



Siebel Chat Guide

Siebel Innovation Pack 2014

November 2014

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1

What's New in This Release

NOTE: Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release.

What's New in Siebel Chat Guide, Siebel Innovation Pack 2014

Table 1 lists the changes in this revision of the documentation to support this release of the software.

Table 1. New Product Features in Siebel Chat Guide, Siebel Innovation Pack 2014

| Topic | Description |
|--|---|
| "Siebel Chat Interface" on page 45 | Modified topic. It describes how the chat pane is displayed in this release. |
| "Siebel Chat Dashboard" on page 74 | Modified topic. It explains that the chat dashboard is available in this release of the software. |
| "Configuring the Behavior of the Push URL Functionality" on page 133 | Modified topic. It explains that the push URL functionality is available in this release of the software. |

What's New in Siebel Chat, Version 8.1/8.2

Table 2 describes the new features that are available in Siebel CRM version 8.1.1.11, Siebel CRM version 8.2.2.4, and later.

Table 2. New Product Features in Siebel Chat, Version 8.1/8.2

| Topic | Description |
|--|---|
| "Siebel Chat Interface" on page 45 | Modified topic. It describes how the chat pane is displayed in this release. |
| "Siebel Chat Dashboard" on page 74 | Modified topic. It explains that the chat dashboard is not available in this release of the software. |
| "Configuring the Behavior of the Push URL Functionality" on page 133 | Modified topic. It explains that the push URL functionality is not available in this release of the software. |

2

Overview of Siebel Chat

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

- [About Siebel Chat on page 11](#)
- [Siebel Chat Process Flows on page 15](#)

About Siebel Chat

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

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

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

NOTE: The procedures in this guide assume that you do not use left-hand navigation. However, you can set up left-hand navigation. For more information about left-hand navigation and about implementing it, see *Siebel Fundamentals for Siebel Open UI*.

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

This guide includes information about how to:

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

- Use the Oracle Contact On Demand Supervision Manager application to supervise Siebel Chat.

This guide describes the features of Siebel Chat that are available to a contact center agent, and where relevant provides guidelines for supervisors and administrators. To learn more about setting up, administering, configuring, and supervising Siebel Chat, review “[Setting Up Siebel Chat](#)” on [page 21](#) and “[Managing Siebel Chat](#)” on [page 85](#). In addition, refer to the following Oracle Contact On Demand documents on the Siebel Bookshelf:

- *Oracle Contact On Demand Administration Manager Guide*
- *Oracle Contact On Demand Supervision Manager Guide*
- *Oracle Contact On Demand Interaction Manager Guide*

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

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

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

Siebel Chat Features

Common features of Siebel Chat include the following:

General Siebel Chat Features

The following general features are available for Siebel Chat:

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

- **Anonymous Chat.** This feature allows a customer to chat with an agent anonymously.
- **Activity Wrap-Up.** This feature gives agents the ability to conduct Siebel Chat disposition activities, such as, capture critical data, alert the supervisor, or create follow up tasks.

Siebel Chat Dashboard Features

The following features are available on the Siebel Chat dashboard:

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

Siebel Chat Message Features

The following message features are available for Siebel Chat:

- **Smart Share.** Clicking Smart Share allows the agent to share highlighted text, service request details, and solution details with the customer.
- **Frequently Used Text.** Agents have a global list of predefined message responses at their disposal to send to customers, as required, when handling Siebel Chat interactions.

Siebel Chat Push URL Features

The following push URL features are available for Siebel Chat:

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

Other Features

Other features available for Siebel Chat include the following:

- **Business Intelligence.** Supervisors and agents can use Oracle Business Intelligence (formerly known as Siebel Business Analytics), if installed, against the Siebel Chat data.

- **Oracle Contact On Demand Integration.** Siebel Chat is fully integrated with the communications technology of Oracle Contact On Demand. Administrators and supervisors can set up Oracle Contact On Demand Administration Manager and Supervision Manager applications to manage and monitor Siebel Chat interactions.

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

Siebel Chat Users

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

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

For information about setting up accounts for agents, administrators, and supervisors, see [“Setting Up User Accounts in Oracle Contact On Demand Administration Manager” on page 89](#).

Table 3 outlines the main access level permissions for agents, administrators, and supervisors.

Table 3. Access Level Permission for Siebel Chat Users

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

Table 3. Access Level Permission for Siebel Chat Users

| User | Access Level Permission |
|------------|--|
| Supervisor | <p>Supervisors can:</p> <ul style="list-style-type: none"> ■ Log in to Oracle Contact On Demand Supervision Manager ■ Monitor agent statistics, workgroups, projects, and Siebel Chat interactions ■ Set alarms ■ Create and run reports |

Siebel Chat Process Flows

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

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

For more information about the chat process flows for the customer and the agent, see the following:

- [“Customer-Facing Chat Process Flow” on page 15](#) describes a typical chat process flow for a customer.
- [“Agent-Facing Chat Process Flow” on page 17](#) describes a typical chat process flow for an agent.

Customer-Facing Chat Process Flow

The steps involved in a typical customer-facing chat process flow are shown in [Figure 1 on page 17](#) as follows:

- 1 A customer, looking for an answer to a problem, requests a chat with an agent from any non-Siebel self-service Web application.

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

- Click Contact Us, then Chat (or navigate to Support, Contact Us, and then Chat).
- Click the *Chat with a Live Agent* shortcut in the Need more Help? frame.

- 2 The customer fills out the chat request form by entering personal information (name or user ID, email address, address), product type details (product name or product category), problem summary, problem description, then clicks Submit and waits in the queue. For identified customers, the self-service Web application prepopulates as many of these values as possible. An example chat request form is shown in [Figure 3 on page 19](#).
- 3 Using the information on the chat request form as search parameters, the self-service Web application executes a search against the Oracle Knowledge Base, and returns a list of suggested knowledge base articles and solutions for the customer to review.

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

- 4 If still not satisfied, then the customer clicks Chat and waits to be connected to an agent.
If set up accordingly during chat project setup in Oracle Contact On Demand, then customers can be pushed Oracle Contact On Demand predefined URLs under the following circumstances:
 - While waiting to be connected to an agent
 - When no agent is available
 - When the contact center is closed
 - When the customer connects to an agent
 - When the agent disconnects from the customer

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

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

For more information about push URL configuration and chat project setup, see ["Configuring the Behavior of the Push URL Functionality" on page 133](#) and ["Setting Up a Chat Project in Oracle Contact On Demand Administration Manager" on page 90](#).

- 5 When the customer is connected to an agent, the customer engages in a chat conversation with the agent.
- 6 The customer releases the chat session.

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

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

Figure 1 describes a customer-facing chat process flow.

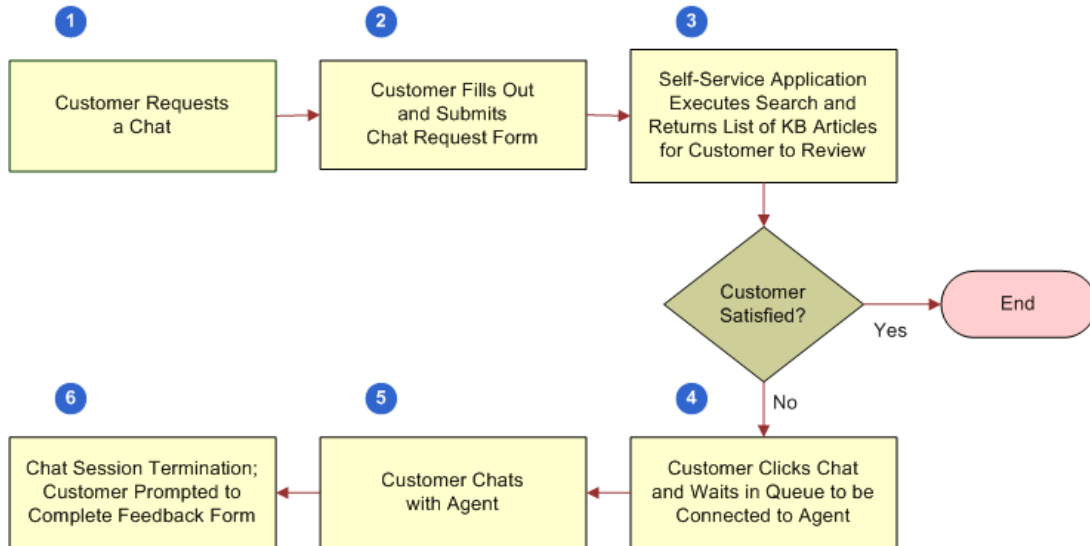


Figure 1. Customer-Facing Chat Process Flow

Agent-Facing Chat Process Flow

The steps involved in a typical agent-facing chat process flow are shown in [Figure 2 on page 18](#) as follows:

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

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

- a A user account must be set up for each agent in Oracle Contact On Demand, see [“Setting Up User Accounts in Oracle Contact On Demand Administration Manager” on page 89](#).
- b Each agent must be added to at least one chat communications configuration.

For more information, see [“Configuring Communications in Siebel Call Center for Siebel Chat” on page 31](#) and [“Adding Agents to the Communications Configuration for Siebel Chat” on page 34](#). See also *Siebel CTI Administration Guide* for more information about configuring agents after an agent has been added to a communications configuration.

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

For more information about accepting a chat, see [“Accepting an Incoming Chat” on page 58](#).

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

The information on the chat request form determines whether an *activity event* or a *service request* is created, and consequently the *application view* that the agent is directed to in the Siebel Call Center application. For example, if the customer provides only a Contact ID on the chat request form, then the agent is directed to the Contact screen in Siebel Call Center. However, if the customer provides a valid Service Request ID that Siebel Call Center can identify, then the agent is directed to the Service Requests screen in Siebel Call Center. For more information about how Siebel Call Center identifies the customer requesting a chat, see [“Chat Standard Accept Process Workflow” on page 47](#).

- 5 The agent is directed to an appropriate application view in Siebel Call Center and engages in a chat conversation with the customer.

For more information about how an agent handles a chat, review the following:

- [“Responding to an Incoming Chat” on page 60](#)
- [“Reviewing Inbound Siebel Chat Activities” on page 62](#)
- [“Handling Siebel Chat Sessions” on page 65](#)

- 6 The agent releases the chat session, see [“Releasing Siebel Chat Sessions” on page 68](#).

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

Wrapping up a chat session involves recording, for example, the outcome of the chat session and agent satisfaction with the outcome. For more information about wrap-up, see [“Wrapping Up Siebel Chat Sessions” on page 70](#).

Figure 2 describes an agent-facing chat process flow.

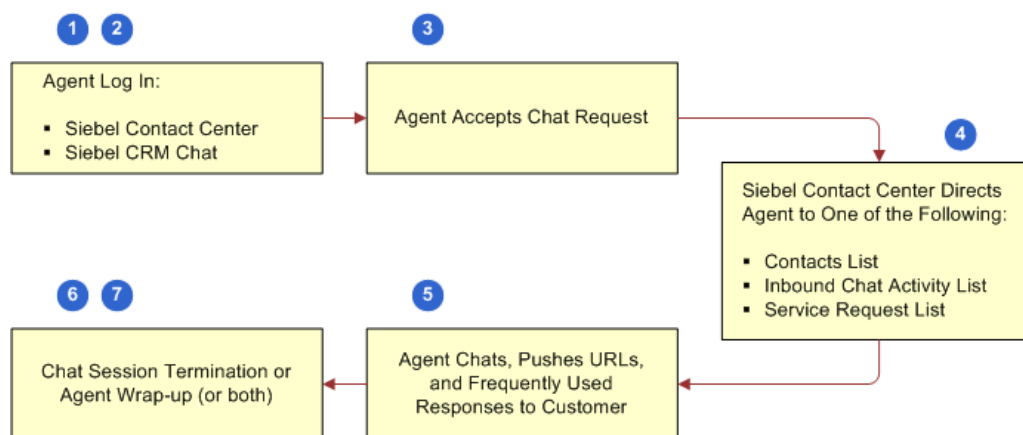


Figure 2. Agent-Facing Chat Process Flow

Chat Request Form

Figure 3 shows an example of a chat request form. The callouts in Figure 3 show the following:

- 1 **Profile information.** First name, last name, phone number, email address, which is prepopulated if the user is logged in to the self-service Web application.

- 2 **Service request information.** Service request number, product name, problem summary, problem description, which is prepopulated if the chat is requested from a Service Request Detail page.

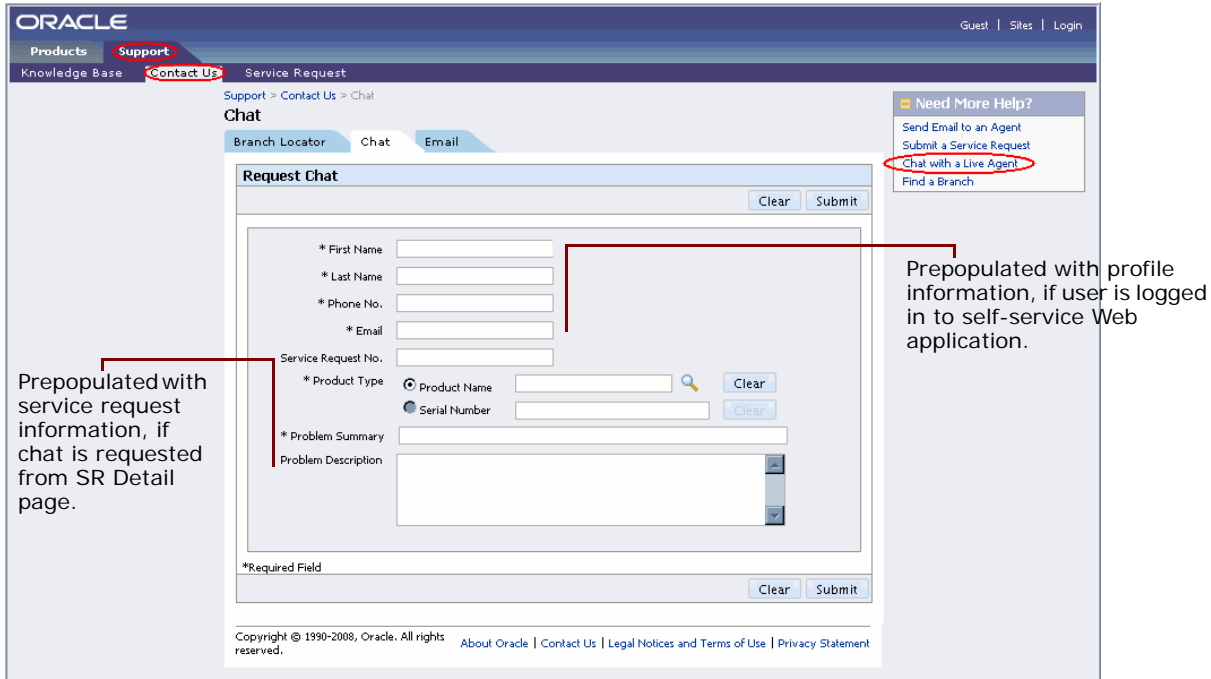


Figure 3. Example Chat Request Form

3

Setting Up Siebel Chat

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

- [Planning Your Siebel Chat Set Up on page 21](#)
- [Installing Customer-Facing Components on page 24](#)
- [Process of Setting Up Siebel Chat for Self-Service Web Applications on page 25](#)
- [Process of Configuring Oracle Contact On Demand for Siebel Chat on page 26](#)
- [Roadmap for Configuring Siebel Call Center for Siebel Chat on page 29](#)
- [Configuring Parameters for Oracle Solaris on page 44](#)

Planning Your Siebel Chat Set Up

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

- [“Deployment Model and Topology” on page 21](#)
- [“Capacity Planning for Siebel Chat” on page 22](#)
- [“Calculating Chat Session Capacity for Siebel Chat” on page 23](#)

Deployment Model and Topology

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

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

Capacity Planning for Siebel Chat

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

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

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

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

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

- Customer chat sessions
- Simultaneous agent sessions
- Communications toolbar or Oracle Contact On Demand Administration Manager sessions

This is the number of Communication Session Manager sessions multiplied by the number of Oracle Contact On Demand instances.

The Communication Session Manager server component logs information about all communication sessions.

- Oracle Contact On Demand Administrator Manager sessions, not including reports
- Oracle Contact On Demand Supervisor Manager sessions

Calculating Chat Session Capacity for Siebel Chat

To estimate how many agents and supervisors are supported and how many Web servers and application servers are required based on the example chat session capacities of 600, 1000, and 3000, review the calculations in [Table 4](#). In reviewing the calculations in [Table 4](#), note the following:

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

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

NOTE: The recommended server configurations in [Table 4](#) are for a single company deployment and do not consider master and backup redundancy, which would require additional hardware. In multitenancy mode, dedicated application servers must be configured on a company by company basis. For high interactivity mode, clustering is recommended where ideally every physical server would be replicated.

Table 4. Capacity of Chat Session for Siebel Chat

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

Table 4. Capacity of Chat Session for Siebel Chat

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

Installing Customer-Facing Components

The self-service Web application that customers use can be any third-party or in-house Web application to which Siebel Chat is integrated. For information about installing self-service Web applications, see the documentation that accompanies that product. After you have installed your self-service Web application, you must set it up for Siebel Chat, see [“Process of Setting Up Siebel Chat for Self-Service Web Applications” on page 25](#).

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

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

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

- 1 In the Siebel application (for example, Siebel Call Center):
 - a Set up chat communications configuration, see [“Configuring Communications in Siebel Call Center for Siebel Chat” on page 31](#).
 - b Set up chat system preferences, see [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 41](#).
- 2 Modify the configuration parameters of your self-service Web application to:
 - a Connect with Siebel Chat.

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

For example, then you might must set the `ENABLE_CHAT` parameter in the `SelfServiceConfiguration.properties` file.

For more information about setting up Siebel Chat for non-Siebel self-service Web applications, see the documentation that accompanies that product.

Process of Configuring Oracle Contact On Demand for Siebel Chat

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

- [“Installing Parameter Extensions for Siebel Chat” on page 26](#)
- [“Deploying Oracle Contact On Demand Web Application” on page 26](#)
- Set up Oracle Contact On Demand applications for Siebel Chat, see [“About Setting Up Oracle Contact On Demand Applications for Siebel Chat” on page 28](#)

Installing Parameter Extensions for Siebel Chat

This task is a step in [“Process of Configuring Oracle Contact On Demand for Siebel Chat” on page 26](#).

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

NOTE: [Table 17 on page 157](#) describes some of the seeded parameter extensions for chat.

Deploying Oracle Contact On Demand Web Application

This task is a step in [“Process of Configuring Oracle Contact On Demand for Siebel Chat” on page 26](#).

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

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

- [“Deploying Oracle Contact On Demand Web Application on Oracle WebLogic” on page 27](#)
- [“Deploying Oracle Contact On Demand Web Application on Oracle Application Server 10g” on page 28](#)

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

Deploying Oracle Contact On Demand Web Application on Oracle WebLogic

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

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

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

For example:

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

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

For example:

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

- 5 Under the applications directory, extract the Siebel_Extensions_8.1.1.23.tar.gz file into the TAW directory that you created in Step 2. Select Yes if prompted to overwrite existing files.
- 6 Delete the Siebel_Extensions_8.1.1.23.tar.gz file.
- 7 Edit the web.xml file to include your system information.
- 8 Connect to the Web based Oracle WebLogic console.

For example:

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

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

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

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

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

- 1 Copy the files located in Siebel_Extensions_8.1.1.23.tar\i\ght\chat to
j2ee\home\appls\TAW\TAW\i\ght\chat.

- 2 Apply the content located in the scripts\Integration.js file to
j2ee\home\appls\TAW\TAW\i\ght\chatscripts\Integration.js by copying the following:

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

in to the related function in

j2ee\home\appls\TAW\TAW\i\ght\chatscripts\Integration.js.

- 3 Copy the TAWBundle*_*_CHATAPP.properties file located in
Siebel_Extensions_8.1.1.23.tar\WEB-INF\classes to
j2ee\home\appls\TAW\TAW\WEB-INF\classes.
- 4 Copy the chat folder in Siebel_Extensions_8.1.1.23.tar\WEB-INF\classes\com\taw\web to
j2ee\home\appls\TAW\TAW\WEB-INF\classes\com\taw\web.
- 5 Add the following element to the web.xml file located in
j2ee\home\appls\TAW\TAW\WEB-INF:

```
<context-param>  
    <param-name>Siebel ChatPushedURLAsPopup</param-name>  
    <param-value>on</param-value>  
</context-param>
```

About Setting Up Oracle Contact On Demand Applications for Siebel Chat

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

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

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

- [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87.](#)
- [“Process of Setting Up Oracle Contact On Demand Supervision Manager” on page 96.](#)

Roadmap for Configuring Siebel Call Center for Siebel Chat

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

- [“Verifying Organization Access Control” on page 30](#)
- [“Setting Up Agent Responsibilities and Views in Siebel Call Center” on page 30](#)
- [“Configuring Communications in Siebel Call Center for Siebel Chat” on page 31](#)
- [“Adding Agents to the Communications Configuration for Siebel Chat” on page 34](#)
- [“Setting Up an Alias for Siebel Chat Users in Siebel Call Center” on page 35](#)
- [“Setting Up Frequently Used Text in Siebel Call Center for Siebel Chat” on page 36](#)
- [“Extending Wrap-Up LOVs in Siebel Call Center for Siebel Chat” on page 37](#)
- [“Configuring the Communications Toolbar” on page 38](#)
- [“Setting Up a Global URL Library in Siebel Call Center for Siebel Chat” on page 38](#)
- [“Configuring the RedoPopupInMenu Command” on page 39](#)
- [“Setting Up Outbound Email Communications in Siebel Call Center” on page 40](#)
- [“Configuring Support for F5 Refresh in Siebel Chat” on page 41](#)
- [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 41](#)
- [“Using the Browser During Siebel Chat Sessions” on page 73](#)
- [“Setting Up Siebel Chat Transfer to Agent or Workgroup Functionality” on page 109](#)
- [“Configuring Siebel Chat Auto Answer” on page 117](#)
- [“Customizing the Siebel Chat User Interface” on page 134](#)
- [“Modifying the Spelling Checker for Siebel Chat” on page 146](#)
- [“Process of Configuring Siebel Chat Feedback” on page 150](#)

NOTE: The tasks listed here assume that you have already set up a company, user accounts, and chat projects in Oracle Contact On Demand as outlined in [“About Setting Up Oracle Contact On Demand Applications for Siebel Chat” on page 28.](#)

Verifying Organization Access Control

Siebel Chat supports multitenancy, so access to data in general is restricted to those records belonging to the agent’s Position Organization. The Position Organization is the organization to which the agent’s current position belongs. To verify an agent’s position and position organization, complete the steps in the following procedure. This task is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat”](#) on page 29.

To verify an agent’s position and position organization

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

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

Setting Up Agent Responsibilities and Views in Siebel Call Center

To handle chat interactions, each user of Siebel Chat must be given access to certain views and responsibilities. By default, the Universal Agent responsibility in Siebel Call Center is already set up for Siebel Chat. However, if you want to use a different responsibility (other than Universal Agent), then you must set up a new agent responsibility in Siebel Call Center, and add the appropriate chat views and users to that responsibility. This task is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat”](#) on page 29.

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

- 1 Navigate to the Administration - Application screen, then the Responsibilities view.
A list of responsibilities displays with the responsibilities tab open.
- 2 Click New to create a new universal agent responsibility, and complete the fields as described in the following table.

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

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

Configuring Communications in Siebel Call Center for Siebel Chat

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

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

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

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

- [“Process of Setting Up Siebel Chat for Self-Service Web Applications” on page 25](#)
- [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#)

To configure communications in Siebel Call Center for Siebel Chat

- 1 Locate the `multichannel_enhanced_chat.def` file as required.

You must use the `multichannel_enhanced_chat.def` file if you are using the default workflow to handle incoming chat requests. For more information, see [“Chat Standard Accept Process Workflow” on page 47](#).

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

```
<Siebel_Bui | d>\ses\si ebsrvr\bin\language_code
```

If you cannot locate the communication file, then contact your system administrator or Oracle account support representative.

NOTE: You can optionally make a copy of `multichannel_enhanced_chat.def` and modify it using a text editor before importing it into your communications configuration record.

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

When the import process is complete, the Import Configuration window closes, and the Parameters, Profiles, Commands, and Event Handlers tabs are now populated with communication configuration information. For example, clicking the Event Handlers tab displays a list of available chat-related event handlers (such as, ChatAccepted, ChatMessageReceived, ChatSuspended, and so on). You can add or delete Parameters, Profiles, Commands, and Event Handlers, as required.

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

- Select the configuration record that you created, and click the Profiles tab.
- Click the Driver name. The particular name of the driver that you configure for Oracle Contact On Demand integration is TaW.

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

- On the Communications Drivers screen, use the vertical navigation buttons to navigate to the Profile Parameter Overrides section, and set the driver parameters, as required.

NOTE: If no profile exists for the driver, then one must be created. If one does exist, but it is not the profile that you want to configure, then add a new profile now.

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

| Driver Parameter | Value |
|----------------------------|--|
| Driver:CompanyName | Required. Set to the company alias as defined in Oracle Contact On Demand Administration Manager. |
| Driver:AdminUserName | Required. Set to the administrator name, as defined in Oracle Contact On Demand Administration Manager. |
| Driver:AdminPassword | Required. Set to the administrator password (of AdminUserName). |
| Driver:URL | Required. Set to the location of Oracle Contact On Demand services, for example, as follows: http://east/cod/services/ |
| Driver:ProxySupport | Optional. Set to script if you want to use wpad.dat to access Oracle Contact On Demand services using an HTTP proxy. Set to Disabled if you do not want to use a proxy. |
| Driver:ProxyScriptLocation | Optional. If Driver:ProxySupport is set to script, then set this parameter to the location of the script, for example, as follows: http://wpad.us.oracle.com/wpad.dat |
| Driver:EnableSOAPTrace | Optional. Set to True to log all communications between the driver and Oracle Contact On Demand, and set to False to ignore all communications. |
| Driver:LogFile | Optional. Specify a name for the driver log file. |
| Driver:LogSOAPFile | Optional. Specify a name for the log file, into which all messages between the driver and Oracle Contact On Demand are written. |

- 3 Add agents to the chat communications configuration record.

This step involves mapping an agent's details as defined in Oracle Contact On Demand Administration Manager to the corresponding agent user in the Siebel Call Center application. For more information about adding agents, see ["Adding Agents to the Communications Configuration for Siebel Chat" on page 34](#).

- 4 Save the chat configuration record if required so that you can readily access it in the future, for example, if you want to update and amend it.

- 5 (Optional) If changes have been made to the configuration, driver parameters, or profile parameters, then save the communications configuration to another file as follows:

- a Navigate to the Administration - Communications screen, then the All Configurations view.

- b Select the chat configuration record that you want to save, and click Export Configuration.

- c On the Export Configuration window, specify the communications configuration elements to export. Choose from the following options:

- Configuration Parameters

- Drivers and Profiles

- Commands

- Events

- d When prompted, save the communications configuration file to a suitable location.

- 6 Configure chat routing parameters.

This step involves configuring the routing for chat data, see ["Setting Up an Alias for Siebel Chat Users in Siebel Call Center" on page 35](#).

- 7 Configure an email profile for chat communications, see ["Setting Up Outbound Email Communications in Siebel Call Center" on page 40](#).

Adding Agents to the Communications Configuration for Siebel Chat

When adding agents to the communications configuration for Siebel Chat in Siebel Call Center, it is important that you use the same Agent Login and Password that were set up for the agent in Oracle Contact On Demand.

To add agents to the communications configuration set up in Siebel Call Center, complete the steps in the following procedure. This task is a step in ["Roadmap for Configuring Siebel Call Center for Siebel Chat" on page 29](#).

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

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the (chat) communications configuration record for which you want to add agents, and click the Agents tab.

- 3 Click New to add an agent.
- 4 On the Add Agents window, select or query for the agent that you want to add, and then click OK.
- 5 Specify the Agent Login and Password that the agent must use to log in to Oracle Contact On Demand:
 - a Click on the agent name to go to the Agent General Profile page.
 - b Enter the Login and Password in the Agent Login and Password fields respectively.

The value you specify for Agent Login and Password must correspond to the agent's user name and password, as defined in Oracle Contact On Demand Administration Manager.
- 6 Assign a teleset to each agent:
 - a Click an Agent, then the Telesets tab, then New.
 - b On the Add Telesets window, select or query for the teleset that you want to assign, and click OK.

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

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

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

For example, if you set up a user account for John Doe in Oracle Contact On Demand Administration Manager where First Name is JohnD, then set Alias to JohnD in John Doe's corresponding Person record in Siebel Call Center. This task is a step in "[Roadmap for Configuring Siebel Call Center for Siebel Chat](#)" on page 29.

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

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

NOTE: The alias value that you enter in this field for the user must correspond to the First Name value that is defined for the user account in Oracle Contact On Demand Administration Manager. For more information about Oracle Contact On Demand user accounts, see "[Setting Up User Accounts in Oracle Contact On Demand Administration Manager](#)" on page 89.

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

Administrators can set up a library of message response templates (or frequently used text) for chat in Siebel Call Center where each template holds a predefined message response, which agents can choose to send to customers as required. When responding to chat requests, agents can access this library of predefined message responses by clicking the Frequently Used Text button in the message input area of the chat pane. For more information about responding to chat requests, see [“Responding to an Incoming Chat” on page 60](#).

To set up predefined message responses for chat in Siebel Call Center, complete the steps in the following procedure. This task is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#).

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

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

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

| Field | Description |
|---|---|
| Pick Available Substitutions (Optional) | <p>Select the Chat UI substitution object from the object drop-down list if you want to use any of the available Chat UI data substitutions when composing your text response. The available Chat UI data substitutions are:</p> <ul style="list-style-type: none"> ■ [Chat UI.Customer First Name] ■ [Chat UI.Customer Last Name] ■ [Chat UI.Employee Alias] ■ [Chat UI.InputText] ■ [Chat UI.Primary Owner Id] |

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

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

You can extend the wrap-up list of values (LOVs) in Siebel Call Center for Siebel Chat. [“Wrapping Up a Chat” on page 71](#) describes the wrap-up values that are set up by default for Siebel Chat. To add a new wrap-up LOV or modify an existing one, complete the steps in the following procedure. For more information about LOVs, see *Siebel Applications Administration Guide*.

Use the following procedure to extend wrap-up LOVs in Siebel Call Center for Siebel Chat. This task is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#).

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

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

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

Configuring the Communications Toolbar

This task is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#). The communications toolbar displays the functions related to chat that are available for Siebel Chat. [“Working with Siebel Chat” on page 45](#) describes the chat-related behavior of the functions on the communications toolbar. The communications toolbar is defined and configured within Siebel Tools, like other toolbars in Siebel applications. For information about configuring the communications toolbar in Siebel Tools, including object definitions, toolbar items, commands, and bitmaps, see the following:

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

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

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

Administrators can make a list of URLs, save it, and store it in a URL library so that an agent can push the URLs to users when required. In Siebel Call Center, resolution documents of type URL are used to populate the URL library list. To set up a URL library for chat in Siebel Call Center, complete the steps in the following procedure. This task is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#).

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

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

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

When handling chat interactions, agents can access a list of available URLs. For more information, see [“Accepting an Incoming Chat” on page 58](#) and [“Responding to an Incoming Chat” on page 60](#).

Configuring the RedoPopupInMenu Command

If the RedoPopupInMenu command is configured in Siebel Call Center for Siebel Chat, then chat response messages that are not successfully accepted for a chat session are cached for the agent for that chat session. For example, when agents accept a new work item or resume work on an existing work item that has not been wrapped up yet, any chat response messages that the agent has not successfully accepted for the chat session are cached provided that the RedoPopupInMenu command is configured. Agents can then replay the chat response messages that were cached by navigating to Tools, then Communications in Siebel Call Center, and clicking Redo Popup. Use the following procedure to configure the RedoPopupInMenu command in Siebel Call Center for Siebel Chat.

To configure the RedoPopupInMenu command

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Query for the communications configuration record for which you want to configure the RedoPopupInMenu command, then click the Commands tab.
- 3 Go to the RedoPopupInMenu command.

If the RedoPopupInMenu command does not exist, then click New to add it, and then click Save.

- 4 Drill down on the RedoPopupInMenu command by clicking the RedoPopupInMenu link and configure the command parameters as follows:
 - a Click the Command Parameters tab.
 - b Click New and add the command parameters for RedoPopupInMenu with the values shown in the following table.

| Name | Value |
|---------------|--|
| Description | Redo Popup in menu |
| HotKey | Shift+Alt+R NOTE: Make sure that the keyboard shortcut does not conflict with any keyboard shortcuts that are defined already. |
| MenuPosition | 15 NOTE: Change the menu position if it conflicts with the menu position of another command. |
| ServiceMethod | Communications Client.RedoPopup |
| Title | Redo Popup |

- 5 Navigate to WINDOWS\Downloaded Program Files, and clear the Internet Explorer cache.
- 6 Log in to Siebel Call Center again, and test your configuration.

Setting Up Outbound Email Communications in Siebel Call Center

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

Use the following procedure to set up outbound email communications in Siebel Call Center. This task is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#).

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

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

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

- **Chat: Auto Email Mode.** Set this to POPUP, SEND, or NONE.

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

Configuring Support for F5 Refresh in Siebel Chat

To configure support for F5 refresh in Siebel Chat, you must remove the ApplicationUnload run-time event. After the ApplicationUnload run-time event is removed, you can use the F5 refresh function key during chat sessions without losing any focus.

NOTE: Remove the run-time event record only. Do not remove the Action Sets record.

To configure support for F5 refresh in Siebel Chat

- 1 Navigate to Administration - Runtime Events, then the Events view.
- 2 Query for an event record with the following values, and if the record is present, then delete it:
 - Event name: ApplicationUnload
 - Action Set Name: Comm. Web Session Close Action
 - Object Type: application
- 3 Restart the Siebel Server for the changes to take effect.

Now when an agent accepts a chat and starts exchanging chat messages with a customer, the chat pane and service request view are open, and if the agent then selects F5 on the keyboard or Refresh on the browser toolbar, the Siebel application refreshes. But after the refresh, the Siebel application remains the same, the chat session is still connected, the chat pane and service request view are open, and the agent can continue the chat conversation with the customer.

Setting Up System Preferences in Siebel Call Center for Siebel Chat

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

- ["Process of Setting Up Siebel Chat for Self-Service Web Applications" on page 25](#)
- ["Roadmap for Configuring Siebel Call Center for Siebel Chat" on page 29](#)

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

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Query for **Chat** to get a list of all the chat-related system preferences that can be set up.

- 3 For each Siebel Chat system preference that you want to set up, specify the system preference name, value, and description, as defined in the following table.

| System Preference Name | System Preference Value | Description |
|------------------------------|--|--|
| TAW: DefaultChatCompanyAlias | NOTE: Change this value to the company alias (defined in Oracle Contact On Demand), which you want Siebel Chat to use by default. | Alias of the company, as defined in Oracle Contact On Demand. |
| Chat: Default Email Template | NOTE: You must define the default email template first, and then specify it in this field. For more information, see "Setting Up Outbound Email Communications in Siebel Call Center" on page 40. | Name of the default email template used to automatically generate the email that is sent when a user releases a chat session. |
| Chat: AutoCreate Service Req | FALSE | Flag that determines whether a service request is created automatically when agents accept a chat request. Valid values are TRUE or FALSE. |
| Chat: Auto Search Mode | ON | Determines the mode used to automatically perform a search when agents accept a chat request. Valid values are ON or OFF. |
| Chat: Auto Email Mode | SEND | Determines the mode used for automatically sending an email when a chat is terminated. Valid values are POPUP, SEND, and NONE: <ul style="list-style-type: none"> ■ POPUP automatically displays the email, allowing the agent to modify it before sending. ■ SEND automatically sends the email, without prompting the agent. ■ NONE does not send an email. |

| System Preference Name | System Preference Value | Description |
|-------------------------------|-----------------------------------|---|
| Chat: BlinkTab | ON | Determines whether the chat tab blinks (ON) or not (OFF) when a new chat is accepted. For more information, see “Configuring the Siebel Chat Blink Tab System Preference” on page 118. |
| Chat: CustomerTypeDisplayTime | 5 | The time interval in seconds in which to continue showing the <i>customer is typing</i> message in the chat pane. The value must be greater than zero. For example, if Chat: CustomerTypeDisplayTime is set to 5 when a customer starts typing, then the message shows for 5 seconds in the chat pane. When the customer stops typing, the <i>customer is typing</i> message in the chat pane disappears 5 seconds later. |
| Chat: AgentTypeDetectInterval | 5 | The time interval in seconds after which the system checks if the agent is typing a message. The value must be greater than zero. |
| Chat: SendAgentTypeMsgCmd | SendAgentTypingMsg | The CTI command to call when sending the agent’s message response to a customer. The CTI command must be a valid command when configuring in CTI. |
| Chat: Set Language Workflow | Set Chat Language For Spell Check | The name of the workflow which is used to determine the chat language using the RequestSiteID field. For more information, see “Configuring the Default Language for Siebel Chat Spelling Checker” on page 148. |

Configuring Parameters for Oracle Solaris

The following parameters must be configured appropriately if setting up Siebel Chat on Oracle Solaris: CommSessionMgr, EnterpriseServer, GatewayAddress, and RequestServer.

To configure the parameters for Oracle Solaris

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the communications configuration record that you want to modify, then click the Parameters tab.

| Name | Value |
|------------------|--|
| CommSessionMgr | CommSessionMgr |
| RequestServer | [Windows Server where CommMgmt is running] |
| GatewayAddress | [Gateway address of the computer where CommMgmt is running : gateway port] |
| EnterpriseServer | [Siebel] |

4

Working with Siebel Chat

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

- [Siebel Chat Interface on page 45](#)
- [Processing Siebel Chat Requests on page 47](#)
- [Verifying That Siebel Chat Is Installed for Siebel Call Center on page 54](#)
- [About the Communications Toolbar on page 56](#)
- [Logging in to Siebel Chat on page 57](#)
- [Receiving a New Chat on page 57](#)
- [Accepting an Incoming Chat on page 58](#)
- [Responding to an Incoming Chat on page 60](#)
- [Reviewing Inbound Siebel Chat Activities on page 62](#)
- [Handling Siebel Chat Sessions on page 65](#)
- [Siebel Chat Dashboard on page 74](#)
- [Changing Agent Status on page 76](#)
- [Agent and Siebel Chat Interaction States on page 77](#)
- [Setting Up Logging and Tracing for Siebel Chat Components on page 80](#)

Siebel Chat Interface

The Siebel Chat interface is a part of the communications panel on the right side of your Siebel Call Center application. To the left of the communications panel is the main Siebel Call Center application area.

The communications panel, including the Siebel Chat interface, can be in a docked position or as a floating pane. When the communications panel is floating, it can be dragged anywhere within the confines of the main Siebel Call Center application area. For more information about the communications panel, see *Siebel Fundamentals for Siebel Open UI*.

Agents can engage in multiple chat sessions with many users simultaneously. If more than one chat session is open, the chat sessions are represented by tabs across the top of the chat pane. For more information, see ["Handling Multiple Simultaneous Siebel Chat Sessions" on page 65](#).

Siebel Chat Interface

[Figure 4](#) shows the Siebel Chat interface or chat pane. The callouts in [Figure 4](#) show the following:

- **Dashboard.** The chat dashboard in the chat pane displays details about the problem that the customer is having. Agents can carry out a number of popular actions quickly using the chat dashboard. For more information about the chat dashboard, see [“Siebel Chat Dashboard” on page 74.](#)
- **Transcript area.** The transcript area in the chat pane is where agents view the transcript of the chat conversation so far. Each part of the chat conversation is clearly labelled with either the agent’s or the customer’s name, is dated, and time stamped. The transcript area also captures any chat wrap-ups, end messages, and displays a typing indicator. When a chat session ends, the chat transcript is attached to an activity. For more information about accessing chat transcripts and attachments, see [“Reviewing Inbound Siebel Chat Activities” on page 62.](#)
- **Message input area.** The message input area in the chat pane is where an agent enters the responses to a chat request, executes a search, and smart shares service request and solution information. For more information about these tasks, see [“Responding to an Incoming Chat” on page 60.](#)
- **URL area.** The URL area in the chat pane is where an agent can enter a Web URL to share with a customer, which is then automatically displayed in the customer’s browser. To do this, enter the URL, and then press enter to push the URL to the customer. This eliminates the need for the customer to manually copy and paste the URL into a browser window. Agents can also click the URL Library button to access a global list of predefined URLs, which they can push to customers as required. For more information about push URL, see [“Pushing a Web URL” on page 61.](#)

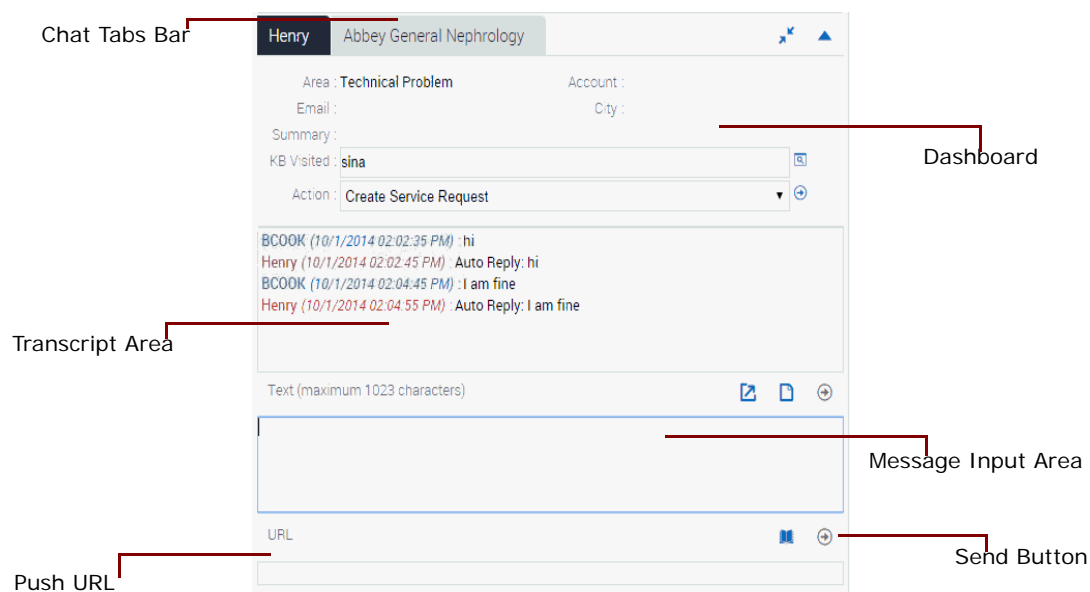


Figure 4. Siebel Chat Interface (Chat Pane)

Processing Siebel Chat Requests

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

This topic includes information about the following:

- [“Chat Standard Accept Process Workflow” on page 47](#)
- [“Siebel Call Center Behavior When Processing Siebel Chat Requests” on page 49](#)
- [“Guidelines for Processing Siebel Chat Requests” on page 54](#)

Chat Standard Accept Process Workflow

Siebel Chat provides a sample workflow called *Chat Standard Accept Process - vx* to handle incoming chat requests, where *vx* represents the version number. Currently, the latest version is v3. The Chat Standard Accept Process workflow, shown in [Figure 5 on page 48](#), is the default workflow that is called when an incoming chat request is accepted by an agent. When an agent accepts an incoming chat, Siebel Call Center attempts to identify the customer requesting the chat from the information provided on the chat request form. This information determines whether a service request is created, and consequently the application view that the agent is directed to in the Siebel Call Center application.

The Chat Standard Accept Process workflow provides the following enhanced chat functionality to handle incoming chat requests:

- Configuring which parameters to pass from the chat request page
- Configuring the chat accept process using Siebel Workflow
- Configuring the RedoPopupInMenu command
- Siebel Chat transfer to agent and workgroup
- Siebel Chat bookmark transfer
- Siebel Chat auto answer for agents
- Configuring the display name for Siebel Chat sessions

For more information about how to configure and set up this enhanced chat functionality, see the following:

- [Chapter 6, “Setting Up Siebel Chat Transfer to Agent or Workgroup Functionality”](#)
- [Chapter 7, “Configuring Siebel Chat Auto Answer”](#)
- [Chapter 8, “Customizing Siebel Chat”](#)

The Chat Standard Accept Process workflow is a Siebel Workflow, and you can configure the workflow as required using Siebel Tools to suit your own business needs.

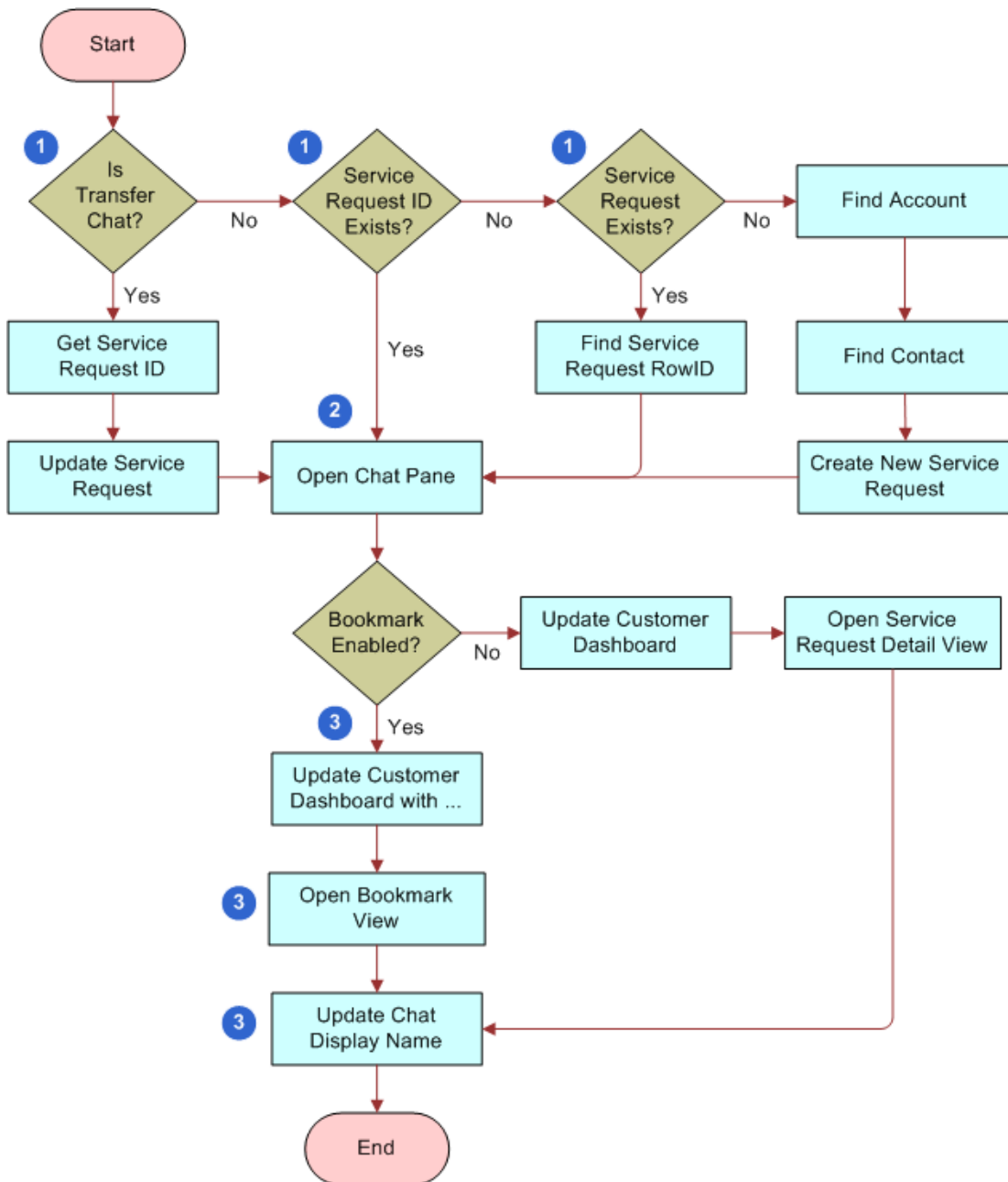


Figure 5. Chat Standard Accept Process Workflow

Workflow Description. This workflow performs the following actions:

- 1 When an agent accepts a chat, the chat UI business service does one of the following:
 - Obtains the service request ID if the chat is a transferred chat.
 - Identifies the service request ID if one is associated with the incoming chat.
 - Identifies the service request number if one is associated with the incoming chat.
 - Identifies the account or contact if the customer provides a valid contact name or user ID and account name, then it creates a new service request.
- 2 The chat UI business service opens the chat pane.
- 3 The chat UI business service directs the agent to the appropriate view (service request detail view or bookmark view) in the Siebel Call Center application, and the chat display name is updated accordingly in the chat pane.

For example:

- If bookmark is enabled, then the customer dashboard is updated, the bookmarked view opens, and the chat display name is updated in the chat pane.
- If bookmark is disabled, then the customer dashboard updates, the service request detail view opens, and the chat display name updates accordingly in the chat pane.

Siebel Call Center Behavior When Processing Siebel Chat Requests

[Table 5](#), [Table 6 on page 51](#), [Table 7 on page 51](#), and [Table 8 on page 52](#) further summarize the default workflow for accepting Siebel Chat requests by describing what happens in Siebel Call Center when various conditions are met (or not, as the case might be). Depending on the information that the customer provides on the chat request form, and the ability of Siebel Call Center to identify that customer, the workflow for accepting an incoming chat can vary.

Table 5 describes what happens in Siebel Call Center when the user's contact ID only is identified, along with the presence or absence of various other conditions.

Table 5. Chat Accept Process Workflow Where Contact ID Is Identified

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

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

Table 6. Chat Accept Process Workflow Where Service Request ID and Contact ID Are Identified

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

Table 7 describes what happens in Siebel Call Center when the user’s service request ID only is identified, along with the presence or absence of various other conditions.

Table 7. Chat Accept Process Workflow Where Service Request ID Is Identified

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

Table 8 describes what happens in Siebel Call Center when neither the user’s service request ID nor the contact ID are identified, but various other conditions are either present or absent.

Table 8. Chat Accept Process Workflow Where Neither Contact ID Nor Service Request ID Is Identified

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

Table 8. Chat Accept Process Workflow Where Neither Contact ID Nor Service Request ID Is Identified

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

Table 8. Chat Accept Process Workflow Where Neither Contact ID Nor Service Request ID Is Identified

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

Guidelines for Processing Siebel Chat Requests

Consider the following guideline for processing chat requests:

Set the system preference Chat: AutoCreate Service Req to TRUE to automatically create a new service request for every incoming chat request that is accepted by an agent.

For more information about system preference setup for chat, see [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 41.](#)

Verifying That Siebel Chat Is Installed for Siebel Call Center

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

- That Siebel Chat has been installed for Siebel Call Center. For more information, see [“Enabling the Chat Button to Appear on the Toolbar in Siebel Call Center” on page 54.](#)
- That all server component groups from Siebel Call Center are started. Server component groups must be started so that agents can receive inbound chats. For more information, see [“Checking That All Server Component Groups are Started for Siebel Call Center” on page 55.](#)

Enabling the Chat Button to Appear on the Toolbar in Siebel Call Center

The presence of the Chat button on the global toolbar of Siebel Call Center indicates that Siebel Chat has been installed and set up for the application. The Chat button appears only if the IsChatEnabled configuration parameter is set to TRUE in Siebel Call Center. To check whether the Chat button has been enabled or not in Siebel Call Center, complete the steps in the following procedure.

To enable the Chat button to appear on the toolbar in Siebel Call Center

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the appropriate chat configuration record, then query for the IsChatEnabled parameter.
If IsChatEnabled is set to TRUE, the Chat button appears on the global toolbar in Siebel Call Center. If set to FALSE, the Chat button will not appear on the toolbar.

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

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

Starting Server Component Groups from Siebel Call Center

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

To start the server component groups from Siebel Call Center

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

NOTE: Without enabling the Communication Management, Workflow Management, and EAI, Siebel Chat agents are not able to receive inbound chats.
- 3 Click the Synchronize tab, then the Synchronize button.
- 4 Restart the Siebel Server.

Starting Server Component Groups from the Command Line

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

To start server component groups from the command line

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

```
<Siebel_bui | d>\ses\si ebsrvr\bin >smgr
```

2 Enable the server component groups:

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

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

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

```
srvrmgr> exit
```

```
\\ Use the following when setting environment parameters in WINDOWS:  
\\ <Siebel_bui ld>\ses\si ebsrvr\bin>Set SIEBEL_DEBUG_FLAGS=16
```

```
\\ Use the following when setting environment parameters in UNIX:  
\\ <Siebel_bui ld>\ses\si ebsrvr\bin >setenv SIEBEL_DEBUG_FLAGS 16
```

3 Connect back to the application database:

```
<Siebel_bui ld>\ses\si ebsrvr\bin>smgr
```

4 To synchronize:

```
srvrmgr>sync
```

5 Restart the Siebel Server.

About the Communications Toolbar

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

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

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

- [“Logging in to Siebel Chat” on page 57](#)
- [“Receiving a New Chat” on page 57](#)
- [“Accepting an Incoming Chat” on page 58](#)
- [“Responding to an Incoming Chat” on page 60](#)
- [“Reviewing Inbound Siebel Chat Activities” on page 62](#)
- [“Handling Siebel Chat Sessions” on page 65](#)
- [“Transferring Siebel Chat Interactions to Others” on page 67](#)

- [“Releasing Siebel Chat Sessions” on page 68](#)
- [“Wrapping Up Siebel Chat Sessions” on page 70](#)
- [“Closing the Siebel Chat Sessions” on page 73](#)
- [“Changing Agent Status” on page 76](#)

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

Logging in to Siebel Chat

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

To log in to Siebel Chat

- 1 Log in to your Siebel Call Center application.
- 2 Click the Log in button on the communications toolbar to log in to Oracle Contact On Demand.

You are now ready to:

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

You can perform all of these actions using the functions related to chat that are available on the communications toolbar. For more information about the communications toolbar, see [“About the Communications Toolbar” on page 56](#).

Receiving a New Chat

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

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

Siebel Chat uses the information that the user provides on the chat request form to route the chat interaction to a particular workgroup queue.

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

- Either the Accept Work Item button on the communications toolbar flashes to notify that a chat request has been queued, or the chat tab flashes to indicate that a new chat has been automatically accepted and queued to the agent.
- At the same time, the communications toolbar displays a message to identify the user requesting a chat, for example, as follows:

Chat Request from customer@example.com

- When the agent accepts the chat, the customer dashboard automatically prepopulates with the following information, if provided by the customer on the chat request form:

Customer Name
Phone Number
Email Address

For anonymous chat users, the customer dashboard remains blank. For more information about the customer dashboard, see [“About the Customer Dashboard” on page 74](#).

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

Agents can then update the customer’s contact information, as described in [“Updating Customer Contact Details Using the Siebel Chat Dashboard” on page 76](#).

Accepting an Incoming Chat

Agents accept an incoming chat that has been queued to them by clicking the Accept Work Item button, when it flashes, on the communications toolbar of the Siebel Call Center application. However if chat auto answer is enabled for agents in Siebel Call Center, then agents do not need to manually accept the incoming chat as the chat either opens up automatically on the agent’s screen or the chat tab flashes to indicate that a new chat has been automatically accepted and queued.

By default, when an agent accepts a chat, the agent automatically becomes *not ready* or unavailable for other channels. If an agent does not accept an incoming chat:

- The status of that agent automatically changes to not ready, and no further incoming chats are queued to that agent until that agent changes the status back to ready. Agent status is indicated by the status button (State: ready or State: not ready) on the communications toolbar.

If chat auto answer is enabled and the agent is configured to accept a maximum number of chats at the same time in Oracle Contact On Demand, then chat auto answer accepts incoming chats, up to the maximum number of chats allowed. For more information about agent status, see [“Changing Agent Status” on page 76](#).

- Depending on workgroup setup in Oracle Contact On Demand, the customer requesting the chat is either disconnected if no agents are available, or waits in the queue for the next available agent.

The length of time that a customer waits can be configured during workgroup setup. For more information about workgroups, see [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 91](#).

While the customer waits, Web pages can be pushed to the customer according to chat project setup in Oracle Contact On Demand. For more information about projects, see [“Setting Up a Chat Project in Oracle Contact On Demand Administration Manager”](#) on page 90.

Accepting an Incoming Chat Manually

Use the following procedure to manually accept an incoming chat. Agents must manually accept incoming chats when chat auto answer is disabled for agents. For more information about chat auto answer, see [“Roadmap for Configuring Siebel Chat Auto Answer for Agents”](#) on page 117.

To accept an incoming chat manually

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

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

- 2 Respond to the incoming chat as described in [“Responding to an Incoming Chat”](#) on page 60.

Opening an Automatically Accepted Incoming Chat

Use the following procedure to open an incoming chat that has been automatically accepted. This happens when chat auto answer is enabled for agents. This procedure assumes that there are other active chat sessions or that agent is already working on an existing chat.

NOTE: If there are no other active chat sessions or the agent is not working on an existing chat, then the agent does not need to do anything to open the incoming chat as the chat pane opens up automatically.

For more information about chat auto answer, see [“Roadmap for Configuring Siebel Chat Auto Answer for Agents”](#) on page 117.

To open an automatically accepted incoming chat

- 1 Click the flashing chat tab to open the chat session.

The chat tab stops flashing and a chat pane opens in an action pane to the right of your Siebel Call Center application. The chat dashboard is prepopulated with the information provided by the user on the chat request form. The customer dashboard in Siebel Call Center also opens, showing customer information.

- 2 Respond to the incoming chat as described in [“Responding to an Incoming Chat”](#) on page 60.

Responding to an Incoming Chat

When an agent accepts an incoming chat, the agent can respond to the chat in several different ways as described in the following procedure.

To respond to an incoming chat

- 1 Accept the incoming chat as described in [“Accepting an Incoming Chat” on page 58](#).
- 2 In the message input area of the chat pane, respond to the incoming chat using one or a combination of the following:
 - a Send a message to the customer as described in [“Sending a Message” on page 60](#).
 - b Push a Web URL to the customer as described in [“Pushing a Web URL” on page 61](#).
 - c Share information with the customer as described in [“Sharing Information Using Smart Share” on page 62](#).
 - d Run the spelling checker on the chat session as described in [“Running Spelling Checker on Chat Sessions” on page 149](#).
- 3 Depending on the information provided by the customer on the chat request form (contact ID, service request ID), create a new service request if configured to do so, where no service request already exists. For anonymous chats, a service request is always created and also a corresponding activity. An activity is created either under a Service Request or a Contact record. For more information about activities, see [“Reviewing Inbound Siebel Chat Activities” on page 62](#). For more information about manually creating a service request, see [“Creating a Service Request Manually” on page 75](#).
- 4 Release the chat as described in [“Releasing Siebel Chat Sessions” on page 68](#).
- 5 If configured, wrap-up the chat.

You can only wrap up a chat after the chat session has been released by either the agent or the customer. For more information about wrapping up a chat session, see [“Wrapping Up Siebel Chat Sessions” on page 70](#).

Sending a Message

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

To use predefined message responses, you must set up frequently used text for Siebel Chat first, see [“Setting Up Frequently Used Text in Siebel Call Center for Siebel Chat” on page 36](#).

To send a message

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

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

Pushing a Web URL

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

In responding to an incoming chat, agents can type the URL address of a page that they want to share or they can push a predefined URL, as described in the following procedure. All URLs that you send to a customer appear in the transcript area of the chat pane.

To push predefined Web URLs, you must set up a global URL library for Siebel Chat first. For more information about URL library setup, see ["Setting Up a Global URL Library in Siebel Call Center for Siebel Chat" on page 38](#).

To push a Web URL

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

NOTE: Pushed URLs can either appear in a frame within the customer's chat window, or in a completely new browser window, depending on configuration. Where a new browser window is launched, subsequent URL pushes simply refresh the same window. For more information about push URL configuration, see ["Configuring the Behavior of the Push URL Functionality" on page 133](#).

Sharing Information Using Smart Share

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

To share information using Smart Share

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

Reviewing Inbound Siebel Chat Activities

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

- To review inbound chat activities, complete the steps in the following procedure.
- To review inbound chat activities associated with individual contacts and service requests, see the following:
 - [“Reviewing Inbound Siebel Chat Activities Associated with Service Requests” on page 63](#)
 - [“Reviewing Inbound Siebel Chat Activities Associated with Contacts” on page 64](#)
- To review cached chat response messages, see [“Replaying Cached Chat Response Messages” on page 64](#).

To review inbound chat activities

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

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

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

- b** Go to the Attachments tab and click the chat_transcript file to open and review the entire transcript of the inbound chat activity.
Click any other file attachment to open up, and review the solution content.
- c** Go to the Wrap-Up tab, and review activity outcome, feedback, and reason. For more information about wrap-up, see ["Wrapping Up a Chat" on page 71](#).

Reviewing Inbound Siebel Chat Activities Associated with Service Requests

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

To review inbound chat activities associated with a service request

- 1** Navigate to the Service screen, then the Service Requests List view.
- 2** Click or query for the service request that you want to review.
- 3** Go to the Activities tab, click Query, select Chat - Inbound from the Type drop-down list, then click Go to display the inbound chat activities associated with this service request.
- 4** Click an inbound chat activity to open and review it. In the Chat - Inbound screen that opens:
 - a** Go to the Chat Info tab and review the chat-related information associated with the inbound chat activity. For a description of the fields within the Chat Info tab, see ["Reviewing Inbound Siebel Chat Activities" on page 62](#).
 - b** Go to the Attachments tab and click the chat_transcript file to open and review the entire transcript of the inbound chat activity. Click any other file attachment to open up, and review the solution content.

- c Go to the Wrap-Up tab and review wrap-up outcome, feedback, and reason. For more information about wrap-up, see [“Wrapping Up a Chat” on page 71](#).

Reviewing Inbound Siebel Chat Activities Associated with Contacts

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

To review inbound chat activities associated with a contact

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Click or query for the contact that you want to review.
- 3 Go to the Activities tab, click Query, select Chat - Inbound from the Type drop-down list, then click Go to display the inbound chat activities associated with this contact.
- 4 Click an inbound chat activity to open and review it. In the Chat - Inbound screen that opens:
 - a Go to the Chat Info tab and review the chat-related information associated with the inbound chat activity. For a description of the fields within the Chat Info tab, see [“Reviewing Inbound Siebel Chat Activities” on page 62](#).
 - b Go to the Attachments tab and click the chat_transcript file to open and review the entire transcript of the inbound chat activity. Click any other file attachment to open up, and review the solution content.
 - c Go to the Wrap-Up tab and review wrap-up outcome, feedback, and reason. For more information about wrap-up, see [“Wrapping Up a Chat” on page 71](#).

Replaying Cached Chat Response Messages

When agents accept a new work item or resume work on an existing work item that has not been wrapped up yet, any chat responses that the agent has not successfully accepted for the chat session are cached provided that the RedoPopupInMenu command is configured. Agents can then replay the chat response messages that were cached as shown in the following procedure. After replaying the cache, the cache is cleared, and all cached chat response messages are removed for the chat session.

To replay cached chat response messages for a chat session

- 1 Select the active chat session that you want.
- 2 Navigate to Tools, then Communications in Siebel Call Center, and click Redo Popup.

Related Topic

[“Configuring the RedoPopupInMenu Command” on page 39](#)

Handling Siebel Chat Sessions

This topic includes information about the following:

- [“Showing and Hiding the Siebel Chat Pane” on page 65](#)
- [“Handling Multiple Simultaneous Siebel Chat Sessions” on page 65](#)
- [“Transferring Siebel Chat Interactions to Others” on page 67](#)
- [“Handling Transferred Siebel Chat Interactions” on page 68](#)
- [“Releasing Siebel Chat Sessions” on page 68](#)
- [“Wrapping Up Siebel Chat Sessions” on page 70](#)
- [“Closing the Siebel Chat Sessions” on page 73](#)
- [“Using the Browser During Siebel Chat Sessions” on page 73](#)
- [“Guidelines for Handling Unsuccessful Siebel Chat Interactions” on page 73](#)
- [“Process of Configuring Siebel Chat Feedback” on page 150](#)

Showing and Hiding the Siebel Chat Pane

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

To show and hide the chat pane

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

NOTE: To close the chat pane, agents can also click the Close button in the upper right-hand corner of the chat pane. For more information, see [“Closing the Siebel Chat Sessions” on page 73](#).

Handling Multiple Simultaneous Siebel Chat Sessions

Agents can handle multiple chat sessions simultaneously, up to a limit set by the administrator in Oracle Contact On Demand Administration Manager. For more information about setting the maximum number of simultaneous chat sessions for an agent (the default is 5), see [“Setting Up User Accounts in Oracle Contact On Demand Administration Manager” on page 89](#).

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

- Each chat tab shows the first name of the customer.
- A number appears after the customer name (for example, John: 3) representing the number of messages sent by the customer since the chat was last viewed by the agent.

- If you hover the mouse over the tab, the last message received is shown without making the agent switch to the chat.

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

- [“Switching Between Chat Sessions Using Chat Tabs” on page 66](#)
- [“Switching Between Chat Sessions Using the Communications Toolbar” on page 66](#)

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

Switching Between Chat Sessions Using Chat Tabs

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

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

To switch between chat sessions using chat tabs

- 1 In the chat pane, click the chat tab belonging to the chat session that you want to move to.
- 2 Resume work on the active chat session as described in, for example, [“Responding to an Incoming Chat” on page 60](#) and [“Reviewing Inbound Siebel Chat Activities” on page 62](#).

Switching Between Chat Sessions Using the Communications Toolbar

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

To switch between chat sessions using the communications toolbar

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

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

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

Transferring Siebel Chat Interactions to Others

It is possible for an agent to transfer or reassign a chat, which the agent has already accepted, to another workgroup or agent. Transferred chats are processed exactly the same way as other incoming chats. However, it is possible to monitor the total number of interactions transferred into a workgroup and transferred out of a workgroup by setting up a Workgroup Statistics View in Oracle Contact On Demand Supervision Manager. For more information about setting up views in Oracle Contact On Demand, see [“About Setting Up Views in Oracle Contact On Demand Supervision Manager” on page 97](#).

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

Transferring a Chat to a Workgroup

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

To transfer a chat to a workgroup

- 1 Select the chat that you want to transfer:

In the Siebel Chat interface, click the tab of the chat interaction that you want to transfer.

- 2 Click the Bind Transfer Work Item button on the communications toolbar of Siebel Call Center.
- 3 Select a workgroup on the Bind Transfer Work Item list that opens, then click OK.

The chat is transferred to the selected workgroup. The chat transcript includes all previous conversations and interactions that the previous agent had with the customer.

The Bind Transfer Work Item list shows only the available chat workgroups. It does not show any available voice (or CTI) workgroups.

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

Transferring a Chat to Another Agent

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

To transfer a chat to another agent

- 1 Select the chat that you want to transfer:

In the Siebel Chat interface, click the tab of the chat interaction that you want to transfer.

- 2 Click the Transfer to Agent button on the communications toolbar of Siebel Call Center.

- 3 Select an agent that has a status of Available on the Transfer to Agent list that opens, then click OK.

The chat is transferred to the selected agent. The chat transcript includes all previous conversations and interactions that the previous agent had with the customer.

You cannot transfer a chat to an agent that has a status of Busy, On Break, or Logged Out.

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

Related Topic

[“Process of Setting Up Siebel Chat Transfer to Agent or Workgroup” on page 109](#)

Handling Transferred Siebel Chat Interactions

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

To handle a transferred chat

- 1 The receiving agent receives the transferred chat interaction, see [“Receiving a New Chat” on page 57](#), and does one of the following as required:
 - If chat auto answer is enabled, clicks the flashing chat tab to open the chat session.
 - If chat auto answer is disabled, clicks the Accept Work Item button on the communications toolbar to open the chat session.
- 2 The receiving agent reviews the chat transcript (if there is one) in the transcript area of the chat pane.

For more information about how agents review chat activities and transcripts, including inbound chat activities associated with service requests and contacts, see [“Reviewing Inbound Siebel Chat Activities” on page 62](#).
- 3 The receiving agent responds to the transferred chat, see [“Responding to an Incoming Chat” on page 60](#).

Releasing Siebel Chat Sessions

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

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

- For information about email profile setup in Siebel Call Center, see *Siebel Email Administration Guide*.
- For information about outbound email communications setup in Siebel Call Center, see [“Setting Up Outbound Email Communications in Siebel Call Center” on page 40](#).
- For information about chat session wrap-up, see [“Wrapping Up Siebel Chat Sessions” on page 70](#).

Releasing a Chat

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

To release a chat where wrap-up is not configured

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

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

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

For more information about setting system preferences for chat, see [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 41](#).

Releasing a Chat Where Wrap-Up Is Configured

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

To release a chat where wrap-up is configured

- 1 Select the chat session that you want to release.

- 2 Click the Release Work Item button on the communications toolbar to release the chat session.

Doing this starts the wrap-up clock. Where wrap-up is configured and a customer ends a chat, then this also starts the wrap-up clock. For information about how to configure the amount of time that agents have to wrap up a chat session, see [“Configuring Wrap-Up for Siebel Chat” on page 70](#).

- 3 Wrap-up the chat session, see [“Wrapping Up a Chat” on page 71](#).

- 4 End wrap-up by clicking the End Wrapup button on the communications toolbar.

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

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

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

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

Wrapping Up Siebel Chat Sessions

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

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

- [“Configuring Wrap-Up for Siebel Chat” on page 70](#)
- [“Wrapping Up a Chat” on page 71](#)
- [“Wrapping Up a Transferred Chat” on page 72](#)

Configuring Wrap-Up for Siebel Chat

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

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

- 1 Navigate to the Options screen, then the Agents view in Oracle Contact On Demand Administration Manager, and select an agent.

- 2 Go to the Controls and Restrictions tab, and enable wrap-up for the user account:
 - a Select the Allow Wrap-up Time After Call check box.
 - b Specify the amount of time (in seconds) that the agent has to wrap-up an interaction.
After this specified time, wrap-up ends and the agent is available for the next chat request.
NOTE: Wrap-up starts from when a customer or agent releases a chat, and continues until either the agent ends the wrap-up or the wrap-up time runs out. For more information about releasing and wrapping up a chat session, see [“Releasing a Chat Where Wrap-Up Is Configured” on page 69](#).
 - c Click OK or the Apply button to save the changes.

For more information about user accounts, see [“Setting Up User Accounts in Oracle Contact On Demand Administration Manager” on page 89](#).

Wrapping Up a Chat

Wrap-up can be performed by the agent handling a chat interaction when the chat session is released, provided wrap-up is enabled for the agent’s user account in Oracle Contact On Demand (described in [“Configuring Wrap-Up for Siebel Chat” on page 70](#)).

To wrap up a chat in Siebel Call Center

- 1 When a chat session is released (see [“Releasing a Chat Where Wrap-Up Is Configured” on page 69](#)), point your mouse to the center of the screen to set focus, then press the Shift+Alt+W hot key to navigate to the Wrap-up tab for the corresponding inbound chat activity.

By default, the multichannel_enhanced_chat.def file defines the hot key (Shift+Alt+W) that is used to navigate the agent’s screen to the Wrap-up tab. This default hot key can be changed by modifying multichannel_enhanced_chat.def, then importing the new file in to your communications configuration. The hot key combination that you set must be unique. For more information about multichannel_enhanced_chat.def, see [“Configuring Communications in Siebel Call Center for Siebel Chat” on page 31](#).

NOTE: Agents can access the Wrap-up tab at any time by navigating to the Activities - Activities List view, selecting an inbound chat activity, and then the Wrap-up tab. The Wrap-up tab is a generic Siebel applications applet, which can be modified using Siebel Tools.
- 2 On the (Wrap-up tab of the) Chat - Inbound screen that opens, specify the following:
 - a Activity Outcome: The result of handling the inbound chat request
 - b Activity Feedback: Satisfaction with the outcome
 - c Activity Reason: The area where the inbound chat interaction applies

The following table describes the default LOVs available within the Wrap-up tab. These values can be modified, using Siebel Tools, to fit your specific business needs. To add a new wrap-up LOV or modify an existing one, see [“Extending Wrap-Up LOVs in Siebel Call Center for Siebel Chat” on page 37](#).

| Field Name | Description |
|-------------------|--|
| Activity Outcome | Record the result of handling the inbound chat request. Options are: <ul style="list-style-type: none"> ■ No answer ■ Problem solved ■ Left a message ■ Payment taken |
| Activity Feedback | Record satisfaction with handling the chat request. Options are: <ul style="list-style-type: none"> ■ Satisfied ■ Unsatisfied ■ Somewhat satisfied |
| Activity Reason | Specify the area where the chat request applies. Options are: <ul style="list-style-type: none"> ■ General inquiry ■ Customer support ■ Technical support ■ Other reason |

Wrapping Up a Transferred Chat

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

To wrap up a transferred chat in Siebel Call Center

- 1 The transferring agent reassigns the chat to another workgroup. For more information about how to reassign a chat, see [“Transferring Siebel Chat Interactions to Others” on page 67](#).
- 2 The transferring agent is prompted to wrap up the chat that is reassigned. For more information about wrapping up a chat, see [“Wrapping Up a Chat” on page 71](#).
- 3 When the receiving agent accepts the reassigned chat, a new chat activity is created.
This new chat activity has the same interaction ID as the reassigned chat from [Step 1](#). Transferred chats also retain their links to service requests and contacts.
- 4 The receiving agent is prompted to wrap-up when the chat session is released. For more information about wrapping up a chat, see [“Wrapping Up a Chat” on page 71](#).

Closing the Siebel Chat Sessions

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

- Where only one chat session is open, agents must close the chat pane by clicking the Close button in the upper right-hand corner of the chat pane.
- Where multiple chat sessions are open and the current chat session is released, agents must either close the current chat session, or switch to another chat tab to automatically close the current chat session.
- Where multiple chat sessions are open, and a chat session in the background is released, then the released chat session is automatically closed.

Use the following procedure to manually close a chat session.

To close a chat session

- Click the X button in the upper right-hand corner of the chat session.

Using the Browser During Siebel Chat Sessions

It is recommended that you do not use any of the following during a chat session because the chat session might be disconnected:

- The Forward and Back buttons on your browser.
- The following keyboard shortcuts: ALT+Left Arrow and ALT+Backspace.
- The F5 function key if support for it is not configured. For more information, see [“Configuring Support for F5 Refresh in Siebel Chat” on page 41](#).

Guidelines for Handling Unsuccessful Siebel Chat Interactions

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

- Search for and review other shared solutions to see if one might be useful.
- Create a new predefined message response capturing the information, see [“Setting Up Frequently Used Text in Siebel Call Center for Siebel Chat” on page 36](#).
- Create a new solution and add it to the URL library, see [“Setting Up a Global URL Library in Siebel Call Center for Siebel Chat” on page 38](#).
- Associate the (new) solution with the appropriate activity, contact, or service request. Agents can associate solutions with:
 - Inbound chat activities by navigating to the Activities - Activities List view.

- Service requests by navigating to the Service screen, then the Service Requests List view.
- Contact records by navigating to the Contacts screen, then the Contacts List view.

For more information about inbound chat activities, see [“Reviewing Inbound Siebel Chat Activities” on page 62](#).

- Reassign the chat interaction to another workgroup, see [“Transferring Siebel Chat Interactions to Others” on page 67](#).

Siebel Chat Dashboard

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

- **Area.** The area where assistance is needed.
- **Subarea.** The subarea within the area where assistance is needed.
- **Product.** The Product ID of the area or subarea where assistance is needed.
- **Summary.** A summary of the problem, if provided.
- **KB Visited.** A list of knowledge base articles that the customer has viewed prior to requesting a chat with an agent. The agent can choose an item from the list and navigate to its detail page.
- **Action.** The Action drop-down menu contains a number of quick actions that the agent can perform, including the following:
 - [“Creating a Service Request Manually” on page 75](#)
 - [“Viewing Service Requests, Activities, and Contacts Using the Siebel Chat Dashboard” on page 75](#)
 - [“Updating Customer Contact Details Using the Siebel Chat Dashboard” on page 76](#)
 - [“Refreshing Siebel Chat Dashboard Fields” on page 137](#)

Related Topics

[“About the Customer Dashboard” on page 74](#)

[“About Customizing Siebel Chat” on page 127](#)

Chapter 8, [“Customizing Siebel Chat”](#)

About the Customer Dashboard

The customer dashboard in Siebel Call Center automatically shows customer contact information (Customer Name, Phone Number, and Email Address), if provided on the chat request form.

The purpose of the customer dashboard is to alert the agent if the customer requesting a chat provides profile information which does not match the contact record. For example, if the phone number or email address provided by a known customer does not match the contact record on file,

then an exclamation mark appears next to these fields indicating to the agent that this information is new. Agents can then update the customer's contact information as described in ["Updating Customer Contact Details Using the Siebel Chat Dashboard" on page 76](#). For more information about configuring the customer dashboard, see *Configuring Siebel Business Applications*.

Creating a Service Request Manually

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

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

To manually create a service request

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

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

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

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

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

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

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

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

Updating Customer Contact Details Using the Siebel Chat Dashboard

If an exclamation mark appears next to the phone number or email address fields on the customer dashboard of Siebel Call Center, then this indicates to the agent that the customer's contact information has changed and must be updated. For more information about the customer dashboard, see ["About the Customer Dashboard" on page 74](#).

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

To update customer contact details using the chat dashboard

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

Changing Agent Status

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

To change agent status

- 1 Log in to your Siebel Call Center application.
- 2 Click the Log in button on the communications toolbar to log in to Oracle Contact On Demand.
Notice that your status, as indicated by the status button on the communication toolbar, is set to State: ready by default.
- 3 Click the status button on the toolbar, as required, to change your status from State: ready to State: not ready (and conversely).

Agent and Siebel Chat Interaction States

Table 9 lists the different chat interaction states that exist for Siebel Chat, which have a visible effect for the agent. Some of these states are automatically forced by Siebel Chat and others are manually triggered by the agent.

Table 9. Agent and Siebel Chat Interaction States

| Interaction State | Description and Siebel Call Center Behavior | Automatic or Manual? |
|-------------------|---|--|
| Active | <p>The chat session is currently active, whereby the agent is actively chatting with the customer.</p> <ul style="list-style-type: none"> ■ The corresponding chat tab in the chat pane is in the foreground. ■ The communications toolbar shows this chat as the active chat interaction in the drop-down list of currently open chats. ■ The Chat Activity has a status of In Progress. | Automatic. |
| On Hold | <p>The chat is on hold.</p> <ul style="list-style-type: none"> ■ The corresponding chat tab in the chat pane is in the background. ■ The Chat Activity still has a status of In Progress. | Manual. Agents can place the currently active chat session on hold by clicking another chat tab, or they can use the communications toolbar to switch between chats. For more information, see “Handling Multiple Simultaneous Siebel Chat Sessions” on page 65. |
| Transferred | <p>The chat has been transferred.</p> <ul style="list-style-type: none"> ■ When the chat is accepted by another agent, the interaction state changes to In Progress. ■ The transferring agent's chat tab is removed once the agent moves onto another chat, or closes the chat pane. ■ The Chat Activity has a status of Transferred. ■ When the transferred chat is accepted by the receiving agent, a new activity is created with a status of In Progress. | Manual. Agents must click the Get Transfer List button on the communications toolbar to transfer a chat interaction that they are currently working on to another workgroup. For more information, see “Transferring Siebel Chat Interactions to Others” on page 67. |

Table 9. Agent and Siebel Chat Interaction States

| Interaction State | Description and Siebel Call Center Behavior | Automatic or Manual? |
|-------------------|--|--|
| Wrapping Up | <p>The chat is being wrapped up.</p> <ul style="list-style-type: none"> ■ The agent is no longer able to send or receive messages but can see the chat transcript. However, some functions are still active; for example, create and view a service request. ■ The chat tab remains in the chat pane. If you move onto another chat tab, the current chat tab becomes red. | <p>Manual. Provided wrap-up is configured for chat, agents can manually trigger this mode by clicking the Release Work Item button on the communications toolbar.</p> <p>Provided wrap-up is configured for chat, customers can also manually trigger this mode by clicking the Terminate button in their browser window. For more information about wrap-up, see “Wrapping Up Siebel Chat Sessions” on page 70.</p> |
| Terminated | <p>The chat session is terminated.</p> <ul style="list-style-type: none"> ■ The chat tab in the chat pane is removed in one of the following ways: <ul style="list-style-type: none"> ■ Manually, if the agent moves on to another chat tab or closes the chat pane. ■ Automatically, when the wrap-up time limit is reached. ■ The Chat Activity has a status of Done. | <p>Manual. Agents can manually release a chat session by clicking the Release Work Item button on the communications toolbar.</p> <p>Customers can also manually release a chat session by clicking the Terminate button in their browser window. For more information about releasing a chat, see “Releasing Siebel Chat Sessions” on page 68.</p> |
| Idle | <p>There has been no activity within a chat session from either the agent or the customer for over two minutes.</p> <p>NOTE: Currently, you cannot configure this two-minute time limit.</p> | Automatic. |

Table 9. Agent and Siebel Chat Interaction States

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

Table 10 lists the different agent states that exist for Siebel Chat agents. Some of these states are automatically forced by Siebel Chat and others are manually triggered by the agent.

Table 10. Agent States

| Agent State | Description | Automatic or Manual? |
|-------------|--|--|
| Chatting | The agent is engaged, or actively chatting, in at least one chat session. | Automatic. |
| Working | The agent is available to handle chat requests. | Manual. Agents must click the Status button on the communications toolbar to set their status to available (State: Ready). For more information about agent status, see “Changing Agent Status” on page 76 . |
| On Break | The agent is currently unavailable to handle chat requests. | Manual. Agents must click the Status button on the communications toolbar to set their status to unavailable (State: Not Ready). For more information about agent status, see “Changing Agent Status” on page 76 . |
| In Wrap-Up | The agent is busy wrapping up a chat session. | Automatic. This agent state is automatically triggered when just one of an agent’s chat sessions is in wrap-up mode. For more information about wrap-up, see “Wrapping Up Siebel Chat Sessions” on page 70 |
| Idle | There has been no activity within any of an agent’s active chat sessions for over two minutes. NOTE: Currently, you cannot configure this two-minute time limit. | Automatic. |

Setting Up Logging and Tracing for Siebel Chat Components

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

- Oracle Contact On Demand Web Application
For more information, see ["Turning on Error Logging for the Oracle Contact On Demand Web Application"](#) on page 80.
- Siebel Communications Server
For more information, see ["Siebel Communications Server Logging"](#) on page 81.
- Siebel Server
For more information, see ["Setting Siebel Server Logging Parameters"](#) on page 81.
- Siebel Call Center
For more information, see ["Siebel Chat Logging"](#) on page 82.

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

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

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

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

```
<context-param>
  <param-name>debugTracel evel </param-name>
  <param-val ue>DEBUG</param-val ue>
</context-param>
```

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

| Value | Description |
|-------|-----------------------------------|
| FATAL | Logs all fatal message errors. |
| ERROR | Logs all standard message errors. |
| WARN | Logs all warning messages. |
| INFO | Logs all information messages. |

| Value | Description |
|-------|---|
| DEBUG | Enables debugging for the Oracle Contact On Demand Web application. |

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

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

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

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

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

Siebel Communications Server Logging

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

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

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

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

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

Driver logging can be turned on during driver configuration, using the Driver:LogFile parameter at the Profile Parameter Override level. For more information about driver configuration, see [“Configuring Communications in Siebel Call Center for Siebel Chat” on page 31](#).

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

Setting Siebel Server Logging Parameters

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

To set Siebel Server logging parameters

- Navigate to the Administration - Server Configuration screen, then the Servers view.
- Select your Siebel Server, and then its Call Center Object Manager component.

3 Set the following parameters to the value specified:

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

Siebel Chat Logging

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

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

The standard client-side logging capabilities of Siebel Call Center are also used for customer Siebel Chat logging, whereby logging is set up and controlled from the customer’s workstation using the environment variables described in [Table 11](#).

Table 11. Logging Environment Variables

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

5

Managing Siebel Chat

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

- [Example of Using Oracle Contact On Demand on page 85](#)
- [Process of Setting Up Oracle Contact On Demand Administration Manager on page 87](#)
- [Process of Setting Up Oracle Contact On Demand Supervision Manager on page 96](#)
- [About Running Reports with Oracle Contact On Demand on page 102](#)
- [Managing Agents and Workgroup Queues on page 104](#)

Example of Using Oracle Contact On Demand

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

A company has a family of products and related services for two different, distinct industries. Each industry offering has two major brand names. Each brand name in turn has multiple products, each requiring special agent skills to support the products. [Figure 6 on page 86](#) illustrates how to set up Oracle Contact On Demand for this scenario, as follows:

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

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

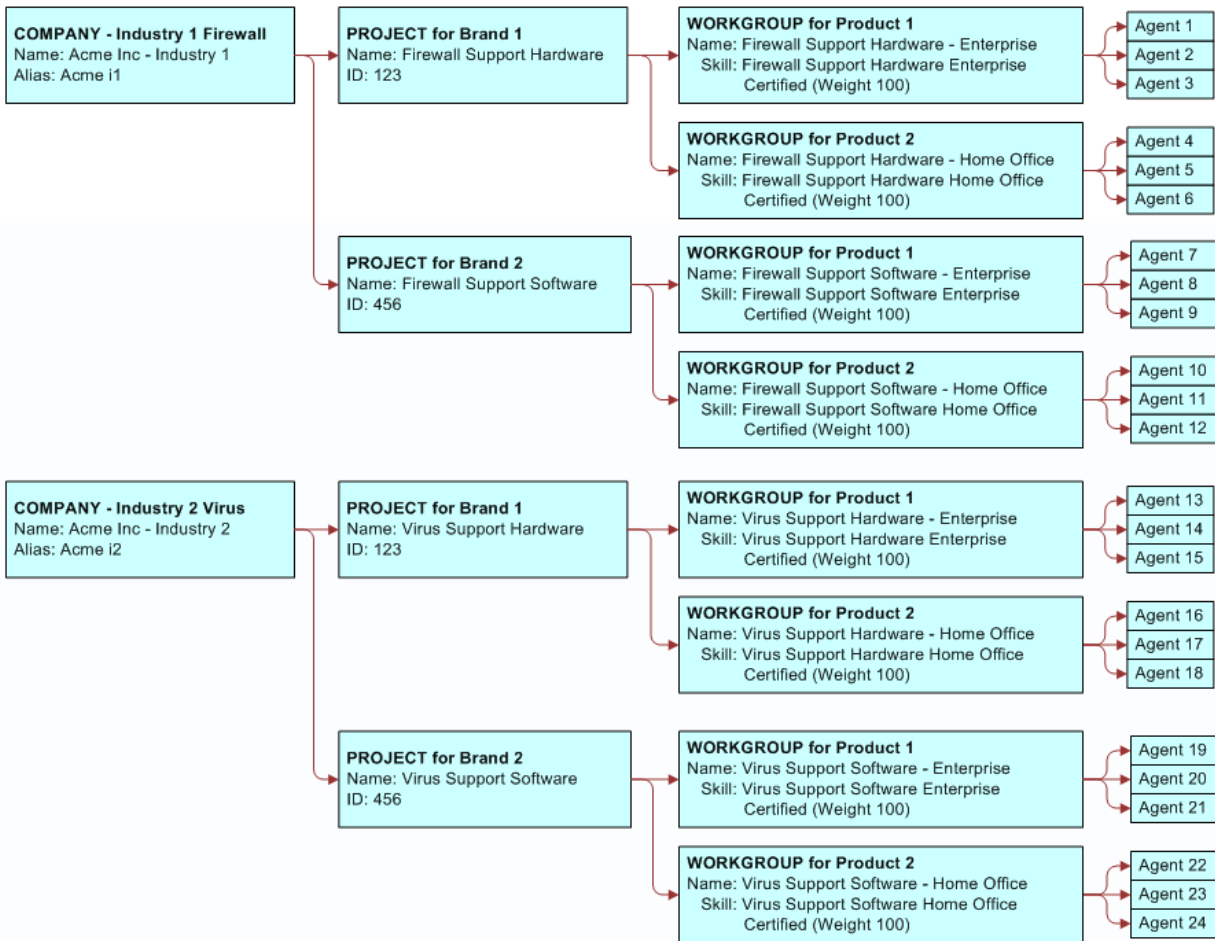


Figure 6. Company, Project, Workgroup, and Skills Setup in Oracle Contact On Demand

Process of Setting Up Oracle Contact On Demand Administration Manager

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

To set up Oracle Contact On Demand Administration Manager to manage Siebel Chat activity, it is recommended that administrators review [“Example of Using Oracle Contact On Demand” on page 85](#) and complete the following tasks in the following sequence:

- 1 [“Setting Up a Company in Oracle Contact On Demand Administration Manager” on page 87](#)
- 2 [“Setting Up User Accounts in Oracle Contact On Demand Administration Manager” on page 89](#)
- 3 [“Setting Up a Chat Project in Oracle Contact On Demand Administration Manager” on page 90](#)
- 4 [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 91](#)
- 5 [“Setting Up Skills in Oracle Contact On Demand Administration Manager” on page 93](#)
- 6 [“Creating a Company Package in Oracle Contact On Demand Administration Manager” on page 93](#)
- 7 [“Creating a URL Library in Oracle Contact On Demand Administration Manager” on page 94](#)

Setting Up a Company in Oracle Contact On Demand Administration Manager

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

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

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

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

Use the following procedure to set up a company in Oracle Contact On Demand Administration Manager for Siebel Chat. One company must be set up for each organization in Siebel Call Center that uses Siebel Chat. This task is a step in [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87](#).

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

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

The New Company screen opens with the Profile area.

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

NOTE: Make a note of the Company Alias that you set. The Company Alias is required when setting up the Oracle Contact On Demand (chat communication) driver parameters in Siebel Call Center, and it is used as the value for the Driver:CompanyName parameter. For more information about communication configuration, see [“Configuring Communications in Siebel Call Center for Siebel Chat” on page 31](#).

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

Select the package that contains the feature set for your company. Web chat media must be enabled for the company package that you select. For more information about company packages, see [“Creating a Company Package in Oracle Contact On Demand Administration Manager” on page 93](#).

- 4 Click Next to navigate to the Licensing information.

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

- **Interactions Limitations.** This sets a limit or reserves license slots for online, offline, and chat interactions.
- **Maximum Number of Logged in Users.** This sets the maximum number of users that a company can have logged in at the same time (excluding supervisors and administrators).
- **Maximum Number of Logged in Supervisors.** This sets the maximum number of supervisors that a company can have logged in at the same time (excluding agents and administrators).

- 5 Click Next to navigate to the Regional Settings information.

Set regional settings (Date Format, Time Zone, and Language) for the company, as required.

- 6 Click Next to navigate to the Business Hours information.

Set the operational hours for the company, as required.

- 7 Click Next until the Finish screen opens.

To set up the company, click the Create Company button on the Finish screen. When done, the List of Companies screen opens and includes the new company's name and information in the list.

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

Setting Up User Accounts in Oracle Contact On Demand Administration Manager

Siebel Chat can be used by administrators, supervisors, and agents. An account must be set up in Oracle Contact On Demand for each administrator, supervisor, and agent user of Siebel Chat. This task is a step in [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87](#).

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

- 1 Log in to Oracle Contact On Demand Administration Manager as administrator, and navigate to the List of Companies screen.
- 2 On the company list page, click the row of the company for which you want to set up user accounts, then click Edit.
- 3 Navigate to the Options screen, then Agents view, and click Add.

The Agents screen opens to the Profile tab.

- a On the Profile tab, specify the First Name, Last Name, Username, Password, and Access Permission level for the account. [Table 3 on page 14](#) outlines the main access permission levels for Siebel Chat users.

NOTE: When setting up user accounts in Oracle Contact On Demand Administration Manager, the First Name value provided is the name that is seen by customers who are chatting with the agent. If using aliases for your agents, make sure that you set the value of First Name to an alias that you want the customer to see. The First Name value that you set here corresponds to the agent's Alias value on the Person record in Siebel Call Center. For more information about setting an alias, see [“Setting Up an Alias for Siebel Chat Users in Siebel Call Center” on page 35](#).

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

Specify the amount of wrap-up time (in seconds) that the agent has to wrap-up an interaction. After this specified wrap-up time, the chat session is released, and the agent is available for another interaction.
 - If creating or editing a supervisor account, specify the level of access in the Supervisor Permissions section.
 - If you want to allow agents to handle more than one chat interaction at a time, set the maximum number of simultaneous interactions for chat by specifying a value on this tab.
- c Go to the Regional Settings tab, then specify the time zone and date format.
- d Go to the Email tab, then specify the agent's email address. This is a required Oracle Contact On Demand setting.
- e Go to the Phone tab, then specify the phone data (agent extension number and type of phone) for the agent. This is a required Oracle Contact On Demand setting.

- f Depending on the type of account that you are creating, go to the Administration Configuration tab, Agents to Supervise tab, or Supervisors tab, as required:
 - If creating an administrator account, go to the Administration Configuration tab, and specify the options to be made available to this administrator account.
 - If creating a supervisor account, go to the Agents to Supervise tab, and specify the agents that this supervisor will supervise.
 - If creating an agent account, go to the Supervisors tab, and specify the supervisor that will supervise this agent.
- g Go to the remaining tabs as required (for example, Skills, Workgroups, Follow Me, and so on), and configure the available options, as required.

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

- 4 Click OK.

For more information about creating user accounts in Oracle Contact On Demand, see *Oracle Contact On Demand Administration Manager Guide* and also [“Setting Up Supervisor Accounts in Oracle Contact On Demand” on page 96](#).

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

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

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

A project set up for chat can be associated with only one workgroup, so that the incoming chat request can be routed to its destination. To set up a chat project in Oracle Contact On Demand for Siebel Chat, you must create a project definition and then enable it to handle chat interactions, as described in the following procedure. This task is a step in [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87](#).

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

- 1 Navigate to the Options screen, then Projects view in Oracle Contact On Demand Administration Manager, and click Add.
- 2 On the Projects screen that opens on the General tab, enter a name and description for the chat project, select the Use this Project for Billing check box, and then click Apply.
- 3 Go to the Chat tab and:
 - a Select the Enable Chat Project (Use Default Project Language) check box. Doing this enables the project for chat media.

- b From the Route Chat to Workgroup drop-down list, select the workgroup to which you want to route the chat requests from this project.

Workgroups must be set up first. For more information about workgroups, see [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 91](#).

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

If required, define a chat push page sequence.

NOTE: To set values for the available options here, a URL library must be set up first. For more information about URL library setup, see [“Creating a URL Library in Oracle Contact On Demand Administration Manager” on page 94](#).

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

This option must always be selected for Siebel Chat. However, if you want to customize the customer and agent chat UI, contact your system administrator or Oracle account support representative for more information.

- ❑ If you want to perform a test to ensure that all setups in Oracle Contact On Demand have been carried out correctly, click Create Page to generate a Chat Request Form for your chat project, then use this page to test Oracle Contact On Demand chat communications.

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

- ❑ Click Apply to save your changes.

- 4 Click OK when finished setting up your chat project.

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

Setting Up Workgroups in Oracle Contact On Demand Administration Manager

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

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

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

This task is a step in [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87](#).

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

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

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

For more information about setting up skills, see ["Setting Up Skills in Oracle Contact On Demand Administration Manager" on page 93](#).

- 6 Go to the Overflow tab, and define workgroup overflow conditions. The purpose of defining workflow overflow conditions is to make sure that interactions that are waiting too long for an agent response are given immediate attention. Oracle Contact On Demand handles two workgroup overflow conditions:
 - Interaction wait-time exceeded
 - Number of queued interactions exceeded
- 7 Go to the Options tab, and set the following options:
 - Set the Initial Wait Time to at least one minute.
 - Select Stay in the Queue if you want chat requests to remain in the queue until an agent becomes available, or until an agent logs in and becomes available.
 - Select Disconnect if you want to release chat requests when no agents are logged in.
- 8 Go to the Service Level tab, and set workgroup service levels. A workgroup service level lets a supervisor monitor whether online interactions (in this case, chat interactions) are being accepted at a specific rate.
- 9 Click OK.

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

Setting Up Skills in Oracle Contact On Demand Administration Manager

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

This task is a step in [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87](#).

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

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

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

Creating a Company Package in Oracle Contact On Demand Administration Manager

Some features of Oracle Contact On Demand Administration Manager are not supported by Siebel Chat, [“Unsupported Oracle Contact On Demand Administration Manager Features” on page 95](#). To hide these features from your agents, it is recommended that you set up a company package definition specifically for your company in Oracle Contact On Demand. This task is a step in [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87](#).

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

- 1** Navigate to the Company List view in Oracle Contact On Demand Administration Manager.
- 2** Click Go To, then select Package Creator from the drop-down list.
The Company Package screen opens listing all existing packages.
- 3** Click Add to define a new (chat) company package for your company.
On the Add Company Package screen that opens:
 - a** Enter a name and a description for your package.
 - b** Select or deselect the check box next to each listed feature to include or remove it from your company package.
For example, make sure that the Web Chat feature is enabled for the company package.
 - c** Click OK.
- 4** Apply the new (chat) company package to your company:
 - a** Navigate to the Options screen, then Company view in Oracle Contact On Demand Administration Manager, and select the company you want to edit.
 - b** Go to the Company Configuration tab, then select the appropriate company package from the Package drop-down list. For more information about company setup, see [“Setting Up a Company in Oracle Contact On Demand Administration Manager” on page 87](#).
- 5** Make sure that all company projects are enabled for Web chat.
For more information about enabling a project for chat, see [“Setting Up a Chat Project in Oracle Contact On Demand Administration Manager” on page 90](#).

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

Creating a URL Library in Oracle Contact On Demand Administration Manager

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

To create a URL library containing content that agents can use when assisting customers, complete the steps in the following procedure. This task is a step in [“Process of Setting Up Oracle Contact On Demand Administration Manager” on page 87](#).

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

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

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

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

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

For more information about chat projects, see [“Setting Up a Chat Project in Oracle Contact On Demand Administration Manager” on page 90](#).

Unsupported Oracle Contact On Demand Administration Manager Features

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

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

Process of Setting Up Oracle Contact On Demand Supervision Manager

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

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

- 1 Contact the Oracle Contact On Demand administrator, and request that a supervisor account be set up.

For more information about supervisor accounts, see [“Setting Up Supervisor Accounts in Oracle Contact On Demand” on page 96](#).

- 2 Set up agent, workgroup, and project views in Oracle Contact On Demand for Siebel Chat.

For more information about views, see [“About Setting Up Views in Oracle Contact On Demand Supervision Manager” on page 97](#).

- 3 Set up alarms in Oracle Contact On Demand for Siebel Chat.

For more information about alarm setup, see [“About Setting Up Alarms in Oracle Contact On Demand Supervision Manager” on page 100](#).

When supervisors have set up suitable views and alarms for the company, they can view reports (provided they have been given permission) that have been created by administrators. For more information about reports, see [“About Running Reports with Oracle Contact On Demand” on page 102](#).

Setting Up Supervisor Accounts in Oracle Contact On Demand

Administrators must set up supervisor accounts in Oracle Contact On Demand Administration Manager before supervisors can log in to Oracle Contact On Demand Supervision Manager. This task is a step in [“Process of Setting Up Oracle Contact On Demand Supervision Manager” on page 96](#). Administrators can create supervisor accounts in Oracle Contact On Demand with limited or full access.

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

For more information about account set up in Oracle Contact On Demand, see [“Setting Up User Accounts in Oracle Contact On Demand Administration Manager” on page 89](#).

About Setting Up Views in Oracle Contact On Demand Supervision Manager

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

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

Setting Up Views in Oracle Contact On Demand Supervision Manager

It is recommended that supervisors set up at least one each of the following types of views in Oracle Contact On Demand Supervision Manager to help monitor agent activity and chat interaction activity, and make decisions in relation to agent and queue management. This task is a step in [“Process of Setting Up Oracle Contact On Demand Supervision Manager” on page 96](#). [Table 12 on page 98](#) describes each of these views in more detail.

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

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

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

- 1 Log in to Oracle Contact On Demand Supervision Manager, and select the Supervision tab.
- 2 Navigate to the Panels screen, then Panel *N* (for example, Panel A).
NOTE: Before creating a view, it is recommended that you select a Panel first because you cannot move a view to another panel after you create it.
- 3 Navigate to the Views screen, then *View Selection*, where *View Selection* can be one of the following:
 - View Agents
 - View Interactions
 - View Project Statistics
 - View Project Media Totals
 - View Workgroup Statistics
 - View Workgroup Media Totals

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

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

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

Table 12 describes the types of views that you can set up in Oracle Contact On Demand Supervision Manager. For more information about creating views in Oracle Contact On Demand Supervision Manager, see *Oracle Contact On Demand Supervision Manager Guide*.

Table 12. View Types in Oracle Contact On Demand Supervision Manager

| View Name | Description |
|------------------------------|---|
| Agent Statistics View | This view monitors the real-time activity for the agents that you supervise. |
| Interactions Statistics View | This view enables you to see how chat interactions are flowing through the application. This information helps you to determine the number of interactions your agents are currently handling and the number of interactions that are backing up in the queues. NOTE: Flow tracking begins when interactions enter Oracle Contact On Demand, continues while Oracle Contact On Demand routes them to an agent, and ends when Oracle Contact On Demand disconnects them. |

Table 12. View Types in Oracle Contact On Demand Supervision Manager

| View Name | Description |
|--------------------------------------|---|
| Workgroup Statistics View | <p>This view enables you to view chat interaction activity in monitored workgroups with a high level of granularity. For example, you can monitor the following real-time statistics related to workgroup activity, all of which are of vital importance to supervisors responsible for managing agents and queues:</p> <ul style="list-style-type: none"> ■ Track the current and total interactions for chat interactions. ■ Display the average talk time, average handle time, and average wrap-up time for chat interactions. ■ Display the maximum wait time and maximum talk time for chat interactions. ■ Display the average speed to answer statistics for chat interactions. ■ Monitor the total number of interactions transferred in to the workgroup and transferred out of the workgroup. |
| Project Statistics View | <p>This view evaluates the success of a specific project. There are many different values to choose from to customize your view, including the following:</p> <ul style="list-style-type: none"> ■ The average handle time for chats ■ The average speed of answering chats ■ The average talk time for chats ■ The average time for all chats from start to finish ■ The average chat wrap-up time ■ The total number of daily chats ■ The longest time a customer waited before an agent accepted a chat request from this project ■ The longest time spent on a chat ■ The total number of workgroup chats currently in the queue and being handled |
| Project Media Totals Statistics View | <p>This view tracks the following activities in real-time:</p> <ul style="list-style-type: none"> ■ Total number of abandoned chats ■ Total number of answered chats ■ Total number of chats in the queue ■ Total number of chats ■ Total number of chats that reached overflow criteria |

Table 12. View Types in Oracle Contact On Demand Supervision Manager

| View Name | Description |
|--|--|
| Workgroup Media Totals Statistics View | <p>This view tracks answered and abandoned statistics, as well as queued and overflowed chat interactions. There are many statistics to choose from for your view, including the following:</p> <ul style="list-style-type: none">■ The total number of abandoned chats in a workgroup.■ The total number of chat requests for the workgroup that are received from the Web and answered by the agent.■ The total number of chats queued.■ The total number of chat requests for the workgroup received from the Web. |

About Setting Up Alarms in Oracle Contact On Demand Supervision Manager

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

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

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

Setting Up Alarms in Oracle Contact On Demand Supervision Manager

It is recommended that supervisors set up at least one each of the alarm types described in [Table 13](#) to help them monitor and make decisions in relation to agent and queue management. This task is a step in [“Process of Setting Up Oracle Contact On Demand Supervision Manager”](#) on page 96.

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

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

As soon as you create an alarm, it takes effect and remains defined in Oracle Contact On Demand Supervision Manager until you disable or delete it entirely. Alarms use a 24-hour clock that resets at midnight. When alarm conditions are met, the alarm is activated. To view all activated alarms in your workspace, complete the steps described in [“Viewing Alarms in Oracle Contact On Demand Supervision Manager” on page 101](#). To set up an alarm in Oracle Contact On Demand Supervision Manager, complete the steps in the following procedure.

To set up alarms in Oracle Contact On Demand Supervision Manager

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

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

Viewing Alarms in Oracle Contact On Demand Supervision Manager

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

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

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

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

Unsupported Oracle Contact On Demand Supervision Manager Features

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

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

NOTE: When a chat session is released, you can access the chat transcript which is attached to the activity record (in Siebel Call Center). For more information about accessing chat transcripts and attachments, see ["Reviewing Inbound Siebel Chat Activities"](#) on page 62.

About Running Reports with Oracle Contact On Demand

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

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

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

The topic includes information about the following:

- ["Standard Reports"](#) on page 103
- ["Advanced Reports"](#) on page 103

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

Standard Reports

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

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

NOTE: This report is particularly useful if you have skills based routing configured for chat.
 - Set up an Agent Utilization report that displays the amount of time each agent spends handling chat interactions.
- **Project.** An example project report to set up includes the following:
 - Set up a Project Segments report that displays a set of chat interaction statistics.
- **Workgroup Productivity.** Example reports to set up include the following:
 - Set up a Workgroup Segments report that displays a set of chat interaction statistics.
 - Set up a Workgroup Interval Time report that displays how workgroups are performing at specific times of the day.
 - Set up a Workgroup Interval Time by Media report that displays how many chat interactions are received at specific times of the day.
- **Call Center Operations.** Example reports to set up include the following:
 - Set up a Workgroup Skills report that displays the skills assigned to a workgroup and the rating assigned to each skill.

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

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

Advanced Reports

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

- **Daily Project Performance.** Set up a Daily Project Performance report to monitor chat interaction activity. You can use this report to determine project volume and other service factors, which help identify the *busy hour* and staffing requirements based on volume of chat interactions.

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

Restricted Reports

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

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

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

Managing Agents and Workgroup Queues

This topic includes information about the following:

- [“Guidelines for Managing Agents” on page 104](#)
- [“Guidelines for Managing Workgroup Queues” on page 106](#)

Guidelines for Managing Agents

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

Guidelines for Administrators

It is recommended that administrators follow these guidelines:

- 1 Do not display the names of your agents to users, use aliases for your agents instead.
 Make sure that the First Name value used for each agent when setting up user accounts in Oracle Contact On Demand corresponds to the alias that you use for the same agent on the agent's Person record in the Siebel Call Center application.
 For more information, review the following:
 - ["Setting Up an Alias for Siebel Chat Users in Siebel Call Center" on page 35](#)
 - ["Setting Up User Accounts in Oracle Contact On Demand Administration Manager" on page 89](#)
- 2 Make sure that skills are assigned to agents appropriately, and that weights are attached to skills within workgroups accordingly.
 For more information, review the following:
 - ["Setting Up Skills in Oracle Contact On Demand Administration Manager" on page 93](#)
 - ["Setting Up Workgroups in Oracle Contact On Demand Administration Manager" on page 91](#)
- 3 To assist agents in the handling of inbound chat interactions:
 - Set up URL libraries in Oracle Contact On Demand, then link the URLs as push pages to a chat project.
 - Where possible, hide the features of Oracle Contact On Demand Administration Manager that are unsupported by Siebel Chat from your agents by setting up a company package for your company.
- 4 Set up and run reports that provide concrete performance statistics about agents.

Related Topics

- ["Creating a URL Library in Oracle Contact On Demand Administration Manager" on page 94](#)
- ["Creating a Company Package in Oracle Contact On Demand Administration Manager" on page 93](#)
- ["About Running Reports with Oracle Contact On Demand" on page 102](#)

Guidelines for Supervisors

It is recommended that supervisors follow these guidelines:

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

Related Topics

- ["About Setting Up Views in Oracle Contact On Demand Supervision Manager" on page 97](#)

[“About Setting Up Alarms in Oracle Contact On Demand Supervision Manager” on page 100](#)

[“About Running Reports with Oracle Contact On Demand” on page 102](#)

Guidelines for Managing Workgroup Queues

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

Guidelines for Administrators

It is recommended that administrators follow these guidelines:

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

For more information, review the following:

- [“Setting Up Skills in Oracle Contact On Demand Administration Manager” on page 93](#)
- [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 91](#)

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

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

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

For more information, review the following:

- [“Adding Agents to the Communications Configuration for Siebel Chat” on page 34](#)
- [“Transferring Siebel Chat Interactions to Others” on page 67](#)
- [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 91](#)

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

Related Topic

[“About Running Reports with Oracle Contact On Demand” on page 102](#)

Guidelines for Supervisors

It is recommended that supervisors follow these guidelines:

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

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

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

For more information, review the following:

- [“Adding Agents to the Communications Configuration for Siebel Chat” on page 34](#)
 - [“Transferring Siebel Chat Interactions to Others” on page 67](#)
 - [“Setting Up Workgroups in Oracle Contact On Demand Administration Manager” on page 91](#)
- 4 Review reports that provide concrete performance statistics about workgroup queues.

Related Topics

[“About Setting Up Views in Oracle Contact On Demand Supervision Manager” on page 97](#)

[“About Setting Up Alarms in Oracle Contact On Demand Supervision Manager” on page 100](#)

[“About Running Reports with Oracle Contact On Demand” on page 102](#)

6

Setting Up Siebel Chat Transfer to Agent or Workgroup Functionality

This chapter describes the process of setting up Siebel Chat transfer to agent or workgroup functionality in Siebel Chat. It contains the following topics:

- [Process of Setting Up Siebel Chat Transfer to Agent or Workgroup on page 109](#)
- [Setting Up the Bookmark-Transfer Feature in Siebel Call Center for Siebel Chat on page 114](#)

NOTE: The functionality described in this chapter applies only if you are using the default workflow to handle incoming chat requests. For more information about the default workflow for Siebel Chat, see [“Chat Standard Accept Process Workflow” on page 47](#).

Process of Setting Up Siebel Chat Transfer to Agent or Workgroup

To set up Siebel Chat transfer to an agent or workgroup in Siebel Chat, perform the following tasks:

- [“Verifying Workgroup LOV Data Types” on page 109](#)
- [“Configuring Workgroup Records and Associated LOVs” on page 110](#)
- [“Modifying the Communication Configuration to Support Chat Transfer to Workgroup Functionality” on page 111](#)
- [“Adding the Media Type to the Work Item Object” on page 112](#)
- [“Configuring Chat Transfer to Agent Functionality in Siebel Call Center for Siebel Chat” on page 113](#)

This process is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#).

Related Topic

[“Transferring Siebel Chat Interactions to Others” on page 67](#)

Verifying Workgroup LOV Data Types

To transfer a chat to another workgroup in Siebel Chat, you must use the following workgroup list of values (LOV) data types in Siebel Call Center for Siebel Chat:

- **CCA CHAT WORKGROUP.** Use this LOV data type for chat workgroups.
- **CCA CTI WORKGROUP.** Use this LOV data type for voice workgroups.

Complete the steps in the following procedure to verify that these workgroup LOV data types exist. This task is a step in [“Process of Setting Up Siebel Chat Transfer to Agent or Workgroup” on page 109](#). For more information about LOVs, see *Siebel Applications Administration Guide*.

To verify workgroup LOV data types in Siebel Call Center for Siebel Chat

- 1 Log in to Siebel Call Center as system administrator.
- 2 Navigate to the Administration - Data screen, then the LOV Explorer view.
- 3 Verify that the following workgroup LOV data types exist with the values shown in the following table. If the CCA CHAT WORKGROUP and CCA CTI WORKGROUP LOV data types do not exist, then create them with the values shown in the following table.

| Type | Translate | Multilingual | Replication Level |
|--------------------|-----------|--------------|-------------------|
| CCA CHAT WORKGROUP | True | True | All |
| CCA CTI WORKGROUP | True | True | All |

- 4 Click Save.

Configuring Workgroup Records and Associated LOVs

Use the following procedure to configure workgroup records and associated LOVs for the following workgroups in Siebel Call Center for Siebel Chat:

- CCA CHAT WORKGROUP
- CCA CTI WORKGROUP
- COMM_MEDIA_TYPE

To configure workgroup records and associated LOVs

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 Verify that the CCA CHAT WORKGROUP record exists with the values shown in the following table. If it does not exist, then click New, and create it.

| Type | Display Value | Language Independent Code | Language Name | Order | Active |
|--------------------|----------------|-------------------------------------|------------------|-------|--------|
| CCA CHAT WORKGROUP | Chat Workgroup | For example, your Workgroup ID: 987 | English-American | 1 | TRUE |

- 3 Verify that the CCA CTI WORKGROUP record exists with the values shown in the following table. If it does not exist, then click New, and create it.

| Type | Display Value | Language Independent Code | Language Name | Order | Active |
|-------------------|-----------------|-------------------------------------|------------------|-------|--------|
| CCA CTI WORKGROUP | Voice Workgroup | For example, your Workgroup ID: 888 | English-American | 1 | TRUE |

- 4 Verify that the following COMM_MEDIA_TYPE workgroup record exists with the values shown in the following table. If it does not exist, then click New, and create it.

| Type | Display Value | Language Independent Code | Language Name | Parent LIC | Order | Active |
|-----------------|---------------|---------------------------|------------------|------------|-------|--------|
| COMM_MEDIA_TYPE | MultiChannel | MultiChannel | English-American | COMMON | 1 | TRUE |

Modifying the Communication Configuration to Support Chat Transfer to Workgroup Functionality

Modify the communication configuration to support chat transfer to workgroup functionality, according to the workgroup LOV data types that you created in [“Verifying Workgroup LOV Data Types” on page 109](#). This task is a step in [“Process of Setting Up Siebel Chat Transfer to Agent or Workgroup” on page 109](#).

To modify the communication configuration to support chat transfer to workgroup functionality

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the communications configuration record that you want to modify, then click the Commands tab.
- 3 Configure the BlindTransferToWorkgroup command as follows:
 - a Drill down on the BlindTransferToWorkgroup command, click the Command Parameters tab, and add the command parameters with the values shown in the following table.

| Name | Value |
|-------------|--|
| CmdData | BlindTransferToWorkgroup |
| Description | Blind transfer work item to workgroup. |
| Hidden | TRUE |

- b Click the Subcommands tab, and add the subcommands with the order shown in the following table.

| Subcommands | Order |
|--------------------|-------|
| BlindTransferChat | 1 |
| BlindTransferVoice | 2 |

- 4 To configure the BlindTransferGroup command, drill down on the BlindTransferGroup command, click the Subcommands tab, and add the subcommands shown in the following table.

| Subcommands | Order |
|----------------------------------|-------|
| BlindTransferCallToPhone | 1 |
| BlindTransferToWorkgroup | 2 |
| BlindTransferCallToSROwner | 3 |
| BlindTransferCallToEmployee | 4 |
| BlindTransferCallToCurrentPhone | 5 |
| BlindTransferCallToPopupEmployee | 6 |

Adding the Media Type to the Work Item Object

To differentiate between the chat and voice workgroups, you must add a new mediaType property because they both use the same driver. Use the following procedure to add the new media type to the work item object. This task is a step in [“Process of Setting Up Siebel Chat Transfer to Agent or Workgroup”](#) on page 109.

To add the media type to the work item object

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the communications configuration record that you want to modify, and then click the Event Handlers tab.
- 3 Drill down on the ChatAccepted event handler, then click the Associated Event Logs tab.
- 4 Configure the mediaType parameter for ChatAcceptedLog and ChatTransferAcceptedLog as follows:
 - a Drill down on ChatAcceptedLog or ChatTransferAcceptedLog as required.
 - b Click the Event Log Parameter tab, and configure or add the mediaType parameter with the value shown in the following table.

| Name | Value |
|---------------------------|-------|
| WorkTrackingObj.mediaType | Chat |

- 5 Use the FilterSpec parameter to differentiate between the voice and chat workgroup channels.
 - For the Voice workgroup channel, set the following FilterSpec parameter:
FilterSpec = "[@SelectedWorkItem:mediaType] IS NULL"
 - For the Chat workgroup channel, set the following FilterSpec parameter:
FilterSpec = "[@SelectedWorkItem:mediaType] = 'Chat' "

For example:

```
[Command: Consul tati veTransferGroup]
SubCommand_1 = "Compl eteConsul tati veTransferToPhone"
SubCommand_2 = "Consul tati veTransferToPhone"
SubCommand_3 = "Consul tati veTransferToSROwner"
SubCommand_4 = "Consul tati veTransferToEmpl oyee"
SubCommand_5 = "Consul tati veTransferToCurrentPhone"
SubCommand_6 = "Consul tati veTransferToPopupEmpl oyee"
Description = "Consul tati ve transfer work i tem"
Fi lterSpec = "[@Sel ectedWorkI tem: medi aType] I S NULL"
Hi dden = "TRUE"
```

Configuring Chat Transfer to Agent Functionality in Siebel Call Center for Siebel Chat

Use the following procedure to configure the chat transfer to agent functionality in Siebel Call Center for Siebel Chat. This task is a step in ["Process of Setting Up Siebel Chat Transfer to Agent or Workgroup" on page 109](#).

To configure chat transfer to agent functionality in Siebel Call Center for Siebel Chat

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the communications configuration record that you want to modify, then click the Commands tab.
- 3 Configure the TransferToAgentGroup command as follows:
 - a Drill down on the TransferToAgentGroup command, click the Command Parameters tab, and add the command parameters with the values shown in the following table.

| Name | Value |
|-------------|--|
| CmdData | TransferToAgentGroup |
| Description | Transfer work item to agent. |
| Hidden | TRUE |
| FilterSpec | [@SelectedWorkItem:Workstate] = Active |

- b Click the Subcommands tab, and add the subcommand shown in the following table.

| Subcommands | Order |
|---------------------|-------|
| TransferChatToAgent | 0 |

4 Configure the TransferChatToAgent command as follows:

- a** Drill down on the TransferChatToAgent command, click the Command Parameters tab, and add the command parameters with the values shown in the following table.

| Name | Value |
|---------------|---------------------------------------|
| CmdData | TransferChatToAgent |
| Description | Transfer chat to agent. |
| FilterSpec | [@SelectedWorkItem:mediaType] = Chat |
| ServiceMethod | Chat UI Business Service.TransferChat |

- b** Click the Command Data Parameters tab, and add the command data parameters with the values shown in the following table.

| Name | Value |
|----------------------------|---------------------------------------|
| ServiceParam.DeviceCommand | TransferMuteExtension |
| ServiceParam.InteractionId | {@SelectedWorkItem:DriverWorkTrackId} |
| ServiceParam.NotifyText | Chat Transferred from {@UserName}... |
| ServiceParam.PhoneNumber | [Extension] |
| ServiceParam.isTransfer | 1 |

- 5** For the changes to take effect, log out of the Siebel application, and then log in again.

Setting Up the Bookmark-Transfer Feature in Siebel Call Center for Siebel Chat

When transferring Siebel Chat interactions to others, the transferring agent's screen can be saved as a bookmark with the chat transcript before being transferred to another agent, provided that the bookmark-transfer feature has been enabled in Siebel Call Center for Siebel Chat. Then when another agent accepts the transferred chat, the Chat Business Service retrieves the bookmark information from the chat transcript and populates the chat screen with the bookmark information. In this way, the agent receiving the transferred chat has access to all information relating to the chat and the agent transferring the chat.

Use the following procedure to set up the bookmark-transfer feature in Siebel Call Center for Siebel Chat commands. This task is a step in ["Process of Setting Up Siebel Chat Transfer to Agent or Workgroup"](#) on page 109.

To set up the bookmark-transfer feature in Siebel Call Center for Siebel Chat

- 1** Navigate to the Administration - Communications screen, then the All Configurations view.
- 2** Select the communications configuration record that you want to modify, then click the Commands tab.
- 3** Configure the bookmark-transfer feature for each command by setting the ServiceParam.AttachContext command data parameter to True or False as required.

For example, enable the bookmark-transfer feature for the BlindTransferChat command as follows:

- a** Drill down on the BlindTransferChat command, then click the Command Data Parameters tab.
- b** Configure the ServiceParam:AttachContext parameter for BlindTransferChat as shown in the following table.

| Name | Value |
|----------------------------|-------|
| ServiceParam.AttachContext | TRUE |

The settings have the following effect:

- If ServiceParam:AttachContext is set to True, then the bookmark-transfer feature is enabled, and the bookmark string is transferred with the chat transcript.
- If ServiceParam:AttachContext is set to False, then the bookmark-transfer feature is disabled, and the bookmark string is not transferred with the chat transcript.

7

Configuring Siebel Chat Auto Answer

This chapter describes how to configure Siebel Chat auto answer in Siebel Call Center. It contains the following topics:

- [Roadmap for Configuring Siebel Chat Auto Answer for Agents on page 117](#)
- [Process of Configuring Communications for Siebel Chat Auto Answer on page 120](#)

NOTE: The functionality described in this chapter applies only if you are using the default workflow to handle incoming chat requests. For more information about the default workflow for Siebel Chat, see [“Chat Standard Accept Process Workflow” on page 47](#).

Roadmap for Configuring Siebel Chat Auto Answer for Agents

This topic describes how to enable the automatic acceptance of chat (hereafter referred to as chat auto answer) in Siebel Call Center for agents. Administrators can either configure chat auto answer for agents, or agents can configure it.

When chat auto answer is enabled for agents, agents do not have to manually accept chats that are offered to them. Instead, the chat that is offered automatically becomes the active chat session for the agent by opening on the agent’s screen, provided that the agent has no other chat sessions assigned. The behavior is different if chat auto answer is enabled and the agent is busy handling one or more chat sessions or completing a chat wrap-up. In these cases, the behavior is as follows:

- The chat that is offered does not automatically open on the agent’s screen.
- The chat tab flashes to indicate that a new chat has been automatically accepted and queued to the agent. Administrators can configure the color that is used when the chat tab flashes.
- When the agent clicks the flashing chat tab, the chat session opens, and the chat tab stops flashing.
- If the customer decides to disconnect from the chat before the agent can open the chat session, then the chat is wrapped up as normal.

To configure Siebel Chat auto answer for agents in Siebel Call Center, perform the following tasks and process:

- [“Configuring the Siebel Chat Blink Tab System Preference” on page 118](#)
- (Optional) [“Setting the Color for the Siebel Chat Blinking Tab” on page 118](#)
- [“Preventing All Chat Tabs from Becoming Inactive” on page 119](#)
- [“Disabling the Service Integration Inbox Workflows” on page 119](#)
- [“Process of Configuring Communications for Siebel Chat Auto Answer” on page 120](#)

Configuring the Siebel Chat Blink Tab System Preference

The BlinkTab system preference must be set to On for chat auto answer so that the chat tab flashes. This tab indicates that a new chat has been automatically accepted and queued. Use the following procedure to configure the BlinkTab system preference for chat auto answer. This task is a step in [“Roadmap for Configuring Siebel Chat Auto Answer for Agents” on page 117](#).

To configure the Siebel Chat BlinkTab system preference

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Query for **Chat** to get a list of all the chat-related system preferences you can set up.
- 3 Set the Chat: BlinkTab system preference to On.

For information about other chat system preferences, see [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 41](#).

Setting the Color for the Siebel Chat Blinking Tab

By default, the color of the Siebel Chat blinking tab can be one of the following:

- Green, which indicates a new automatically answered chat.
- Yellow, which indicates that new chat messages are waiting.
- Orange, which indicates that a new chat message is waiting for the new automatically answered chat.

However, you can set the color of the Siebel Chat blinking tab by changing the color that the chat tab flashes. The configured color applies to all Siebel Chat agents. Use the following procedure to set the color for the Siebel Chat blinking tab. This task is a step in [“Roadmap for Configuring Siebel Chat Auto Answer for Agents” on page 117](#).

To set the color for the Siebel Chat blinking tab

- 1 Open the chat.css file.
- 2 Go to TabHoldNewColor parameter in .styleTitleTabBar.
- 3 Replace the color in the TabHoldNewcolor parameter with the new color that you want.
To help you select the color that you want, go to <http://www.colorpicker.com> for color examples.
- 4 Clear your browser’s cache, for example, as follows:
 - a Open Microsoft Internet Explorer.
 - b Click Tools, Internet Options, and then click Delete within Browsing History.
 - c Click Delete All on the Delete Browsing History dialog box and when prompted for confirmation, do the following:

- ❑ Select the following check box: Also delete files and settings stored by add-on.
- ❑ Click Yes.

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

Preventing All Chat Tabs from Becoming Inactive

To prevent all chat tabs from becoming inactive when you switch from an active chat to a chat that is in wrap-up mode, you must edit the definition of the ChatWrapUpResumed event handler as shown in the following procedure. This task is a step in [“Roadmap for Configuring Siebel Chat Auto Answer for Agents”](#) on page 117.

To configure the ChatWrapUpResumed event handler

- 1 Navigate to the Administration - Communications screen, then the All Event Handlers view.
- 2 In the Event Handlers list, configure ChatWrapUpResumed with the following values:
 - **Comments.** Set to Chat.
 - **DeviceEvent.** Set to InteractionMessage.
 - **Response.** Set to ChatResumedEventResponse.
 - **Order.** Set to 4.
- 3 Click the Event Handlers Parameters tab, and configure the following records for the ChatWrapUpResumed event handler with the values shown in the following table.

| Name | Value |
|----------------|--------------|
| Filter.Channel | Chat |
| Filter.MsgType | TYPE_STATE |
| Filter.State | STATE_WRAPUP |

Disabling the Service Integration Inbox Workflows

Use the following procedure to disable the service integration inbox workflows. This task is a step in [“Roadmap for Configuring Siebel Chat Auto Answer for Agents”](#) on page 117.

To disable inbox workflows

- 1 Navigate to the Administration - Business Process screen, then the Workflow Deployment view, and select the Active workflow process tab.
- 2 Query for and select the Inbox - Service Integration workflow.

- 3 Click Menu, then select Deactivate to deactivate the workflow.
- 4 Query for and select the Inbox - Service Main Integration workflow.
- 5 Click Menu, then select Deactivate to deactivate the workflow.

Process of Configuring Communications for Siebel Chat Auto Answer

To configure communications for Siebel Chat auto answer in Siebel Call Center, complete the following tasks:

- [“Configuring the AutoAnswer System Parameter” on page 120](#)
- [“Configuring the Enable AutoAnswer User Preference at the Agent Level” on page 121](#)
- [“Configuring the ServiceParam.WorkID Event Log Parameter” on page 121](#)
- [“Configuring the Accept Chat Command Data Parameters for AcceptChatGroup” on page 122](#)
- [“Configuring the OnChatArrived Event Response” on page 123](#)
- [“Configuring the ChatArrived Event Handler” on page 124](#)
- [“Configuring the ChatTransferArrived Event Handler” on page 124](#)

This process is a step in [“Roadmap for Configuring Siebel Chat Auto Answer for Agents” on page 117](#).

Configuring the AutoAnswer System Parameter

The following procedure shows how to configure the AutoAnswer system parameter, which can be set to TRUE, FALSE, or User Preference. The following are the settings:

- If AutoAnswer is set to User Preference, then it indicates to defer to the Enable AutoAnswer user preference setting to determine whether or not to enable chat auto answer. For more information, see [“Configuring the Enable AutoAnswer User Preference at the Agent Level” on page 121](#).
- If AutoAnswer is set to TRUE, then chat auto answer is enabled irrespective of whether or not the Enable AutoAnswer user preference is selected at the agent-level configuration.
- If AutoAnswer is set to FALSE, then chat auto answer is disabled irrespective of whether or not the Enable AutoAnswer user preference is selected at the agent-level configuration.

This task is a step in [“Process of Configuring Communications for Siebel Chat Auto Answer” on page 120](#).

To configure the AutoAnswer system parameter

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select your communications configuration record from the Configurations list, then click the Parameters tab.

- 3 Set the value for the AutoAnswer parameter as shown in the following table.

| Parameter | Value | Active |
|------------|-----------------|----------|
| AutoAnswer | User Preference | Selected |

Configuring the Enable AutoAnswer User Preference at the Agent Level

Use the following procedure to configure the Enable AutoAnswer user preference at the agent level in Siebel Call Center. The Enable AutoAnswer user preference setting determines whether to enable or disable chat auto answer when the AutoAnswer system parameter is set to User Preference. This task is a step in [“Process of Configuring Communications for Siebel Chat Auto Answer” on page 120](#).

To configure the Enable AutoAnswer user preference at the agent level

- 1 Select Tools, User Preferences, and then the Communications option.
- 2 Do one of the following
 - Select the Enable AutoAnswer checkbox to enable chat auto answer at the agent level.
 - Deselect the Enable AutoAnswer checkbox to disable chat auto answer at the agent level.

The Enable AutoAnswer user preference setting is relevant only if the AutoAnswer system parameter is set to User Preference. If AutoAnswer is not set to User Preference, then Enable AutoAnswer is ignored.
- 3 Click Save.

Configuring the ServiceParam.WorkID Event Log Parameter

The ServiceParam.WorkID event log parameter must be configured for ChatAcceptedLog and ChatTransferAcceptedLog.

To configure the ServiceParam.WorkID event log parameter

- 1 Navigate to the Administration - Communications screen, then the All Event Logs view.
- 2 In the Event Logs list, configure ChatAcceptedLog with the value shown in the following table.

| Name | Configuration |
|-----------------|--|
| ChatAcceptedLog | Select your communications configuration record. |

- 3 Click the Event Log Parameters tab, and add a new record for ChatAcceptedLog with the values shown in the following table.

| Name | Value |
|---------------------|----------------------|
| ServiceParam.WorkID | { SiebelWorkItemID } |

- 4 Go back to the Event Logs list, and configure ChatTransferAcceptedLog with the value shown in the following table.

| Name | Configuration |
|----------------------------|--|
| ChatTransferredAcceptedLog | Select your communications configuration record. |

- 5 Click the Event Log Parameters tab, and add a new record for ChatTransferAcceptedLog with the values shown in the following table.

| Name | Value |
|---------------------|----------------------|
| ServiceParam.WorkID | { SiebelWorkItemID } |

Configuring the Accept Chat Command Data Parameters for AcceptChatGroup

The following procedure shows how to configure the accept chat command data parameters (AcceptChatCmdData) for AcceptChatGroup commands.

To configure the accept chat command data parameters for AcceptChatGroup

- 1 Navigate to the Administration - Communications screen, then the All Command Data view.
- 2 In the Command Data list, configure AcceptChatCmdData with the values shown in the following table.

| Name | Configuration | Comment |
|-------------------|--|---|
| AcceptChatCmdData | Select your communications configuration record. | Enter a comment, for example: Add for chat auto answer. |

- 3 Click the Command Data Parameters tab, and configure the following records for AcceptChatCmdData with the values shown in the following table.

| Name | Value |
|----------------|-------|
| Param.AutoHold | FALSE |

| Name | Value |
|------------------|-------------------|
| Param.TrackingID | { InteractionId } |

- 4 Navigate to the Administration - Communications screen, then the All Configurations view, select your communications configuration record from the Configurations list, and then do the following:
 - a Click the Commands tab, and configure the AcceptChatGroup command with the value shown in the following table.

| Name | Command Data Name |
|-----------------|-------------------|
| AcceptChatGroup | AcceptChatCmdData |

- b Click the Parameters tab, and verify that the command data parameters have the Param.TrackingID that you configured in [Step 3](#).

Configuring the OnChatArrived Event Response

Use the following procedure to configure the OnChatArrived event response.

To configure the OnChatArrived event response

- 1 Navigate to the Administration - Communications screen, then the All Event Responses view.
- 2 In the Event Responses list, configure OnChatArrived with the values shown in the following table.

| Name | Configuration | Comment |
|---------------|--|---|
| OnChatArrived | Select your communications configuration record. | Enter a comment, for example: Add for chat auto answer. |

- 3 Click the Event Response Parameters tab, and configure the following records for OnChatArrived with the values shown in the following table.

| Name | Value |
|---------------------------|-------------------------------------|
| ServiceMethod | Communications Client.TryAutoAnswer |
| ServiceParam.Command | AcceptChatGroup |
| ServiceParam.Interactioid | { InteractionId } |

Configuring the ChatArrived Event Handler

Use the following procedure to configure the ChatArrived event handler.

To configure the ChatArrived event handler

- 1 Navigate to the Administration - Communications screen, then the All Event Handlers view.
- 2 In the Event Handlers list, configure ChatArrived with the values shown in the following table.

| Name | Configuration | Event Response | Device Event | Order |
|-------------|--|----------------|--------------------|-------|
| ChatArrived | Select your communications configuration record. | OnChatArrived | InteractionMessage | 0 |

- 3 Click the Event Handlers Parameters tab, and configure the following records for ChatArrived with the values shown in the following table.

| Name | Value |
|-----------------------|----------|
| Filter.Channel | Chat |
| Filter.MsgType | TYPE_NEW |
| Filter.systemTransfer | 0 |

- 4 Navigate to Administration - Communications screen, Configurations view, and then click the Event Handlers tab.
- 5 Select the ChatArrived record, and configure it as follows:
 - a In the Comments field, modify or enter a comment, for example, as follows:
Comments: Chat
 - b In the Event Response field, click the Look Up icon, and associate the OnChatArrived event response with the ChatArrived event handler.

Configuring the ChatTransferArrived Event Handler

Use the following procedure to configure the ChatTransferArrived event handler.

To configure the ChatTransferArrived event handler

- 1 Navigate to the Administration - Communications screen, then the All Event Handlers view.
- 2 In the Event Handlers list, configure ChatTransferArrived with the values shown in the following table.

| Name | Configuration | Event Response | Device Event | Order |
|---------------------|--|----------------|--------------------|-------|
| ChatTransferArrived | Select your communications configuration record. | OnChatArrived | InteractionMessage | 1 |

- 3 Click the Event Handlers Parameters tab, and configure the following records for ChatTransferArrived with the values shown in the following table.

| Name | Value |
|----------------|--------------------|
| Filter.Channel | Chat |
| Filter.MsgType | TYPE_NEW |
| FilterSpec | [systemTransfer]>0 |

- 4 Navigate to the Administration - Communications screen, Configurations view, and then click the Event Handlers tab.
- 5 Select the ChatTransferArrived record, and configure it as follows:
 - a In the Comments field, modify or add a comment, for example, as follows:
Comments: Chat
 - b In the Event Response field, click the Look Up icon, and associate the OnChatArrived event response with the ChatTransferArrived event handler.

8

Customizing Siebel Chat

This chapter describes how to customize Siebel Chat including how to modify the chat spelling checker, how to configure keyboard shortcuts for chat, and how to configure chat feedback. It contains the following topics:

- [About Customizing Siebel Chat on page 127](#)
- [Siebel Call Center and Siebel Chat-Related Applets on page 128](#)
- [Configuring Parameters to Pass from the Chat Request Page on page 129](#)
- [Process of Configuring the Siebel Chat Interface on page 129](#)
- [Configuring the Appearance of Transcript Attachments on page 132](#)
- [Configuring the Behavior of the Push URL Functionality on page 133](#)
- [Customizing the Siebel Chat User Interface on page 134](#)
- [Modifying the Spelling Checker for Siebel Chat on page 146](#)
- [Process of Configuring Siebel Chat Feedback on page 150](#)

NOTE: The functionality described in this chapter applies only if you are using the default workflow to handle incoming chat requests. For more information about the default workflow for Siebel Chat, see “Chat Standard Accept Process Workflow” on page 47.

About Customizing Siebel Chat

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

NOTE: Active X controls are used only in the high-interactivity client.

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

- [“Siebel Call Center and Siebel Chat-Related Applets” on page 128](#)
- [“Specific ActiveX Controls Distributed with Siebel Chat” on page 128](#)
- [“Process of Configuring the Siebel Chat Interface” on page 129](#)
- [“Configuring the Appearance of Transcript Attachments” on page 132](#)
- [“Configuring the Behavior of the Push URL Functionality” on page 133](#)
- [“Configuring Parameters to Pass from the Chat Request Page” on page 129](#)
- [“Customizing the Siebel Chat User Interface” on page 134](#)

Siebel Call Center and Siebel Chat-Related Applets

Some Siebel Call Center and Siebel Chat-related applets are configured in Siebel Tools, and called from a custom chat ActiveX control. The names of these applets, which are listed in [Table 14](#) and called from the chat ActiveX control, must not be changed because they might not function correctly.

NOTE: Active X controls are used only in the high-interactivity client.

Table 14. Siebel Call Center and Siebel Chat-Related Applets

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

Specific ActiveX Controls Distributed with Siebel Chat

[Table 15](#) lists the ActiveX controls that are distributed and used with Siebel Chat. Control names reflect the names of the files that are created in the Downloaded Program Files directory when each control is deployed.

NOTE: Active X controls are used only in the high-interactivity client.

Table 15. Siebel Chat-Specific ActiveX Controls

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

Configuring Parameters to Pass from the Chat Request Page

Use the following procedure to configure the parameters to pass from the chat request page.

To configure parameters to pass from the chat request page

- 1 Add or remove the parameters on the customer chat request page, then configure the parameter extensions for Siebel Chat in Oracle Contact On Demand.

For more information about how to add or remove the parameters on the customer chat request page, see the following:

- 727972.1 (Article ID) on My Oracle Support
- Oracle Contact On Demand documents on the Siebel Bookshelf, for example:
 - *Oracle Contact On Demand Administration Manager Guide*
 - *Oracle Contact On Demand Supervision Manager Guide*
 - *Oracle Contact On Demand Interaction Manager Guide*

For more information about configuring parameter extensions for Siebel Chat, see ["Installing Parameter Extensions for Siebel Chat" on page 26](#).

- 2 Add or remove the process property, input argument, or output argument as required in the default workflow for Siebel Chat.

For more information, see *Siebel Business Process Framework: Workflow Guide* and ["Chat Standard Accept Process Workflow" on page 47](#).

Process of Configuring the Siebel Chat Interface

To configure the Siebel Chat interface, perform the following tasks:

- 1 Create a chat.css stylesheet containing the appropriate default parameter definitions for the chat interface.

For more information, see ["Creating a Chat.css Stylesheet" on page 130](#).

- 2 Modify the chat.css stylesheet to get the required look and feel for the Siebel Chat interface.

For more information, see ["Modifying the Chat.css Stylesheet" on page 131](#).

- 3 Customize the chat interface as required.

For more information, see [Customizing the Siebel Chat User Interface on page 134](#).

Creating a Chat.css Stylesheet

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

To create a chat.css stylesheet

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

```
. chatAxLayout
{
  Mi nAxHei ght: 400;
  Mi nAxWi dth: 300;
  Ti tleBarHei ght: 24;
  TabBarHei ght: 22;
  But tonBarHei ght: 24;
  TextI nputHei ght: 75;
  Ur l I nputHei ght: 24;
}

. styl eChatAxNormal
{
  TextCol or: #000000;
  Ur l Col or: #000000;
  Ti mestampCol or: #0000FF;
  CustomerTi mestampCol or: #FF3300;

  Ctr l BackgroundCol or: #D5E0F4;
  Label TextBackgroundCol or: #EEEEEE;
  But tonHotCol or: #B0C4DE;

  Ctr l Font: Ari al ;
  Ctr l FontSi ze: 9;
}

. styl eTi tleTabBar
{
  TextCol or: #123783;
  Ctr l BackgroundCol or: #ADBEE4;
  Tabl temCol or: #EFEFEF;
  TabSel ectedCol or: #D5E0F4;
  TabHi ghtl i ghtCol or: #FF0000;
  But tonHotCol or: #B0C4DE;
}
```

- 3 Save the file as chat.css.

Modifying the Chat.css Stylesheet

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

NOTE: The chat.css stylesheet must be created first. For more information, see “Creating a Chat.css Stylesheet” on page 130.

To modify the chat.css stylesheet

- 1 Open the chat.css file.
- 2 Modify the parameters, as required.

For example, change the height of the different areas of the chat pane by adjusting the parameters described in the following table. If you modify the TextInputHeight parameter, then the chat transcript and message input areas increase or decrease in size accordingly. Figure 4 on page 46 shows the different areas that are on the chat pane.

| Parameter | Description |
|---------------------|---|
| MinAxHeight | The minimum height for the whole chat pane. |
| MinAxWidth | The minimum width for the whole chat pane. |
| TitleBarHeight | The height of the chat title bar. |
| TabBarHeight | The height of the chat tab bar. |
| TextButtonBarHeight | The height of the text button bar. |
| TextInputHeight | The height of the message input area. |
| URLButtonBarHeight | The height of the URL button bar. |
| UrlInputHeight | The height of the URL area. |

Add and set the MaxFieldLabelWidth parameter as required, which limits the maximum allowed label length. The default is 70 pixels.

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

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

    CtrlFont: Arial;
    CtrlFontSize: 9;

    MaxFieldLabelWidth: 70;
}
```

- 3 Save the chat.css file to the following location on Siebel Server for the changes to take effect:

```
<Siebel_Bui l d>\siebel\apps\publ i c\enu\fi les
```

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

Configuring the Appearance of Transcript Attachments

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

```
<Siebel_Bui l d>\siebel\webtempl
```

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

To configure the appearance of transcript attachments

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

```
<Siebel_Bui l d>\siebel\webtempl
```

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

Configuring the Behavior of the Push URL Functionality

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

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

This is the default setup for Siebel Chat.

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

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

- In a completely new browser window.

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

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

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

NOTE: Active X controls are used only in the high-interactivity client.

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

To configure the behavior of the push URL functionality

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

```
<context-param>
  <param-name>Siebel ChatPushedURLAsPopup</param-name>
  <param-value>off</param-value>
</context-param>
```

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

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

Customizing the Siebel Chat User Interface

Administrators can configure the appearance of the Siebel Chat interface, the behavior of buttons and functionality on the chat interface, such as, the chat spelling checker, and keyboard shortcuts for chat functionality. For more information, see the following topics:

- [“Configuring Siebel Chat Dashboard Fields” on page 134](#)
- [“Formatting Siebel Chat Dashboard Fields” on page 135](#)
- [“Configuring Siebel Chat Pane Drop-Down Controls” on page 136](#)
- [“Refreshing Siebel Chat Dashboard Fields” on page 137](#)
- [“Removing the URL Area from the Chat Pane” on page 139](#)
- [“Configuring the Button Sequence for the Button Bar” on page 140](#)
- [“Configuring Siebel Chat Quick Actions” on page 141](#)
- [“Configuring the Display Name for Siebel Chat Sessions” on page 143](#)
- [“Configuring Keyboard Shortcuts for Buttons on the Siebel Chat UI” on page 145](#)
- [“Modifying the Spelling Checker for Siebel Chat” on page 146](#)
- [Process of Configuring Siebel Chat Feedback on page 150](#)

When you remove elements from the chat dashboard, you increase the chat transcript and message input areas of the chat pane as a result. Before starting to customize the Siebel Chat interface, it is recommended that you review the following topics:

- [“About Customizing Siebel Chat” on page 127](#)
- [“Process of Configuring the Siebel Chat Interface” on page 129](#)
- [Appendix B, “Methods for Customizing Siebel Chat Process Flow and Interface Functionality”](#)

Configuring Siebel Chat Dashboard Fields

You can configure the following fields for the chat dashboard: Area, Subarea, Product, Summary (or Problem). To add, remove, or modify chat dashboard fields, you must configure the DashboardFields control user property under the Chat Tab Applet in Siebel Tools. Because of the limited size of the chat pane, it is recommended that you configure up to a maximum of five or six fields for the chat dashboard. Use the following procedure to configure the chat dashboard fields.

To configure Siebel Chat dashboard fields

- 1 Start Siebel Tools.
- 2 In the Object Explorer, go to Project, find Chat UI, and then lock Chat UI.
- 3 In the Object Explorer, go to Applet, and then find Chat Tab Applet.
- 4 Drill down on Control, and then select DashboardFields.

- 5 Drill down on Control User Prop.
- 6 Configure, for example, the following chat dashboard fields as required:
 - Area
 - Subarea
 - Product
 - Summary (or Problem)
 - MaxRowNum

MaxRowNum represents the number of rows to show on the chat dashboard. By default, the value in *MaxRowNum* is 6. However, if *MaxRowNum* is set 5, then only five rows appear on the chat dashboard.

- 7 To modify the name of a field as it is displayed on the chat dashboard, edit the Value field.
- 8 To remove a field from the chat dashboard, click the Inactive field next to the Value field.
- 9 Recompile the SRF.
- 10 Restart the Siebel Server.

Formatting Siebel Chat Dashboard Fields

For each chat dashboard field configured, you can define where it appears on the chat dashboard (the row and column) and the width of the field. Use the following procedure to format chat dashboard fields.

To format Siebel Chat dashboard fields

- 1 Start Siebel Tools.
- 2 In the Object Explorer, go to Project, find Chat UI, and then lock Chat UI.
- 3 In the Object Explorer, go to Applet, and then find Chat Tab Applet.
- 4 Drill down on Control, and then select DashboardFields.
- 5 Drill down on Control User Prop.
- 6 Configure, for example, the following fields as required:
 - **Column.** The column where the field appears. The value can be either 1 or 2 because each row on the chat dashboard can be divided into a maximum of two columns.
 - **Length.** The width of the field, which can be either half or full. The length value is case sensitive. A value of full indicates that the field width is the entire length of the row; half indicates that the field width is only half the length of the row. Any other value is treated as a full value.
 - **Row.** The row where the field is located. The value can be from 1 to *MaxRowNum*. *MaxRowNum* is configured for the DashboardFields control user property. Any value less than 1 or larger than *MaxRowNum* is ignored.

- **Value.** Indicates the data source to which the field belongs. The value can be interaction data or a business component field. The format of the value is as follows: {BC Name:fieldName} or {CCA-Data:fieldName}.

For example, the user properties for the Area and Product fields are shown in the following table.

| User Property Name | Values for the Area Field | Values for the Product Field |
|--------------------|---------------------------|------------------------------|
| Column | 1 | 1 |
| Length | half | half |
| Row | 1 | 2 |
| Value | CCA_Data:Area | ServiceRequest:Product |

- 7 Recompile the SRF.
- 8 Restart the Siebel Server.

Configuring Siebel Chat Pane Drop-Down Controls

You can configure the controls for the following drop-down elements on the chat pane:

- KB Visited field control and button
- Action field control and button

Use the following procedure to configure the controls for the KB Visited and Action on the chat pane.

To configure Siebel Chat pane drop-down controls

- 1 Start Siebel Tools.
- 2 In the Object Explorer, select Applet, and then Chat Tab Applet.
- 3 In the Object Explorer, select Applet User Prop, then the appropriate control.
- 4 To configure the KB Visited control, do one of the following:
 - Deselect the Visible property for KB to make the whole field control invisible on the chat dashboard. Select the Visible property for KB to make the whole field control visible.
 - Set the Visible property for the KBBUTTON control to False to make only the KB Visited button invisible on the chat dashboard. Set it to True to make only the KB Visited button visible on the chat dashboard.
- 5 To configure the QuickActionList control:
 - Set the Visible property for QuickActionList to False to make the whole field control invisible on the chat dashboard. Set it to True to make the whole field control visible.
 - Set the Visible property for the Go control to False to make only the Action button invisible on the chat dashboard. Set it to True to make only the Action button visible.
- 6 Recompile the SRF.

- 7 Restart the Siebel Server.

Refreshing Siebel Chat Dashboard Fields

By default you can manually refresh Siebel Chat dashboard fields. However, you can also set up chat dashboard fields to dynamically refresh.

Refreshing Siebel Chat Dashboard Fields Manually

After changing fields, such as, Account and Contact on the Chat Service Request detail view, you can manually refresh the chat dashboard fields during a chat session to show the latest changes.

To manually refresh the Siebel Chat dashboard fields

- 1 Click the Action menu in the chat dashboard.
- 2 Select Refresh Chat Dashboard Fields, and then click Go.

Configuring Dynamic Refresh for Siebel Chat Dashboard Fields

If you want the fields on the chat dashboard to update straight away after an agent changes the business component values, then you must configure a new action set and run-time event respectively. Use the following procedure to configure dynamic refresh for Siebel Chat dashboard fields so that after an agent updates, for example, the service request record, the chat dashboard fields are updated automatically as well.

To configure dynamic refresh for Siebel Chat dashboard fields

- 1 Log in to your Siebel Call Center application.
- 2 Create the action set to update the chat dashboard as follows:
 - a Navigate to Administration - Runtime Events, Actions Sets view, select the Personalization Action Set list applet, and then add a record with the values shown in the following table.

| Field | Value |
|---------------|---|
| Name | Update Chat Dashboard |
| Active | Selected |
| Enable Export | Selected |
| Description | Update the BC field values on the chat dashboard. |

- b Navigate to Administration - Runtime Events, Actions Sets view, select the Personalization Action list applet, and then add a record with the values shown in the following table.

| Field | Value |
|--|--------------------------|
| Name | Update Chat Dashboard |
| Action Type | BusService |
| Sequence | 1 |
| Active | Selected |
| NOTE: This field indicates whether the action is active or not. | |
| Business Service Name | Chat UI Business Service |
| Business Service Method | RefreshChatPaneDashboard |

- 3 Create the event alias, and then the event as follows:

- a Navigate to Administration - Runtime Events, Event Aliases view, and then add a record with the values shown in the following table.

| Field | Value |
|-------------|--------------------------|
| Name | Service Request - Update |
| Object Type | BusComp |
| Object Name | Service Request |
| Event | WriteRecordUpdate |

- b Navigate to Administration - Runtime Events, Events view, and then add a new event with the values shown in the following table.

| Field | Value |
|--|---|
| Name | Service Request - Update |
| After you select the event name from the drop-down list, the Object Type, Object Name, and Event fields are filled in automatically. | |
| Object Type | BusComp |
| Object Name | Service Request |
| Event | WriteRecordUpdated |
| Sequence | Enter a sequence number (for example, 2) that does not conflict with the current event. |
| Action Set Name | Update Chat Dashboard. |

- 4 Restart the Siebel Server for the run-time event to take effect.

Whenever an agent updates a service request, an action is triggered to update all the BC fields (not only the service request fields) on the chat dashboard.

You can configure more events, as required, using other business components whose fields display on the chat dashboard to trigger the update dashboard action. For example, you can configure an event triggered by updating a contact. In this case, all BC fields on the chat dashboard are updated when the agent updates the contact.

Removing the URL Area from the Chat Pane

You can remove the URL area from the chat pane by modifying the `siebel_chat.css` stylesheet. When you remove the URL area from the chat pane, the chat transcript area by default expands. Complete the steps in the following procedure to remove the push URL area from the chat pane.

To remove the URL area from the chat pane

- 1 Open the `chat.css` file.
- 2 Modify the `chatAxLayout` parameter, as follows:
 - a Remove the old `ButtonBarHeight` property.
 - b Add the following two new properties:
 - **TextButtonBarHeight.** This value is the height of the text button bar, which contains the following buttons: Send, Spell Check, Frequently Used Text, and Smart Share.
 - **URLButtonBarHeight.** This value is the height of the URL button bar, which contains the following buttons: Push URL and URL Library.

In the following code example, `URLButtonBarHeight` is set to 24, and `UrlInputHeight` is set to 24, which means that the URL area appears in the chat pane:

```
. chatAxLayout
{
  Mi nAxHei ght: 400;
  Mi nAxWi dth: 300;
  Ti tl eBarHei ght: 24;
  TabBarHei ght: 22;
  TextBut tonBarHei ght: 24;
  TextI nputHei ght: 75;
  URLBut tonBarHei ght: 24;
  Ur l I nputHei ght: 24;
}
```

- c To remove the URL area from the chat pane, set the `URLButtonBarHeight` and `UrlInputHeight` properties to zero, as shown in the following code example:

```
. chatAxLayout
{
  Mi nAxHei ght: 400;
  Mi nAxWi dth: 300;
```

```

TitleBarHeight: 24;
TabBarHeight: 22;
TextButtonBarHeight: 24;
TextInputHeight: 75;
URLButtonBarHeight: 0;
UrlInputHeight: 0;
}

```

- 3 Save the chat.css file to the following location on the Siebel Server for the changes to take effect:

<Siebel_Bui l d>\siebel \eapps\publ i c\enu\fi l es

Configuring the Button Sequence for the Button Bar

You can configure the order in which buttons appear on the text and URL button bars, by configuring the Sequence property for the appropriate button control user property in Siebel Tools. The Sequence property accepts any number greater than zero. The decimal part of a number (if there is one) is ignored. To insert a space between two adjacent buttons, skip a sequence number. After the sequence is configured for the buttons on the text and URL button bars, the buttons appear on the chat pane in ascending order moving from the right-side border of the chat pane to the left.

To configure the button sequence for the button bar

- 1 Start Siebel Tools.
- 2 In the Object Explorer, select Applet, then the Chat Tab Applet.
- 3 In the Object Explorer, select Control.
- 4 Configure the Sequence property for the buttons on the URL button bar as follows:

Select the PushURL or URILib control user property as required and configure Sequence as shown in the following table.

| Name | Caption | Parent | Sequence |
|---------|-------------|--------|----------|
| PushUrl | Push URL | Url | 1 |
| UrLib | URL Library | Url | 3 |

where:

- *Name* is the name of the control user property being configured.
- *Caption* value is the name that appears when you hover over the button in the chat pane.
- *Parent* value indicates the button bar (in this case, the URL button bar) to which the button belongs.
- *Sequence* value represents the location where the button appears on the button bar.

- 5 Configure the Sequence property for the buttons on the Text button bar as follows:

Select the Send, SpellCheck, FUT, or SmartShare control user property as required, and configure Sequence as shown in the following table.

| Name | Caption | Parent | Sequence |
|----------------|----------------------|--------|----------|
| Send | Send | Text | 1 |
| SpellCheck | Spell Check | Text | 3 |
| FUT | Frequently Used Text | Text | 4 |
| SmartShare | Smart Share | Text | 5 |
| ChangeLanguage | Change Language | Text | 6 |

where:

- *Name* is the name of the control user property being configured.
 - *Caption* value is the name that appears when you hover over the button in the chat pane.
 - *Parent* value indicates the button bar (in this case, the Text button bar) to which the button belongs.
 - *Sequence* value represents the location where the button appears on the button bar.
- 6 Recompile the SRF.
 - 7 Restart the Siebel Server.

Configuring Siebel Chat Quick Actions

Agents by default can perform a number of quick actions using the Action menu on the chat dashboard. For more information about these quick actions, see [“Siebel Chat Dashboard” on page 74](#). To configure a new Siebel Chat quick action, perform the following tasks:

- [“Configuring a Quick Action for the Chat Dashboard in Siebel Tools” on page 141](#)
- [“Adding a Quick Action to the QuickActionList Control in Siebel Tools” on page 142](#)

Configuring a Quick Action for the Chat Dashboard in Siebel Tools

Use the following procedure to configure a new quick action for the chat dashboard in Siebel Tools.

To configure a new quick action for the chat dashboard

- 1 Start Siebel Tools.
- 2 In the Object Explorer, select Applet, and then Chat Tab Applet.
- 3 In the Object Explorer, select Applet User Prop.
- 4 Add a new control property with the following information:

- **Name.** The name of the action. For example: ViewContactSR.
 - **Caption.** The name of the action as it appears in the Action menu on the chat dashboard. For example: View Contact for Current Chat Service Request.
- 5 Configure the control user properties for ViewContactSR, for example, as shown in the following table.

In this example, the ViewContactSR control calls the Workflow Process ManagerSaRunProcess with the input parameters {ProcessName, ContactId}.

| User Property Name | Description | Example Value |
|---|--|------------------------------|
| Business Service Name | The business service that this action calls. If the action is a workflow, then the value in this field is Workflow Process Manager. If the action is not a workflow, then the value can be any service. | Workflow Process Manager |
| Business Service Method | The business service method that this action calls. If the action is a workflow, then the value in this field is RunProcess. If the action is not a workflow, then the value can be any service. | RunProcess |
| Process Name | If the action is to call a workflow, then the value in this field is the workflow name. You can ignore this property if the action does not call a workflow. | View Contact of Current Chat |
| [Parameters] For example, ContactId. | To pass parameters into the service method or workflow, you must define the name-value pairs here. <i>Name</i> is the input argument name. For <i>value</i> , two formats are supported: <ul style="list-style-type: none"> ■ A literal value, consisting of a string in double quotation marks ■ One of the following: <ul style="list-style-type: none"> ■ {BC Name:fieldName} ■ {CCA-Data:fieldName} | ServiceRequest:ContactId |

- 6 Recompile the SRF.
- 7 Restart the Siebel Server.

Adding a Quick Action to the QuickActionList Control in Siebel Tools

Use the following procedure to add a quick action to the QuickActionList control in Siebel Tools.

To add a quick action to the QuickActionList control in Siebel Tools

- 1 Start Siebel Tools.
- 2 In the Object Explorer, select Applet, and then Chat Tab Applet.
- 3 In the Object Explorer, select Applet User Prop, then the QuickActionList control.
- 4 Configure the user properties for the QuickActionList control, for example, as shown in the following table.

| User Property Name | Description | Example Value |
|--------------------|---|---------------|
| Name | ActionItemX, where X represents the order in which the action appears in the Action menu on the chat dashboard. ActionItem2 indicates that the action appears as the second item on the list. | ActionItem5 |
| Value | The control name of the action that you are adding to the quick action list. | ViewContactSR |

- 5 Recompile the SRF.
- 6 Restart the Siebel Server.

Configuring the Display Name for Siebel Chat Sessions

You can configure and customize the display name for chat sessions. The following procedure shows how to configure the display name for chat sessions.

NOTE: Siebel Chat by default provides a run-time event and the Chat Display Name Update Process workflow for configuring the display name for Siebel Chat sessions. You can modify both the run-time event and the workflow as required.

To configure the display name for Siebel Chat sessions

- 1 Verify that the Accept Chat Workflow name in the ChatAcceptedLog is configured in your Siebel Business application as follows:
 - a Navigate to Administration - Communications, then the All Event Logs view.
 - b Query for ChatAcceptedLog, locate ServiceParam.ProcessName, then verify the workflow name, and make sure that it has included the workflow step to update the display name for Siebel Chat sessions.
 - c Query for ChatTransferAcceptedLog, locate ServiceParam.ProcessName, then verify the workflow name, and make sure that it has included the workflow step to update the display name for Siebel Chat sessions.

NOTE: Siebel Chat provides a default sample workflow to handle incoming chat requests called *Chat Standard Accept Process*.

- 2 Verify that the run-time events for updating the chat display name have been added to your Siebel application and configured appropriately as follows:
 - a Navigate to Administration - Runtime Events, Actions Sets view, then select the Personalization Action Set list applet.
 - b Add a record with the values shown in the following table, if a record is not already configured with these values.

| Field | Value |
|---------------|--------------------------|
| Name | Update Chat Display Name |
| Active | Selected |
| Enable Export | Selected |
| Description | Update Chat Display Name |

- c Navigate to Administration - Runtime Events, Actions Sets view, then select the Personalization Action list applet.
 - d Add a record with the values shown in the following table, if not already configured.

| Field | Value |
|--------------------------|---|
| Name | Update Chat Display Name |
| Action Type | BusService |
| Sequence | 1 |
| Active | Selected |
| | NOTE: This field indicates whether the action is active or not. If this field is not selected, then the action is ignored when the event occurs. |
| Business Service Name | Workflow Process Manager |
| Business Service Method | RunProcess |
| Business Service Context | "ProcessName", "Chat Display Name Update Process" |

- e Navigate to Administration - Runtime Events, then the Events view.
 - f Add a record with the values shown in the following table, if not already configured.

| Field | Value |
|-----------------|--------------------------|
| Action Set Name | Update Chat Display Name |
| Sequence | 1 |
| Object Type | BusComp |

| Field | Value |
|-------------|--------------------|
| Object Name | Service Request |
| Event | WriteRecordUpdated |

- 3 Update the Chat Display Name Update Process workflow in Siebel Tools as follows:
 - a Start Siebel Tools.
 - b Locate, verify, and open the Chat Display Name Update Process workflow.

NOTE: Siebel Chat by default provides the Chat Display Name Update Process workflow, and you can modify it as required.
 - c Configure the following methods as required in the following order:
 - ❑ **UpdateChatDataField.** This method resets the ChatDisplayName in the Chat Data map to an empty string.
 - ❑ **Update ChatDataFieldEx.** This method updates the field in the Chat Data map with the value in a business component field.
 - ❑ **UpdateWithBCField.** This method updates a field in the Chat Data map with the value in a business component field.
 - ❑ **UpdateWithBCFieldEx.** This method updates the field in the Chat Data map with the value in a business component field.
 - ❑ **UpdateWithChatData.** This method updates a field in the Chat Data map with the value in the Oracle Contact On Demand Chat Data field.
 - ❑ **UpdateChatUI Field.** This method updates the chat display name in the chat pane.

For more information about each of these methods, see [Appendix B, “Methods for Customizing Siebel Chat Process Flow and Interface Functionality.”](#)

Configuring Keyboard Shortcuts for Buttons on the Siebel Chat UI

You can configure a keyboard shortcut for any button that is available on the text button bar or URL button bar of the Siebel Chat UI. After you configure the keyboard shortcut for a button, the shortcut key is displayed automatically in the tooltip for the button when you hover over the button.

To configure keyboard shortcuts for buttons on the Siebel Chat interface

- 1 Start Siebel Tools.
- 2 In the Object Explorer, select Applet, and then Chat Tab Applet.
- 3 In the Object Explorer, select Applet User Prop, then the *Button* control user property that you want to configure.

For example, select the SpellCheck button control user property to configure a keyboard shortcut for the Spell Check button.

- 4 Configure the HotKey user property, for example, as shown in the following table.

| Name | Value |
|--------|-------|
| HotKey | Alt+K |

The value can be a combination of CTRL, ALT, or SHIFT plus a keyboard letter or function key. For more information about the shortcut key formats that are allowed, see the topic about creating accelerator objects in *Siebel Object Types Reference*.

Make sure that your keyboard shortcut key combination does not conflict with any command accelerators in Siebel Tools or with any existing Communication Toolbar keyboard shortcuts already defined. Any command accelerators in Siebel Tools or existing Communication Toolbar keyboard shortcuts already defined take precedence over the keyboard shortcuts defined for the chat interface. Also note that Alt+D is a special accelerator for Microsoft Windows Internet Explorer Version 7.0 and later.

Modifying the Spelling Checker for Siebel Chat

Siebel Chat spelling checker has been enhanced allowing agents to set the language for the chat spelling checker using the RequestSiteID field. This allows agents to change the language for spelling checker at run time using the Change Language button on the text button bar or, if configured, the Change Language keyboard shortcut. After changing the language, agents can restore the default language mapping for the chat spelling checker if required. For more information, see the following topics:

- [“Customizing the Language Mappings for Siebel Chat Spelling Checker” on page 146](#)
- [“Configuring the Default Language for Siebel Chat Spelling Checker” on page 148](#)
- [“Running Spelling Checker on Chat Sessions” on page 149](#)

Customizing the Language Mappings for Siebel Chat Spelling Checker

The default language for Siebel Chat spelling checker is determined by the RequestSiteID field in the service request, which is a configurable business component field. The RequestSiteID field refers to the site or country to which the customer is affiliated. For example, if a German user starts a chat session with an agent, the RequestSiteID field has a value of 77.

The language mappings for Siebel Chat spelling checker are defined in the GetLanguageCodeFromMapping script method inside the Service_PreInvokeMethod in the Chat UI Business Service. An example Service_PreInvokeMethod follows:

```

function Service_PreInvokeMethod (MethodName, Input*, Output*)
{
  if (MethodName == "GetLanguageCodeFromMapping")
  {
    var sRequestSiteID = "";
    sRequestSiteID = Inputs.GetProperty("RequestSiteID");
    switch(sRequestSiteID)
    {
      case "0"
        Outputs.SetProperty ("LanguageCode", "ENU");
        break;
      case "101"
        Outputs.SetProperty ("LanguageCode", "ITA");
        break;
      case "71"
        Outputs.SetProperty ("LanguageCode", "FRA");
        break;
      default:
        Outputs.SetProperty ("LanguageCode", "ENU");
        break;
    }
    return CancelOperation;
  }
  return (ContinueOperation);
}

```

The Service_PreInvokeMethod has the following input and output parameters respectively:

- **RequestSiteID (Input).** This is the language code or ID associated with the site or customer requesting the chat.
- **LanguageCode (Output).** This is the language code mapping for RequestSiteID.

You can modify and add new language mappings for a customer as required by editing the GetLanguageCodeFromMapping script method, provided that the language is supported by Siebel Chat spelling checker. Use the following procedure to customize the language mappings for Siebel Chat spelling checker.

To customize the language mappings for Siebel Chat spelling checker

- 1 Start Siebel Tools.
- 2 Click the Chat UI Business Service object in the Tools Object Explorer, then the Service_PreInvokeMethod.
- 3 Go to the switch(sRequestSiteID) section, and modify or add new language mappings as required.

Table 16 lists the languages that are currently supported by Siebel Chat spelling checker. Supported languages are defined in the SPELLCHECK_LANG LOV (list of values).

Table 16. Supported Languages for Siebel Chat Spelling Checker

| Language Code | Language |
|---------------|--------------------|
| ENU | English-American |
| ENUL | English-US-Legal |
| ENUM | English-US-Medical |
| Dan | Danish |
| NLD | Dutch |
| ENG | English-British |
| ENGL | English-UK-Legal |
| ENGM | English-UK-Medical |
| FIN | Finnish |
| FRA | French-France |
| FRB | French-Canadian |
| DEU | German |
| ITA | Italian |
| PDG | Portuguese-Iberian |
| PTB | Portuguese-Brazil |
| ESP | Spanish-Spain |
| ESN | Spanish-American |
| SVE | Swedish |
| NOR | Norwegian |

Configuring the Default Language for Siebel Chat Spelling Checker

Customers can use the default Set Chat Language for Spell Check workflow to obtain and set the language for the chat spelling checker by using the RequestSiteID field, or they can provide their own workflow.

Siebel Chat spelling checker by default uses the Set Chat Language for Spell Check workflow to determine the language for the chat spelling checker as follows:

- It obtains the RequestSiteID from the business component field.
- It retrieves the LanguageCode for the RequestSiteID using the GetLanguageCodeFromMapping script method.
- It converts the chat data to the required language.

The Chat: Set Language Workflow system preference sets the default language for the chat spelling checker, as shown in the following procedure. However, agents can override the default, language setting manually for the chat spelling checker at run time by using the Change Language button on the text button bar or the corresponding keyboard shortcut if it is configured. For more information, see [“Running Spelling Checker on Chat Sessions” on page 149](#).

To configure the default language for Siebel Chat spelling checker

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Query for **Chat** to get a list of all the chat-related system preferences that you can set up.
- 3 Set the Chat: Set Language Workflow system preference to one of the following:
 - **Set Chat Language for Spell check.** Indicates to use the default workflow (Set Chat Language for Spell Check) to obtain and set the language for the chat spelling checker.
 - **CHANGE_ME.** Indicates to use the workflow that the customer provided to obtain and set the language for the chat spelling checker.

For information about other chat system preferences, see [“Setting Up System Preferences in Siebel Call Center for Siebel Chat” on page 41](#).

Running Spelling Checker on Chat Sessions

The Chat: Set Language Workflow system preference sets the default language for the chat spelling checker. However, agents can manually override the default language setting for the chat spelling checker at run time by using the Change Language button on the text button bar or the corresponding keyboard shortcut, if it is configured. After changing the language, agents can restore the default language mapping for the chat spelling checker. Use the following procedure to run spelling checker on a chat session.

To run spelling checker on chat sessions

- 1 In the Siebel Chat UI, click the tab of the chat interaction that you want to spell check.
- 2 Click the Spell Check button on the text button bar, or enter the keyboard shortcut key for the spelling checker (if configured).

On the spelling checker window, the Language read-only field displays the default language that is currently set for the chat spelling checker.

- 3 Review the suggested spelling or enter the correct spelling as required.
- 4 Use the following buttons to complete the spelling check as required:

Change, Change All, Ignore, Ignore All, Add to Dictionary, Done, and Cancel

Use the following procedure to override the default language setting for the chat spelling checker, and set a different spelling-checker language for the chat session.

To change the spelling checker language for a chat session

- 1 In the Siebel Chat interface, click the tab of the chat interaction that you want to spell check.
- 2 On the text button bar, click the Change Language button.
- 3 Select the language that you want from the language list that is displayed, then click OK.
- 4 On the text button bar, click the Spell Check button to run the spelling checker in the new language on the selected chat session.

Use the following procedure to restore the spelling checker language for a chat session to the default language for the chat spelling checker.

To restore the spelling checker language for a chat session to the default language

- 1 Select the chat interaction that you want.
- 2 Click the Action menu in the chat dashboard.
- 3 Select Restore to Default Language for Spell Check, and then click Go.

Related Topics

[“Modifying the Spelling Checker for Siebel Chat” on page 146](#)

[“Configuring the Default Language for Siebel Chat Spelling Checker” on page 148](#)

[“Configuring Keyboard Shortcuts for Buttons on the Siebel Chat UI” on page 145](#)

Process of Configuring Siebel Chat Feedback

When agents are typing a response to an incoming chat, the following feedback message appears on the recipient’s chat pane, provided that Siebel Chat feedback is configured:

Agent is typing . . .

Likewise when customers are typing a response to the agent, the following message appears on the agent’s chat pane, provided Siebel Chat feedback is configured:

Customer is typing . . .

In both cases, the feedback message appears at the bottom of the chat transcript area in the chat pane, and it is displayed for approximately 5 seconds before disappearing.

To configure feedback messages to display during chat sessions between agents and customers, perform the following tasks. This process is a step in [“Roadmap for Configuring Siebel Call Center for Siebel Chat” on page 29](#).

- [“Configuring User Preferences for Siebel Chat Feedback” on page 151](#)
- [“Configuring the SendAgentTypingMsg Command” on page 152](#)
- [“Configuring the ChatCustomerTyping Event Response” on page 152](#)
- [“Configuring the ChatCustomerTyping Event Handler” on page 153](#)

Configuring User Preferences for Siebel Chat Feedback

The following system preferences must be configured in Siebel Call Center for Siebel Chat feedback:

- **Chat: CustomerTypeDisplayTime.** Indicates the time in seconds that the following feedback message is displayed on the agent’s chat screen to indicate that the customer is typing a message response:

Customer is typing

After this time, provided the customer has stopped typing, the feedback message disappears.

- **Chat: AgentTypeDetectInterval.** Indicates the period in seconds during which to detect the agent’s typing status. The value must be greater than zero.
- **Chat: SendAgentTypeMsgCmd.** Indicates the CTI command to call when sending the agent’s feedback message to a customer. The CTI command must be a valid command used when configuring CTI (Computer Telephony Integration).

Use the following procedure to configure the user preferences in Siebel Call Center for Siebel Chat feedback. This task is step in [“Process of Configuring Siebel Chat Feedback” on page 150.](#)

To configure the user preferences for Siebel Chat feedback

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Query for **Chat** to get a list of all the chat-related system preferences that you can set up.
- 3 Configure the following system preferences with, for example, the values shown in the following table.

| System Preference Name | Value | Comment |
|-------------------------------|--------------------|---|
| Chat: CustomerTypeDisplayTime | 5 | Indicates to show the feedback message (Customer is typing) for 5 seconds on the agent’s chat screen. |
| Chat: AgentTypeDetectInterval | 5 | Indicates to show the feedback message (Agent is typing) for 5 seconds on the customer’s chat screen. |
| Chat: SendAgentTypeMsgCmd | SendAgentTypingMsg | Indicates the CTI command to use to send the agent’s feedback message to a customer. |

Configuring the SendAgentTypingMsg Command

Use the following procedure to configure the SendAgentTypingMsg command in Siebel Call Center for Siebel Chat feedback. This task is step in [“Process of Configuring Siebel Chat Feedback” on page 150](#).

To configure the SendAgentTypingMsg Command

- 1 Navigate to the Administration - Communications screen, then the All Configurations view.
- 2 Select the communications configuration record that you want to modify, then click the Commands tab.
- 3 Configure the SendAgentTypingMsg command as follows:
 - a Drill down into the SendAgentTypingMsg command, click the Command Parameters tab, and add the command parameters with the values shown in the following table.

| Name | Value |
|---------------|---------------------------|
| CmdData | SendAgentTypingMsgCmdData |
| DeviceCommand | SendAgentTyping |

- b Click the Command Data Parameters tab, and add the command data parameter with the value shown in the following table.

| Name | Value |
|---------------------|-----------------|
| Param.InteractionId | {InteractionId} |

- 4 For the changes to take effect, log out of the Siebel application, and then log in again.

Configuring the ChatCustomerTyping Event Response

Use the following procedure to configure the ChatCustomerTyping event response in Siebel Call Center for Siebel Chat feedback. This task is step in [“Process of Configuring Siebel Chat Feedback” on page 150](#).

To configure the ChatCustomerTyping event response

- 1 Navigate to the Administration - Communications screen, then the All Event Responses view.
- 2 In the Event Responses list, configure ChatCustomerTyping with the values shown in the following table.

| Name | Configuration | Comment |
|--------------------|---|-------------------------|
| ChatCustomerTyping | Select your communications configuration record. For example: Devchat_wkflow. | Add a relevant comment. |

- 3 Click the Event Response Parameters tab, and configure the following records for ChatCustomerTyping with the values shown in the following table.

| Name | Value |
|-------------------------|---|
| ServiceMethod | Chat UI Business Service.handleCustomerTyping |
| ServiceParam.InteractId | {InteractionId} |

Configuring the ChatCustomerTyping Event Handler

Use the following procedure to configure the ChatCustomerTyping event handler in Siebel Call Center for Siebel Chat feedback. This task is a step in [“Process of Configuring Siebel Chat Feedback” on page 150](#).

To configure the ChatCustomerTyping event handler

- 1 Navigate to the Administration - Communications screen, then the All Event Handlers view.
- 2 In the Event Handlers list, configure ChatCustomerTyping with the values shown in the following table.

| Name | Configuration | Event Response | Device Event | Order |
|--------------------|---|--------------------|--------------------|-------|
| ChatCustomerTyping | Select your communications configuration record. For example: Devchat_wkflow. | ChatCustomerTyping | InteractionMessage | 0 |

- 3 Click the Event Handlers Parameters tab, and configure the following records for ChatCustomerTyping with the values shown in the following table.

| Name | Value |
|----------------|----------------------|
| Filter.Channel | Chat |
| Filter.MsgType | TYPE_CUSTOMER_TYPING |

- 4 Navigate to Administration - Communications screen, Configurations view, and then click the Event Handlers tab.

- 5** Select the ChatCustomerTyping record, and configure it as follows:
 - a** In the Comments field, modify or add a comment, for example, as follows:

Comments: Chat
 - b** In the Event Response field, click the Look Up icon, and associate the ChatCustomerTyping event response with the ChatCustomerTyping event handler.

9

Localizing Siebel Chat

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

- [Setting Up Siebel Chat for Languages Supported by Default by Oracle Contact On Demand on page 155](#)
- [Setting Up Siebel Chat for Languages Not Supported by Default by Oracle Contact On Demand on page 156](#)

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

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

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

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

To set up default chat language mapping

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

Adding New Language Mappings in Siebel Call Center

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

To add a new language mapping in Siebel Call Center

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

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

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

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

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

A

Siebel Chat Deployment Using Third-Party Chat Solutions

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

- [Deployment of Siebel Chat Using Third-Party Chat Solutions on page 157](#)

Deployment of Siebel Chat Using Third-Party Chat Solutions

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

- Create or extend an existing Siebel Communications API (SCAPI) driver.
This task involves adding Siebel Chat to an existing driver, or creating a new driver for a non-Oracle Contact On Demand chat communication server. For information about developing and testing a new communications driver, see *Siebel CTI Administration Guide*.
- Take the existing third-party customer chat client and modify it to support the passing of Siebel Chat extended parameters. [Table 17](#) lists the chat parameter extensions, Field Name and Field Size, that must be set up for proper integration with the Siebel Call Center application.
- Integrate with the Chat UI Business Service in order to process chat events from the agent-facing chat UI. The Chat UI business service is responsible for handling all Siebel Chat commands and events, and manages the state of all active chats.

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

Table 17. Siebel Chat Parameter Extensions

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

Table 17. Siebel Chat Parameter Extensions

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

B

Methods for Customizing Siebel Chat Process Flow and Interface Functionality

This appendix describes the methods that are available for customizing Siebel Chat process flow and interface functionality, including the chat screen pop-up logic. It contains the following topic:

- [Methods for Customizing Siebel Chat Process Flow and Interface Functionality on page 159](#)

Methods for Customizing Siebel Chat Process Flow and Interface Functionality

The following methods are available to support the customization of the Siebel Chat UI and the chat screen pop-up logic, which allows you to use workflows to design the chat screen pop-up process:

- ["AcceptChatEx" on page 160](#)
- ["FindRecord" on page 161](#)
- ["FindRecordEx" on page 162](#)
- ["GetActiveChatActId" on page 163](#)
- ["GetChatDataByField" on page 163](#)
- ["GetLanguageCodeFromMapping" on page 164](#)
- ["GetSystemPreference" on page 165](#)
- ["GetTransferredActivityDataFromDB" on page 165](#)
- ["InsertRecord" on page 166](#)
- ["OpenView" on page 166](#)
- ["OpenViewEx" on page 168](#)
- ["PostScreenPopRequest" on page 168](#)
- ["PreScreenPopRequest" on page 168](#)
- ["PushToToolbarCallFunction" on page 169](#)
- ["RefreshChatPaneDashboard" on page 169](#)
- ["RestoreMainViewFromBookmark" on page 170](#)
- ["SetSpellCheckLanguage" on page 170](#)
- ["UpdateChatDataField" on page 171](#)
- ["UpdateChatDataFieldEx" on page 171](#)
- ["UpdateChatUIField" on page 173](#)

- "UpdateRecord" on page 174
- "UpdateWithBCField" on page 174
- "UpdateWithBCFieldEx" on page 176
- "UpdateWithChatData" on page 177

AcceptChatEx

This method contains the update for the input argument. It is a newer version of the existing AcceptChat method. It is used whenever a new or transferred chat is accepted to open the chat pane and dashboard and to update the activity information, such as the Contact ID and Service Request ID. [Table 18](#) shows the input PropertySet arguments for AcceptChatEx.

Table 18. AcceptChatEx Method: Input Arguments

| Input Argument | Description |
|-----------------------|---|
| ActivityId | The row ID of the activity created by the CTI event log. |
| InteractionId | The interaction ID of the active chat interaction. |
| SRId | The row ID of the service request record. |
| AccountId (Optional) | The row ID of the account record. |
| ContactId (Optional) | The row ID of the contact record. |
| isTransfer (Optional) | A value of 1 indicates a transferred chat. Any value other than 1 indicates a new inbound chat. |
| Firstname (Optional) | The first name of the customer. |
| Lastname (Optional) | The last name of the customer. |
| WorkID | The work ID of the active chat interaction. |

[Table 19](#) shows the output PropertySet argument for AcceptChatEx.

Table 19. AcceptChatEx Method: Output Arguments

| Output Argument | Description |
|-----------------|---|
| HasBookmark | A value of True indicates the following: <ul style="list-style-type: none"> ■ That this chat has the bookmark feature enabled ■ That the chat screen is populated with the bookmark information ■ That this chat is a transferred chat |

FindRecord

This method contains the update for the input argument. It is used to query records from a specific business component according to the search specification. You can define the business object name, business component name, query field value pairs, and value field list. By default, the row ID of the query results is returned as output, but you can define more output by using the input value field list. [Table 20](#) shows the input PropertySet arguments for FindRecord.

Table 20. FindRecord Method: Input Arguments

| Input Argument | Description |
|------------------------|--|
| BusObj | The business object name. |
| BusComp | The business component name. |
| QueryFields | <p>A comma-separated field list. This list indicates to use the field name list to query the business component. A corresponding key value pair must also be defined for the query search specification. For example, if you define Query Fields as follows (QueryFields = First Name, Last Name), then you also must provide a list of key value pairs:</p> <pre> First Name = John Last Name = Smith </pre> <p>First Name and Last Name are the query field names. John and Smith are the corresponding field values used for the query.</p> |
| ValueFields (Optional) | A comma-separated field list, indicating the output field name list. The default functionality is to generate the row IDs of the query results, but you use this parameter to generate the other fields as required. |

[Table 21](#) shows the output PropertySet argument for FindRecord, which returns the row IDs and value fields defined by the input of the query results.

Table 21. FindRecord Method: Output Arguments

| Output Argument | Description |
|-------------------|---|
| Id | The row ID of the first query record. You can query for more than one record by using the input arguments, but this argument saves only the row ID of the first record. |
| IsMultipleRecord | A value of True indicates that the number of query records is greater than one. |
| IdList | A comma-separated row ID list of the query results. |
| <key, value> pair | According to the values in the ValueFields input parameter, this method generates more field values of the first query record. |

Example

If you want to query a contact by contact name and generate the contact row ID and work phone number, then the input is as follows:

```
BusObj = Contact
BusComp = Contact
QueryFields = First Name, Last Name, xxx,
First Name = John
Last Name = Smith
Xxxx =
ValueFields = Work Phone #
```

FindRecordEx

This method contains the update for the input argument. This method is an enhanced version of the FindRecord method and is used to query for multiple levels of business components. You can use this method to query for the child business component according to the query results of the parent business components. [Table 22](#) shows the input PropertySet arguments for FindRecordEx.

Table 22. FindRecordEx Method: Input Arguments

| Input Argument | Description |
|----------------------------------|--|
| BusObj | The business object name. |
| BusComp | A comma-separated business component name list. NOTE: The order is important. The child business component must be listed below the parent business component. |
| <BusComp>:QueryField:XXX | This is the query field of the specific business component. The business component is listed in the BusComp parameter. In the query, XXX is the query field name of the business component. For example, to query using the row ID of the Business Component Account, the argument values are as follows: Account: QueryField: Id |
| <BusComp>:ValueFields (Optional) | A comma-separated field list indicating the output field name list of the specific business component. The default functionality is to generate the row IDs of the query results, but you can use this parameter to generate the other fields as required. |

The output PropertySet for FindRecordEx includes the query results of all the business components defined by the BusComp parameter. The query result for each business component is organized as a child PropertySet with the type set to the business component name.

Example

If you want to query for a contact that belongs to a specific Account and the account has many associated contacts, then you must use the work phone number to query the contact too. In this case, the input is as follows:

```
BusObj = Account  
BusComp = Account, Contact  
Account: QueryField: Id = 42-FF616  
Contact: QueryField: Work Phone # = 123456789
```

GetActiveChatActId

This method is used to get the action row ID of the current active chat. [Table 23](#) shows the output argument for GetActiveChatActId.

Table 23. GetActiveChatActId Method: Output Argument

| Output Argument | Description |
|-----------------|--|
| ActivityId | Returns the row ID of the current active chat. |

GetChatDataByField

This method is used to get the chat data by field name. [Table 24](#) shows the input arguments for GetChatDataByField.

Table 24. GetChatDataByField Method: Input Argument

| Input Argument | Description |
|----------------|---|
| InteractionId | If an InteractionId is provided, then it indicates to set data to the related chat. If an InteractionId is not provided, then it indicates to set data to the current chat. |
| FieldList | The data field names that you want to get, separated by a comma. |

For each field name in FieldList, there is a corresponding output argument with the same name.

GetLanguageCodeFromMapping

This method is a script method, and it is used to get the language code from the user defined mapping. [Table 25](#) shows the input argument for GetLanguageCodeFromMapping.

Table 25. GetLanguageCodeFromMapping Method: Input Argument

| Input Argument | Description |
|----------------|---|
| RequestSiteID | The ID for the request site; that is, the customer site requesting to chat to an agent. |

[Table 26](#) shows the output argument for GetLanguageCodeFromMapping.

Table 26. GetLanguagecodeFromMapping Method: Output Argument

| Output Argument | Description |
|-----------------|---|
| Language | <p>The language code for the request site. An example of the method code is as follows:</p> <pre> function Service_PreInvokeMethod (MethodName, Inputs, Outputs) { if (MethodName == "GetLanguageCodeFromMapping") { var sRequestSiteID = ""; sRequestSiteID = Inputs.GetProperty("RequestSiteID"); switch(sRequestSiteID) { case "0": Outputs.SetProperty ("LanguageCode", "ENU"); break; case "101": Outputs.SetProperty ("LanguageCode", "ITA"); break; case "71": Outputs.SetProperty ("LanguageCode", "FRA"); break; default: Outputs.SetProperty ("LanguageCode", "ENU"); break; } return CancelOperation; } return (ContinueOperation); } </pre> |

GetSystemPreference

This method is used to query for the system preference. You must insert the system preference name, and then the value is set to the output argument. [Table 27](#) shows the input PropertySet arguments for GetSystemPreference.

Table 27. GetSystemPreference Method: Input Arguments

| Input Argument | Description |
|----------------|---|
| Name | The name of the system preference item. |

[Table 28](#) shows the output PropertySet argument for GetSystemPreference.

Table 28. GetSystemPreference Method: Output Arguments

| Output Argument | Description |
|-----------------|-------------------------------------|
| Value | The value of the system preference. |

GetTransferredActivityDataFromDB

This method is used to query the parent activity record. The query is based on the interaction ID, and it applies only to chat transfers. Generally, this method queries for the service request ID when a second agent accepts a chat. [Table 29](#) shows the input PropertySet arguments for GetTransferredActivityDataFromDB.

Table 29. GetTransferredActivityDataFromDB Method: Input Arguments

| Input Argument | Description |
|----------------------|---|
| InteractionId | The interaction ID for the chat. |
| QuerySpec (Optional) | This optional input argument applies if you want to redefine your own query specifications. |
| ValueFields | This is a comma-separated field list that indicates the output field name list. If no Value Fields are defined, then the default value is Activity SR Id. |

The output PropertySet for GetTransferredActivityDataFromDB contains the key value pairs that are defined by the ValueFields input parameter.

Example

When an agent accepts a transferred chat, the service request ID that Siebel automatically creates must be located. The Chat Business Service by default uses the interaction to query the activity created by the first agent (who transferred the chat), and then to query for that activity to obtain the service request ID. The input is as follows: `InteractionId = 1234423545`

ValueFields = Id, Primary Contact Id, Activity SR Id

InsertRecord

This method is used to insert a new record into a specific business component. You can define the business object name, business component name, and field value pairs to be inserted as input. The row ID of the newly created record is returned as output. [Table 30](#) shows the input PropertySet arguments for InsertRecord.

Table 30. InsertRecord Method: Input Arguments

| Input Argument | Description |
|-----------------------|---|
| BusObj | The business object name. |
| BusComp | The business component name. |
| Field: XXX | The fields to be set. In this argument, you must replace XXX with the field name. |
| Use Locale (Optional) | A value of True or False indicates whether to format the value or not. |

[Table 31](#) shows the output PropertySet argument for InsertRecord, which returns the row ID of the newly created record.

Table 31. InsertRecord Method: Output Arguments

| Output Argument | Description |
|-----------------|---|
| Id | The row ID of the newly created record. |

Example

If you want to insert a new service request record with a contact ID of 04-LLSQ5, then the input is as follows:

```
BusObj = Service Request  
BusComp = Service Request  
Field: Contact Id = 04-LLSQ5
```

OpenView

This method is used to open a chat screen pop-up according to the following input information: business component and view name. This method cannot be used directly and must always be called using the PushToToolBarCallFunction method. [Table 32](#) shows the input PropertySet arguments for OpenView.

Table 32. OpenView Method: Input Arguments

| Input Argument | Description |
|-----------------------------|--|
| ViweBusObj | The view's business object name. |
| ViewBusComp | The view's business component name. |
| Id | The row ID of the record to be populated. |
| ViewName | The name of the view to be populated. NOTE: The ViewName must be associated with the business component defined in ViewBusComp. |
| SearchMode | The value of this argument can be OFF, ON, or ALL: <ul style="list-style-type: none"> ■ If the value is set to OFF, then the search center is not populated. ■ If the value is set to ON, then the search center is populated when there is no query result according to the input ID. ■ If the value is set to ALL, then the search center is always populated irrespective of whether the query result is empty or not. |
| ViewNameEx (Optional) | The default view name if AllowEmptyRecord is not set, or if it is set to False when the ID is empty or invalid. The view must be associated with the business object defined in ViewBusObjEx. |
| ViewBusObjEx (Optional) | The view's business object name for ViewNameEx. |
| ViewBusCompEx (Optional) | The view's business component name for ViewNameEx. |
| AllowEmptyRecord (Optional) | If set to True when the ID is empty or invalid, then it indicates to go to the same view but with an empty active record. If set to False, then it indicates to go to the view according to the values in ViewNameEX, ViewBusObjEx, and ViewBusCompEx. |

Example

If you want to open the service request detail view by using the service request ID 42-DOOTG and the user wants to open the search center when there is no such service request with ID 42-DOOTG in the database, then the input is as follows:

```

ViewBusObj = Service Request
ViewBusComp = Service Request
Id = 42-DOOTG
ViewName = Service Request Detail View
SearchMode = ON
AllowEmptyRecord = FALSE
ViewBusObjEx = Service Request Home
ViewBusCompEx = Public and Private View Link
ViewNameEx = Service Request Screen Homepage View
    
```

OpenViewEx

This method is used to obtain the chat screen pop-up according to the following input information: business component and view name. This method shows the record list, and it can be used to query more than one field besides the row ID. [Table 33](#) shows the input arguments for OpenViewEx.

Table 33. OpenViewEx Method: Input Arguments

| Input Argument | Description |
|---------------------|---|
| ViewName | The name of the view to be populated. The view must be associated with the defined business component. |
| ViewBusObj | The view's business object name. |
| ViewBusComp | The view's business component name. |
| SearchMode | The value of this argument can be OFF, ON, or ALL. <ul style="list-style-type: none">■ If set to OFF, then the search center is never populated.■ If set to ON, then the search center is populated when there is no query result according to the input ID.■ If set to ALL, then the search center is always populated irrespective of whether the query result is empty or not. |
| QueryFields | The comma-separated list of field names, which you want to use to query the view business component. For each field, there is an input argument for the query value. |
| NonEmptyQueryFields | The comma-separated list of query field names for which the query value cannot be empty. If the query value for one of the fields is set to " ", then the query fails and no results are returned. |

PostScreenPopRequest

This method is used to carry out the postrequest for the chat screen pop-up. [Table 34](#) shows the input PropertySet arguments for PostScreenPopRequest.

Table 34. PostScreenPopRequest Method: Input Arguments

| Input Argument | Description |
|----------------|----------------------------------|
| InteractionId | The interaction ID for the chat. |

PreScreenPopRequest

This method is used to carry out the prerequest for the chat screen pop-up. [Table 35](#) shows the input PropertySet arguments for PreScreenPopRequest.

Table 35. PreScreenPopRequest Method: Input Arguments

| Input Argument | Description |
|----------------|----------------------------------|
| InteractionId | The interaction ID for the chat. |

Table 36 shows the output PropertySet argument for PreScreenPopRequest.

Table 36. PreScreenPopRequest Method: Output Arguments

| Output Argument | Description |
|-----------------|--|
| HasBookmark | Indicates whether or not a bookmark is enabled for the chat. A value of True indicates that the chat has the bookmark feature enabled. |

PushToToolbarCallFunction

This method is used to call a chat screen pop-up method, such as OpenView or RestoreMainViewFromBookmark. This method is used, for example, if there are several asynchronous updates that must be made to the UI. By using PushToToolbarCallFunction to call chat screen pop-up methods, you ensure that all the methods are called one-by-one. Table 37 shows the input PropertySet arguments for PushToToolbarCallFunction.

Table 37. PushToToolbarCallFunction Method: Input Arguments

| Input Argument | Description |
|--------------------------|---|
| MethodName | The name of the chat screen pop-up method to be called, such as OpenView. |
| InteractionId (Optional) | The interaction ID for the chat. If IsQueued is set to True, then you must provide the InteractionID. |
| IsQueued (Optional) | Indicates whether or not to queue the method. The method name is MethodName. |

Except for this parameter, you must also enter all the necessary parameters for the chat screen pop-up method to be called later.

RefreshChatPaneDashboard

This method is used to refresh the business component fields on the chat dashboard with the latest data. There are no input or output arguments for RefreshChatPaneDashboard.

RestoreMainViewFromBookmark

This is an existing method that is used to populate screens using bookmarks. No inputs or outputs must be defined for this method.

SetSpellCheckLanguage

This method is used to set the language for the chat spelling checker. [Table 38](#) shows the input arguments for SetSpellCheckLanguage.

Table 38. SetSpellCheckLanguage Method: Input Arguments

| Input Argument | Description |
|----------------|--|
| ActivityId | <p>This argument is used to determine whether to use the chat associated with the activity or the current chat to set the language for the chat spelling checker. The settings are as follows:</p> <ul style="list-style-type: none">■ If this argument is not empty and an activity ID is provided, then it indicates to set the language for the chat spelling checker according to the chat associated with the activity.■ If this argument is empty, then it indicates to set the language for the chat spelling checker according to the current chat. |
| InteractionId | <p>If this argument is not empty and an InteractionId is provided, then it indicates to set the language for the chat spelling checker according to the related chat. If this argument is empty, then it indicates to defer to ActivityId to determine the language to use for the chat spelling checker.</p> |
| LanguageCode | <p>The language code that you want to set. For example: ENU, FRA, ESP, and so on.</p> |
| ManualSelected | <p>The value of this argument can be True or False.</p> <ul style="list-style-type: none">■ If set to True, then the language for the chat spelling checker can be changed by agents.■ If set to False, then the language for the chat spelling checker cannot be changed by agents. |

UpdateChatDataField

This method is used to update the field in the Chat Data map with a given value. [Table 39](#) shows the input arguments for UpdateChatDataField.

Table 39. UpdateChatDataField Method: Input Arguments

| Input Argument | Description |
|--------------------------|---|
| InteractionId (Optional) | The value in this argument is the interaction ID that you want to update if IsSingleChat is set to True. The value in this argument is ignored if IsSingleChat is set to False. For new and transferred chats, IsSingleChat is always set to True and always provides the value for InteractionId that is passed from Oracle Contact On Demand data. |
| IsSingleChat (Optional) | If set to True, then it indicates to update the value provided for InteractionId. If set to False, then it indicates to update the value for all chats. For new and transferred chats, IsSingleChat is always set to True. |
| UpdateField | The field that you want to update in the Chat Data map. Do not use the existing field name in Oracle Contact On Demand because the value in the field will be over-written. |
| UpdateValue (Optional) | The value that you want to update in the UpdateField. If UpdateValue is not provided, then an empty string is used by default. |

Example

If you want to update the ChatDisplayName field in the Chat Data map with the default value "" for all chats, then the input is as follows:

```
InteractionId =
IsSingleChat = FALSE
UpdateField = ChatDisplayName
UpdateValue =
```

UpdateChatDataFieldEx

This method is used to update the field in the Chat Data map with the value in a business component field. This method is typically used as a preceding step for the UpdateWithBCFieldEx method. For example, if QueryField is set to the SR Number business component field in UpdateWithBCFieldEx and to the SRNumber value in the Chat Data map, then the SRNumber value in Chat Data map expires if the agent associates a new service request with the chat activity. As a result, you must update the SRNumber value in the Chat Data map before SR Number is used in UpdateWithBCFieldEx. [Table 40](#) shows the input arguments for UpdateChatDataFieldEx.

Table 40. UpdateChatDataFieldEx Method: Input Arguments

| Input Argument | Description |
|--------------------------|---|
| InteractionId (Optional) | <p>The value in this argument is the interaction ID that you want to update if IsSingleChat is set to True. The value in this argument is ignored if IsSingleChat is set to False.</p> <p>For new and transferred chats, IsSingleChat is always set to True and always provides the value for InteractionId that is passed from Oracle Contact On Demand data.</p> |
| IsSingleChat (Optional) | <p>If set to True, then it indicates to update the value provided for InteractionId. If set to False, then it indicates to update the value for all chats. For new and transferred chats, IsSingleChat is always set to True.</p> |
| BusObj | The business object, for example, Action. |
| BusComp | The business component in the business object, for example, Action. |
| QueryFields | <p>The Query Field list to use to query the value in ValueField (for example, Id). You must provide the value in Chat Data for the query field. For example, provide the Activity Id in Chat Data for Id.</p> <p>The comma-separated field list indicates the field name list to use to query the business component.</p> <p>For query search specification, you must also define a corresponding key value pair. For example, if QueryFields is set to Id and Contact First Name, then a list of key value pairs must also be provided as follows:</p> <pre> Id=Acti vi ty Id Contact Fi rst Name = fi rstname </pre> <p>Id and Contact First Name are the query business component field names. Activity Id and firstname are the corresponding Chat Data fields.</p> |
| UpdateField | The field that you want to update in the Chat Data map. |
| Value Field | The business component field that you want to get the value from. |

Example

If you want to update the SRNumber field in Chat Data map with the SR Number value in the Action business component, *Id* is used as the query filter and is set to the value of the ActivityId field in Chat Data map. That is, the ActivityId value in Chat Data map is used as the query filter to query the Action business component record to obtain the SR Number value in the Action business component record. The SR Number value is then used to update the SR Number field in Chat Data map, so that it has the latest value if a new service request is associated with the chat activity.

The ActivityId field value in Chat Data map is not always changed in the chat session, but the SRNumber field value in Chat Data map is changed if a new service request is associated with the

chat activity. Therefore, the UpdateChatDataFieldEx method is used to update SRNumber before the SRNumber field value in Chat Data map is used in the next workflow step. To update SRNumber for all chats, the input is as follows:

```

InteractionId =
IsSingleChat = FALSE
BusObj = Action
BusComp = Action
QueryFields = Id // the field of Activity Id in Action BC
Id = ActivityId // the field of Activity Id in Chat Data map
UpdateField = SRNumber // the field of SR Number in Chat Data map
ValueField = SR Number // the field of SR Number in Action BC
  
```

UpdateChatUIField

This method is used to update a field in the chat UI with the value in the Chat Data map field. [Table 41](#) shows the input arguments for UpdateChatUIField.

Table 41. UpdateChatUIField Method: Input Arguments

| Input Argument | Description |
|--------------------------|---|
| InteractionId (Optional) | The value in this argument is the interaction ID that you want to update if IsSingleChat is set to True. The value in this argument is ignored if IsSingleChat is set to False. For new and transferred chats, IsSingleChat is always set to True and always provides the value for InteractionId that is passed from Oracle Contact On Demand data. |
| IsSingleChat (Optional) | If set to True, then it indicates to update the value provided for InteractionId. False indicates to update the value for all chats. For new and transferred chats, IsSingleChat is always set to True. |
| UpdateField | This is the field that you want to get the value from in Chat Data map. For example: ChatDisplayName in Chat Data map. |

Example

If you want to use the ChatDisplayName field in the Chat Data map to update the Chat Display Name in the chat UI for all chats, then the input is as follows. For example, if a user wants to use Chat Data map field, ChatDisplayName, to update Chat Display Name in the Chat UI for all chats, then the input is as follows:

```

InteractionId =
IsSingleChat = FALSE
UpdateField = ChatDisplayName // the field of ChatDisplayName in Chat Data map
  
```

UpdateRecord

This method is used to update an existing record and a specific business component. You must provide the row ID as input and the field value pairs to be updated. [Table 42](#) shows the input arguments for UpdateRecord.

Table 42. UpdateRecord Method: Input Arguments

| Input Argument | Description |
|-----------------------|--|
| BusObj | The business object name. |
| BusComp | The business component name. |
| Id | The row ID of the record to be updated. |
| Field: XXX | The fields to be updated; replace XXX with the field name. |
| Use Locale [optional] | A value of True or False indicates if the value must be formatted. |

[Table 43](#) shows the output PropertySet argument for UpdateRecord, which returns the row ID of the newly created record.

Table 43. UpdateRecord Method: Output Argument

| Output Argument | Description |
|-----------------|---|
| Id | The row ID of the newly created record. |

UpdateWithBCField

This method is used to update a field in the Chat Data map with the value in a business component field. The business component must be included in the business object component of the *Chat Related Data* business object. For the Service Request business component, there must be a link with Action. For other business components, there must be a link with Service Request. [Table 44](#) shows the input arguments for UpdateWithBCField.

Table 44. UpdateWithBCField Method: Input Arguments

| Input Argument | Description |
|--------------------------|--|
| InteractionId (Optional) | The value in this argument is the interaction ID that you want to update if IsSingleChat is set to True. The value in this argument is ignored if IsSingleChat is set to False. For new and transferred chats, IsSingleChat is always set to True and always provides the value for InteractionId that is passed from Oracle Contact On Demand data. |
| IsSingleChat (Optional) | If set to True, then it indicates to update the value provided for InteractionId. False indicates to update the value for all chats. For new and transferred chats, IsSingleChat is always set to True. |

Table 44. UpdateWithBCField Method: Input Arguments

| Input Argument | Description |
|------------------------|---|
| BusComp | The business component list that is added to the business object component in the Chat Related Data business object. For example: Service Request, Account |
| UpdateField | The field that you want to update in the Chat Data map. |
| UpdateValue (Optional) | The business component field that you want to get the value from. |

Table 45 shows the output arguments for UpdateWithBCField.

Table 45. UpdateWithBCField Method: Output Argument

| Input Argument | Description |
|-------------------------|---|
| HasSetForAll (Optional) | Indicates whether or not to set (or update) the value for all chats. If set to True, then all chats get the update value. |

Example

If you want to update ChatDisplayName in the Chat Data map with the Service Request Business Component Account field for all chats, then the Service Request Business Component must be included in the business object component in the Chat Related Data Business Object, and it must be linked with Action. The input is as follows:

```
Interactio nI d =
IsSi ngl eChat = FALSE
BusComp = Servi ce Request
UpdateFi el d = ChatDi spl ayName
Val ueFi el d = Account
```

UpdateWithBCFieldEx

This method is used to update the field in the Chat Data map with the value in a business component field. This method is typically used together with the [“UpdateChatDataFieldEx” on page 171](#). [Table 46](#) shows the input arguments for UpdateWithBCFieldEx.

Table 46. UpdateWithBCFieldEx Method: Input Arguments

| Input Argument | Description |
|--------------------------|---|
| InteractionId (Optional) | <p>The value in this argument is the interaction ID that you want to update if IsSingleChat is set to True. The value in this argument is ignored if IsSingleChat is set to False.</p> <p>For new and transferred chats, IsSingleChat is always set to True and always provides the value for InteractionId that is passed from Oracle Contact On Demand data.</p> |
| IsSingleChat (Optional) | <p>If set to True, then it indicates to update the value provided for InteractionId. False indicates to update the value for all chats. For new and transferred chats, IsSingleChat is always set to True.</p> |
| BusObj | <p>The business object, for example, Service Request.</p> |
| BusComp | <p>The business component name in the business object, for example, Service Request.</p> |
| QueryFields | <p>The Query Field list that is used to query the value in ValueField (for example, SR Number). You must provide the value in Chat Data for the query field. For example, provide the SR Number in Chat Data for SR Number in the business component field.</p> <p>The comma-separated field list indicates the field name list to use to query the business component.</p> <p>For query search specification, you must also define a corresponding key value pair. For example, if QueryFields is set to Id and SR Number, then a list of key value pairs must also be provided as follows:</p> <pre style="margin-left: 40px;">Id=Acti vi ty Id SR Number = SRNumber</pre> <p>Id and SR Number are the query business component field names. Activity Id and SRNumber are the corresponding Chat Data fields.</p> |
| UpdateField | <p>The field that you want to update in the Chat Data map.</p> |
| Value Field | <p>The business component field that you want to get the value from.</p> |

Example

You want to update ChatDisplayName in Chat Data map with the Service Request Business Component Account field for all chats, and you do not want to use the Chat Related Data Business Object in the method. For every business component field in QueryFields, you must provide the related Chat Data map field to give the query value. In this example, the QueryFields is the SR Number business component field, so you must provide the related SRNumber field in the Chat Data map, so that it can get and use the SRNumber field value as the QueryField value. The input is as follows:

```
Interactio nId =  
IsSingleChat = FALSE  
BusObj = Service Request  
BusComp = Service Request  
QueryFields = SR Number // the field of SR Number in Action BC  
SR Number = SRNumber // the field of SRNumber in Chat Data map  
UpdateField = ChatDisplayName // the field of ChatDisplayName in Chat Data map  
ValueField = Account // the field of Account in Action BC
```

Table 47 shows the output arguments for UpdateWithBCFieldEx.

Table 47. UpdateWithBCFieldEx Method: Output Argument

| Input Argument | Description |
|-------------------------|---|
| HasSetForAll (Optional) | Indicates whether or not to set (or update) the value for all chats. If set to True, then all chats get the update value. |

UpdateWithChatData

This method is used to update a field in the Chat Data map with the value in the Oracle Contact On Demand Chat Data field. Table 48 shows the input arguments for UpdateWithChatData.

Table 48. UpdateWithChatData Method: Input Arguments

| Input Argument | Description |
|--------------------------|---|
| InteractionId (Optional) | The value in this argument is the interaction ID that you want to update if IsSingleChat is set to True. The value in this argument is ignored if IsSingleChat is set to False. For new and transferred chats, IsSingleChat is always set to True and always provides the value for InteractionId that is passed from Oracle Contact On Demand data. |
| IsSingleChat (Optional) | If set to True, then it indicates to update the value provided for InteractionId. False indicates to update the value for all chats. For new and transferred chats, IsSingleChat is always set to True. |
| UpdateField | The field that you want to update in the Chat Data map. |
| Value Field | The Oracle Contact On Demand business component field that you want to get the value from. |

Table 49 shows the output arguments for UpdateWithChatData.

Table 49. UpdateWithChatData Method: Output Argument

| Input Argument | Description |
|-------------------------|---|
| HasSetForAll (Optional) | Indicates whether or not to set (or update) the value for all chats. If set to True, then all chats get the update value. |

Example

If you want to update ChatDisplayName in the Chat Data map with the Oracle Contact On Demand firstname field for all chats, then the input is as follows:

```

InteractionId =
IsSingleChat = FALSE
UpdateField = ChatDisplayName // the field of ChatDisplayName in Chat Data map
ValueField = firstname // the field of firstname in Chat Data map (CCA Data)
    
```

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