check the “**Send all replies composed by this agent to review**” box.
4. Click the **Save** button to save your changes.

Procedure: Working With Queues

To add a new queue:

1. In the Supervise: Queues view, select the Business Unit the queue will belong to from the Business Unit drop-down list.
2. Click the **Add** button and enter the required information.
3. Click the **Save** button to save your changes.

To edit queue settings:

1. In the Supervise: Queues view, select the Business Unit the queue belongs to from the Business Unit drop-down list.
2. Select the queue from the Queue drop-down list.
3. Click the **Edit** button.
4. Make your changes. On the screen you can add, edit, and remove queue Frequent Responses, Default Greetings, and AutoAcknowledgment messages.
5. Click the **Save** button to save your work.

To assign a group to a queue:

1. In the Supervise: Queues view, select the Business Unit the queue is assigned to from the Business Unit drop-down list.
2. Select the queue from the Queue drop-down list.
3. Click the **Edit** button.
4. Select the group you want to add to the queue from the list displayed.
5. Click the **Save** button to save your changes.

To assign an agent to a queue:

An agent must be assigned to the Business Unit for you to assign them to a queue.

1. In the Supervise: Queues view, select the Business Unit the agent is assigned to from the Business Unit drop-down list.
2. Select the queue from the Queue drop-down list.
3. Click the **Edit** button.
4. Select the agent you want to add to the queue from the list displayed.

5. Click the **Save** button to save your changes.

To delete a queue:



A queue that contains working or pended messages cannot be deleted. Messages must first be reassigned to another queue.

1. In the Supervise: Queues view, select the Business Unit the queue is assigned to from the Business Unit drop-down list.
2. Select the queue you want to delete from the Queue drop-down list.
3. Click the **Delete** button.

To restore a previously deleted queue:

1. In the Supervise: Queues view, select the Business Unit the queue is assigned to from the drop-down list.
2. Click **Restore**.
3. Select the queue to restore from the list displayed.

Contact Center Console

Introduction

This chapter describes the Contact Center Console in detail, including each view and its purpose, fields, and controls. References to more detailed information provided elsewhere are given where appropriate.

To make it easier to scroll through the document online, the description of each view starts at the top of the page (the rest of this page has been intentionally left blank).

Admin: Business Units View

| Admin Business Units : Initial | | |
|---|---|---|
| Business Units: <input type="text" value="Initial"/> <input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Restore"/> <input type="button" value="Refresh"/> | | |
| Name: <input type="text" value="Initial"/> | | |
| Note: <input type="text"/> | | |
| Users : Uehling, Tom | Agents : Olson, Karl Uehling, Tom Ulvi, Joe | Knowledge Bases : Product Line Alpha.kb Product Line Beta.kb Default KB : Product Line Alpha.kb |
| Mail Boxes : | | |
| InBox (Default) | OutBox info@company.com | AckBox info@company.com |
| Email Notifications : | | |
| Status Transitions | Addresses | |
| None | | |
| Supervisor Review : | | |
| Percentage of replies to be reviewed (0 to 100) : <input type="text" value="0"/> | | |
| Exclude unedited replies : <input type="text" value="No"/> | | |
| Exclude replies from agents under review : <input type="text" value="No"/> | | |
| Suggestions : | | |
| Allow web processing : <input type="text" value="Yes"/> | | |
| Disable HTML formatting of outbound messages : <input type="text" value="Yes"/> | | |
| For Auto Replies | | For Secure Emails |
| Allow auto replies : <input type="text" value="Yes"/> | | Send all the replies only as secure : <input type="text" value="No"/> |
| Include original message : <input type="text" value="Yes"/> | | Reply Body : You have secure mail. Please login to read it. |
| Greetings : | | |
| Signature : | | |

Figure 4-1. The Admin: Business Units Screen

Use the Admin: Business Units screen (Figure 4-1) to:

- Add, edit, and delete Business Units.
- Assign and de-assign users, agents, and knowledge bases to Business Units.
- Add, edit, and delete settings for InBox, OutBox and AckBox (Acknowledgment copy) mapping.
- Set up email notification for specified users when the condition of Business Unit queues changes. For more information about Queue Condition see “Condition Codes”, on page 17.
- Adjust percentage of Agent responses set aside for Supervisor Review and whether unedited replies and Agents currently under review are included.
- Enable/Disable HTML formatting of outbound messages. Refer to the Integration Development Kit Guide for details on the benefits of using HTML formatting and how to set up an HTML template for all outgoing messages.
- Allow/disallow the processing of Web requests (i.e. requests originating on your Web site) in the specified Business Unit.
- Enable and disable automatic responses from a Business Unit when the Intelligence Engine identifies message intent with 100% certainty.
- Add, edit, and delete default greeting and signature text you wish to appear before or after a designated auto-response.

- Designate that all Business Unit responses be sent via the Secure Email Portal. For more information see “The Secure Email Portal”, on page 19.
- Add, edit, and delete customer notification text indicating that a secure reply to their inquiry can be found at the specified URL.

Select a Default Knowledge Base

The Admin: Business Units screen lists the Knowledge Bases that are available for supervisors to use to create business rules (for example, help process or route requests). If you have assigned multiple Knowledge Bases to the Business Unit, your selection from the **Default KB** drop-down list is used to identify the Knowledge Base to use if the business rule does not specify it.

Randomized Supervisor Review

To select a random percentage of the overall message replies for review, set the “Percentage of replies to be reviewed” between 1 (for approximately 1 percent of the overall messages) and 100 (for approximately 100 percent of the overall messages). The default is 0 (Supervisor Review is off).

Additional Randomized Supervisor Review options include:

- **Exclude unedited replies** – Do not include replies selected from the suggested auto response and not edited by the agent in the review process.
- **Exclude replies from agents under review** – Do not include agents currently under review. This feature ensures that an agent, who has all replies reviewed, does not overly impact the randomized review percentage.



Please note Agent information is cached by the system. Changes made will not go into effect until the next time the Agent logs in.

For more information on Supervisor Review, see “Supervisor Review Comments Via Draft”, on page 74.

Admin: Users View

The screenshot shows the 'Admin Users: SupMon' interface. At the top, there is a toolbar with buttons for 'Add', 'Edit', 'Delete', 'Restore', 'Reset Password', and 'Refresh'. Below the toolbar is a form for user details:

| | |
|--------------|---------|
| Login Name: | SupMon |
| First Name: | b |
| Middle Name: | |
| Last Name: | c |
| Email: | new@new |
| Note: | |

Below the form, there is a 'Business Units:' section with a link to 'BU1'. Underneath is a 'Permissions:' table:

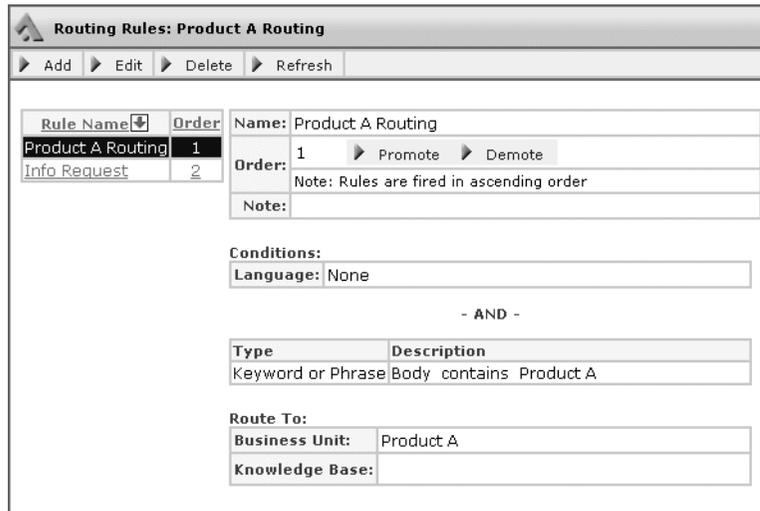
| Manage | Admin | Monitor |
|--------|--|---|
| | Agents Queues Groups Assignment Rules Responses Reasons | Overall Groups Queues Agents Review |

Figure 4-2. The Admin: Users Screen

Use the Admin: Users screen (Figure 4-2) to:

- Add, edit, delete, and restore Contact Center Users. For each User set:
 - Name and login ID.
 - Business Unit assignment.
 - User permissions, i.e. configure their desktop views. For more information on setting up user desktops see “Customizing User Desktops”, on page 28.
 - You can also reset a user’s password to blank (empty).

Admin: Routing Rules View



| Rule Name | Order |
|-------------------|-------|
| Product A Routing | 1 |
| Info Request | 2 |

Name: Product A Routing

Order: 1 Promote Demote

Note: Rules are fired in ascending order

Conditions:

Language: None

- AND -

| Type | Description |
|-------------------|-------------------------|
| Keyword or Phrase | Body contains Product A |

Route To:

Business Unit: Product A

Knowledge Base:

Figure 4-3. The Admin: Routing Rules Screen

Use the Admin: Routing Rules screen (Figure 4-3) to add, edit, and delete Business Unit Routing rules (the rules that route incoming requests to Business Units). Routing rules are only used for requests coming through the e-mail channel. For each rule specify:

- **Rule Name** – The name of the rule.
- **Order** – If you’ve created more than one rule for this Business Unit, indicate by numerical sequence (1-10), which rule should fire in the event that conditions for more than one rule are met. Click a rule, and then click **Promote** or **Demote** to change its order.
- **Language** – The language of the requests the rule will operate on.
- **Conditions** – The conditions under which the rule will fire (when the specified message field contains the indicated word, phrase, or regular expression).
- **Business Unit** – The Business Unit requests will be routed to.
- **Knowledge Base** – If more than one Knowledge Base is associated with this Business Unit, select the Knowledge Base you want to use when this rule is fired (the first true routing rule found).

For more information on creating rules please see “Rules”, on page 12.

Admin: Global Responses View

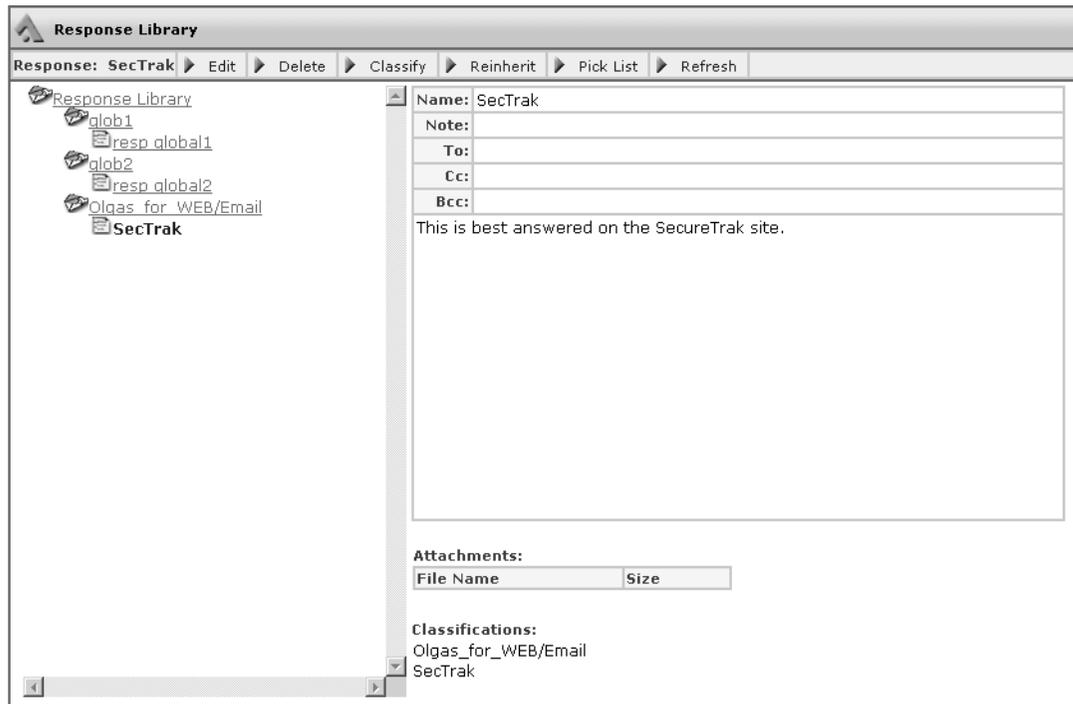
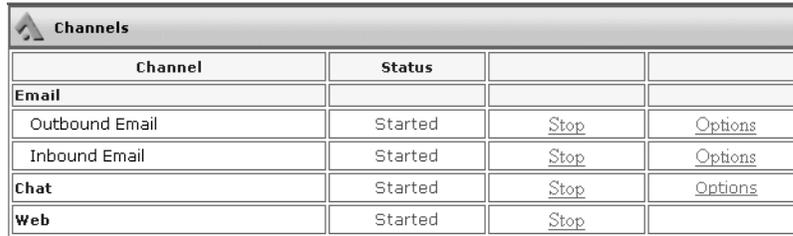


Figure 4-4. The Admin: Global Responses Screen

Use the Admin: Global Responses screen (Figure 4-4) to add, edit, and delete responses visible to all agents in all Business Units.

The Global Response Library functions identically to the regular Contact Center Response Library. For a detailed explanation of response creation and management please see “Supervise: Responses View”, on page 60.

Admin: Channels View



| Channels | | | |
|----------------|---------|----------------------|-------------------------|
| Channel | Status | | |
| Email | | | |
| Outbound Email | Started | Stop | Options |
| Inbound Email | Started | Stop | Options |
| Chat | | | |
| | Started | Stop | Options |
| Web | | | |
| | Started | Stop | |

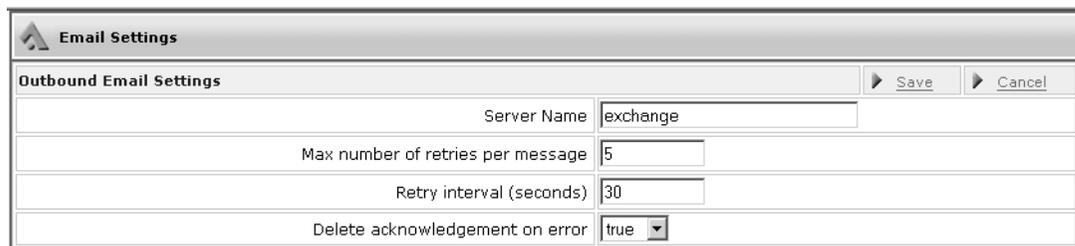
Figure 4-5. The Admin: Channels Screen

Use the Admin: Channels screen (Figure 4-5) to:

- Start and stop Email, Chat, and Web applications. Click the link (either **Stop** or **Start**) to reverse its state.
- Configure settings for Contact Center’s Outbound and Inbound mail handlers.
- Click the **Reload Intelligence Engine** link to load a new Knowledge Base, Business Unit Routing rules, and Queue Assignment rules.

Outbound E-Mail

Outbound E-Mail Settings



| Email Settings | |
|---|-------------------------------|
| Outbound Email Settings Save Cancel | |
| Server Name | exchange |
| Max number of retries per message | 5 |
| Retry interval (seconds) | 30 |
| Delete acknowledgement on error | true <input type="checkbox"/> |

Figure 4-6. Outbound Mail Handler Settings

- **Server name** – The name of the outbound SMTP server.
- **Maximum successive messaging error before always retrying** – In the event of a problem with the mail server, the maximum number of messages that will be resent, rejected by the mail server, and re-queued in Contact Center.
- **Retry interval** – In the event of an error, the period of time the server should wait between trying to resend messages to the mail server (default is 30 seconds).
- **Delete acknowledgement on error (true/false)** – If set to true, Contact Center will not resend auto acknowledgments if there is a problem on the mail server.

LDAP Server Settings

| LDAP Server Settings | <input type="button" value="Test Connection"/> |
|------------------------|--|
| LDAP Server Name: | <input type="text"/> |
| Base DN: | <input type="text"/> |
| LDAP Port: | <input type="text"/> |
| Use Anonymous Bind: | false ▾ |
| User Name: | <input type="text"/> |
| Password: | <input type="password"/> |
| Display Name Attribute | cn |
| Batch Size: | 100 |
| Search Filter: | <input type="text"/> |

Figure 4-7. LDAP Server Settings

Lightweight Directory Access Protocol (LDAP) is a protocol used to look up contact information from a server.

- **LDAP Server Name** – The server name should be the complete server name with all domains listed.
- **Base DN** – This is the search base for locating the directory.
- **LDAP Port** – The port number for the LDAP server.
- **Use Anonymous Bind** – If you are using Active Directory, be sure to set this to **false** because Active Directory does not support Anonymous Bind. You should also set this to **false** anytime your LDAP server requires a user name and password. If set to **true**, authentication does not require user name and password to be entered and your mail server must be configured for anonymous bind authentication.
- **User Name** – If you do not use Anonymous Bind, you should provide a username to connect to the LDAP server.
- **Password** – If you do not use Anonymous Bind, you should provide a password to connect to the LDAP server.
- **Display Name Attribute** – The attribute to use for displaying contact information. Type cn for Common Name, or dn for Display/Distinguished Name (you may need to check your LDAP server setup to see what values are allowed here). This information is displayed in the Agent Desktop address book.
- **Batch Size** – This optional field is an integer field that the LDAP service provider uses to determine how many results to read from the server before unblocking and allowing the client program to get the results by using next() or nextElement(). When the client program exhausts the batch, the LDAP service provider fetches another batch so that the client program can continue with the enumeration. If the batch size is zero, then the service provider will block until all results have been read. If this property was not set, then the default batch size is 1.
- **Search Filter** – Narrows the results returned so the entire LDAP tree does not have to be returned if not necessary. Use regular expressions to define the search filter.

Click **Test Connection** to have Contact Center Console attempt a connection with the LDAP server. The results of the test will be displayed on this screen.

| LDAP Server Settings | ▶ Test Connection |
|------------------------|------------------------------------|
| LDAP Server Name: | name.company.com |
| Base DN: | cn=Users,DC=name,DC=company,DC=com |
| LDAP Port: | |
| Use Anonymous Bind: | false |
| User Name: | Administrator |
| Password: | ***** |
| Display Name Attribute | cn |

Figure 4-8. Example 1: Setup with Active Directory

| LDAP Server Settings | ▶ Test Connection |
|------------------------|------------------------------------|
| LDAP Server Name: | name.company.com |
| Base DN: | cn=Users,DC=name,DC=company,DC=com |
| LDAP Port: | |
| Use Anonymous Bind: | true |
| User Name: | |
| Password: | |
| Display Name Attribute | |

Figure 4-9. Example 2: Setup Without Active Directory

Inbound E-Mail

Global Inbound Email Server Settings

| Global Inbound Email Server Settings | | ▶ Save | ▶ Cancel |
|--|-------|--------|----------|
| Polling Interval (seconds) | 8 | | |
| Retry interval (seconds) | 30 | | |
| Maximum Non-Closed Requests | 10000 | | |
| Maximum incoming message body size (kilobytes) | 512 | | |
| Maximum incoming message attachment size (kilobytes) | 6144 | | |

Figure 4-10. Inbound Mail Handler Settings

- **Polling interval (in seconds)** – Period of time the Inbound Mail Handler should wait between checking for messages. Should not be less than 8 seconds.
- **Retry interval (in seconds)** – Period of time the Inbound Mail Handler waits after a mail server error occurs before retrying.
- **Maximum allowable non closed requests** – Open messages slow down processing, so this parameter allows you to set a maximum number of Pended or Open requests in the database to avoid performance degradation. The default is 10,000 messages. Once the maximum is reached no additional messages will be admitted into Contact Center until you are once again under the limit.

- **Maximum incoming message body size** – The largest size e-mail that will be accepted by the system (in kilobytes). A message that is too large will generate an alert.
- **Maximum incoming message attachment size** – The largest size e-mail that will be accepted by the system (in kilobytes).

Inbound E-Mail Notification Settings

| Inbound Email Notification Settings | | Test Notification |
|-------------------------------------|----------------------|-----------------------------------|
| Notification E-mail Address(es): | <input type="text"/> | |

Figure 4-11. Inbound E-Mail Notification Settings

Type one or more e-mail addresses that will receive notification when Siebel Brightware has a problem handling an inbound e-mail. Problems include a body or attachment that exceeds the size you specify in the Inbound Mail Handler Settings. After entering the e-mail addresses (separated by a semicolon) click **Test Notification** to validate the Notification E-Mail Address(es) format, as well as your outbound e-mail settings

Repeat Sender Detection

| Repeat Sender Detection | | | | | |
|--|--|--------------------------------------|---------------------|------|--|
| From: Address Cache Size | <input type="text" value="100"/> | | | | |
| Repeat Sender Threshold | <input type="text" value="20"/> | | | | |
| Enable Repeat Sender Detection | <input checked="" type="checkbox" value="true"/> | | | | |
| <table border="1"> <thead> <tr> <th>Repeat Sender Address Exclusion List</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>None</td> <td></td> </tr> </tbody> </table> | | Repeat Sender Address Exclusion List | New | None | |
| Repeat Sender Address Exclusion List | New | | | | |
| None | | | | | |

Figure 4-12. Repeat Sender Detection Settings

The Repeat Sender Detection mechanism prevents e-mail loops (for example, if an auto-acknowledgment response triggers a customer’s “Out of The Office” response, which triggers an auto acknowledgment’s response, into infinity).

- **From: Address Cache Size** – Number of customer e-mail addresses to store.
- **Repeat sender threshold** – Number of messages from a single customer allowed in the Repeat Sender From: Address cache.
- **Enable Repeat Sender Detection (true/false)** – If set to True, and a mail loop is detected, looping messages from the identified customer will be routed to the Exception Business Unit with no auto acknowledgments or response.
- **Repeat Sender Address Exclusion List** – Addresses allowed in the cache that won’t trigger the Repeat Sender mechanism (those from a web site from which you regularly receive mail). Click **New** to add e-mail addresses.

Mail Servers

| Mail Servers | | | | New |
|--------------|------------------|-------------|----------------------|------------------------|
| Protocol | Server Name | Email Login | | |
| POP3 | Mail.Company.Com | info | Edit | Delete |

Figure 4-13. E-Mail Servers Settings

Use the Mail Servers controls to specify Contact Center settings for connecting to your mail server(s).

Click **New** to add servers.

| Email Server Settings | | Save | Cancel |
|-----------------------|------------|------|--------|
| Protocol | POP3 | | |
| Server Name | exchange | | |
| Email Login | docin | | |
| Email Password | XXXXXXXXXX | | |
| Thread Count | 1 | | |

Figure 4-14. E-Mail Server Settings

- **Protocol** – IMAP or POP3. We recommend IMAP if it is supported by the server.
- **Server Name** – Name of your mail server.
- **Email Login** – Username (corresponding to the mailbox you want to read mail from) on that server.
- **Email Password** – Password to that user’s account.
- **Thread Count** – Allows you to have multiple threads reading mail over the same connection for greater performance. The default value is 1.



If you expect mail volume to exceed 15,000 messages per day you may want to change the Thread Count and related Console settings to improve performance. For assistance in adjusting these settings for high volume conditions please contact Oracle Technical Support.

Chat Settings (Options)

If you are using the Chat channel, you can set up the system to display a message when no agents are available to reply to chat or when the server is down. You can set up a schedule when the auto-reply should be activated based on working hours, or holidays. You can also specify the web pages to display for the various circumstances (outside working hours, holiday, and server down time).

The settings are saved in the file `schedule.xml`.

Click the **Options** link on the Admin: Channels screen to display the Chat Settings. The Chat settings are organized into three tabs:

URLs

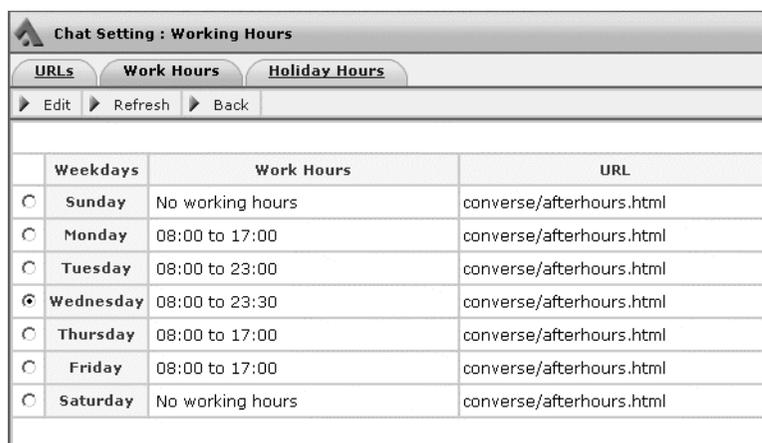


| Chat Setting : URLs | | |
|--|----------------------------|---------------|
| URLs | Work Hours | Holiday Hours |
| <a>Edit <a>Refresh <a>Back | | |
| Working Hours: | converse/registration.html | |
| Server Downtime: | converse/onoff.html | |
| Non-working Hours: | converse/afterhours.html | |
| Holidays: | converse/afterhours.html | |

Figure 4-15. Chat URLs

Click the **Edit** link to change any of the URLs. Note that you can specify a URL for Non-working hours and a URL for Holidays on this tab as well as on the Work Hours tab and the Holiday Hours tab. The system uses the URLs specified here unless you specify an overriding URL for a time span on the other two tabs.

Work Hours



| Chat Setting : Working Hours | | |
|--|------------------|--------------------------|
| URLs | Work Hours | Holiday Hours |
| <a>Edit <a>Refresh <a>Back | | |
| Weekdays | Work Hours | URL |
| <input type="radio"/> Sunday | No working hours | converse/afterhours.html |
| <input type="radio"/> Monday | 08:00 to 17:00 | converse/afterhours.html |
| <input type="radio"/> Tuesday | 08:00 to 23:00 | converse/afterhours.html |
| <input checked="" type="radio"/> Wednesday | 08:00 to 23:30 | converse/afterhours.html |
| <input type="radio"/> Thursday | 08:00 to 17:00 | converse/afterhours.html |
| <input type="radio"/> Friday | 08:00 to 17:00 | converse/afterhours.html |
| <input type="radio"/> Saturday | No working hours | converse/afterhours.html |

Figure 4-16. Chat Work Hours

Click the **Option** button next to any weekday and then click **Edit** to change the working hours for that day. You can add more than one span of hours, or you can delete all of the hours to set the day to **No working hours**.

Holiday Hours

Click the **Option** button next to any holiday and then click **Edit** to change the URL that chat users are routed to during the date(s) specified.

Click **Add** to create new holidays.

Click the **Option** button next to any holiday and then click **Delete** to remove a holiday and its URL.

| Chat Setting : Holiday Hours | | |
|--|----------------------|-------------------------------------|
| URLs | Work Hours | Holiday Hours |
| ▶ Add ▶ Edit ▶ Delete ▶ Refresh ▶ Back | | |
| Holidays | | URL |
| <input checked="" type="radio"/> | 1/1/03 to 1/1/03 | http://www.company.com/NewYear.html |
| <input type="radio"/> | 11/23/03 to 11/24/03 | converse/afterhours.html |

Figure 4-17. Chat Holiday Hours

Admin: Configurations View

The screenshot shows the 'Configurations' window with a 'Save' button. It is divided into several sections:

- For Desktops:** A table with three columns: 'For Contact Center Console' and 'For Agent Desktop'. Each row has a label and two radio button options: 'all business units' and 'assigned business units'.

| | For Contact Center Console | For Agent Desktop |
|----------------------------------|--|--|
| Allow customer history search on | <input type="radio"/> all business units <input checked="" type="radio"/> assigned business units | <input type="radio"/> all business units <input checked="" type="radio"/> assigned business units |
| Allow reopen of requests in | <input type="radio"/> all business units <input checked="" type="radio"/> assigned business units | <input type="radio"/> all business units <input checked="" type="radio"/> assigned business units |
| Allow transfer of requests to | <input type="radio"/> all business units <input checked="" type="radio"/> assigned business units | <input type="radio"/> all business units <input checked="" type="radio"/> assigned business units |
- For Agent Desktop:** A checkbox labeled 'Allow comma as address separator'.
- For Answer Server:** A text input field for 'Enter the maximum size of the message beyond which the language processing will be skipped by the server (100 to 99999 chars):' with the value '1000'. Below it are two checkboxes: 'Send auto responses to emails. If this is turned off, the business unit specific settings are ignored.' (unchecked) and 'Send threaded messages automatically back to the last agent that handled the request.' (checked).
- For Queue Manager:** A section with a label 'While determining queue status also include:' followed by three checkboxes: 'Working Requests', 'Pended Requests', and 'Requests Assigned to Agent'. Below this are two more checkboxes: 'Consider pre-assignment when assigning requests to agents' and 'Consider rank when assigning requests to agents'.

Figure 4-18. The Admin: Configurations Screen

Use the Admin: Configurations Screen (Figure 4-18) to:

- Set Customer History search options for users and agents (search in all Business Units or just those to which they are assigned).
- Allow/disallow users and agents to reopen messages (in all Business Units or just those to which they are assigned).
- Allow/disallow users and agents to transfer messages (to all Business Units or just those to which they are assigned).
- Allow the comma as an address separator on the Agent Desktop.
- Set allowable maximum message size for Intelligence Engine processing.
- Enable/disable delivery of automatic responses to customers. This master switch overrides any Business Unit settings. For example, if auto-response is enabled in a Business Unit and the master switch is set to Off, no auto-responses will be sent.
- Enable/disable automatic delivery of threaded messages back to the last agent to process the request.

- Set additional criteria for determining queue condition (for more information see “Condition Codes”, on page 17). The default is the age of the oldest non-assigned message. Optionally you can also include the age of:
 - Working requests.
 - Pended requests.
 - Requests assigned to an agent.
- Enable/disable consideration of Request Rank when assigning messages to agents. Ordinarily rank is not considered when messages are assigned directly to an agent. Use this setting to include Request Rank. This switch is ordinarily set to Off since it can degrade performance.

Supervise: Agents View

| | |
|---|-------------------|
| Login Name: | AgentZ |
| First Name: | Agent |
| Middle Name: | |
| Last Name: | Z |
| Email: | agentz@agentz.com |
| Signature: | |
| Status: | Active |
| Note: | Agent |
| Send all replies composed by this agent to review : Yes | |

Business Units : Initial **Groups :** None
Queues assigned directly : Standard **Queues assigned through groups :** None

Figure 4-19. The Supervise: Agents Screen

Use the Supervise: Agents screen (Figure 4-19) to:

- Add, edit, and delete agents.
- Assign/remove agents to/from queues.
- Assign/remove agents to/from groups.
- Create a custom signature for an agent.
- Reset an agent's password to blank (empty).
- Make an agent offline.
- Restore a previously deleted agent.
- Place messages handled by a specific agent under review.



Queues and groups can be assigned to only one business unit. Agents can be shared across multiple business units.

Make an Agent Offline

In the event that an Agent forgets to logoff the system, the Supervisor has the ability to disconnect the agent.

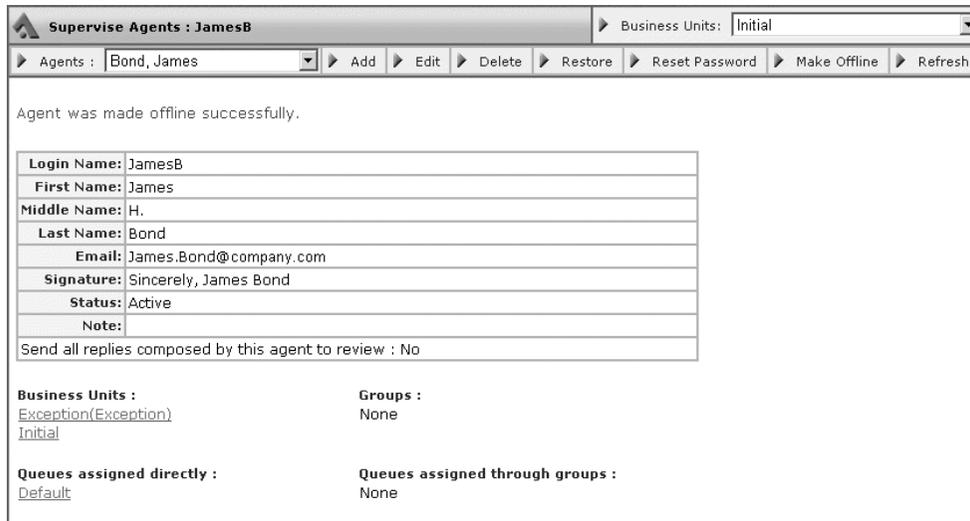


Figure 4-20. Supervise: Make an Agent Offline

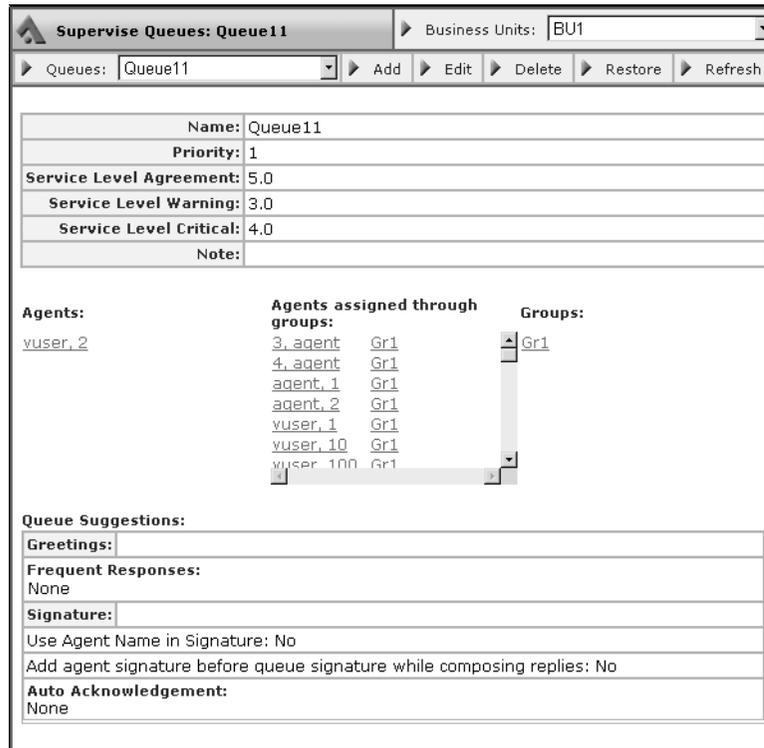
This will ensure that messages are not being routed to an Agent’s queue who is offline for an extended period of time. The Agent’s availability will change from “Available” to “Offline.”



Figure 4-21. Agent: Session Terminated by Supervisor

When the agent attempts to continue working, the system displays a message indicating the session has been terminated by the supervisor. The Agent is required to log in to the system to continue.

Supervise: Queues View



| Supervise Queues: Queue11 | | Business Units: BU1 |
|---|---------------------------------|--|
| Queues: | Queue11 | <input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Restore"/> <input type="button" value="Refresh"/> |
| Name: | Queue11 | |
| Priority: | 1 | |
| Service Level Agreement: | 5.0 | |
| Service Level Warning: | 3.0 | |
| Service Level Critical: | 4.0 | |
| Note: | | |
| Agents: | Agents assigned through groups: | Groups: |
| vuser_2 | 3_agent Gr1 | Gr1 |
| | 4_agent Gr1 | |
| | agent_1 Gr1 | |
| | agent_2 Gr1 | |
| | vuser_1 Gr1 | |
| | vuser_10 Gr1 | |
| | vuser_100 Gr1 | |
| Queue Suggestions: | | |
| Greetings: | | |
| Frequent Responses: | None | |
| Signature: | | |
| Use Agent Name in Signature: | No | |
| Add agent signature before queue signature while composing replies: | No | |
| Auto Acknowledgement: | None | |

Figure 4-22. Supervise: Queues

Use the Supervise: Queues screen (Figure 4-22) to:

- Add, edit, and delete queues.
- Assign (and deassign) agents and groups to queues.
- Specify frequent responses for a queue.
- Specify default greetings and signatures.
- Specify Service Level Agreement values.
- Restore a previously deleted queue.
- Specify the AutoAcknowledgement message for a queue.

System-Defined Queues

Every Contact Center Business Unit contains five system-defined queues: Default, Exception, Review, Inbound, and Outbound. The names of these queues can be changed but they cannot be deleted. Refer to “System Defined Queues”, on page 11 for a description of each queue.

Set Service Level Agreement Times

Edit a queue to set the time (using hours and fractions of hours) for each condition change of a queue’s status. When a message is in the queue for a time equal to the warning level, the queue status is “warning.” When a message is in the queue for a time equal or exceeding the critical level, the queue status is “critical.”

Default Greetings and Signatures

Use the **Greetings** and **Signature** fields to place boilerplate text before and/or after responses from this queue. For example, a default signature might be, “Sincerely, the Technical Support Staff.”

Check **Use Agent Name in Signature** to automatically include the name of the processing agent below the default signature in the reply.



If a custom signature has been defined for that agent, the custom signature will appear.

Check **Add agent signature before queue signature while composing replies** to have the agent’s signature appear before the queue’s signature in the reply.

Greetings and signatures can span multiple-lines for Business Units, Queues, and Agents. The length is restricted to 254 characters for Business Units but the text can be distributed across multiple lines. There is no limitation for Queues & Agents.

Queue Frequent Responses

Use the **Frequent Responses** controls to select responses from the Response Library that you want to appear in the **Queue Frequent Responses** folder on the Agent Desktop when agents process requests from this queue. For more information about the Response Library see “Supervise: Responses View”, on page 60.

AutoAcknowledgement Message for Queue

Use the AutoAcknowledgement feature to send customers a short message to let them know you’ve received their inquiry and will respond shortly. Use the AutoAcknowledgement **Add** and **Remove** controls to select auto responses from the Response Library. AutoAcknowledgment responses are triggered by the arrival of a message in a particular queue.

AutoAcknowledgement messages should be general so they are appropriate even if the incoming request is complicated or obscure. For example, “Thank you, we’ve received your message. A customer service representative will contact you shortly.” You can even tailor an AutoAcknowledgement to a particular queue. For example, the AutoAcknowledgement in a marketing queue might read: “Thank you for your interest in our products. Your request has been routed to a service representative for a reply.”

Supervise: Groups View

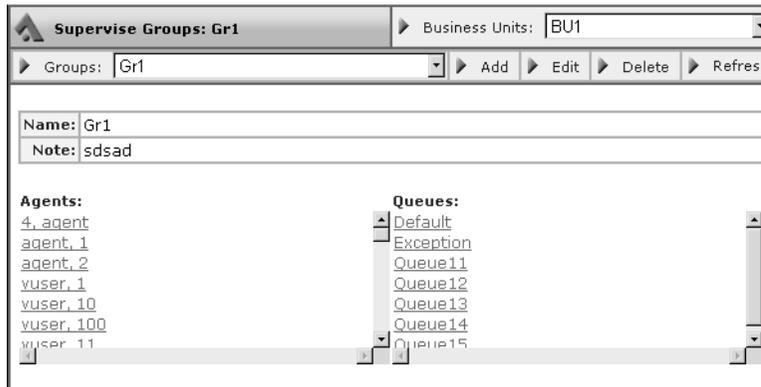


Figure 4-23. The Supervise: Groups Screen

Use the Supervise: Groups screen (Figure 4-23) to:

- Add, edit, and delete groups.
- Assign (and de-assign) agents to groups and groups to queues.

Supervise: Assignment Rules View

Assignment Rules: Product B Info Business Units: Product A

Queue Request Rank

Add Edit Delete Refresh

| Rule Name | Order |
|----------------|-------|
| Product A Info | 1 |
| Product B Info | 2 |

Name: Product B Info

Order: 2 Promote Demote

Note: Rules are fired in ascending order

Conditions:

Language: None

- AND -

| Type | Description |
|-------------------|-------------------------|
| Keyword or Phrase | Body contains Product B |

Assign To:

Queue: Default

Agent: Olson, Karl

Figure 4-24. The Supervise: Assignment Rules Screen

Queue

Use the Supervise: Assignment Rules screen (Figure 4-24) to add, edit, and delete Queue Assignment Rules (the rules that route incoming requests to queues). For each rule specify:

- **Name** – Name of the rule.
- **Order** – If you’ve created two or more rules that use some of the same conditions, indicate the sequence in which they should be evaluated (1-10). Rules are evaluated in ascending order (first Rule 1, then Rule 2, then Rule 3). Only the highest ordered “true” rule will fire.
- **Language** – The language of the requests the rule will operate on. Be sure to view the language-detector.xml file located at \edocs\Brightware\lib\common\dictionaries. The file contains embedded instructions. By adding words and phrases to this file that reflect the language of the messages typically sent to your Siebel Brightware system, you can increase the system’s ability to properly identify the language used. If the language is not correctly identified, then the language condition may not fire.
- **Conditions** – The conditions under which the rule will fire, or when the specified message field contains the indicated word, phrase, or regular expression. For more information on rules please see “Rules”, on page 12. A condition can also be met by matching an Intent or a Feature set up in a Knowledge Base. Select The **Message Field**, **Intent Matched**, or **Feature Matched** tab depending on the type of condition you want to create.

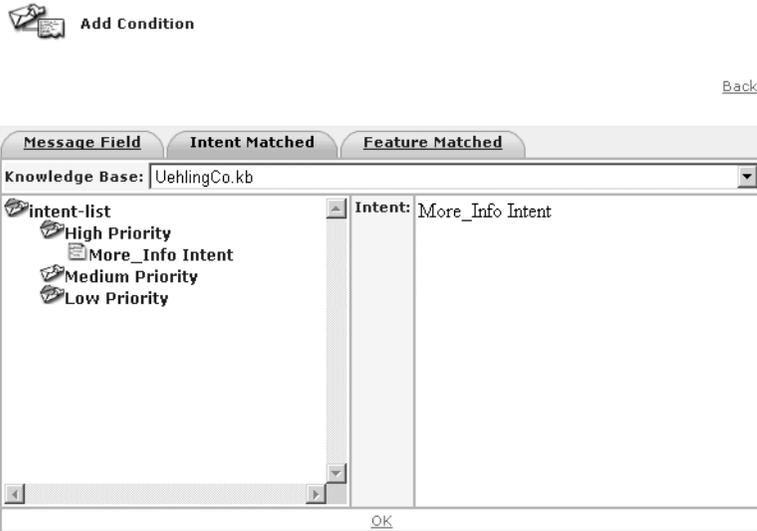


Figure 4-25. The Intent Matched Condition Tab

Click the **Intent Matched** tab to create a condition based on an Intent match from one of the Knowledge Bases associated with the current Business Unit.

Click the **Feature Matched** tab to create a condition based on a Feature match from one of the Knowledge Bases associated with the current Business Unit.



If you attempt to create an assignment rule within a Business Unit that does not have an associated Knowledge Base, you may receive an error message when you click the Intent Matched tab or the Feature Matched tab.

,

The Intent Matched and Feature Matched tabs have a Knowledge Base drop-down list that allows you to select any Knowledge Base associated with the related business unit. However, at run time, the assignment rule can only use the Knowledge Base already assigned to the request. For example, if an incoming request does not trigger any routing rules, then the default Knowledge Base is assigned prior to the request's evaluation by the assignment rules. Thus, the assignment rule will be true only if you have selected, in this case, the default Knowledge Base from the drop-down list on the Intent Matched or Feature Matched tabs. With this in mind, you must give careful thought to the Knowledge Bases that might be applied to a request before it reaches the assignment rules. If you use Intent Matched or Feature Matched conditions, you may need to create several similar assignment rules to account for the various Knowledge Bases that might have been previously applied.

Request Rank

Use the Request Rank tab to set up rules that determine the order in which requests are handled. For example, you might want to handle Gold Service Level requests before Silver Service Level requests (the requestor would include the service level and the rule would identify it).

Assign a Request Rank to each rule. Note that a Request Rank of 1 results in the lowest priority and 10 the highest.

Request Rank must be enabled in the Configurations View (refer to “Admin: Configurations View”, on page 49).

The screenshot shows the 'Request Rank' configuration interface. At the top, there's a header with 'Assignment Rules : Gold_Service_Level' and a dropdown for 'Business Units: Initial'. Below this are two tabs: 'Queue' and 'Request Rank', with 'Request Rank' being the active tab. A toolbar contains 'Add', 'Edit', 'Delete', and 'Refresh' buttons. The main area is divided into two sections. On the left is a table listing rules:

| Rule Name | Order |
|----------------------|-------|
| Bronze_Service_Level | 1 |
| Silver_Service_Level | 2 |
| Gold_Service_Level | 3 |

On the right, the configuration for the selected 'Gold_Service_Level' rule is shown. It includes a 'Name' field with the value 'Gold_Service_Level' and a 'Note' field. Below that is a 'Conditions' section with a 'Language' dropdown set to 'None'. A separator '- AND -' is present. The 'Assign To' section contains a 'Request Rank' dropdown set to '10' and a 'Note' field with the text 'Note: 1 Lowest to 10 Highest'. A table below the conditions shows the rule's logic:

| Type | Description |
|-------------------|----------------------------------|
| Keyword or Phrase | Body contains Gold Service Level |

Figure 4-26. Request Rank Tab

Supervise: Responses View

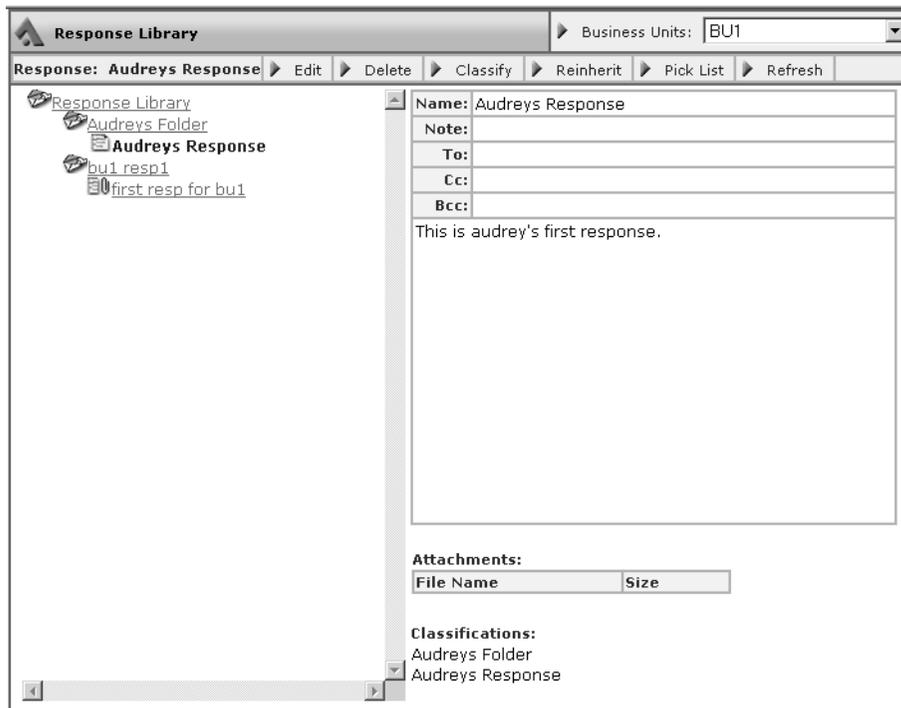


Figure 4-27. The Supervise: Response Screen

The Response Library

A response is a pre-formatted reply (also called a template) used to respond to customer email. Responses are stored in the Contact Center Response Library. Use the Supervise: Response screen (Figure 4-27) to:

- Add, edit, and delete responses and response folders in the Response Library for a given Business Unit.
- Add and remove response attachments.
- Classify responses.
- Reclassify responses (reset response classifications to the default).

On the Contact Center Console

The Response Library index appears on the left side of the Supervise: Responses screen.

- Click a folder to display its contents, either responses or other folders.
- Click the name of the response to display its contents, including header, body, attachment, and classification information.

On the Agent Desktop

The Response Library also appears on the Agent Desktop, though there are some differences between what the agents see on their desktop and what the supervisor sees.

On the Agent Desktop the **Suggested Responses** folder contains replies selected from the Response Library by the Intelligence Engine in response to a request's intent. A folder called **Queue Frequent Responses** contains those replies designated as "Frequent Responses" in the Supervise: Queues view.

The **Suggested Responses** and **Queue Frequent Responses** folders reside permanently above the other folders in the library at the top of the Library index. Unlike the other library folders, the contents of **Suggested Responses** and **Queue Frequent Responses** folders change in response to the request being processed, giving agents fast access to the best response for a given request.

The following logic determines which response appears on an agent's desktop when they open a request to process it:

1. If the Intelligence Engine determined the request's intent, the first response in the **Suggested Responses** folder is displayed.
2. If no intent was determined (either because the Intelligence Engine was unable to determine intent or because the Intelligence Engine isn't being used), the first response in the **Queue Frequent Responses** folder is displayed.
3. If no frequent responses are defined for that queue, the first response in the Response Library is displayed.

For more information about the Agent Desktop see the *Agent Guide*. For more information about Intelligence Engine processing see the *Knowledge Engineer's Handbook*.

Sending a Copy of a Response (CC:ing and BCC:ing)

If you'd like to send a copy of a response to someone each time it is used, enter their email address in the **CC:** or **BCC:** fields. To list more than one email address, separate the addresses with a semicolon ";".

Response Attachments

You can attach a file to a response. For example, if you receive many requests for information about a particular product, you can create a response that includes an attached brochure. When a response has an attachment, a paperclip icon appears next to its name in the Library and the attachment file's name and size appears beneath the message text.

Response Classification

Contact Center message classification allows you to categorize messages by type. Contact Center automatically logs classification information each time a response is used.

The better you are at classifying messages by type, the easier it is to build automated responses tailored to a particular type of incoming mail. Accurate classification information helps ensure that there are suggested responses for as many requests as possible.

The classification window on the Supervise: Responses screen displays a list of classifications associated with a particular response. Agents have the ability to associate additional classifications with a particular reply.

Contact Center assigns two default classifications to every response you create: the response name and the response folder name.

Working in the Response Library: A Procedural Overview

Procedures for creating responses and Response Library folders, and working with attachments and classifications are given below.

To create a Response Library folder:

1. Click Response Library root folder.
2. Click the **Add Folder** button.
3. Enter the folder's name in the Name: field and press **Enter** (or click the **Save** button).

To create a response:

1. Select the Response Library folder you want to contain the response.
2. Click the **Add Response** button.
3. Enter the response body and any desired header and note information.



When cutting and pasting materials created in other programs (such as Microsoft Word, Adobe Acrobat, etc.) into Contact Center response templates, check your results carefully. Formatting can be lost or altered.

4. If you want to insert a variable, click the **Insert Variable** button. You will be able to select a variable that was created in the Supervise: Variables view. Refer to “Supervise: Variables”, on page 65 for more information about creating variables. Variables allow you to personalize a response.
5. If you want to add an attachment to this response, click the **Add** button next to the Attachments box and enter the name of the file you wish to attach.
6. Click **Save** to return to the Response Library view.
7. If you wish to classify this response using other than the defaults click the **Classify** button. For information on working with classifications please see below.

To add or remove a classification to/from a response:

To associate a classification with a response (other than the defaults):

1. Click the **Classify** button to display the Pick List window (Figure 4-28).

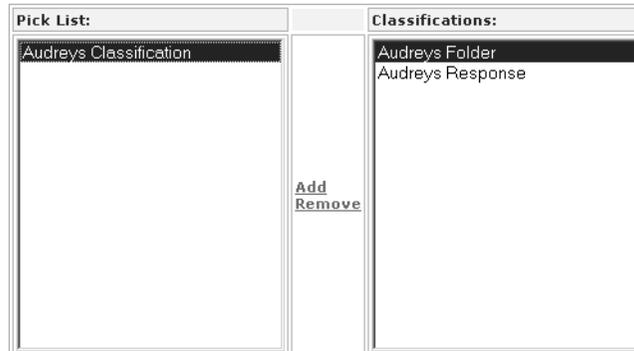


Figure 4-28. Adding and Deleting Classifications

2. Select the response whose classification you want to change.
3. Click the **Classify** button.
4. Use the **Add** and **Remove** buttons to move classifications between the Pick List and Classification windows.

To add a classification:

1. Click the **Picklist** button to display the Pick List window (Figure 4-29).



Figure 4-29. Adding and Deleting Classifications

2. Enter the name of the new classification in the **Tag** field.
3. Click **Add**.
4. When you are through adding classifications click **OK**.

To edit a Classification:

1. To modify a classification you must create a new one that reflects the changes you want to make.
2. Then delete the old classification.

To delete a Classification:

1. Click the **Picklist** button to display the Pick List window (Figure 4-29).
2. Select the classification you want to remove.
3. Click **Remove**.

To reset a response's classifications to the default (response name and folder name):

1. Select the response you want to reset from the Response Library.
2. Click the **Reinherit** button.

Supervise: Variables

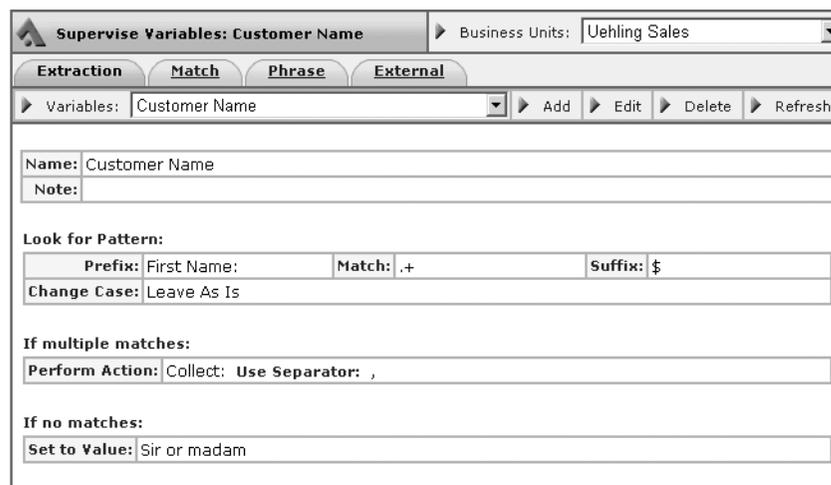
Contact Center allows you to use variables within responses. For example, you can extract the customer name from an e-mail (especially if the e-mail follows a predictable format) and then use that name in the response. There are four types of variables that you can create:

1. Extraction – Allows you to look for a pattern (string) within a request and then assign the text that follows it to a variable. For example, many companies use Web forms as a way for customers to request information. The Web form generates an e-mail that includes predictable patterns such as “[Name:”. You can assign the text between the prefix pattern and suffix pattern to a variable.

- **Prefix** – When the system finds this string within a request, it will capture everything after it until it reaches the Suffix string. You need to include a “\” before the prefix if the prefix string begins with a special character such as a bracket.
- **Match** – Set this to “.*” if you want to match zero or more characters, or “.+” if you want to match one or more characters. You can also include characters in the match value that you know will be there and that you want to preserve. For example, a match value of “Name: .+” would return “Name: Joe Customer” from the string “Name: Joe Customer”.
- **Suffix** – When the system finds this string, it stops extracting. You need to include a “\” before the suffix if the suffix string begins with a special character such as a bracket. Type a “\$” to indicate you want to extract everything to the end of the line.

You can also change the case of the extracted characters, determine how to handle multiple Prefix/Suffix matches, and set a value to assign if there are no matches.

White space beginning and ending e-mail variable matches is automatically removed when variables are saved to the database.



Supervise Variables: Customer Name Business Units: Uehling Sales

Extraction Match Phrase External

Variables: Customer Name Add Edit Delete Refresh

Name: Customer Name
Note:

Look for Pattern:
Prefix: First Name Match: .+ Suffix: \$
Change Case: Leave As Is

If multiple matches:
Perform Action: Collect Use Separator: ,

If no matches:
Set to Value: Sir or madam

Figure 4-30. The Supervise: Variables Screen - Extraction Tab

2. Match – Allows you to see if the request matches any features or intents. You can assign a string to the variable when a feature or intent is matched. You can also assign a string when a feature or intent is not matched. Features and intents are explained in the *Knowledge Engineer Handbook* and created in the Knowledge Manager.

Figure 4-31. The Supervise: Variables Screen - Match Tab

3. Phrase – Allows you to set the variable to a phrase the customer used. This is based on a feature match. For example, if you set up a feature in the knowledge base to recognize the phrase “Product B”, you could use that phrase as a variable in the response to the customer (for example, “here is the information you requested for Product B”). You could also use this to capture a known customer business name, or any other predictable phrase the customer might type. Features are explained in the *Knowledge Engineer Handbook* and created in the Knowledge Manager.

Figure 4-32. The Supervise: Variables Screen - Phrase Tab

4. External – Allows you to assign a variable that you set up through the Integration Development Kit. There are APIs you can use to set a value. Refer to the *Integration Development Kit User Guide*

for information about creating plugins to fill external variables. The default value will be used if there is no external variable plugin defined in the system. If an external variable plugin is defined, and the plugin does not set a size for the external variable, the variable will also be filled with the default value.

Working with Variables

If a variable is not assigned a value, the agent will need to fill in the information. The Agent Desktop will indicate variables that remain unassigned by displaying the variable name in brackets <Variable_Name> within the response. For the agent to send a response email, all variables must be replaced with specific values. No response is sent if any variables remain unfilled.



Variables are processed and filled for each individual message as the message enters the Siebel Brightware system. If a response is used in the reply that contains a variable which was defined after the message entered the system, the variable will not have a value, as no value existed when the message entered.

Supervise: Reasons View

Figure 4-33. The Supervise: Reasons Screen

Use the Edit Reason Code screen (Figure 4-33) to add, edit, and delete Contact Center reason codes. Reason codes allow you to collect information about why a message was processed a particular way. Agents use reason codes when they pend, transfer, or reassign a request, or perform a routine operation for other than routine reasons. There are four types of reason codes:

- Close reason codes
- Pend reason codes
- Reassign reason codes
- Reopen reason codes

Here are some samples:

- **Pend** – NMI (Need More Information)
- **Reassign** – WRQ (Wrong Queue, message was in wrong queue)
- **Close** – NRN (No Response Needed, such as for a thank you note from a customer)

Monitor: Overall View

| Monitor Overall: Queues | | | | | | | Business Units: BU1 | | | |
|-------------------------|-----------|--------|---------|----------|-------|----------------------------------|---------------------|--------|----------|----------|
| Business Units | | Queues | | Agents | | | | | | |
| Refresh | | | | | | Last Updated: 22 Apr 02 16:43:33 | | | | |
| Queue | Condition | OK | Warning | Requests | | | Agents | Groups | Priority | SLA |
| | | | | Critical | Total | Oldest | | | | |
| Default(Default) | Critical | | | 260 | 260 | 964:09 hrs | 3 | 1 | 1 | 5:00 hrs |
| Exception(Exception) | Critical | | | 8 | 8 | 1133:59 hrs | 1 | 1 | 1 | 4:00 hrs |
| Queue11 | OK | | | | | | 1 | 1 | 1 | 5:00 hrs |
| Queue12 | Critical | | | 240 | 240 | 911:39 hrs | 1 | 1 | 2 | 5:00 hrs |
| Queue13 | Critical | | | 240 | 240 | 911:38 hrs | | 1 | 3 | 5:00 hrs |
| Queue14 | Critical | | | 240 | 240 | 911:38 hrs | | 1 | 4 | 5:00 hrs |
| Queue15 | Critical | | | 224 | 224 | 911:37 hrs | | 1 | 5 | 6:00 hrs |
| Review(Review) | Critical | | | 3 | 3 | 1132:00 hrs | | | 10 | 4:00 hrs |
| inbound (Inbound) | OK | | | 9 | 9 | 1129:09 hrs | | | 1 | 4:00 hrs |
| outbound (Outbound) | OK | | | | | | | | 1 | 4:00 hrs |

Figure 4-34. The Monitor Overall Screen

Use the Monitor Overall screen to view system status and evaluate request flow in real time (Figure 4-34).

Click the tabs to display data by Business Unit, Queue, or Agent.

The Overall view provides a way to quickly see what's happening within the entire system. The supervisor will want to check this view frequently to see if there are any requests that have not been responded to within an appropriate amount of time.

Monitor: Groups View

| Monitor Groups: Audreys Group | | Business Units: BU1 | |
|-------------------------------|--------------------|-------------------------------|------------------------|
| Groups: Audreys Group | | Preview | Reassign |
| Requests: 1 of 1 | | Close | Transfer |
| OK: 0 | Warning: 0 | Critical: 1 | Oldest Req: 928:32 hrs |
| Queues: 0 | Agents: 0 | Last Updated: 23 Apr 02 09:38 | |
| Select All | Clear All | 1 | |
| MsgAge | Condition | Queue | Agent |
| 928:32 hrs | Critical | Queue15 | vuser_1 |
| Status | From | Subject | |
| Working | customer94@lab.com | bu1S2-M094 password | |

Figure 4-35. The Monitor Group Screen

Use the Monitor Groups screen (Figure 4-35) to review the status and condition of groups and the messages they contain. For the selected group and business unit you can:

- Preview messages.
- Transfer messages to another business unit.
- Reassign messages to another agent or queue. Reassign a message if it was assigned incorrectly or to adjust the system load.
- Close messages. Close a message when a reply has already been sent or no reply is required.
- Display message Action History.
- Display message Customer History.
- Display Intelligence Engine rule, intent, and feature information for the selected message.

Monitor: Queues View

The screenshot shows the 'Monitor Queues: Default(Default)' interface. At the top, there's a header with 'Business Units: BU1'. Below that is a navigation bar with buttons for 'Queues', 'Preview', 'Reassign', 'Close', 'Transfer', 'History', 'Actions', 'Rules', and 'Refr'. A status bar indicates 'Requests: 200 of 260', 'OK: 0', 'Warning: 0', 'Critical: 260', 'Oldest Req: 981:07 hrs', 'SLA: 5:00 hrs', and 'Last Updated: 23 Apr 02 09:41'. Below the status bar are 'Select All' and 'Clear All' buttons. The main area is a table with columns: 'MsgAge', 'Condition', 'Agent', 'Status', 'From', and 'Subject'. The table contains 8 rows of data, all with 'Queued' status and 'Critical' condition. The first row is selected.

| | MsgAge | Condition | Agent | Status | From | Subject |
|-------------------------------------|------------|-----------|-------|--------|--------------------|---|
| <input checked="" type="checkbox"/> | 981:07 hrs | Critical | | Queued | segment3@lab.com | sdsadas ack |
| <input type="checkbox"/> | 980:22 hrs | Critical | | Queued | segment4@lab.com | test |
| <input type="checkbox"/> | 931:18 hrs | Critical | | Queued | segment4@lab.com | sahdsialkdjisa difksif dsfdf |
| <input type="checkbox"/> | 928:38 hrs | Critical | | Queued | customer11@lab.com | bu1S2-M002 PLEASE SEND ME INFORMATION ABOUT |
| <input type="checkbox"/> | 928:38 hrs | Critical | | Queued | customer10@lab.com | bu1S2-M003 PLEASE SEND ME INFORMATION ABOUT |
| <input type="checkbox"/> | 928:38 hrs | Critical | | Queued | customer12@lab.com | bu1S2-M004 PLEASE SEND ME INFORMATION ABOUT |
| <input type="checkbox"/> | 928:38 hrs | Critical | | Queued | customer13@lab.com | bu1S2-M005 RE: ACCT#217602743901 |
| <input type="checkbox"/> | 928:38 hrs | Critical | | Queued | customer14@lab.com | bu1S2-M006 pay bills |
| <input type="checkbox"/> | 928:38 hrs | Critical | | Queued | customer15@lab.com | bu1S2-M007 RELATIONSHIP PR |

Figure 4-36. The Monitor Queue Screen

Use the Monitor Queues screen (Figure 4-36) to review the status and condition of Contact Center queues and the messages they contain. For the selected queue and business unit you can:

- Preview messages.
- Transfer messages to another business unit.
- Reassign messages to another agent or queue. Reassign a message if it was assigned incorrectly or to adjust the system load.
- Close messages. Close a message when a reply has already been sent or no reply is required.
- Display message Action History.
- Display message Customer History.
- Display Intelligence Engine rule, intent, and feature information for the selected message.

Monitor: Agents View

| Monitor Agents: Olson, Karl - 1 Requests | | | | | Business Units: Product A | | | |
|--|------------|-----------|----------------------|----------|----------------------------------|-------------------------|-------|---------|
| Agents: Olson, Karl | | Reassign | Close | Transfer | History | Actions | Rules | Refresh |
| Queued: 0 | Working: 1 | Pended: 0 | Oldest Req: 0:05 hrs | | Last Updated: 30 Jul 02 08:50:50 | | | |
| Select All | | Clear All | | | | | | |
| | MsgAge | Condition | Queue | Status | From | Subject | | |
| <input type="checkbox"/> | 0:05 hrs | OK | Exception | Working | uehlingt@testlab14.com | Product A and Product B | | |

Figure 4-37. The Monitor: Agent Screen

Use the Monitor Agents screen (Figure 4-37) to review the status and condition of Contact Center agents and the messages assigned to them. For the selected agent and business unit you can:

- Preview messages.
- Transfer messages to another business unit.
- Reassign messages to another agent or queue.
- Close messages. Close a message when a reply has already been sent or no reply is required.
- Display message Action History.
- Display message Customer History.
- Display Intelligence Engine rule, intent, and feature information for the selected message.

Monitor: Review View

| MsgAge | Condition | Queue From | Agent From | Edited | From | Subject |
|----------|-----------|-------------------|------------|--------|--------------------|-----------------------------------|
| 0:56 hrs | OK | Standard(Default) | Z, Agent | Yes | postmaster@lab.com | Undeliverable: RE: Queue: JMSS... |

Figure 4-38. The Monitor: Review Screen

Replies awaiting supervisor review are stored in the Review queue. Use the Monitor Review screen (Figure 4-38) to process replies handled by agents under review.



Activate the Supervisor Review function for a particular agent on the Supervise: Agent screen.

For the selected business unit you can:

- Approve messages sent for review.
- Preview messages.
- Reassign messages to another agent or queue.
- Approve or Reject messages.
- Add rejection comments.
- Add or Remove attachments.
- Close messages.
- Classify a message.
- Display message Action History.
- Display message Customer History.
- Display Intelligence Engine rule, intent, and feature information for the selected message.

Supervisor Review Comments Via Draft

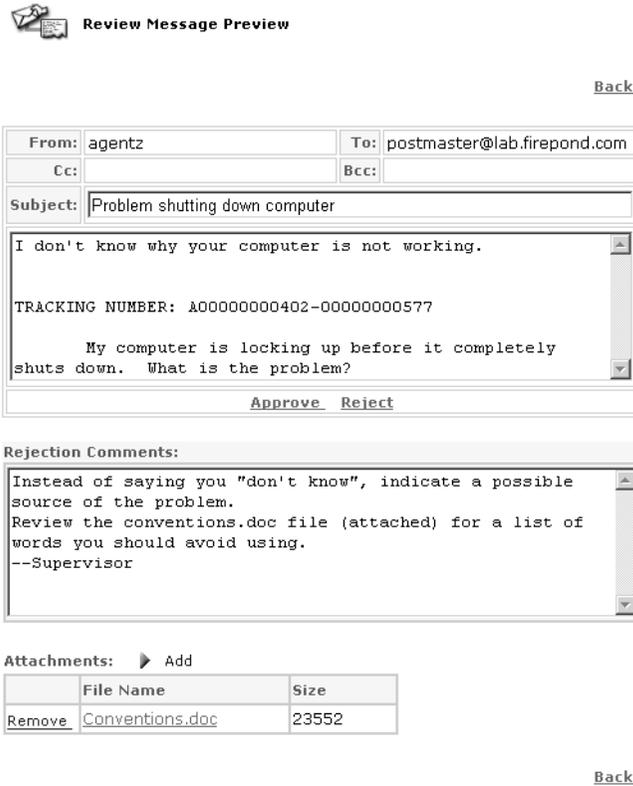


Figure 4-39. The Monitor: Review Message Preview Screen

When a message is sent to the Review Queue, a Supervisor has the ability to Approve or Reject a message, edit the original message, add rejection comments, and add or remove attachments. An entire conversation can take place between the Supervisor and an Agent until the message is adequate and the reply is actually sent.

When using the Reject feature, all the Supervisor comments are sent back to the original Agent as a “draft response” (even if the Agent has logged out for the day). The Rejection comments are viewed only by the Supervisor and Agent. The comments do not get sent with the final response.

For more information on the Review Queue, see “Randomized Supervisor Review”, on page 37.

Monitor: Search View

 Search

| | |
|------------|---|
| Thread ID: | <input type="text"/> |
| | Note: Enter the first 12 chars of the Tracking Number. E.g A00000472340. |
| | <input type="button" value="OK"/> |

- OR -

| | |
|-----------------------|--|
| Customer Name: | <input type="text"/> |
| Customer Domain: | <input type="text"/> |
| Agent Name: | <input type="text"/> |
| Subject: | <input type="text"/> |
| From Date: | 30 Jun 02 |
| To Date: | 30 Jul 02 |
| Status: | <input type="radio"/> Open <input type="radio"/> Closed <input checked="" type="radio"/> Both |
| Look for Messages in: | <input checked="" type="radio"/> Current Business Unit <input type="radio"/> Assigned Business Units |
| | <input type="button" value="OK"/> |

Figure 4-40. The Search screen

Use the Search screen (Figure 4-40) to find a specific message or set of messages. The results of the search are displayed on the Customer History screen. You can search on:

- Thread ID.
- Customer name.
- A word or phrase (text string) in the message subject.
- Customer domain (i.e. the string after the @ in an email address, e.g. “@aol.com,” “@edocs.com,”).
- A range of dates: (specify From: and To: dates).
- Name of the processing agent.
- Open messages, closed messages, or both.

The more information you can provide, the more refined the search will be. If you search by Thread ID, no other fields on this screen are used.

Monitor: Buttons

Reassign



The screenshot shows the 'Reassign Request' interface. At the top left is an icon of an envelope and a person, followed by the text 'Reassign Request'. At the top right is a 'Back' link. Below this is a text box containing a note: 'Note: Some of the selected messages are currently being handled by one or more agents. If you do not wish to affect those messages, deselect them.' Under the note, there is a checked checkbox, the text 'Working uehlingt@testlab14.company.com Product A', and three dropdown menus: 'Queue: Queue Product A Info', 'Agent: Bond, James', and 'Reason: Default - Unspecified'. Below these is a 'Comments:' text area with scrollbars. At the bottom center is an 'OK' button.

Figure 4-41. The Reassign Request Screen

Select a request and then click the **Reassign** button to reassign it to another queue or agent.

Close



The screenshot shows the 'Close Request' interface. At the top left is an icon of an envelope and a person, followed by the text 'Close Request'. At the top right is a 'Back' link. Below this is a text box containing a note: 'Note: Some of the selected messages are currently being handled by one or more agents. If you do not wish to affect those messages, deselect them.' Under the note, there is a checked checkbox, the text 'Working uehlingt@testlab14.company.com Product A', and two dropdown menus: 'Reason: Default - Unspecified' and 'Comments:'. Below these is a 'Comments:' text area with scrollbars. At the bottom center is an 'OK' button.

Figure 4-42. The Close Request Screen

Select a request and then click the **Close** button to close it. You might do this when a message does not require a response. You can indicate the reason for closing the request by selecting from the **Reason** drop-down list.

Transfer

Transfer Request

[Back](#)

Note: Some of the selected messages are currently being handled by one or more agents. If you do not wish to affect those messages, deselect them.

Working uehlingt@testlab14.company.com Product A

Business Unit:

Knowledge Base:

[OK](#)

Figure 4-43. The Transfer Request Screen

Select a request and then select the **Transfer** button to move the request to another business unit.

History

Customer History

[Preview](#) [Actions](#) [Reopen](#) [Search](#) [Refresh](#) [Back](#)

| Received | Direction | Thread ID | Status | Business Unit | From | Subject |
|--------------------|-----------|-----------|--------|---------------|-----------------|-------------------------|
| 06 Mar 02 12:11:31 | Incoming | 121 | Open | BU1 | agent22@lab.com | Testing lots of address |

[Back](#)

Figure 4-44. The Customer History Screen

Use the Customer History screen (Figure 4-44) to review all messages associated with a particular customer. For the selected message, review the following information:

- Date and time the message was received.
- Message Direction (inbound/outbound).
- Thread ID.
- Message status.
- Name of sender.
- Message subject.

You can also:

- Click the **Subject** field for a message to preview the message, or click the **Thread ID** field to view all messages within a thread.
- Click a message and then click the **Actions** link to display action history for the message.

- Click a message and then click the **Rules** link to see the rules and features that fired for that message.
- Reopen one or more messages.
- Search for a specific message or set of messages.

Figure 4-45. The Reopen Request Screen

Actions



[Add Comment](#) [Refresh](#)

[Back](#)

| Time | Action | Queue | Agent | Reason | Comment |
|--------------------|-------------------|----------------------|---------------|--------|--------------------------------|
| 13 Mar 02 15:06:27 | Add to Queue | Review(Review) | | UNK | |
| 13 Mar 02 15:05:10 | Sent to Agent | Default(Default) | agent, 2 | UNK | |
| 13 Mar 02 14:48:30 | Add to Queue | Default(Default) | | RA1 | [agent1] Reassigned by agent - |
| 13 Mar 02 14:48:30 | Assigned to Agent | Default(Default) | agent, 2 | RA1 | [agent1] Reassigned by agent - |
| 13 Mar 02 14:47:36 | Assigned to Agent | Exception(Exception) | agent, 1 | UNK | |
| 13 Mar 02 14:47:36 | Sent to Agent | Exception(Exception) | agent, 1 | UNK | |
| 07 Mar 02 16:54:34 | Add to Queue | Exception(Exception) | | UNK | |
| 07 Mar 02 13:58:34 | Add to Queue | Review(Review) | | UNK | |
| 07 Mar 02 13:58:34 | Assigned to Agent | Review(Review) | agent, 2 | UNK | |
| 07 Mar 02 13:57:16 | Assigned to Agent | Default(Default) | agent, 2 | UNK | |
| 07 Mar 02 13:56:09 | Add to Queue | Default(Default) | | UNK | |
| 07 Mar 02 13:56:09 | Assigned to Agent | Default(Default) | agent, 2 | UNK | |
| 07 Mar 02 13:51:04 | Assigned to Agent | Default(Default) | agent, 2 | UNK | |
| 06 Mar 02 12:11:33 | Manual Review | | Agent, Answer | | |
| 06 Mar 02 12:11:33 | Add to Queue | Default(Default) | | UNK | |
| 06 Mar 02 12:11:32 | Assigned to Agent | inbound (Inbound) | Agent, Answer | UNK | |
| 06 Mar 02 12:11:32 | Sent to Agent | inbound (Inbound) | Agent, Answer | UNK | |
| 06 Mar 02 12:11:31 | Add to Queue | inbound (Inbound) | | UNK | |
| 06 Mar 02 12:11:31 | Open | | | UNK | |

Figure 4-46. The Action History Screen

Use the Action History screen (Figure 4-46) to review all actions, including those initiated by Contact Center, taken on a particular message. For the selected message, review the following information:

- Date and time of action.
- Action taken.
- Name of queue holding the message.
- Name of the agent that took the action.



When the agent “Agent, Answer” appears in the list, it indicates the action was taken by the Intelligence Engine.

- Reason for action.
- Any comments entered about the action.
- You can also add additional comments to the request’s action history.

Rules

Click a message and then click the **Rules** link to see the rules and features that fired for that message.

Find

The screenshot shows the 'Find Messages' screen with a search form. The form includes fields for Customer Name, Customer Domain, From Date (30 Jun 02), To Date (30 Jul 02), and Subject. There are 'Back' links above and below the form, and an 'OK' button at the bottom.

| | |
|------------------|----------------------|
| Customer Name: | <input type="text"/> |
| Customer Domain: | <input type="text"/> |
| From Date: | 30 Jun 02 |
| To Date: | 30 Jul 02 |
| Subject: | <input type="text"/> |
| OK | |

Figure 4-47. The Find Messages Screen (Queues View)

Click the **Find** button to display the Find Message screen. Type the Customer Name, Domain, date range and/or subject. The fields you can search on will vary depending on what view you were in when the Find button was clicked.

Refresh

Click the **Refresh** button to update the screen with the latest information.

Application: Options View

| | |
|--|----------------------------------|
| Refresh Rate(1 - 60): | <input type="text" value="0"/> |
| Maximum number of rows to be retrieved from the database(5 - 999): | <input type="text" value="200"/> |
| Maximum number of rows to be displayed(5 - 200): | <input type="text" value="20"/> |
| <input type="button" value="OK"/> | |

Figure 4-48. The Monitor View Options Screen

Use the Application: Options view to change your password or reset Monitor view options (Figure 4-48).



Since Contact Center recognizes only one Administrator, when changing the Administrator password remember to notify any other personnel who may be affected.

- **Refresh Rate** – The frequency, in minutes, that data from the database is refreshed on the screen. A refresh rate of 0 means data is only refreshed when requested by a user.
- **Maximum number of rows retrieved** – The maximum number of rows retrieved in a search. Reducing this number speeds up searches.
- **Maximum number of rows displayed** – Of the rows retrieved in a search, the number you want displayed on a single screen.

System Status Check

You can get a quick snapshot of your Oracle's Siebel Brightware system by sending an e-mail to any of the in-boxes set up for the system.

Send an email into the system with a subject of "System Status Check".

You can specify a date range if you want to limit the request. For example:

```
System Status Check;Dates(10/01/2003-10/01/2004)
```

The system will return an e-mail with the following items

- Total Business Units
- Total Queues
- Total Knowledge Bases loaded
- Total Agents in the system
- Number of Agents online
- Number of Supervisors online
- Total original messages
- Total auto-generated messages
- Total suggested response messages

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