

Oracle Fusion Service

**How do I set up Oracle Fusion
Omnichannel Chat Service?**



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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

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Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 Where do I start?

Enable Chat Features

Implementing a chat system between an user and an agent involves several key steps to ensure seamless communication, efficient routing, and exceptional customer support.

This playbook will guide you through setting up the core components of your Fusion Chat service.

For help with configuring Digital Customer Service or Digital Assistant as an Agent, see [Help Center playbooks](#).

2 What's the Digital Engagement Channels Service?

Digital Engagement Channels Service

Digital Engagement Channels Service is a cloud-native platform with the following capabilities:

- **Chat and Real-time Dashboards:** Administrators and supervisors can monitor contact center performance.
- **Scalability and Resilience:** The service offers redundancy, disaster recovery, regional availability, elastic scalability, and observability.
- **Unified Management:** A centralized entry point for seamless service management, integration, extensibility, and enhancements.

3 Manage profile options for Omnichannel and Chat

Set Up Profile Options

This section covers the profile options you enable or disable for Omnichannel and Chat, along with some optional setups that can be done for your chat sessions.

Manage Omnichannel Profile Options

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. Select **Service > Communication Channels**.
3. In the **Show** drop-down list, select **All Tasks**.
4. Select **Manage Omnichannel Profile Options**.
5. View and edit Omnichannel profile options using the following table:

Omnichannel profile options

Profile Option	Description	Suggested value
SVC_ENABLE_OMNI	Enable the sending of work requests to Omnichannel for assignment to an agent.	Yes
SVC_OMNICHANNEL_BROWSER_NOTIFICATION_ENA	Used to enable real-time browser notifications.	Yes
SVC_OMNICHANNEL_DESKTOP_NOTIFICATION_ENA	Enable desktop toast notifications even when you're not actively viewing the application pages.	Yes
SVC_OMNI_DISABLE_WORK_ITEM_AVAILABILITY_SELECTION	Disables the option for agents to change their availability to handle work items on the Omnichannel toolbar.	○ None ○ All ○ Chat ○ Non-Real-Time Work
ORA_SVC_ENABLE_DEC_WITH_LIVEWINDOW	Enable the use of the Digital Engagement Channels chat with Live Window.	Value: No Note: This can be set to Yes for individual agents that will work using Classic Fusion. But all agents in the Redwood User Experience should have this profile option set to No.

Manage chat profile options

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. Select **Service > Communication Channels**.
3. In the **Show** drop-down list, select **All Tasks**.
4. Select **Manage Chat Profile Options**.
5. View and edit Chat profile options using the following table:

Chat profile options

Profile Option	Description	Suggested value
SVC_ENABLE_CHAT	Enable the Chat feature to make users available for chat and allow them to receive incoming chat requests.	Yes
SVC_CHAT_OFFER_NOTIFICATION_TIMEOUT_VALUE	Specify the seconds that lapse before the chat offer notification is automatically dismissed. The default number is 30 but the dismiss interval can be set between 5 and 285 seconds.	30
SVC_CHAT_TRANSFER_TO_QUEUE_ENABLED	Enable transferring to queue for the Chat agent.	Yes
ORA_SVC_CHAT_TRANSFER_TO_AGENT_ENABLED	Enable transferring to of a chat to another chat agent.	Yes
ORA_SVC_CHAT_CONFERENCE_WITH_AGENT_ENABLED	Enable a chat conference between agents.	Yes
SVC_CHAT_ANONYMOUS_ACCESS_ENABLED	Enable chat anonymous access for the end users	Yes Note: Set Anonymous Access to No if chat is only used for the Help Desk. If it's being used for other applications, such as Service Center, then it should be set to Yes.
SVC_CHAT_INLAYS_ACCESS_ENABLED	Enable access for chat inlays to get the bootstrap configurations.	Yes For more information, see How do I implement Embedded Service?
SVC_CHAT_CKEDITOR_ENABLE	Enable the CK Editor for the Chat agent.	Yes

Additional profile options

The following profile options are optional but might be helpful, depending on your business requirements.

Manage MCA profile options

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. Select **Service > Communication Channels**.
3. In the **Show** drop-down list, select **All Tasks**.
4. Select **Manage MCA Profile Options**.
5. View and edit MCA profile options using the following table:

MCA profile options

Profile Option	Description	Suggested value
SVC_MCA_SHOW_CONTACT_ON_WRAP_UP	Indicates whether to show the contact information during the wrap up process.	Yes
ORA_SVC_MCA_WRAP_UP_TIMEOUT	Specify the number of seconds before the wrap up timer expires and work capacity is released. The default value of 0 allows unlimited wrap up time. The recommended range is from 5 to 300 seconds.	Default value is 0.

Configure Call Flow Parameters

Use the Configure Call Flow Parameters task to specify whether a contact must be identified and validated or if a screen pop must be displayed. You can also use these settings to specify when and how a call wrap up must be displayed.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. Select **Service > Communication Channels**.
3. In the **Show** drop-down list, select **All Tasks**.
4. Select **Configure Call Flow Parameters**.
5. View and edit MCA profile options using the following table:

Call Flow Parameter option values

Profile Option	Description	Suggestion value
Contact Required	Used to require that a chat must have a contact.	Yes
Contact Verification	Used to require that a contact of a chat must be verified.	Yes
Screen Pop	Used to screen pop the appropriate page.	Yes
Wrap Up	Used to present a Wrap Up page to the agent at the end of a chat.	Yes

Profile Option	Description	Suggestion value
		Note: Oracle strongly recommends enabling wrap ups for chats if you're using Service Center to prevent the transcript from closing at the end of a chat.

Configure optional profile options

Now, you can review or change profile options accessed by performing the following steps. Note that these usually don't need to be changed.

1. In Setup and Maintenance, click the **Tasks** icon, and then click **Search**.
2. Search for and select **Manage Global Search Profile Options**.
3. Select the **Manage Global Search Profile Options** task.
4. View and configure the profile options listed in the following table:

Chat profile options

Profile Option	Description	Suggested value
SVC_OMNI_REINSTATE_WORK_ITEM_AVAILABILITY	When returning to the supported modules, it automatically reinstates the non-real-time channel availability groups for work items on the Omnichannel toolbar.	- None - None-Real-Time Work
SVC_CHAT_IDLE_TIMEOUT	The number of seconds after which a chat will be terminated if there's no activity. Zero disables the functionality. Except zero, the minimum value is 300. Default is 600.	600
ORA_SVC_OMNI_BROWSER_INACTIVITY_TIMEOUT	Profile option that allows administrators to set ADS timeout due to inactivity; this can be increased up to 8 hours (480). Change the number of minutes of browser inactivity before work assignment offers will end. The minimum default value is 30 minutes, and the maximum value can be up to 480 minutes.	30
ORA_SVC_OMNI_MARK_UNAVAILABLE_ON_BROWSER_INACTIVITY	Enables the system to mark agent unavailable for work after browser inactivity for the duration specified by ORA_SVC_OMNI_BROWSER_INACTIVITY_TIMEOUT.	No
ORA_SVC_QUEUED_REQUEST_DISCARD_SECONDS	Specify the queue time if no agents are available. If the value is 0, the chat will stay	1800

Profile Option	Description	Suggested value
	queued until the customer ends the request. The minimum is 120 and the maximum is 1800.	
ORA_SVC_OMNI_AGENT_SESSIONS_COUNT_INTERVAL	Change the interval number of minutes to look for other active browser sessions before marking a user offline. The maximum value can be up to 480 minutes.	60
ORA_SVC_MCA_GLOBAL_PRESENCE_ENABLED	Decides whether a customer has opted in for global presence across the application.	Yes Note: You can set this profile option at the site level.

4 Create chat agent resources

Create chat agent resources

Create your users who will be either ODA or live chat agents by following these steps:

1. From the Navigator, select **My Team**, then **Users and Roles**.
2. Click **Create (+)** to add a new user.
3. Fill in the basic user information, then use the following table to help with the rest of the required information.

Required information

Field	Entry
User Name	This entry will be the sign in name that's used.
Send user name and password	Deselect this option.
Person Type	Click the drop-down list and select Employee .
Legal Employer	Click the drop-down list and select the legal employer name.
Business Unit	Click the drop-down list and select the business unit.
Resource Role	Click the drop-down list and select the resource role, such as Customer Service Representative.
Autoprovision Roles	Select this option.

4. Click **Save and Close**.

Add more roles

You'll need to add Chat Agent role to all users who'll be chat agents accepting chat offers. Here's how you do it:

1. From the Navigator, select **Tools**, then **Security Console**.
2. Click **Users**.
3. In the text field, enter the user name of the chat agent your previously created.
4. Select the user, then click **Edit**.
5. Click **Add Role**.
6. In the search field, enter **Chat Agent**.
7. Select the **Chat Agent** role (ORA_SVC_CHAT_AGENT_ABSTRACT).
8. Click **Save and Close**.
9. Click **Reset Password**.
10. Select **Manually change the password**.
11. Enter a new password (use at least 8 characters and 1 number).
12. Click **Reset Password**.

5 Create queues

Create queues and other resources

Service Center queues are a critical component of the service management framework. You use them to organize, prioritize, and route work to the appropriate agents or teams based on predefined rules and criteria.

Oracle provides a default queue which will be used during assignments if you haven't defined any assignment rules. However, it's recommended you create logical groupings of similar skilled agents using your own queues.

1. On the application homepage, select **Service**, and then **Queues**.
2. Click **Create Queue**, and then do the following:
 - a. Enter your queue name, such as **Chat <Product> Support**.
 - b. Make sure **Activation** is enabled.
 - c. Set Distribution to **Automatic (Push)**.
 - d. Click **Save and Continue**.
 - e. On the Summary page, click the **Resources** tab.
 - f. Click **Add Resources**.
 - g. Enter the user information for your chat agent or agents.
 - h. From the Search Results, select your user or users.
 - i. Click **Apply**, then click **OK**.

6 Overview of the Fusion Queue dashboard

About the Fusion Queue dashboard

Use the Fusion Queue dashboard to view key performance indicators and real-time information on the status and efficiency of your queues.

Here's some common metrics you might see on the dashboard:

Queue performance metrics

- **Active Queues.** An indicator showing the number of enabled queues and their distribution of work (such as automated assignment to an available engineer or a manual assignment to an agent).
- **Queued Work.** The number of interactions waiting to be assigned to an agent.
- **Assigned Work.** The number of interactions assigned to agents.
- **Abandoned Chats.** The number of customer-initiated chats that ended before an agent could respond.

Agent performance metrics

- **Agents Available.** The number of agents currently associated as a queue resource.
- **Agent Capacity.** The real-time and non real-time capacity available for agents in your queue.

7 Chat Routing Rules

Create Chat Routing Rules

To route chats to your agents, you must define some routing rules so chat requests are offered to an agent who's skills best match the question or issue.

1. From Setup and Maintenance, click the **Tasks** icon, and select the **Search** link.
2. Search for and select **Manage Service Assignment Rules**.
3. From the **Category** drop-down list, select **Generic Queuing Rules**

Note: If you're using Help Desk or Internal Service Request, select that generic category rule.

4. Click the **Add Row** icon (+) to create a new Rule Set.
5. Enter a name for your rule set along with a description. For example, Chat Support to Agent.
6. Click **Save**.
7. In the **Rules** section, click the **Create(+)** icon.
8. Add a rule name and a description. For example, Chat Queue Rule.
9. In the **Conditions** section, click the **Add Row (+)** icon.
10. Click the **Object** drop-down list and select **Any**.
11. Click the **Attribute** drop-down list, and select the value that you'll use to route a chat to an agent. For example, Product, Category, and so on).
12. Click the **Operator** drop-down list and select **Equals**.
13. In the **Value** column, click the **Search** icon and enter of select a matching value for the attribute you created.

Note: you can add more conditions to your rule, but remember to keep your rule unique. If your rules aren't unique, you might have unexpected chat assignments.

14. In the Action: Assign Queue section, click the **Select and Add (+)** icon and do the following:
 - a. In the Select and Add dialog box, click the **Attribute** drop-down list and select **Name**.
 - b. In the Search field, enter the name of the queue that you want to route your chats to.
 - c. Click **Done**.
15. Click **Save and Close**.
16. Click **Save and Publish**.

You'll get a message that the update job is queued. Use the Refresh button to track progress until your rule has been published.

17. Click **Save and Close**.

8 Digital Engagement Channels Service Supervisor Dashboard Console

About the Digital Engagement Channels Service Supervisor Dashboard Console

The Engage Supervisor dashboard gives supervisors insights into the performance of queues and agents. The console offers real-time visibility into key performance metrics, such as average handling time, queue wait times, and agent productivity.

Supervisors can use it to monitor the status and efficiency of multiple queues immediately, allowing them to identify bottlenecks, allocate resources effectively, and ensure best customer service.

The dashboard also features detailed agent performance tracking, enabling supervisors to assess individual agent productivity, identify top performers, and pinpoint areas for improvement.

Note: Supervisor dashboard users must be provisioned with one of the Engagement Channel roles.

For more information, see the [Enable Supervisor Dashboard](#) playbook on Oracle Help Center.

9 OTBI Reporting

Omnichannel Reporting

For more detailed analysis, Fusion Service also comes with standard Omnichannel reports that can be changed using the Omnichannel Events Subject Area in OTBI.

The following table shows some reports provided by Oracle that you can enhance using the OTBI subject areas:

Available reports

Report Name	Report Description
Omnichannel Agent Assignments By Interval	Gives you a count of Agent work assignments broken down by Channel. You can filter based on Agent, Queue, Channel and time frames.
Omnichannel Agent Assignments By Summary	Provides a summary count of Agent work assignments for chosen Agent, Queue, Channel and time frames.
Omnichannel Agent Assignments By Utilization	Provides Agent utilization details for chosen Agent, Queue, Channel and time frames.
Omnichannel Agent Output Detail	Shows you work assignments broken down by Agent. You can filter based on Queue, Agent, Channel, Offer acceptance and time frames.
Omnichannel Assignments By Interval	Provides a count of work assignments broken down by Channel. Users can filter based on Channel and time frames.
Omnichannel Assignments By Summary	Provides a summary count of work assignments broken down by Channel. Users can filter based on channel and time frames.
Omnichannel Output Detail	Gives you a list of work assignments broken down by Channel. You can filter based on Queue, Channel, Offer and time frames.
Omnichannel Queue Assignments By Interval	Gives you a count of work assignments in a Queue. You can filter based on Queue, Channel and time frames.
Omnichannel Queue Assignments By Summary	Provides a summary count of work assignment to a Queue. Users can filter based on Queue, Channel and time frames.
Omnichannel Queue Output Detail	Gives you a list of work assignments broken down by Queue. Users can filter based on Queue, Channel, Offer and time frames.
Omnichannel Agent Availability by Queue and Channel Type	Displays agent available and unavailable metrics grouped by channel type for all queues. You can see a detailed report (Work Type Handling) by selecting any of the counts.
Omnichannel Agent Work Offer, Acceptance and Availability by Queue	For a given queue the report shows the number of work units offered, the number accepted, the number declined against availability. That is, are agents declining work even though they're available.

Report Name	Report Description
Omnichannel Work Type Handling - Drill Report - 1	A drill down report from the Omnichannel Agent Availability by Queue and Channel Type report which shows agent available and unavailable metrics grouped by channel type for all queues at the agent level. Drillings down shows further classification into Accepted, Declined and Timed Out work.
Omnichannel Work Type Handling - Drill Report - 2	Drill down report from Omnichannel Work Type Handling - Drill Report - 1. Shows further classification into Accepted/Declined/Timed Out work.
Omnichannel Abandoned Chat Requests	Gives you a list of chat request offers on Digital Engagement Channels that are terminated or abandoned before being assigned to an agent. You can filter based on Queue and time frames.

10 Troubleshooting

Tips and Troubleshooting

The chat icon isn't displayed in my toolbar

1. Confirm that the Chat Agent role has been provisioned to your user via the Security Console.
2. Confirm the `ORA_SVC_ENABLE_DEC_WITH_LIVELWINDOW` for your site or user (if you have a blend of service users in the classic UI and the Redwood User Experience) is set to No.

Service Center isn't enabled

Search and enable the `ORA_SVC_ENABLE_MSI_WORKSPACE` profile option in Setup and Maintenance. Use the Manage Global Search Profile Options tasks and enter the enter the profile option code.

Chat Smart Text messages aren't displayed

- Make sure your smart text messages have been created within the Chat domain.
- Make sure no value is included in the `ORA_SVC_MCA_SMART_TEXT_URL` profile option. In Setup and Maintenance, use the Manage Global Search Profile Options task and enter profile option code.

Chat users are timing out due to inactivity

You specify the time a chat session is terminated due to inactivity using the `SVC_CHAT_IDLE_TIMEOUT` profile option. In Setup and Maintenance, use the Manage Chat Profile Options task and enter the profile option code. If this value is set to 0, the setting is disabled. To enable it, add a value of 300 or more seconds. The default setting is 600 seconds.

Chat users are being marked absent.

The Absent Interval and Retry Count parameters are used together. These settings allow the chat service to wait for the polling requests from the desktop (agent) or chat widget (customer-facing) to respond after a temporary disconnect (network outage, accidentally closing a browser tab or window, navigating away from Fusion Service, and so on).

When the long polling call, `getMessages` operation stops for a defined amount of time (`ABSENT_INTERVAL`), the chat service waits to allow the agent or consumer to reconnect for X duration of time (identified by the `ABSENT_INTERVAL * RETRY_COUNT`). On the first timeout, the agent is put in an ABSENT state. This is a suspended state where any ongoing chat is still remain with that agent, and new chats aren't routed. This allows your agents to resume the chats once they return from HCM (for example) instead of getting logged out and rerouting the customers.

Recommendations:

- Retry count should not be less than 2

- You can adjust the Absent Interval values, but keep in mind the trade off between the agent's ability to reconnect to ongoing chats versus chats getting rerouted (back of the queue) to seek another available agent. Also, agents must make themselves available for chat whenever the system marks them as offline.