Oracle CX Service

Administering Live Experience

December 2023

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Author: B2C Service Documentation

Contents

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

Use help icons to access help in the application. 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.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

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 Licensing Information

Oracle Live Experience Demo App End-User License Agreement for Android

Last updated 22nd May 2019

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"Oracle" refers to Oracle America, Inc., for and on behalf of itself and its subsidiaries and affiliates under common control. "You" and "Your" refer to the individual or entity that has agreed to use the program (as defined below) in accordance with this Agreement. "Device" refers to the compatible product running the Android operating system that You own or control. "Program" refers to the software application provided with this Agreement and any program documentation provided by Oracle and licensed to You subject to the terms and conditions of this Agreement. "Associated Product" refers to the separately licensed product or cloud service offering associated with the Program which You are an authorized user of pursuant to the terms of the Associated Product Agreement. "Associated Product Agreement" refers to the Oracle license or services agreement for the Associated Product.

This Agreement is governed by and construed in accordance with the substantive and procedural laws of the United States and the State of California, except that body of California law concerning conflicts of law. You and Oracle agree to submit to the exclusive jurisdiction of, and venue in, the courts of San Francisco or Santa Clara counties in California in any dispute arising out of or relating to this Agreement. The United Nations Convention on Contracts for the International Sale of Goods and the Uniform Computer Information Transactions Act do not apply to this Agreement.

Introduction

Once installed and properly configured on Your Device, the Program will enable You to use Your Device to access the Associated Product as permitted by the Associated Product Agreement. Your use of the Program and the Associated Product is subject to the terms referenced herein, including the terms of the Associated Product Agreement.

License

Subject to the terms set forth in this Agreement, Oracle grants You a nonexclusive, nontransferable, nonsublicensable, revocable, limited right and license to install and run the Program on Your Device solely in connection with Your authorized use of the Associated Product.

Your use of the Associated Product is governed by the terms of the Associated Product Agreement. Your right to use the Program will cease upon the earlier of (i) the expiration, termination or suspension of the Associated Product Agreement, or (ii) the expiration, termination or suspension of Your status as an authorized user of the Associated Product. Oracle may audit Your use of the Program. You are not permitted to use the Program for any purpose other

than in connection with Your authorized use of the Associated Product. You agree to comply with any applicable third party terms when using the Program.

Consent To Use Location-Based Services and Data

The Program may contain or use location-based services. If You enable, use or access such location-based services in connection with the Program, You hereby consent to the collection, transmission and use of Your location data by the Program. Information about the Program's collection and use of location data will be specified in the Program's About section; such use may include verifying or otherwise recording your location for the purposes specified in the Data Collection and Privacy section below.

If the Program provides real-time location or route guidance, YOU ASSUME ALL RISKS ASSOCIATED WITH YOUR USE OF SUCH REAL TIME LOCATION DATA OR ROUTE GUIDANCE. LOCATION DATA MAY NOT BE ACCURATE.

Data Collection and Privacy

The Program may collect information about or from Your use of the Program, including information You provide directly or through automated means, such as geolocation (only if You choose to enable location-based services), Program usage, time stamp, Device and operating system identification, login credentials, device locale, or other information as outlined in Oracle's applicable Privacy Policy, available at www.oracle.com/us/legal/privacy/index.html. Images, audio, or video may be captured and uploaded in the event the Associated Product provides such functionality. To the extent the Program enables authentication services, the Program may also collect information on the security posture from Your Device such as device lock status and root status.

If You provide Oracle with personal information under this Agreement, Oracle will comply with the Oracle Privacy Policy, which is available at www.oracle.com/legal/privacy/privacy-policy.html. The Oracle Privacy Policy is subject to change at Oracle's discretion; however, Oracle changes to the Oracle Privacy Policy will not materially reduce the level of protection provided to such personal information under this agreement. Oracle will implement and maintain appropriate physical, administrative and technical safeguards designed to protect the security, confidentiality, and integrity of any personal information You provide to Oracle under this Agreement within its control.

To the extent that Oracle receives information in relation with its provision of the Associated Product or Program, Oracle may use this information for purposes specified in the applicable Privacy Policy, such as for providing the services specified under the Associated Product Agreement, enabling features or content based on or otherwise recording Your location, identity management, security, auditing, marketing, and product improvement.

The Program may provide You with the ability to connect with non-Oracle websites, services, and applications, which may allow the third party to collect or share information about Your use of the Program. Further, if you use push messaging in connection with the Program, independent third parties associated with the push messaging service may use the messaging information to provide, maintain, protect, and improve their services, subject to the privacy policies of those third parties. All such third party connections are beyond Oracle's control. Oracle encourages You to check the privacy policies and terms of use of any non-Oracle connections before using them or providing Your personal information to them.

Any data collected about or from Your use of the Program may be shared with, transferred to or accessed or used by the licensee of the Associated Product. Any such access or use of data by, or further transfer from, the Associated Product licensee is solely between You and such entity. For further information regarding how your information is used by the such entity, or for any questions, concerns or requests You have with respect to such use, please consult directly with such entity or refer to its privacy policies and/or Your agreement(s) with it.

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Export laws and regulations of the United States and any other relevant local export laws and regulations apply to the Program. You agree that such export control laws govern Your use of the Program (including technical data) and You agree to comply with all such export laws and regulations (including "deemed export" and "deemed re-export" regulations). You agree that no data, information and/or Program will be exported, directly or indirectly, in violation of

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give Oracle sole control of the defense and any settlement negotiations; and

give Oracle the information, authority, and assistance it needs to defend against or settle the claim.

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You may terminate this Agreement by destroying all copies of the Program. Your right to use the Program shall end immediately if You fail to comply with any of the terms set forth in this Agreement, or as otherwise set forth in the "License" section above, in which case You shall destroy all copies of the Program. Except as expressly set forth in the Associated Product Agreement, the terms and conditions governing the Associated Product Agreement are not affected by the termination of Your right to use the Program under this Agreement. The provisions of this Agreement that by their nature continue shall survive any expiration or termination of this Agreement.

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You agree that this Agreement is the complete agreement pertaining to the subject matter hereof (including references to information contained in a URL or referenced policy) and this Agreement supersedes all prior or contemporaneous written or oral agreements or representations existing between You and Oracle with respect to such subject matter. You acknowledge that the terms of this Agreement (including the license for the Program) are separate from the terms governing the Associated Product, and that this Agreement does not include the grant of any right to use the Associated Product. If any term of this Agreement is found to be invalid or unenforceable, the remaining provisions will remain effective. Oracle's failure to enforce any right or provisions in this Agreement will not constitute a waiver of such provision, or any other provision of this Agreement. If You are located in the province of Quebec, Canada, the following clause applies: The parties hereby confirm that they have requested that this Agreement and all related documents

be drafted in English. Les parties ont exigés que le présent contrat et tous les documents connexes soient redigés en anglais.

Acknowledgments

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Oracle Live Experience Demo App End-User License Agreement for iOS

Last updated 22nd May 2019

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notify Oracle promptly in writing, not later than 30 days after You receive notice of the claim (or sooner if required by applicable law);

give Oracle sole control of the defense and any settlement negotiations; and

give Oracle the information, authority, and assistance it needs to defend against or settle the claim.

If Oracle believes or it is determined that the Program may have violated a third party's intellectual property rights, Oracle may choose to either modify the Program to be non-infringing (while substantially preserving its utility or functionality) or obtain a license to allow for continued use, or if these alternatives are not commercially reasonable, Oracle may end the license for, and require return of, the Program and refund any fees You may have paid for it. Oracle will not indemnify You if You alter the Program or use it outside the scope of use identified in the Program's user documentation or if You use a version of the Program which has been superseded, if the infringement claim could have been avoided by using an unaltered current version of the Program. Oracle will not indemnify You to the extent that an infringement claim is based upon any information, design, specification, instruction, software, data, or material not furnished by Oracle. Oracle will not indemnify You to the extent that an infringement claim is based upon the combination of the Program with any products or services not provided by Oracle. Oracle will not indemnify You for infringement caused by Your actions against any third party if the Program as delivered to You and used in accordance with the terms of this agreement would not otherwise infringe any third party intellectual property rights. You and Oracle acknowledge that Apple will not be responsible for the investigation, defense, settlement or discharge of any third party claim that the Program or Your possession and use thereof infringes that third party's intellectual property rights. This section provides Your exclusive remedy for any infringement claims or damages.

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Last updated 4th June 2018

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2 Getting Started

Overview of Live Experience

Explore the many ways you can engage your customers with just-in-time communication by adding Oracle Live Experience to your web pages and mobile apps.

By adding Live Experience to your web pages and mobile apps, you allow your customers to initiate live audio and video conversations when it's convenient for them. You get to control which pages of your site the Live Experience widget appears on, what its greeting message is, and what capabilities, features, and channels are available to your customers and associates.

Using the Live Experience Admin Console, you begin by creating an engagement scenario. The engagement scenario determines the Live Experience communication features and capabilities that are available to your associates and your customers. You can add the same engagement scenario to multiple pages, or you can add different engagement scenarios to different pages. See *Overview of Engagement Scenarios*.

You're in control when it comes to determining what digital channels you want to use, and what data you would like to gather from customers. You have complete flexibility to initiate engagements with audio, video, or screen share channels, and you can choose upgrade and downgrade paths for both associates and customers as well.

In addition, you can easily define any context attributes you like using the Live Experience Admin Console, and you can choose whether those context variables, which require only a bit of simple coding to initialize, are displayed in the Live Experience Associate Desktop.

Let's look at some of Live Experience's communication features.

- Engage Customers with Live Experience Audio Calls.

  An audio engagement scenario provides your customers and your associates with a live two-way audio call. Many customer-support issues can be solved with a simple two-way audio call. Audio engagements can be initiated in different ways, depending on your business needs. By default, a customer can tap or click the Live Experience widget, thus initiating an audio call when it's convenient for them. You can also configure Live Experience to allow your associates to make outgoing audio calls, either using an online PSTN (Public Switched Telephone Network) service, or using VoIP (Voice over Internet Protocol) to a Live Experience-enabled mobile app. See *Engage Your Customers by Calling Them Directly*.

  You can add escalation or upgrade options to your audio engagement scenario to permit screen sharing or two-way video. After being connecting to an associate, your customers have access to typical audio call features in an unobtrusive interface, without any additional coding on your part.

- Engage Customers with Video Calls.

  A video engagement scenario provides your customers and your associates with a live, feature-rich, one- or two-way video call. Video calls are a great way to solve more advanced customer-support issues. In some cases, video calls can replace the need to dispatch a support technician, saving the customer time and saving you money. Video engagements can be initiated in different ways, depending on your business needs. By default, a customer can tap or click the Live Experience widget, thus initiating a video call when it's convenient for them. By default, an associate can start a meeting and invite a customer to join it. The meeting engagement scenario is a two-way video call. You can also configure Live Experience to allow your associates to call customers through your Live Experience-enabled mobile app.

- Engage Customers with Screen Sharing.

  A screen-sharing engagement scenario provides your customers and your associates with a live call displaying what the customer can see on their screen. Screen-sharing engagements are a great way to solve issues the customer might be having with online store purchases or completing some kind of web form.

- Annotate Your Visual Engagements

  Your customers and your associates can use the annotation tool when they are on calls together to highlight important things on the screen. The annotation feature is automatically enabled during screen-sharing and video calls. During a video call, the annotation tool is available only to associates. During a screen-sharing engagement, the annotation tool is available to customers and associates. To make annotating video calls easier, associates can temporarily freeze the video stream so that they can annotate a still image. See *Engage Your Customers Visually with Annotations*.

  Your customers activate annotation by clicking or tapping the pencil icon on the widget. Your associates activate annotation by clicking the pencil icon in the corner of the call window, and they can freeze a video stream by clicking the camera icon next to the pencil icon.

  Whether the annotation is made by the associate or the customer, the resulting notation is shown to both parties.

- Engage Your Customers with SMS Conversations.

  You can configure Live Experience to handle SMS conversations. You can allow your associates to send SMS messages, and to send and receive SMS messages. In the Associate Desktop, the Conversations interface allows associates to manage multiple concurrent conversations. Using SMS is a great way to send a customer a meeting URL.

- Engagement Upgrade Options

  You can configure your engagement scenarios with features that your customers and associates can use as they need. For example, you can design an engagement scenario to start as an audio call, but allow the associate to request that the engagement be upgraded to a two-way video call.
  - For your customers, specify whether they can voluntarily share their camera or their screen with the associate.
  - For the associate, specify whether they can voluntarily share their camera or screen with the customer.
  - For the associate, specify whether they can ask the customer to share their camera or their screen.

    When an associate, in the Associate Desktop, clicks the button asking the customer to share either their camera or their screen, the customer is presented with a dialog asking to grant the necessary permission.

  In this way, even if an engagement scenario starts as an audio-only call, you can plan to give your associates and customers access to advanced digital tools to deal with a great range of business scenarios.

- Gather Data that's Important to You.

  A key advantage of engaging with customers directly within your website or mobile app is the ability to leverage context customer data. Armed with context information, you can then determine the best way to engage with the customer, and you can then route the customer to the exact associate equipped to best handle their issue. The relevant context data is relayed to the associate, enabling them to engage the customer in the most efficient and effective way.

  You can gather virtually any data, or context attributes, you like, whether it's system information that Live Experience gathers automatically, metadata from your own web page or app, or account information from your customer database. You can then use that data to define engagement scenario details, routing rules,

and determine what information is presented to your associate. When a customer initiates a call, the context attributes you've defined are relayed by Live Experience directly to the associate.

See *How You Use Routing Rules to Get Customers to the Right Associates on the Right Teams*.

Live Experience System Requirements

Live Experience is easy to use and requires technologies that are easy to obtain.

Oracle Live Experience Associates using the Associate Desktop need:

- Google Chrome, Mozilla Firefox, Microsoft Edge (version based on Chromium), or Safari on a laptop or desktop computer
- Microphone and speakers or a headset and a webcam, to take video calls

Associates who want to access the Associate Desktop on a mobile device need the Oracle Mobile Associate app on their Android device, Google Chrome on their Android device, or Safari on their iOS device.

To join a Live Experience meeting, customers need a microphone, speakers or a headset, and a webcam if video calls are used, and one of the following:

- An up-to-date version of the Live-Experience enabled iOS or Android mobile app to use the Live Experience widget, or
- Google Chrome on their Android device, or Safari on their iOS device, or
- Google Chrome, Mozilla Firefox, Microsoft Edge (version based on Chromium), or Safari on a laptop or desktop computer

Live Experience administrators using the Admin Console need Google Chrome, Mozilla Firefox, or Safari on a laptop or desktop computer.

System administrators might need to configure firewall settings on the network to allow outgoing connections to the Live Experience TURN servers. On the proxy or firewall used by your company, system administrators open an outgoing connection for "`*.live.oraclecloud.com`" or "`*.emea.live.oraclecloud.com`" on ports 443, 5349, and 3478.

Keep your browser, laptop or desktop, and mobile devices up to date to access the best Live Experience features.

The Live Experience Associate Desktop periodically checks your audio and video devices and settings to ensure that they are working properly.

Set Up Your Initial Password

After receiving your invitation to Oracle Live Experience, your first task is to set up your password.

1. Enter your user name.
   Your email address from the invitation is your user name.
2. Enter your password and confirm it by entering it again in **Retype Password**.
3. Click **Done**.

When you click Done, you are accepting the terms of the trial agreement for Live Experience. To read the agreement, click **Trial Agreement**.

Change Your Password

Changing your Live Experience password is simple.

1. In the Admin Console, click your user name.
2. Click **Change Password**.
3. Follow the instructions on the screen to change the password.

You will receive an email acknowledging that you've changed your password.

> **Note:** If you've enabled the IDCS SSO integration, you can change the password only through the IDCS admin console. See *Change and Manage Your Passwords.*

Get Started with Oracle Live Experience

This high-level overview describes all the tasks you need to complete to set up Oracle Live Experience for the first time, and gives you links to detailed information about each configuration task.

You configure your Live Experience account using the Admin Console.

1. Go to one of the following:
   - `https://live.oraclecloud.com/ui?tenant=your_tenant_name`
   - or, for EMEA customers,

     `https://emea.live.oraclecloud.com/ui?tenant=your_tenant_name`
2. Enter the email address and the password you received in your welcome email.

   The Get Started page lists the configuration tasks that you need to complete to get going with Live Experience.
3. Click the link to begin each task. A green check mark appears next to each task after you complete it. Tasks include:
   - Configure a Security Encryption Key: Activate encryption to secure your sensitive data, like customer-engagement recordings. You need to decide whether to store encryption keys with Oracle Live Experience, which is easy, or to keep them on your site, which is more advanced but recommended. See *Activate Your Encryption Key*.
   - Configure your Application: Configure your Oracle Live Experience application and create a client secret. After you've registered your application, the Recording tab in this section lets you choose the types of engagements that you want to record. See *Manage Your Applications*.
   - Add Users: In the User's pane, you can add Associates, who will interact with end users; and Administrators, who will be able to modify system settings for Oracle Live Experience. As an administrator, you can manage these accounts after you've created them. You can also group associates into teams who perform similar roles. See *How You Manage Users*.
   - Add Oracle Live Experience to Your Application: Add Oracle Live Experience features to your iOS, Android, or web-based JavaScript application with Live Experience. Click the link on the Get Started screen and then

click the iOS, Android, or JavaScript link at the top of the screen to access the instructions for integrating each type of application. See *Developing Live Experience*.

The Service Overview Dashboard

Learn about the Service Overview home screen in the Oracle Live Experience Admin Console.

The Service Overview is the home screen of the Admin Console. It displays a selection of real-time data and metrics about your Live Experience tenancy on a single screen, including critical data regarding engagements; engagement queue statistics; and associate activity. If you haven't completed the initial configuration steps, the Service Overview displays Get Started tasks to help you set up your Live Experience tenancy.

The dashboard provides a metric overview of real-time activity for all your tenancy's applications. The data refreshes every 30 seconds but you can manually refresh the display by clicking the Refresh icon next to Last Update in the upper right side of the screen. See *View Live Experience Reports* for more detailed reporting data and information.

Monitor important metrics at a glance:

- The Engagements section gives you information about engagements. By keeping an eye on the number of engagements throughout the day, you can monitor the volume of interactions your associates are handling. The volume information can help you quickly react to spikes or drops in customer activity, and scale up or down as required.
- The Queue section gives you information about your customers. When your customers need to wait too long, they may abandon engagements. The Queue panel shows you critical team response data that can indicate resourcing bottlenecks or training issues.
- The Associate Activity section gives you information about your associates, helping you to determine whether you have enough associates to handle the current number of incoming engagements. This section tells you about the current number of associates online, associates who are on a call, and associates who are waiting for a call. You probably want to have a reasonable ratio of associates on call to associates available so that you're servicing your current customers efficiently, but also have some availability for engagement spikes.

3 Configuring a Security Encryption Key

Activate Your Encryption Key

Oracle Live Experience offers two encryption key management options for securing your sensitive data.

By default, Live Experience manages server-side encryption keys on your behalf. We recommend, though, that you manage your own encryption key. See *Create a Custom Encryption Key*. Follow these steps only if you choose the default Live Experience encryption.

1. Click **Oracle Encryption Key**.
2. Click **Confirm**.
3. Click **OK** in the confirmation window.

Create a Custom Encryption Key

A custom encryption key is a 256-bit Advanced Encryption Standard (AES) key that you create.

Live Experience security configuration is provisioned with an RSA public-private key pair in which the private key is encrypted using the key that you create. You must configure your own tenant key resource (TKR) to store your key. Live Experience will access the key using a RESTFUL API and then use it to encrypt your data.
You can create your own 256-bit AES key or you can use a REST API to generate one. The REST API only generates the key and does not store it. You can generate a key as many times as you need using one of the following API operations:

- `GET https://live.oraclecloud.com/tenant/api/keys/Tenant_Name/generate/tenantKey`
  or, for EMEA customers,
- `GET https://emea.live.oraclecloud.com/tenant/api/keys/Tenant_Name/generate/tenantKey`

where Tenant_Name is your organization's name.

1. On the Security screen, select **Custom Encryption Key**.
2. Next to Key URL, enter a fully qualified URL for the location of your custom encryption key.
   Live Experience sends a POST request to the entered URL. The TKR adds the payload containing the URL and key and sends a POST to Live Experience. Example payload:

```
Authorization: JWT
Payload: {
"url": "http://yourcompany.com/keys",
"oldKey": "",
"newKey": "59v/2Mp5j4gU0|NYppOaGIL4mgSYdInQQrgPmmSfQa8="
}
```

3. Click **Confirm**.
   A confirmation message acknowledges that your custom encryption key will be used to encrypt your data.
4. Click **Close**.

Results:

In the future, the screen displays the dates on which the key was created and last modified.

Update Your Encryption Key

You can update the key you created and the location of the key.

If you are changing the key, the PUT request must contain both the old key and the new key. The existing private RSA key is unencrypted and re-encrypted. The rest of the data is unchanged.

1. On the screen that displays your encryption key, click **Update Key**.
2. In the text field for **Key URL**, enter the fully qualified URL for the new key.
3. Click **Update Key**.

Results:

Live Experience retrieves the current TKR URL and sends a PUT request to the current TKR. The TKR adds a payload containing the updated URL and the old and new keys and sends a PUT to Live Experience. Example payload:

```
Authorization: JWT
Payload: {
"url": "http://yourcompany.com/keys",
"oldKey": "59v/2Mp5j4gU0|NYppOaGIL4mgSYdInQQrgPmmSfQa8=",
"newKey": "FJM27+g67fBjb1kzE3|+plWqv|xmdVtZwUFuKk7Zjzi="
}
```

Delete Your Encryption Key

After you delete your security key that you created, your information will be encrypted with the default Live Experience key.

1. On the screen that displays your encryption key, click **Delete Key**.

   Live Experience retrieves the current TKR URL and sends a DELETE request to the current TKR. The TKR adds a payload containing the URL and the existing key and sends to Live Experience. Example payload:

   ```
   Authorization: JWT
   Payload: {
   "url": "http://yourcompany.com/keys",
   "oldKey": "FJM27+g67fBjb1kzE3|+plWqv|xmdVtZwUFuKk7Zjzi=",
   "newKey": ""
   }
   ```

2. Read the cautionary text in the confirmation window. If you are certain you want to continue with the deletion, click **Delete Key**.

4 Managing Users and Teams

How You Manage Users

You can create user accounts and manage users in Oracle Live Experience.

Use the different roles in Live Experience to grant and control access to Live Experience interfaces, assign skills, and add users to teams for routing rules.

> **Note:** If you've enabled the IDCS SSO integration, you can manage users only through the IDCS console. For details, see *Enable Oracle Identity Cloud Service (IDCS) Authentication.*

Add or Modify a User

You can add or modify users as a Live Experience administrator. This topic applies to you only if you aren't integrated with IDCS.

> **Note:** If you've enabled the IDCS SSO integration, you can only view users in the Live Experience Admin Console. You can manage users only in IDCS console. For details, see *Enable Oracle Identity Cloud Service (IDCS) Authentication* and *Add Users, Assign Policies and Roles*.

1. From the Admin Console navigation menu, click **Users**, then click the Users tab.
2. Click **Add New User** to create a new user.
3. Enter the user's name in the **Name** field or search for an existing user by name or email address in the **Search** field.
   The name in the title automatically updates to match the value you enter. To modify an existing user, click the pencil icon.
4. Enter the user's email address.
   This email address serves as the user's username when logging into Live Experience. You can't change the email address once you create the user because the email address doubles as the username. If a user's email changes, you need to create a new account for them.
5. Select one or more user roles for this account.
   See *User Roles* for more information. Only accounts with the Associate role can be assigned to teams or be given skills. If you want to modify an account so that the user is no longer an associate, you need to remove the teams and the skills first.
6. Add the user account to one or more teams created on this Live Experience tenant.
   Assigning users to teams is helpful for setting up advanced routing rules. See *How You Manage Teams*.

7. Assign skills to this user account.

   Assigning skills to users is helpful for setting up advanced routing rules. See *Manage Skills* for more information.

   a. Enter the skill value to indicate the user's proficiency at each skill, on a range from 1 to 10.
   b. Click the **X** icon to remove a skill from a user account.
   c. To add a skill to an account from the list of skills created for your Live Experience tenant, click **Add New Skill**.

8. To delete a user, click the trash icon.

Related Topics

- How You Use Skills to Route Your Customers to the Right Team

User Roles

Using roles, Live Experience distinguishes between the following kinds of users: associates, supervisors, and administrators.

- An associate has access to the Live Experience Associate Desktop to engage with customers, either by answering incoming engagements that are routed to them, or by directly calling or engagement with customers.
- A supervisor has limited access to the Live Experience Admin Console. Supervisors can view the Service Overview Dashboard, search for engagement details, and play back recorded engagements.
- An administrator has complete access to the Live Experience Admin Console. Administrators can enable and disable features, create and modify users and teams, create and modify engagement scenarios, view the Service Overview Dashboard, view reports, search for engagement details, and play back recorded engagements.

When assigning roles, assign a user the role with the minimum level of privilege required for them to do their job effectively. You should end up with only a handful of administrators, a number of supervisors that represent your organization's managerial structure, and most of your users assigned only the Associate role.

You can grant multiple roles to your users to give them access to multiple interfaces.

User Roles

Role or Role Combination	Live Experience Feature Access
Administrator	Complete access to Admin Console. Can't be assigned to teams.
Supervisor	Access only to service dashboard, reporting dashboard, and engagement history in the Admin Console. Can't be assigned to teams.
Associate	Complete access to the Associate Desktop.

Role or Role Combination	Live Experience Feature Access
	Can be assigned to teams.
Administrator and Associate	Complete access to the Admin Console as well as the Associate Desktop. Can be assigned to teams because of the Associate role.
Supervisor and Associate	Access only to service dashboard, reporting dashboard, and engagement history in the Admin Console, and access to the Associate Desktop. Can be assigned to teams because of the Associate role.

Note: Several possible combinations aren't listed in the table above because they're irrelevant. For example, there's no reason to have a user with both administrator and supervisor roles, since the administrator role already has full access to the Admin Console.

How You Manage Teams

Having teams allows you to group users so that they can share a call queue.

You can use teams in conjunction with skills and routing rules to specify how your customer engagements are routed to associates. For example, you might want to create teams of users that can service different customer languages, or you might want separate teams for separate product lines.

Combined with skills and routing rules, you can ensure that associates with the right skills respond to the appropriate engagements, and minimize engagement times and customer frustration.

You can:

- Enable the Shared Queue feature to route incoming engagements to all associates in the team. Agents can view the total number of calls in a queue, regardless of whether Shared Queues is enabled for the team.
- Set the maximum wait time for a customer in a call queue
- Set the time for a routed engagement to be re-routed
- Limit the number of customers who can wait in a queue
- Enable callbacks

Add or Modify a Team

Add or modify a team.

After you create users, you can then assign them to teams.

1. On the Admin Console navigation menu, click **Users** > **Teams**.
2. On the Teams screen, click **Add New Team** and enter the name of the team in the **Name** field, or search for an existing team in the **Search** field.

   The name in the title automatically updates to match the value you enter. To modify an existing team, click the pencil icon.
3. Enable the **Shared Queue** feature to set this team's call queue as a shared queue.

   When shared, incoming engagements are presented to all available associates in the team and anyone can answer. If all associates are busy, then engagements are withheld from being routed until at least one associate is available. When disabled, incoming engagements are routed to the associate in the team who has been idle the longest.
4. Use the up and down arrows in the **Max Wait Time in Queue** field to select how long a customer can wait in this team's call queue.

   The default time is three minutes. When the limit is reached, the customer is disconnected and has to call again.
5. Use the up and down arrows in the **Agent Re-assign Timeout** field to select when to reroute a routed engagement that hasn't been answered yet.

   The default time is one minute. If a call is routed to an available associate, but that associate doesn't answer the engagement, this timeout automatically reassigns the engagement to another available associate.
6. Enable **Limit Max Queue Length** to limit the number of customers who can wait in the call queue for this team.

   When the limit is reached, new callers are shown a message asking them to call back later. With this option, your customers don't need to wait on a call too long when call volumes are high.
7. Enable **Limit Availability** to set times when this team is available for incoming engagements.

   Live Experience will then only route engagements to this team during the configured time.
8. Add or delete members of this team.

   Remember, only users with the Associate role can be assigned to a team.
   a. Click **Add Members** to add users to the team.
   b. Click **X** in the Action column of the displayed member list to remove a member from the team.
9. To delete a team, click the trash icon.

   If the team is used in a routing rule, you will be prevented from deleting the team. If you still want to delete a team, you will first have to edit the routing rule to unreference the team you want to delete.

5 Configuring Your Application

Manage Your Applications

Get familiar with your Oracle Live Experience applications.

An Oracle Live Experience application isn't a standalone installable, runnable application like an Android or iOS app, or Microsoft Excel. Instead, it's a set of base configuration parameters identified by a client ID.

When you create a client app in the traditional sense such as an Android, iOS, or web application, you use that client ID to register your client app with the Live Experience application. The Live Experience application then governs basic behaviors of your client application, such as:

- Selecting if digital audio, video, or screen share streams should be recorded when your app is participating in a customer engagement.
- Determining whether your app is only available during certain hours.
- Determining if, and at what frequency, your app asks customers for call quality feedback.

1. From the Admin Console navigation menu, click **Applications**.
   When the Applications window opens, you see a list of your applications. The Meeting application is included by default with Live Experience and handles the meeting functionality. You can't delete this application, but you can configure some of its settings.
2. To create a new application, click **Add New Application**.
   When creating a new application, the only thing you need to enter is a unique name.
   When you click **Register New Application**, Live Experience displays an important one-time message.
   - The Client ID is a public identifier that Live Experience uses to identify your application.
   - The Client Secret is a unique string that is only known to the application and the authorization server. It is displayed to you here in plain text for the first and only time. After you close this dialog, you can never retrieve this string from Live Experience. You can regenerate the client secret, but if you do, you need to update all your mobile and web apps where your Live Experience application is referenced.
3. To search for a specific application, click **Search**.
4. Click on an application's name to open its details.
   See *Application Details*.
5. To delete an application, click the trash icon.

> **Note:** If you delete an application that you've embedded in one of your mobile apps or web apps, Live Experience stops working.

Application Details

This table describes the fields on the Application Details window you use to configure an application, see the Client ID, and generate a new Client Secret.

Application Details

Field	Description
Available tabs	Click on the available tabs to configure settings of the application.
Client ID	The application Client ID is always visible on the Details tab.
Client Secret	The application Client Secret is hidden. Click **Display Secret** to generate and display a new secret for the application. **Note:** You need to update every mobile app and web app that references the application if you generate a new client secret.

Manage Recordings and Quality Options

You can set and configure recording and media quality options for your Live Experience applications.

1. Select **Applications** from the navigation menu and then select your application.
2. On the **Media Quality** tab, specify the maximum video quality.
   This setting affects real-time bandwidth usage and the recorded file size of video engagements.
3. On the **Recording** tab, select the types of engagements that you want to record, enable transcription for your recordings, and define custom tags that you can assign to your recordings.
   Choose the types of engagements you want to record. Your options are Audio, Video, and Screen Share. If you don't select at least one channel, no engagements will be recorded.

Configure Availability for Your Live Experience Application

The easiest way to control availability for your Live Experience associates is to configure it at the application level.

Application-level availability applies to any customers and associates logged into a particular Live Experience application instance using that instance's associated client ID and client secret. When you configure application-level availability, it takes effect immediately.

> **Tip:** You can configure multiple Live Experience applications if, for example, you have localized apps that you only distribute in certain countries and you'd like to set particular availability time zones for those.

When you've configured application availability, and a customer accesses your Live Experience-enabled app outside of the hours you specify, the Live Experience mobile and web components won't display in your apps, and your customers won't waste time trying to contact associates who aren't there.

1. From the Admin Console navigation menu, select **Applications**.
2. Select your application.
3. Select the **Availability** tab.
4. Enable **Limit Availability**.
   The other fields on the page become available.
5. Configure the availability settings you want and click **Save**.

How You Control Availability for Your Applications, Teams, and Associates

You can configure availability at the application, team, and associate level; to control when the Oracle Live Experience widget is displayed to your customers; and how Live Experience routes incoming engagements.

It's likely that your company has core business hours during which one or more associates answer customer engagements. Outside of those business hours, you want to avoid customers encountering unstaffed call queues.

Use application-level availability to control when the Live Experience widget is displayed to your customers. Outside the programmed availability, the widget isn't displayed, preventing customers from starting an engagement that won't get answered.

> **Tip:** As an alternative to hiding the widget from your customers outside your business hours, you can enable the Callback option on your engagement scenarios. This way, your customers use the widget to leave a callback request, which will get routed to the first available associate who next logs on. See *Manage Engagement Scenarios*.

Use team-level availability to control Live Experience engagement routing. Outside the programmed availability, Live Experience won't route calls to unavailable teams.

When working with application and team availability in combination, it's important to avoid unwanted behavior. For example, if an application is available from 8am to 5pm, and a team is available from noon to 5pm, your customers will be able to use the widget from 8am until noon, when no associates are available to answer.

Similarly, if an application is available from noon to 5pm, and a team is available from 8am to 5pm, your customers won't be able to use the widget from 8am until noon, when your associates are available to answer.

Setting application and team availability does not change any other configuration settings, and your changes take effect immediately.

> **Note:** Live Experience is configured with one application, Meeting, that you can't delete. The client ID and client secret are irrelevant, but you can use the other tabs to control meeting behavior just like any other Live Experience application.

When combined with routing rules, you can fine-tune the availability of your associates.

Your associates can also control their availability in the Live Experience Associate Desktop, in case they have to take a break or tend to other business. When an associate is away, Live Experience knows not to route calls to them under any circumstances.

Configure Availability for Your Live Experience Teams

You can customize availability for teams.

Before you start

Create users and assign them to teams, and create routing rules to assign engagements to teams. See

- *How You Manage Users*
- *How You Manage Teams*
- *Overview of Routing Rules*

In addition to configure routing rules to assign engagements to teams, you may want to customize the availability of those teams.
For example, you might want to have a support team for customers in Asia, one for customers in the Americas, and another for European customers. Or you might have a particular department that's only staffed by associates during nonstandard hours. Live Experience lets you easily cover all of those scenarios.

Here's what to do

1. From the Admin Console navigation menu, select **Users**.
2. Select the **Teams** tab.
3. Click the pencil icon for the team you want to configure.
4. Enable **Limit Availability**.
   The other fields on the page become available.
5. Configure the availability settings you want and click **Save**.

Results:

With team availability enabled, the web or mobile widget will still display outside the hours you've specified for the team, but a customer will see a message saying that no associates are available.

Add Origin Domains

In Oracle Live Experience, configure origin domains for each website that includes the Live Experience widget.

Adding origin domains is one of the steps required to get Live Experience up and running in your web sites and applications.
In Live Experience, one or more origin domains are required for web applications (but not for native applications). Use origin domains to specify the fully-qualified domain name of the host for the website that will host the Live Experience widget. It must match what the browser presents as the origin of a request, for example, `https://www.yourcompany.com`.

An application can have several origin domains. You can use the asterisk (*) as a wildcard character when adding origin domains so that a single entry can provide access to multiple websites. For example, `https://www.google.*` provides access to any websites that begin with `https://www.google`.

1. From the Admin Console navigation menu, select **Applications**.
2. Select your application.
3. Select the **Origin Domains** tab.
4. Add origin domains you want.

Enable Engagement Quality Metrics

Configure Oracle Live Experience to request feedback from your customers about the quality of the engagement they just experienced.

This valuable set of data is collected and made available in the generated engagement reports. Data is also saved with details of each engagement, allowing you to search for engagements using the feedback ratings (Excellent, Good, Bad) as search filters. See *Search for Engagement Details and Recordings*.

1. From the Admin Console navigation menu, select **Applications**.
2. Select your application.
3. Select the **Engagement Quality** tab.
4. Use the controls on the tab to select whether quality feedback is enabled, and if so, for what percentage of engagements.

Results:

When enabled, a quality feedback question is presented to your customer when the engagement ends.

Customize and Localize the Messages and Text in Live Experience

Oracle Live experience fully supports multi-language localization and customization.

If you are distributing your app in multiple countries, you'll want to localize for native languages. Live Experience provides comprehensive localization support from Abkhazian to Zulu, including double-byte and right-to-left languages like Arabic. You may want to customize the text in Live Experience for any number of reasons. For instance, there may be legal requirements in your country requiring very specific wording when asking a customer to share their screen, or to advise a customer that their engagement is going to be recorded. And, you may want to use local idioms, spellings, and specific industry terms.

You can customize and localize text and labels for each of the following interfaces:

- Customize and localize the messages and labels for:
  - The Live Experience Meetings application
  - Your Live Experience applications, whether they are integrated into a website or a mobile app
  - The Associate Desktop
  - The Admin Console
- Customize and localize the automated email messages such as those they receive when they are onboarded, or change or reset their passwords.

Virtually any message can be customized or localized by editing a plain, human-readable text file.

1. From the Live Experience Admin Console, find the default language file for the interface you want to localize or customize.
    a. For the Meetings application, select **Settings** from the navigation menu, select the **Localization** tab, and then select **Localize Meetings App**.
    b. For one of your Live Experience applications, select **Applications** from the navigation menu, select your application, and then select the **Localization** tab.

       The message that displays on the widget to the customer is not part of the application's language file. Instead, it is part of the engagement scenario. To localize or customize it, go to the **Engagement Scenarios** tab. The greeting message is locale independent. That is, it'll be displayed regardless of device or browser locale settings.

    c. For the Associate Desktop, select **Settings** from the navigation menu, select the **Localization** tab, and then select **Localize Associate Desktop**.
    d. For the Admin Console, select **Settings** from the navigation menu, select the **Localization** tab, and then select **Localize Administration**.
    e. For automated email messages, select **Settings** from the navigation menu, select the **Localization** tab, and then select **Localize Administration**. Search the file for "welcomeEmail," "resetPasswordEmail," or "changePasswordEmail".
2. Download the file to your computer and customize or localize it.
3. Upload the file into Live Experience and specify the locale to which it applies.
4. To delete a customized or localized message file, select the **X** icon next to the message file in question and select **OK** when prompted.

Results:

The updated language file is immediately applied, though users might need to refresh their browsers.

Example: Customize English Messages in Live Experience

This example explains how to customize the English messages in the Associate Desktop.

1. From the Live Experience Admin Console navigation menu, select **Settings** > **Localization** > **Localize Associate Desktop**.
2. In the Locale section next to English, select the download button and save the file to a convenient location.

   You may want to run the string file through a JSON pretty printer such as *https://jsonformatter.org/json-pretty-print* to make it easier to read and edit.
3. Open the file in a text editor of your choice, make any changes required, and save the file.
4. Return to the Admin Console and select **Import**.
5. In the **Import Localization File** window, browse to your updated Associate Desktop string file.
6. Select **English** (United States of America) from the locale drop-down list and then select **Import**.

   To override the default English messages, you must choose English as well as a locale (such as the United States of America). Live Experience will choose the most specific message file it can find for your locale, meaning that if you're in Great Britain, it prefers English (United Kingdom of Great Britain and Northern Ireland) rather than the default English.

Example: Localize Messages in Spanish for Live Experience

This example explains how to localize messages in the Associate Desktop into Spanish.

1. From the Live Experience Admin Console navigation menu, select **Settings** > **Localization** > **Localize Associate Desktop**.
2. In the Locale section next to English, select the download button and save the file to a convenient location.

   You may want to run the string file through a JSON pretty printer such as *https://jsonformatter.org/json-pretty-print* to make it easier to read and edit.
3. Translate the messages file into the language of your choice.
4. Return to the Admin Console and select **Import**.
5. In the **Import Localization File** window, browse to your Spanish Associate Desktop string file.
6. Select **Spanish** from the locale drop-down list and then select **Import**.

   Live Experience will choose the most specific message file it can find for your locale, meaning that if you're in Mexico, it prefers Spanish (Mexico) rather than plain Spanish. That way, you can use specific language translations, such as Canadian French and Parisian French, to ensure that customers and associates in those locales see translations that make the most sense.

Configure Your Application to Send Notifications

You can configure your Oracle Live Experience applications to send push notifications to your Live Experience-enabled mobile apps.

Before you start

Before you begin, get notification settings values for Apple and Android from your mobile application developer.

You can enable and configure both Apple and Android notifications at the same time. See *Developing Live Experience* for more information.

Here's what to do

1. From the Admin Console navigation menu, select **Applications**.
2. Select your application.
3. Select the **Notifications** tab.
4. If you want Live Experience to send notifications to an iOS mobile app, enable **Apple Notifications** and configure the Apple notification settings.
5. If you want Live Experience to send notifications to an Android mobile app, turn **Android Notifications** and configure the Android notification settings.

Customer Identity Verification

Learn how Oracle Live Experience allows you to verify a customer's identity and confirm the authenticity of their official documents with in-channel video ID verification.

Live Experience allows customers to scan their documents with your mobile app, performs real-time verification, and then connects them to an associate for final verification.

Use in-channel video ID verification to:

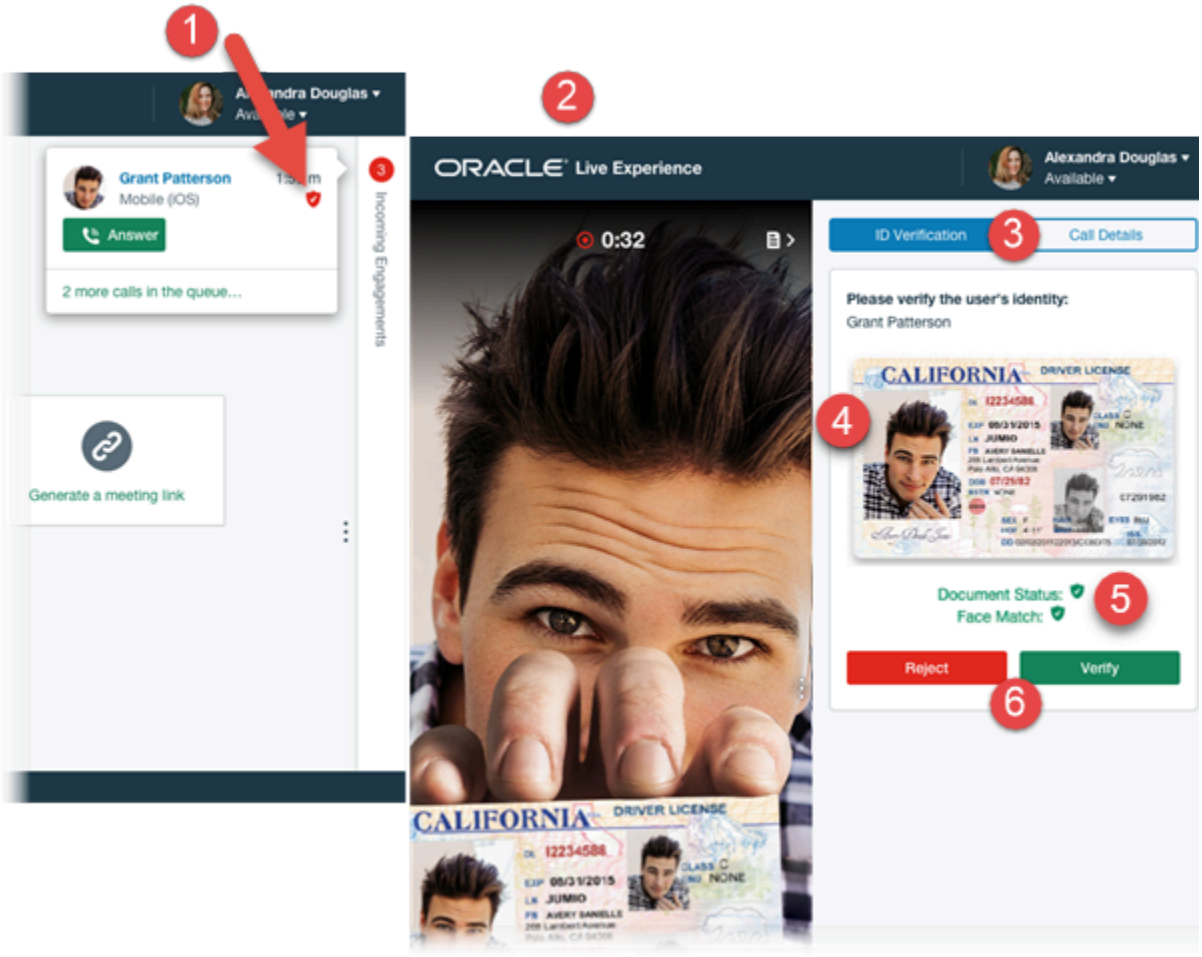
- Onboard new users simply and quickly from a mobile app.
- Reduce your operational costs.
- Meet local regulations and standards around Know Your Customer (KYC), Anti-Money Laundering (AML), and electronic Identification, Authentication and trust Services (eIDAS).
- Provide a better remote customer experience.

Setting up in-channel identity verification is simple. In the Live Experience Admin Console, you configure your Live Experience application for identity verification. Then, you implement identity verification in your iOS or Android app.

Live Experience partners with Jumio to deliver document verification services. You need to have a Jumio account before you can enable and leverage identity verification in Live Experience.

Your customers are walked through a streamlined user experience to scan and submit their documents for authentication before being automatically connected with an associate. Your associates are presented with the scanned documents and the authenticity result. They can quickly determine whether the customer matches the submitted ID and can decide whether to approve or deny the request being made.

The following image illustrates the identity verification functionality in the Associate Desktop.



1. A red badge icon informs associates of an incoming identity-verification engagement.
2. Identity-verification engagements are recorded video engagements. A video engagement affords the associate an opportunity to see the customer's face, to ask them to provide the same ID card or document they scanned, and to compare them all in one interface.
3. For identity-verification engagements, the associate can switch between seeing the Call Details and ID Verification details.
4. The scanned document is displayed to the associate, so that they can compare it with the one being displayed in the live video engagement.
5. The scanned document's authenticity result is displayed to the associate. If Jumio's face-matching capabilities are also implemented, then the face-match authenticity result is also displayed.
6. The associate can choose to either reject or verify the customer's application.

Configure Identity Verification in Live Experience

You configure identity verification using the Live Experience Admin Console.

Whether you are using the default scenario or one you've created, note the following particularities about the engagement scenario that uses the identity verification service.

Unlike other types of engagement scenarios in your mobile apps that start with your customer tapping on the Live Experience widget, the identity-verification engagement starts immediately when the page or view containing the engagement scenario opens.

To enable the identity verification service on an engagement scenario, you turn on Enable ID Verification. When Enable ID Verification is turned on, other fields and buttons are automatically modified. Enable Short Code and Enable Meeting are turned off because they don't work with the identity verification service. If you try to turn either of these buttons back on, Enable ID Verification gets turned off. The End User section is disabled and uneditable. This is because the identity verification service is a preconfigured video engagement that starts automatically without the customer clicking or tapping on the widget.

1. From the Admin Console navigation menu, select **Applications**.
2. On the Applications page, select your application, then select the **ID Verification** tab.
3. Select the identity service provider with whom you have an account, and enter the requested account details.

   In-channel video identity verification is now available for you to use.
4. Set up an engagement scenario to use the identity verification service.

   To help you and to make development easier, there is already a default engagement scenario called "Know_Your_Customer" for this exact purpose. You can either modify the Know_Your_Customer scenario to meet your needs, modify one of your existing engagement scenarios to use the identity verification service, or create a new engagement scenario. See *Overview of Engagement Scenarios*.
5. Optionally, you can use the Call Type context attribute to create routing rules for when the Call Type is SMS. See *How You Use Skills to Route Your Customers to the Right Team* for more information about setting up routing rules.

Implement Identity Verification with Jumio in an iOS App

Implement identity verification in your iOS app.

Before you start

Before you begin, you must already have a working iOS app to which you are adding an identity-verification engagement scenario.

Unlike other types of engagement scenarios in iOS apps that start with the customer tapping on the Live Experience widget, the identity-verification engagement starts automatically when the view containing identity verification opens. The user doesn't tap on anything besides the button or link that opens the view containing the identity-verification engagement.

Here's what to do

1. Open your tenant application project.
2. Log into your Jumio account and download the following SDKs:
   - `JumioCore.framework`
   - `BAMCheckout.framework`
   - `MicroBlink.framework`
   - `Netverify.framework`
   - `NetverifyFace.framework`
   - `ZoomAuthenticationHybrid.framework`
3. Link and embed the Jumio SDKs.

4. Contact your Oracle Live Experience account manager and request the iOS ID Verification SDK.

   When you get it, extract it to a folder on your computer.
5. In your application project, replace the Live Experience iOS SDK with the ID Verification SDK.
6. In your tenant application, create a new view controller for identity verification.
7. In your tenant application, implement some kind of action that opens the new view. For example, create a button labeled **Scan ID** that opens the identity verification view.
8. In the identity verification view controller, implement the call logic the same way you would for any other engagement scenario, but set the `appLocation` value to the engagement scenario that has the identity verification service enabled. For example, if you are using the default identity verification engagement scenario to deliver the identity verification service, set `appLocation` to `"Know Your Customer"`:

```
.
.
.
Controller.shared.settings.startVideoInFullScreen = true
Controller.shared.settings.startVideoWithFrontCamera = true
Controller.shared.contextAttributes.setValue("Know Your Customer", forKey: "appLocation")
Controller.shared.addComponent(viewController: self.parent)
.
.
.
```

9. Optionally, enable Jumio facial recognition service, which compares and verifies the likeness of the faces of the person scanning their identity card and the picture on the card.

   The Jumio assessment is reported to the associate in the Live Experience Associate Desktop. Add the following line of code beneath the context attribute setting appLocation:

```
Controller.shared.settings.attemptFaceMatchWhenVerifyingIdentity = true.
```

10. Optionally, listen for specific Jumio events and notifications and implement your own responses. For example:
    - Sent when an identity verification process is initiated.

      ```
      static let IdentityVerificationInitiated =
      NSNotification.Name("oracle.widget.notification.IdentityVerificationInitiated")
      ```
    - Sent if the process is cancelled either due to error or user request. The notification object is a Boolean, whose value is true if the process is cancelled by the customer on the app.

      ```
      static let IdentityVerificationCancelled =
      NSNotification.Name("oracle.widget.notification.IdentityVerificationCancelled")
      ```
    - Sent when the identity verification documents have been captured. It carries the netVerificationSuccessData object as payload.

      ```
      static let IdentityVerificationDocumentsCaptured =
      NSNotification.Name("oracle.widget.notification.IdentityVerificationDocumentsCaptured")
      ```
    - Sent when we are querying the outcome of the identity verification process.

      ```
      static let ObtainingIdentityVerificationResult =
      NSNotification.Name("oracle.widget.notification.ObtainingIdentityVerificationResult")
      ```
    - Sent when the verification results are obtained.

      ```
      static let IdentityVerificationResultObtained =
      NSNotification.Name("oracle.widget.notification.IdentityVerificationResultObtained")
      ```
    - Sent when an identity verification outcome has been reached. It carries information that describes the outcome (Verified, Failed, Cancelled, Incomplete).

      ```
      static let IdentityVerificationResultObtained =
      NSNotification.Name("oracle.widget.notification.IdentityVerificationResultObtained")
      ```
    - Sent when an identity verification outcome has been reached. It carries information that describes the outcome (Verified, Failed, Cancelled, Incomplete).

      ```
      static let IdentityVerificationResultObtained =
      NSNotification.Name("oracle.widget.notification.IdentityVerificationResultObtained")
      ```

In this example, you are listening for when the documents are successfully scanned and then flashing a green checkmark to the user.

To capture the event for when the documents have been successfully scanned:

```
NotificationCenter.default.addObserver(
 self,
 selector: #selector(self.haveCapturedIdentityDocuments),
 name: NSNotification.Name(rawValue: "oracle.widget.notification.IdentityVerificationDocumentsCaptured"),
 object: nil)
```

Or, you could listen for when the verification results are obtained...

```
NotificationCenter.default.addObserver(
 self,
 selector: #selector(self.catchIdVerificationResult),
 name: NSNotification.Name(rawValue: "oracle.widget.notification.IdentityVerificationResultObtained"),
 object: nil)
```

...so that you can obtain the associated Jumio reference code (which you can use in REST API calls to the Jumio API):

```
// Get the Jumio reference code kycScanReference
 @objc func catchIdVerificationResult(notification: NSNotification) {
 Log.debug("ID Verification outcome = \(notification.object ?? "")")
```

```
self.verificationResult = notification.object as? String
if self.verificationResult == "Verified" {
Log.debug("kycScanReference=\(Controller.shared.service.kycScanReference)")
}
...
```

For a complete list of Live Experience notification events, see the *Oracle Live Experience iOS API Reference*.

Implement Identity Verification with Jumio in an Android App

Implement identity verification into your Android app.

Before you start

Before you begin, you must already have a working Android app to which you are adding an identity-verification engagement scenario.

Unlike other types of engagement scenarios in Android apps that start with the customer tapping on the Live Experience widget, the identity-verification engagement starts automatically when the page containing identity verification opens. The user doesn't tap on anything besides the button or link that opens the page containing the identity-verification engagement.

Here's what to do

1. Open your tenant application project.
2. Implement the following SDKs in the **build.gradle** file:

```
ext {
 JUMIO_SDK_VERSION = "3.6.0"
}
// for Jumio
implementation "com.jumio.android:core:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:bam:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:nv:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:nv-mrz:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:nv-nfc:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:nv-ocr:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:nv-barcode:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:nv-barcode-vision:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:face:${JUMIO_SDK_VERSION}@aar"
implementation "com.jumio.android:dv:${JUMIO_SDK_VERSION}@aar"
//for core:
implementation "androidx.appcompat:appcompat:1.0.0"
implementation "androidx.room:room-runtime:2.0.0"
//for nv:
implementation "com.google.android.material:material:1.0.0"
implementation "androidx.cardview:cardview:1.0.0"
//only for nv-nfc
implementation "com.madgag.spongycastle:prov:1.58.0.0"
implementation "net.sf.scuba:scuba-sc-android:0.0.16"
//only for nv-face
implementation "com.facetec:zoom-authentication-hybrid:7.0.4@aar"
```

3. Add the following activity to **src\main\AndroidManifest.xml**:

```
<activity
 android:name="com.jumio.nv.NetverifyActivity"
 android:configChanges="orientation|screenSize|screenLayout|keyboardHidden"
 android:hardwareAccelerated="true"
 android:theme="@style/CustomNetverifyTheme"
```

```
android:windowSoftInputMode="adjustResize"/>
```

4. Add a theme for identity verification to **\src\main\res\values\styles.xml**. Use the following sample theme and modify it as required.

```
<!-- base application theme for Jumio -->
<style name="CustomNetverifyTheme" parent="Theme.Netverify">
 <!-- global colors -->
 <item name="colorPrimary">#E0F0FD</item>
 <item name="colorPrimaryDark">#cccccc</item>
 <item name="colorControlNormal">#000000</item>
 <item name="jumio_toolbarStyle">@style/Jumio.Actionbar.Title</item>
 <item name="jumio_toolbarSubStyle">@style/Jumio.Infobar.Title</item>
 <item name="android:windowBackground">@color/CustomAndroidBackground</item>
 <!-- loading sdk specific colors -->
 <item name="netverify_scanOptionsLoadingProgress">#FFFFFF</item>
 <!-- Replace the HEX color value above to change the loading progress color (SDK start)-->
 <!-- select document specific colors -->
 <item name="netverify_scanOptionsLoadingBackground">#ffffff</item>
 <item name="netverify_scanOptionsItemBackground">#509ed6</item>
 <item name="netverify_scanOptionsItemForeground">#ffffff</item>
 <item name="netverify_scanOptionsItemHeaderBackground">#4c95c9</item>
 <!-- scan instructions specific colors -->
 <item name="netverify_helpBackground">#FFFFFFFF</item><!--70%-->
 <item name="netverify_helpProgressString">#80000000</item>
 <item name="netverify_helpTitle">#000000</item>
 <item name="netverify_helpImage">#000000</item>
 <item name="netverify_helpSeperator">#33FFFFFF</item>
 <item name="netverify_helpInstructions">#000000</item>
 <item name="netverify_helpFallback">#FFFFFF</item>
 <item name="netverify_helpFallbackText">#222222</item>
 <!-- scan document (scan screen) specific colors -->
 <item name="netverify_scanOverlay">#B3FFFFFF</item>
 <item name="netverify_scanBackground">#40000000</item><!--25%-->
 <!-- readability check specific colors -->
 <item name="netverify_confirmationBackground">#ffffff</item>
 <item name="netverify_confirmationHintStyle">@style/Custom.Netverify.Confirmation.Hint</item>
 <item name="netverify_confirmationPositiveStyle">@style/Jumio.Confirm.Button.Positive</item>
 <item name="netverify_confirmationNegativeStyle">@style/Jumio.Confirm.Button.Negative</item>
 <!-- submission error (error screen) specific colors -->
 <item name="netverify_submissionErrorStatusBar">#B3B3B3</item>
 <item name="netverify_submissionErrorBackground">#FFFFFF</item>
 <item name="netverify_submissionErrorTitle">#1A1A1B</item>
 <item name="netverify_submissionErrorDescription">#565B5D</item>
 <item name="netverify_submissionErrorSeperator">#000000</item>
 <item name="netverify_submissionErrorImage">#FF1911</item>
 <item name="netverify_submissionErrorButtonBackground">#3F61B5</item>
 <item name="netverify_submissionErrorButtonText">#FFFFFF</item>
 <!-- submission success (success screen) specific colors -->
 <item name="netverify_submissionProgressSuccessTitle">#000000</item>
 <item name="netverify_submissionProgressSuccessDescription">#000000</item>
 <item name="netverify_submissionProgressSuccessSeperator">#000000</item>
 <item name="netverify_submissionProgressSuccessImage">#509ed6</item>
 <item name="netverify_submissionProgressSuccessBackground">#ffffff</item>
</style>
<!-- actionbar title color -->
<style name="Jumio.Actionbar.Title" parent="ThemeOverlay.AppCompat">
 <item name="android:textColorPrimary">#000000</item>
</style>
<!-- infobar title color -->
<style name="Jumio.Infobar.Title" parent="@android:style/TextAppearance">
 <item name="android:textColor">#000000</item>
</style>
<!-- positive button theme (readability screen) -->
<style name="Jumio.Confirm.Button.Positive" parent="">
 <item name="android:textColor">#FFFFFF</item>
```

```
 <item name="android:background">#509ed6</item>
</style>
<!-- negative button theme (readability screen) -->
<style name="Jumio.Confirm.Button.Negative" parent="">
 <item name="android:textColor">#FFFFFF</item>
 <item name="android:background">#509ed6</item>
</style>
<!-- readability info theme (readability screen) -->
<style name="Custom.Netverify.Confirmation.Hint" parent="Netverify.Confirmation.Hint">
 <item name="android:theme">@style/ThemeOverlay.AppCompat.Dark</item>
 <item name="android:background">#ffffff</item>
 <item name="android:textColor">#000000</item>
</style>
<color name="CustomAndroidBackground">#ffffff</color>
<style name="WarningDivider">
 <item name="android:layout_width">match_parent</item>
 <item name="android:layout_height">2dp</item>
 <item name="android:background">#E2E2E4</item>
</style>
```

5. Create a new page for identity verification.
6. In your tenant application, implement some kind of action that opens the new page. For example, create a button labeled **Scan ID** that opens the identity-verification page.
7. In the identity verification page, implement the call logic the same way you would for any other engagement scenario, but set the `appLocation` value to the engagement scenario that has the identity verification service enabled. For example, if you are using the default identity verification engagement scenario to deliver the identity verification service, set `appLocation` to `"Know Your Customer"`:

```
.
.
.
CommunicationFragment.settings.startVideoInFullScreen = true
CommunicationFragment.settings.startVideoWithFrontCamera = true
CommunicationFragment.contextAttributes.set("appLocation","Know Your Customer")
.
.
.
```

8. Optionally, enable Jumio's facial recognition service, which compares and verifies the likeness of the faces of the person scanning their identity card and the picture on the card.

   The Jumio assessment is reported to the associate in the Live Experience Associate Desktop. Add the following line of code beneath the context attribute setting appLocation:

   ```
   CommunicationFragment.settings.attemptFaceMatchWhenVerifyingIdentity = true.
   ```

9. Optionally, listen for specific Jumio events and notifications and implement your own responses. The available Jumio events are:
   - Sent when the verification is complete. `LIVE_VERIFICATION_COMPLETE`
   - Sent when the verification failed. `LIVE_VERIFICATION_FAILED`
   - Sent when the verification is canceled. `LIVE_VERIFICATION_CANCELED`
   - Sent when the verification is incomplete. `LIVE_VERIFICATION_INCOMPLETE`
   - Sent when the session is connecting. `LIVE_CONNECTING`
   - Sent when the session ended due to error. `LIVE_ERROR`

In this example, you are listening for when the scanned documents are successfully scanned and then flashing a green checkmark to the user.

To capture the event for when the documents have been captured:

```
// Create Widget and set the customized notification handler
mCxFragment = (CommunicationFragment) manager.findFragmentByTag(FRAGMENT_TAG);
 if (mCxFragment == null) {
 mCxFragment = CommunicationFragment.newInstance();
 getSupportFragmentManager()
 .beginTransaction()
 .add(R.id.cx_container, mCxFragment, FRAGMENT_TAG)
 .commit();
 }
 mCxFragment.setNotificationHandler(new MceNotificationHandler());
// Implement customized notification handler, and handle the KYC verification result notification
/**
* An implementation for notification handler.
*/
class MceNotificationHandler extends DefaultNotificationHandler {
 private EventType lastEvent = EventType.LIVE_ENDED;
 @Override
 public void notification(final NotificationPayload payload) {
 super.notification(payload);
 synchronized (lastEvent) {
 lastEvent = payload.getEventType();
 if (lastEvent == EventType.LIVE_VERIFICATION_COMPLETE
 || lastEvent == EventType.LIVE_VERIFICATION_FAILED
 || lastEvent == EventType.LIVE_VERIFICATION_CANCELED
 || lastEvent == EventType.LIVE_VERIFICATION_INCOMPLETE) {
 handleKycNotification(lastEvent);
 }
 }
 }
}
```

The following example listens for `LIVE_VERIFICATION_COMPLETE` and then obtains the associated Jumio reference code (which you can use in REST API calls to the Jumio API):

```
// Get the Jumio reference code getKycReference()
 private void handleKycNotification(EventType eventType) {
 Log.d(TAG, "handleKycNotification: " + eventType.name());
 if (eventType == EventType.LIVE_VERIFICATION_COMPLETE) {
 Log.d(TAG, "kycScanReference: " + CommunicationFragment.service.getKycScanReference());
 }
 ...
```

For the complete list of Live Experience notification events, see the *Oracle Live Experience Android API Reference*.

Implement Identity Verification with Jumio on the Web

Implement identity verification on your web page.

Before you start

Before you begin, you already have a working Live Experience-enabled web page, to which you are adding an identity-verification engagement scenario.

Here's what to do

1. Implement the call logic like you would for any other engagement scenario, but set the `appLocation` value to the engagement scenario that has the identity verification service enabled.

   For example, if you are using the default identity verification engagement scenario to deliver the identity verification service, set `appLocation` to `"Know Your Customer"`:

```
.
.
.
liveApi.controller.settings.startVideoInFullScreen = true;
liveApi.controller.contextAttributes.set("appLocation", "Know Your Customer");
liveApi.controller.addComponent();
.
.
.
```

2. Optionally, enable Jumio's facial recognition service, which compares and verifies the likeness of the faces of the person scanning their identity card and the picture on the card.

   The Jumio assessment is reported to the associate in the Live Experience Associate Desktop. Add the following line of code beneath the context attribute setting appLocation:

```
liveApi.controller.settings.attemptFaceMatchWhenVerifyingIdentity = true;.
```

3. Develop your web page to listen for specific Jumio live events and notifications and implement your own responses.
   - ID verification is complete. `liveApi.controller.events.LivePreCallIDCheckComplete`
   - ID verification is incomplete. `liveApi.controller.events.LivePreCallIDCheckIncomplete`
   - ID verification is cancelled. `liveApi.controller.events.LivePreCallIDCheckCancelled`
   - ID verification failed. `liveApi.controller.events.LivePreCallIDCheckFailed`
   - ID verification progress indicator, a Boolean parameter that indicates whether the component is busy or ready. `liveApi.controller.events.LiveProgressIndicator`

In this example, you are listening to the progress indicator to show a busy spinner while verification is in progress, and then stopping the spinner when the progress indicator is ready:

```
document.querySelector("body").addEventListener(
 liveApi.controller.events.LiveProgressIndicator, (status) => {
 console.log(status ? "Component Busy (show busy spinner)" : "Component Ready (stop busy spinner)");
 });
```

Or, you could listen for when the verification results are obtained so that you can obtain the associated Jumio reference code (which you can use in REST API calls to the Jumio API):

```
document.querySelector("body").addEventListener(liveApi.controller.events.LivePreCallIDCheckComplete,
 this.appEventHandler.bind(this));
appEventHandler(event) {
 const detail = event.detail;
 console.log("appEventHandler: Got event: " + event.type, detail);
 if (event.type === liveApi.controller.events.LivePreCallIDCheckComplete) {
 console.log("kycScanReference: " + liveApi.controller.service.kycScanReference);
 }
 ...
```

See the complete list of Live Experience notification events for the web: *Oracle Live Experience JavaScript API Reference*.

Customize the Appearance of Live Experience

It's easy to customize Oracle Live Experience to match your corporate branding requirements.

You probably want to customize the appearance and branding of Live Experience so that your customers know that they're dealing directly with you and not a third-party service. You can customize the appearance and branding of the following:

- The Live Experience widget embedded in your website or mobile app.
- The Meetings application interface.
- The Associate Desktop.
- The Admin Console.
- Automated email messages (such as those they receive when they are onboarded, or change or reset their passwords), login page, and diagnostics screen.

Note: The Branding pages are enhanced with a preview so that you can see how the changes you are making will appear when you save your changes.

1. Using the Admin Console, find the branding page for the interface you want to customize.

Navigation Steps to the Branding Page of Customizable Interfaces

Customizable Interfaces	Navigation Steps
One of your Live Experience applications	Select **Applications** from the navigation menu, select your application, and then select the **Localization** tab.
The widget on one of your Live Experience applications or on the Meetings Application	Select **Applications** from the navigation menu, select **Meeting** or your application, and then select the **Branding** tab.
The Meetings Application	Select **Settings** from the navigation menu, select the **Branding** tab, and then select **Customize General Branding**.
The Associate Desktop	Select **Settings** from the navigation menu, select the **Branding** tab, and then select **Customize Associate Desktop Branding**.
The Admin Console	Select **Settings** from the navigation menu, select the **Branding** tab, and then select **Localize Administration**.
Automated email messages, login screen, and diagnostics screen	Select **Settings** from the navigation menu, select the **Branding** tab, and then select **Customize General Branding**.

2. After you make your changes, click **Save**.

Note: To change the text in the headers (the titles and subtitles), you have to customize the text strings for the appropriate interface. See *Customize and Localize the Messages and Text in Live Experience*.

Example: Branding a Live Experience Interface

This example explains how to customize the appearance of the Live Experience Meeting app.

You can easily customize the Live Experience Admin Console, Associate Desktop, and Meeting app by choosing a custom graphic, logo, or background color. As you adjust the options, you'll see a dynamically updated preview.

1. From the Live Experience Meeting app navigation menu, select **Settings** > **Customize General Branding**.
2. Do either or both of the following:
    - Set a custom logo by entering a URL to a graphic file you'd like to use in the Custom Logo URL text box.
    - Choose a custom header background color using the color picker.
3. Click **Save**.

Example: Customizing the Live Experience Widget

This example explains how to customize the appearance of the Live Experience widget that displays to your customers on your websites and mobile apps.

1. From the Live Experience Admin Console navigation menu, select **Applications**.
2. Select your application.
3. Select the **Branding** tab.
4. Make your configuration changes.

   For example, set the position and layout of the widget on the customer's screen, or select colors for buttons and for text on buttons on the widget.
5. Click **Save**.

Manage Engagement Scenarios

Oracle Live Experience engagement scenarios allow you to craft targeted and customized customer experiences to enable your customers to engage you at the right time, the right place, and with the right context.

A Live Experience engagement scenario lets you intelligently control when and how the Live Experience widget appears to your customer, the initial and available communications channels, and the available features for a given engagement. Live Experience provides some default engagement scenarios. See *Default Engagement Scenarios*.
For example, you could create a scenario for first-time customers visiting your website, and another for returning customers. Or you might want to use one scenario for one of the pages on your website or app but a different scenario for another page.

1. From the Admin Console navigation menu, click **Settings**, and then click the **Engagement Scenarios** tab.

   The list of engagement scenarios displays with the name of each engagement scenario, the configured communications channels for customers and associates, and whether the engagement is enabled. See *Engagement Scenario Settings*.
2. To create a new engagement scenario, click **Add New Engagement Scenario**.
3. To enable or disable an engagement scenario, toggle the on/off switch next to the engagement scenario.

4. To delete an engagement scenario, click the **X** icon next to the engagement scenario you want to delete.

   > **Note:** The Meeting engagement scenario is a special scenario, and can't be deleted or disabled. It is this scenario that allows your associates to start instant meetings or schedule future meetings. See *Configure the Meeting Engagement Scenario*.

5. To modify an existing engagement scenario, click the pencil icon next to the engagement scenario you want to modify.
6. To change the order of engagement scenarios, click the handle icon for one engagement scenario and drag it elsewhere in the list of engagement scenarios.

Engagement Scenario Settings

When you create or modify an engagement scenario, you configure several settings that impact both your associate's and your customers' experiences when they use Live Experience.

Start by giving your engagement scenario a name or changing its name. The name needs to be unique. It's helpful if the name is descriptive. For example, you can name a scenario "**Shopping Cart**" for a scenario intended to display the widget to customers who are viewing their shopping cart while shopping on your website.

The Enabled toggle, which is also available when viewing the list of engagement scenarios, allows you to enable or disable the engagement scenario.

Rule Section

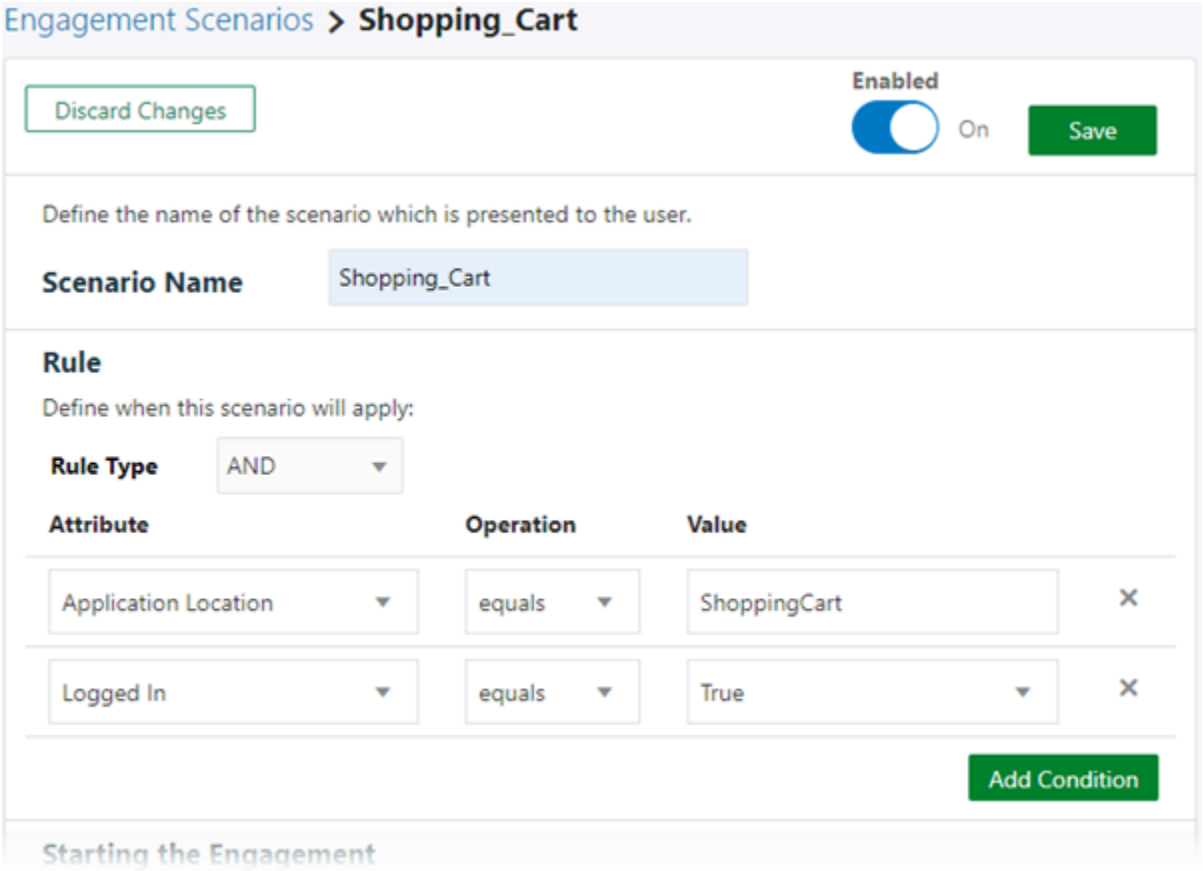
The first section you see when you create or edit an engagement scenario is the Rule section. Use the Rule section to create rules that control or restrict when this engagement scenario is triggered, based on the context attributes you've defined.

The Rule Type list allows you to create an AND rule or an OR rule. If you set Rule Type to AND, then all the conditions need to be true in order for the rule to apply. If you set Rule Type to OR, then any one of the conditions needs to be true for the rule to apply.

The list you see is a list of conditions. Each condition uses a context attribute, an operation, and a value. Add one or more conditions and configure them with a context attribute and specify the desired value to build a sophisticated rule to determine when the engagement scenario will apply to an engagement.

The Add Condition button allows to add and configure another condition to the rule.

In this example for an engagement scenario named **Shopping_Cart**, there are two conditions and the Rule Type is set to AND. With this rule, when your customer taps the Live Experience widget, this Shopping_Cart scenario is applied if the customer is on the Shopping Cart page of your website or app, AND the customer is logged in. If either of these conditions is false, this engagement scenario doesn't apply.



Starting the Engagement Section

Use the Starting the Engagement section to specify the starting behavior for engagements.

The available behaviors to choose from are:

- **Tap and wait for an associate**: When the customer taps on the widget to start the engagement and is placed in a call queue as determined by your routing rules. Then they are connected with the first available associate.
- **Tap and register for a callback**: When the customer taps on the widget they are immediately offered a callback. If the customer accepts, Live Experience records the callback request and routes it to a call queue as determined by your routing rules. The callback request is presented to the first available associate, who can proceed to call the customer back.

  For callback to work, you need to configure Live Experience with a way to make outbound calls. See *Engage Your Customers by Calling Them Directly*.
- **Tap and read out a short code**: When the customer taps on the widget, they are shown a six-character code, which they provide to the associate they want to connect with. Use the short code feature when you want to provide your customers with a way to connect with a specific associate. For example, short codes allow an associate to guide a customer from a PSTN phone call to Live Experience video or screen-sharing engagement.

- **Join by URL**: Customers are sent a URL to join an engagement with a specific associate. Clicking the URL launches a Live Experience meeting. Meetings bypass call routing. Associates can start a meeting immediately, or they can schedule a meeting for a future date and send the URL to one or more participants.

Note: Live Experience already provides you with a Meeting engagement scenario that you can't delete or modify. It exists precisely for the purpose of allowing your associates to schedule meetings and then invite participants to that meeting using a unique URL. The only reason to create another engagement scenario with the meeting feature enabled would be to route meetings to your own custom meeting client. See *Configure the Meeting Engagement Scenario*.

General Options Section

Use the General Options section to enable features and behaviors for the engagement scenario.

General Options

Option	Description
Use External Audio	Select this option to design an engagement scenario for situations when audio isn't needed. For example, if the associate and customer are already talking on the phone, you need an engagement scenario that doesn't duplicate the audio connection.
Enable ID Verification	Select this option to have the widget guide your customer through the process of scanning their identity documents to prove their identity. See *Customer Identity Verification*.
Allow Call Transfer	Select this option to allow an associate to transfer an engagement to another associate. When the transfer is complete, the original associate is removed from the engagement. This option is only available for audio engagements. **Note:** The Live Experience call transfer is completed without allowing the two associates an opportunity to talk to each other.
Allow Add Participant	Select this option to allow an associate to add another available associate to an in-progress audio or video engagement. When this option is enabled, it's not possible to allow screen sharing or use the annotation feature during a call. Associates can use the add participant feature to add another associate to an ongoing engagement, pause the customer, discuss things in private, and then the first associate can leave the engagement.
Allow Callback	Select this option to allow you to offer the callback option to your customers. After a customer waits in the call queue for 15 seconds, they are offered the opportunity to leave a callback instead of waiting. If they refuse, they remain in the call queue. If they accept, your customer hangs up and waits to be called back while Live Experience routes a callback request to the next available associate. For callback to work, you need to configure Live Experience with a way to make outbound calls. See *Engage Your Customers by Calling Them Directly*.

Option	Description
Allow Alternate Callback Number	Select this option to allow the customer to enter a different phone number than the one on file where they want to receive the callback.
Allow In-Channel Messaging	Select this option to allow associates to send short bits of text, a maximum of 140 characters, directly to customers. Using in-channel messaging doesn't require SMS integration. It's perfect for sending links or brief bits of information.
Use Co-browse for Customer screen sharing	Select this option to allow your associates to use your Oracle Co-browse account for screen sharing. **Note:** When Co-browse is enabled for an engagement scenario, Co-browse replaces Live Experience's own screen sharing functionality. Live Experience can't record the customer's screen when it's shared using Co-browse. For Co-browse to work, you need to configure your Co-browse settings. See *Configure Co-browse*.

Customer Experience and Associate Experience Sections

The last sections you see when you create or edit an engagement scenario are the Customer Experience and Associate Experience sections. Use them to configure the initial communication channel and channel upgrade options.

Customer and Associate Experience Options

Option	Description
Engagement	Enter a short message to display to customers next to the widget.
Initial Channels	This option allows you to select the channel the engagement starts with. Select an initial channel for the customer and for the associate.
Can Share	This option allows you to select what channels can be shared voluntarily. Select channels for the customer and for the associate.
Can Request End User	Select this option to give the associate the ability to request the customer to share additional channels.

Configure one or more engagement scenarios to meet your business needs. When you are done, add Live Experience to your mobile app or website. More specifically, you need to add the Live Experience widget to one or more web or app pages and configure the widget so that when your customers tap on it, the correct engagement scenario is triggered. See *Adding and Configuring the Live Experience Widget for your iOS App*, *Adding and Configuring the Live Experience Widget for your Android App*, and *Add and Configure the Live Experience Widget for your Website*.

Default Engagement Scenarios

Live Experience provides the following default engagement scenarios.

Default Engagement Scenarios

Scenario Name	End User	Associate
Basic Guidance	Initial Channel: Audio Can Share: Nothing	Initial Channel: Audio Can Share: Nothing Can Request End User: Screen Share
Remote Support	Initial Channel: Audio Can Share: Nothing	Initial Channel: Audio Can Share: Nothing Can Request End User: Video
Collaboration	Initial Channel: Video Can Share: Screen Share	Initial Channel: Video Can Share: Screen Can Request End User: Screen Share
Personal Shopper	Initial Channel: Audio Can Share: Nothing	Initial Channel: Video Can Share: Nothing Can Request End User: Nothing
Concierge	Initial Channel: Audio Can Share: Nothing	Initial Channel: Video Can Share: Nothing Can Request End User: Screen Share
Short_Code	Initial Channel: Screen Share Can Share: Nothing	Initial Channel: None Can Share: Nothing Can Request End User: Nothing
Meeting	Initial Channel: Video Can Share: Nothing	Initial Channel: Video Can Share: Nothing Can Request End User: Nothing
Web_View	Initial Channel: Audio Can Share: Nothing	Initial Channel: Video Can Share: Nothing Can Request End User: Nothing
Know_Your_Customer	Initial Channel: Video Can Share: Nothing	Initial Channel: Video Can Share: Nothing

Scenario Name	End User	Associate
		Can Request End User: Nothing

Configure the Meeting Engagement Scenario

Configure the Live Experience Meeting engagement scenario to provide associates and your customers the online meeting experience that meets your business requirements.

Usually, it's your customers who initiate engagements by tapping the Live Experience widget. A Live Experience meeting is a way for associates to initiate an engagement with one or more invited participants. Associates can choose to create a meeting immediately, or schedule a meeting for a future date. Live Experience generates a unique meeting URL that both the associates and customers use to join the same meeting instance in a web browser.

You configure the Live Experience meeting experience using the Live Experience Admin Console. The Meeting engagement scenario is just like other engagement scenarios. You select the available channels for the associate and the customer, and specify the channel upgrade options and features. For example, you can configure Live Experience meetings to be audio-only calls, to start as a two-way video calls, or to start as audio calls, with upgrade options to video and screen sharing. See *Manage Engagement Scenarios*.

You have complete control over the appearance and branding of the meeting application. You can upload a logo, choose corporate colors, and customize or localize the text strings and labels. See *Customize the Appearance of Live Experience* and *Customize and Localize the Messages and Text in Live Experience*.

Another configuration option is to work with an app developer to add meeting support to your existing Live Experience-enabled mobile app. You may want to do this to keep your customers within your app as much as possible. If you want your customer to connect using your Live Experience-enabled Android or iOS app, you need to provide the meeting URL with a custom protocol (such as `orcl`). Otherwise, if you send the meeting using the https protocol, the meeting will automatically open in your customer's browser. See *Add Meeting Support to Your iOS App* or *Add Meeting Support to your Android App*.

Manage Context Attributes

Use context attributes to help route calls and to display helpful information to associates.

Use the Manage Context Attributes screen to configure context attributes.

1. From the Admin Console navigation menu, click **Settings** and then click the **Context Attributes** tab.
   The list of context attributes displays by key, label, and type, and provides the default value for each. The list also specifies whether the information captured by the context attribute is visible to associates in the associate desktop.
2. To create a new context attribute, click **Add New Attribute**.
   See *Add a New Context Attribute*.
3. To make the information captured by a context attribute visible to associates in the associate desktop, enable the **Visible to Associates** toggle for that attribute.
   If the context attribute fails to capture contextual information, you can decide to hide the empty value from the associate in the associate desktop. To hide empty values, enable the **Hide If Not Present** toggle.
4. To modify a context attribute, click the pencil icon for the attribute you want to modify.

5. To delete a context attribute, click **X** next to the attribute you want to delete.

Add a New Context Attribute

Add a new context attribute.

1. From the Admin Console navigation menu, click **Settings** and then click the **Context Attributes** tab.
   The list of context attributes displays by key, label, and type, and provides the default value for each. The list also specifies whether the information captured by the context attribute is visible to associates in the associate desktop.
2. Click **Add New Attribute**.
3. Enter a key value in the **Key** field.
   Context attributes come from external devices. The key gives an administrator the ability to configure an attribute that a developer plans to send and allows the attribute to be used in rules and engagement scenarios.
4. Enter a label in the **Label** field.
   The label is a description of the key, which is used in the code. The label is what is displayed to associates.
5. Select an attribute type from the **Types** menu. Your options are Boolean, Date, Email Address, Location on Page, Number, Phone Number, String, or URL.
6. Enter a default value for the attribute in the **Default Value** field.
7. To make the attribute visible to other associates, enable **Visible To Associates**.
   To hide an empty attribute from the associate if the attribute is not present, enable **Hide If Not Present**.

Manage Skills

Define skills that you can associate with users and create routing rules to direct calls most efficiently to teams and users who possess those skills.

1. To add a new skill, click **Add New Skill**.
   a. Enter a skill name in the **Skill Name** field.
   b. Click **Add Skill** to add the skill to the list of available skills.
   c. Click **Cancel** to discard your entry and return to the list of available skills.
2. To delete a skill, locate the skill you want to delete in the list of skills.
   a. Click **X** to the right of skill name.
   b. Click **Delete** to confirm the deletion.
   c. Click **Cancel** to keep the skill and return to Skills.

How You Use Skills to Route Your Customers to the Right Team

After you set up users and teams, start refining the flow of your customer engagements using skills and routing rules.

Skills are tags that you can add to your associates along with a numeric indicator of competence. For instance you might create a skill, **German Speaking**. You can then assign that skill to an associate and indicate the associate's relative skill level. In the case of the Skill Value, a higher number represents higher skill. See *Manage Skills*.

With skills and skill levels assigned to your users and your users assigned to teams, you can then reference both teams and skills in routing rules to send the engagements to associates with the highest available skill level. See *How You Manage Users* and *How You Manage Teams*.

Overview of Routing Rules

A routing rule specifies conditions that determine where a call is routed in Oracle Live Experience.

For example, under certain conditions you want to route a call to the Customer Support group, while under other conditions, you'll want to route the call to a sales associate with certain skills. Routing rules enable you to direct calls to the teams and associates who are most appropriate to handle the call, based on current context information and the skills associated with a particular team.

How You Use Routing Rules to Get Customers to the Right Associates on the Right Teams

After you create users, teams, and skills, and you've assigned skills and skill levels to users, you can create routing rules.

A Live Experience routing rule comprises the following parts:

- A name for the rule
- Optional conditions for when the rule should apply based on context attributes
- A team to which the rule will route engagements
- A list of optional preferred skills the rule will favor when deciding which associate should handle the engagement

When an engagement enters the Live Experience queue, a routing rule processes it in the following manner:

1. The routing rule checks the context attributes associated with the incoming engagement and checks any rule conditions to see if it should apply itself to the engagement.
2. If the rule conditions are met, the routing rule sends the engagement to the associated team.
3. If any preferred skills are configured for the routing rule, the rule assigns the engagement to the associate with the highest skill level.

Live Experience routing rules let you set flexible conditions on whether or not the rule should apply to a particular incoming engagement. For example, you can check an incoming engagement and see if the Location context attribute is equal to Paris, France. You can then route that engagement to a team of associates tagged with a French Language skill that you configured. You can use multiple conditions to handle even more complex routing tasks, but you should keep your routing conditions as simple as possible to meet your business requirements.

Skill based routing sends engagements to the highest skill level first. If you have three associates with a particular skill, with skill levels of 7 (high), 5 (medium) and 2 (low), and you have a routing rule tagged with that particular skill, the routing rule will send the engagement to the highest skill level. If the highest skill level is unavailable, the routing rule will send the engagement down the list, again preferring the highest skill level available. If no associates tagged with that skill are available, the routing rule places the customer in the general queue, and their call will be answered by any other available associate.

See *Overview of Routing Rules* and *How You Use Skills to Route Your Customers to the Right Team*.

Add a New Routing Rule

Add a new routing rule in Oracle Live Experience.

1. Click **Add New Routing Rule**.
2. Enter a name for the rule in the **Name** field.
3. Create a routing rule.
    a. Click **Add Condition**.
    b. In the **Add New Condition** window, choose an attribute from the **Select Attribute** menu.

Condition Attributes

Attribute	Description
Application Location	Identifies where in the application the end user is working or located. For example, Cart.
Avatar	An icon or picture representing the end user.
Device Description	Description of the end user's device such as Mobile (iOS).
Device Type	The type of mobile device the end user is using, such as iPhone.
Email	The end user's email address, retrieved from the user interface.
Full Name	The end user's full name, retrieved from the user interface.
Location	The end user's geographic location.
O/S Name	The device's operating system.
Phone Number	The end user's telephone number in the E.164 format. For example, +16665551212.
Target Phone Number	The phone number dialed by the end user.

    c. Choose an operation, either **equals** or **reg exp** (regular expression).

    A regular expression defines a pattern that can match multiple values rather than a single value. For example, you might want to match multiple versions of the state name California, such as California, CA, and Calif. The regular expression **California | CA | Calif** matches all of those variations. The regular expression **some*** matches any string in which the first four characters are some. You can find tutorials and many examples of regular expressions on the internet.

   d. Enter a value to be matched against the attribute. For example, **Phone Number equals 800-555-0108**.
   e. Click **Add New Rule Condition** to add the new rule.

      To cancel your entry, click **X**.
4. To define multiple conditions for the rule, select the **AND** or **OR** operator from the **Rule Type** menu and repeat the previous step to add an additional condition.
5. Select the team to which the call should be routed when the rule conditions are met.

   The Team list is populated with teams that have been created in the Users section. See *How You Manage Teams*.
6. Click **Add New Skill** to add a preferred skill to the routing rule.

   This routes the call to a member of the team who possesses the named skill. You can move a skill up or down in the list by clicking the handle icon and dragging the skill to the desired position. Changing the position of the skill changes its priority in the order of evaluation. See *How You Use Skills to Route Your Customers to the Right Team*.
7. Click **Save**.

Edit a Routing Rule

You can edit the following values for the routing rule.

1. Click the pencil icon for the rule you want to edit.
2. Make the changes you want.

   You can edit the name, attribute, operation, or value of a rule, add or change a condition, select a different routing team, change or add skills, and move the position of a skill.
3. Click **Discard Changes** and confirm if you want to discard your changes. Click **Cancel and continue editing** to return to editing without discarding your changes.
4. Click **Save** to save your edits.

Delete a Routing Rule

You can delete a routing rule.

1. Click the **X** for the rule you want to delete.
2. Click **Delete** to confirm your deletion or click **Cancel** to keep the rule if you don't want to delete the rule.

Move a Routing Rule

Move a routing rule in the list.

To move a routing rule up or down in the list, click on the handle of the rule and drag it to the desired position in the list.

Reroute PSTN Calls to Live Experience

You can configure Oracle Live Experience to receive and send public switched telephone network (PSTN) calls.

Before you start

You need to have a PSTN account with the following PSTN vendor before you can configure Live Experience to send or receive phone calls. Visit *https://tatacommunications.com*.

Incoming calls get routed to Live Experience associates. Outgoing calls are made by associates using the Associate Desktop.

Here's what to do

1. From the Admin Console navigation menu, select **Settings**, then select the **PSTN** tab.
2. On the PSTN Vendor Configuration screen, select the PSTN provider with which you have an account.
3. Enter your company's assigned phone numbers and click **Save**.

   Enter your phone numbers using the E.164 format. For example, enter a North American phone number as +1nnnnnnnnnn, and enter a United Kingdom phone number as +44nnnnnnnnnn.
4. Add or remove phone numbers that can be answered by Live Experience as needed.
5. To remove all the configuration for a PSTN vendor on an application, click **Remove Vendor Configuration** at the bottom of the screen.

   This also disables the service and the PSTN tab returns to its preconfigured state.

How You Configure Outbound Calling

Configure Oracle Live Experience to make outgoing calls directly to your customers.

Enable your associates to call customers through your Live Experience-enabled mobile app or over the phone, all from the Associate Desktop.

One way to do this is to extend your existing Live Experience-enabled mobile app to receive VoIP calls from Live Experience. This setup allows your associates to start an in-app voice or video engagement while Live Experience sends a push notification to the mobile app. To the customer, this experience resembles any incoming application-based voice or video call.

Another way is to sign up for an online PSTN account. This setup allows your associates to dial a mobile phone number from the Associate Desktop. Using a PSTN account is a great way of reaching customers who haven't fully registered or fully configured your Live Experience-enabled app. See *Reroute PSTN Calls to Live Experience*.

You can also set up Live Experience for both in-app calling and PSTN calling. In this configuration, Live Experience first attempts to contact your customers through your Live Experience-enabled app. If the lookup fails or if the call can't be completed, the associate is presented with an option to call the customer over the PSTN network.

After you've configured outbound calling, you can take advantage of the callback feature. A callback is an option you provide to your customers to keep them from having to wait in a call queue. After 15 seconds of waiting, Live Experience offers your customers the option to be called back rather than continue waiting. See *Manage Engagement Scenarios*.

For your customers, the calls they receive from Live Experience are just like other kinds of calls. PSTN calls behave just like phone calls, and in-app calls behave just like other app-based VoIP calls.

In-app calls are, essentially, voice over IP calls, sent using Live Experience to your Live Experience-enabled mobile app. For your customers to receive in-app Live Experience calls, they need to have your mobile app installed on their device and properly configured. Live Experience performs customer lookup using the mobile phone number as entered by the customer in the app settings. The customer needs to set up your app to allow notifications. If they don't allow notifications, the app won't notify them of incoming calls.

PSTN calls are delivered to the customer over their mobile network and behave just like any telephone call. No special apps or configurations are required.

Configure Live Experience for In-App Calling

When you set up Live Experience for in-app calling, Live Experience establishes the call through the Live Experience-enabled app that your customers already use.

Before you start

Before you begin, you already have a fully-developed and Live Experience-enabled mobile app. If you don't, or if you need information about developing Live Experience-enabled mobile apps, see *Developing Live Experience*.

First, work with your application developer to add notification support to your mobile apps. Adding notification support to your apps allows your apps to understand notification-based events sent by Live Experience, such as a voice call initiated by Live Experience.

To add notification support to your iOS app, see *Add Notification Support to your iOS App*.

To add notification support to your Android app, see *Add Notification Support to your Android App*.

After notification support is added to your mobile apps, configure your Live Experience application to send notifications to your mobile app. See *Configure Your Application to Send Notifications*.

Configure Live Experience for PSTN Calling

To configure Live Experience for PSTN calling, all you need to do is configure the PSTN service.

You need to have a PSTN account with a supported PSTN service provider. See *Reroute PSTN Calls to Live Experience*.

Configure Oracle Live Experience to Send and Receive SMS Messages

You can configure Live Experience to send and receive SMS messages to engage your customers.

Before you start

You need to have an account with the *MessageBird* SMS service before you can configure Live Experience to send and receive SMS messages.

Enable your associates to engage customers with SMS messages directly from the Associate Desktop conversations interface. SMS is a universal communications tool that many of your customers already use, and expect to be able to use with many companies and institutions.

You can configure Live Experience to either send SMS messages, or to send and receive SMS messages. Thereafter, you can use the Associate Desktop to send and receive SMS messages. Associates are provided the ability to send meeting links by SMS. See *The Associate Desktop Conversations (SMS) Interface*.

Here's what to do

1. From the Admin Console navigation menu, select **Settings**, then select the SMS tab.
2. Configure Live Experience to send SMS messages.
    a. Select MessageBird as your SMS vendor.
    b. Enter the API Key and Signing Key.
    c. Enter one or more SMS phone numbers.

    > **Note:** The MessageBird SMS service imposes network restrictions on sending messages to numbers in certain countries. To send messages to multiple countries, you may need to purchase multiple phone numbers from MessageBird and configure them in Live Experience. See *https://support.messagebird.com/hc/en-us/sections/360000108538-Country-Restrictions-and-Regulations* for a discussion on MessageBird's website about country restrictions and regulations.

    d. Click **Save**.

    The SMS service is added to your application. Notice that the SMS tab identifies the configured SMS vendor.
3. Configure Live Experience to receive SMS messages.
    a. Create an API webhook on *MessageBird*. Copy the Inbound SMS Endpoint for MessageBird, which you get from the Live Experience Admin Console, and use it as the URL configured on the webhook object.
    b. After you've set up your application or webhook, you might want to consider the following configurations in the Live Experience Admin Console:
        - Make the **Target Phone Number** context attribute on the Manage Context Attributes page visible to your associates so they can know from which SMS phone number your customers messaged. See *Manage Context Attributes*.
        - You can use the **Call Type** context attribute to create routing rules for the SMS Call Type. See *How You Use Skills to Route Your Customers to the Right Team*.
4. To disable and enable the SMS service, use the On or Off toggle at the top of the SMS tab, where **On** indicates that the service is enabled, and **Off** indicates that the service is disabled.
5. To modify the configuration, make any changes you want such as adding SMS phone numbers or updating the account information, and then click **Update**.
6. To remove the vendor configuration, click **Remove Vendor Configuration** at the bottom of the screen.

    The SMS tab returns to its preconfigured state.

Configure Co-browse

You can configure Oracle Live Experience to use your Oracle Co-browse account for screen sharing with your customers.

You need to have a Co-browse account before you can configure Live Experience to use it.

> **Note:** When Co-browse is enabled for an engagement scenario, Co-browse replaces Live Experience's own screen sharing functionality. Live Experience can't record the customer's screen when it's shared using Co-browse. See *Manage Engagement Scenarios*.

1. From the Admin Console navigation menu, select **Settings**.
2. Select the **Co-browse** tab.

3. Download the Live Experience certificate.
   This certificate contains a public key that identifies the Live Experience tenant to a Co-browse Site.
4. Provide the Live Experience certificate to your Oracle Account Manager and inform them that you either need to edit an existing Co-browse Company, or create a new Company, and to apply the Live Experience certificate.
5. Open the Co-browse Admin interface.
   a. Copy the Co-browse company site ID for the company with the Live Experience certificate.
   b. Paste the company site ID in the **Site ID** field in the Live Experience Admin Console.
      This site ID identifies the Co-browse site ID to Live Experience.
6. In the Live Experience Admin Console, save your Co-browse configuration settings.

Results:

Now you can configure specific engagement scenarios to use Co-browse.

6 Reporting

View Live Experience Reports

Live Experience reports allow you to track a variety of metrics to help your business.

> **Note:** If you are a Live Experience distribution partner looking for reporting information about your own tenants, see *View Tenant Usage Reports*.

You can see how your engagement volume is trending, review a team's performance, and monitor your customers' satisfaction level, all from one interface. For example, if you see that customer average wait times are high, or trending up, it may mean that your associates are spread too thin. A high engagement duration might mean that your associates don't have the necessary information they need to service customer requests. Use the intuitive reporting interface to filter the reports to give you just the information you are looking for.

> **Note:** Some metrics are also gathered and displayed on the Service Overview screen (click **Home** on the navigation menu). See *The Service Overview Dashboard*.

1. From the Admin Console navigation menu, click **Reports**.
2. Select the reporting tab you want to view.

   The **Engagement Report** tab displays the reports about Live Experience engagements. The **Team Performance Report** tab displays reports about user and team performance. See *Engagement Reports* and *Team Performance Reports*.

Search for Engagement Details and Recordings

Every Oracle Live Experience engagement is logged and stored in Live Experience.

If you have the supervisor or administrator role, you can use the Live Experience Admin Console to search for engagements. Use the search parameters on the Engagement History screen to filter the list of engagements to help you find the one you're looking for.
After you find a specific engagement record, you can review the engagement details. If the engagement was recorded, you can also play back the recording.

1. From the Admin Console navigation menu, click **Engagements**.

   The Engagement History page opens.

2. Use the **Search for Engagements** area to search for engagements.
    a. In the search bar, search by participants or keyword.

       For the keyword search, you need to enable the Transcription feature and set up keywords in your application. See *Creating Text Records of Your Engagements*.

       The Engagements list updates automatically to match the search values and filters you set. If no search criteria are used, it lists all engagements.

    b. Use the drop-down list in the search bar to match on **ANY** search terms, or **ALL** search terms.
    c. Click **Clear Search** to clear the search values and filters and see all engagements.
    d. Click **Save Query As** to save and name the current set of search values and filters so you can easily perform the same search again.
    e. Click **Saved Queries** to view and select from your saved queries.
3. Use the **Channels** field to filter your search results by one or more channels.

   Possible channel types are Chat, Video, Audio, Screen Share, Message (SMS), and ID Verification. A single engagement can include multiple types of channels. For example, if an engagement starts as an audio call and is upgraded to a video call, it is both an audio and a video engagement. The Channels filter works as an AND filter, meaning that it filters the Engagements list to match all the selected channels in the field. So, if you select Video and Audio, the search results will include engagements that are either video and audio engagements, or both.
4. Use the **From** and **To** fields to filter the search results by date and time.

   You can set the From date, or you can set both the From and To dates.
5. Use the **Duration** slider to filter the search results by duration of the engagement.
6. Use the **Application** field to filter the search results by the application that handled the engagement.
7. Use the **Quality** field to filter the search results by the quality of the engagement, as specified by your customer.

   To use this filter, you need to enable Engagement Quality Tracking. See *Enable Engagement Quality Metrics*.
8. Click the pencil icon to specify your display preferences for the Engagements list.

   For example, you can specify how many results to display at a time.
9. Click an engagement title to open its engagement details.

   From the engagement details, you can get more information about the engagement and play it back. See *Engagement Details*.
10. If the transcription feature is configured and enabled, select the engagements for which you want transcripts.

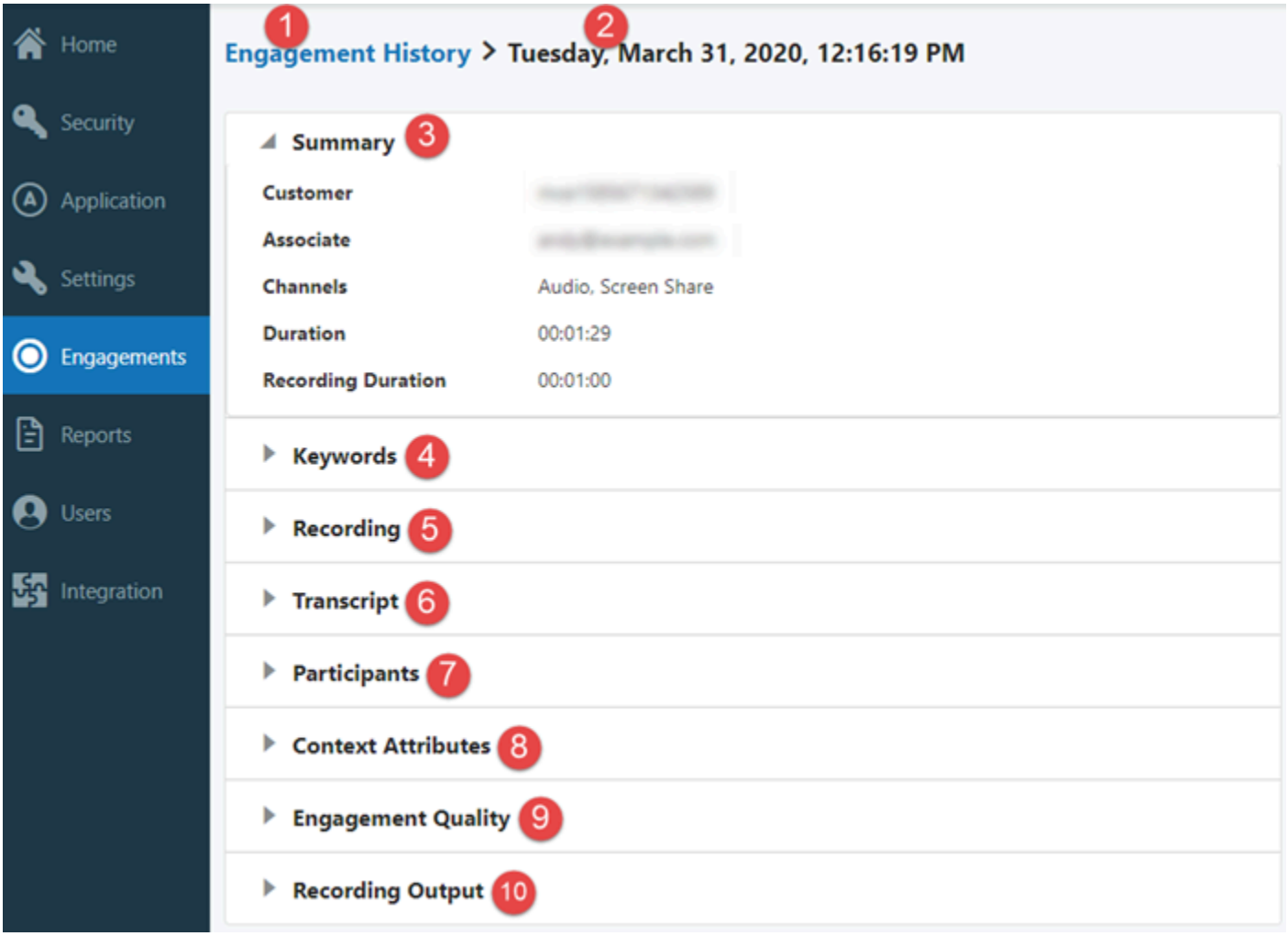
    The transcription feature is enabled per application, so not all engagements are available for transcription. When you select an engagement, the Request Transcript button becomes available if enabled.

Engagement Details

Every Oracle Live Experience engagement is logged and stored in Live Experience.

If you have the supervisor or administrator role, you can use the Live Experience Admin Console to view the details about past engagements, and to play back engagements that were recorded.

After you search for an engagement on the Engagement History page, click on the engagement to view details.



1. Click **Engagement History** in the navigation menu to return to Engagement History the page.
2. Engagements are titled with a date stamp.
3. The Summary section shows you basic information about the engagement, such as the names of participants, the channels used, the duration, and the length of any associated recording.
4. Click **Keywords** to view a list of generated keywords for the engagement. Keywords are automatically generated and associated to engagements when the Transcription feature is enabled and the transcription contains pre-configured keywords. See *Create Keywords*.
5. Click **Recording** to play back the engagement. You can only play back engagements if the Live Experience application is configured to record engagements. See *Manage Recordings and Quality Options*.
6. Click **Transcript** to view the call transcript. You can only read the transcript if the transcription feature is configured. See *Create a Transcription for an Engagement*.
7. Click **Participants** to see the list of participants who were involved in the engagement.
8. Click **Context Attributes** to see a list of all the context attributes from the engagement. The attributes can tell you if the engagement was started from a mobile app with Android or iOS, or if it was started from your website. Context attributes can also tell you the app or browser version, the name of the participant, and from what part of your application they started the engagement. See *Use Context Attributes to Route Engagements to the Right Team*.

9. Click **Engagement Quality** to see the engagement quality rating the customer gave the engagement. You can only see engagement quality feedback if the Live Experience application is configured to ask customers for feedback, and only if the customer chose to give feedback. See *Enable Engagement Quality Metrics*.
10. Click **Recording Output** to download any recorded parts of the engagement.

Engagement Reports

The Engagement Report tab displays the reports about Live Experience engagements.

The following reports are displayed.

Engagement Reports

Report	Description
Total Engagements	Displays the total number of completed engagements for the application and period that you specified.
Average Engagement Duration	Displays the average duration of engagements.
Average Wait Time	Displays the average time customers wait in queue to be connected with an associate.
Engagement Volume	Displays a bar graph showing the number of engagements by day for the reporting period.
Engagements Per	Displays a line graph showing the number of engagements by Device Type, O/S Version, or App Location.
Engagements per Channel	Displays a bar graph showing the volume of engagements for each of the engagement channels: audio, video, and screen share.
Call Quality	Displays a line graph that summarizes call quality ratings for the specified reporting period.

Use the report filtering controls at the top of the Engagement Report tab to dynamically regenerate the reports based on specific parameters. The Reporting Period filter regenerates all reports for the Last 24 Hrs, Last 7 days, Last 30 Days, or Last 90 Days, or you can use the date pickers to specify a custom reporting period. The Application filter regenerates all reports for a specific Live Experience application.

Some reports include additional filters. For example, the Engagements report allows you to report by device type, operating system version, and app location.

Team Performance Reports

The Team Performance Report tab displays reports about user and team performance.

The following reports are displayed.

Team Performance Reports

Report Name	Description
Total Engagements	Displays the total number of engagements that the team completed over the specified reporting period. Also shows the percentage that the total represents compared to engagements completed in the previous period of the same length.
Average Response Time	Displays the average time that a customer waited in queue to be connected with an associate. Also shows the percentage that this value represents compared to the average wait time in the previous period of the same length.
Average Engagement Duration	Displays the team's average engagement duration. Also shows the percent that this value represents of the average engagement duration in the previous period of the same length.
Maximum Queue Length	Displays the most customers in the queue at one time over the specified period. Also shows the percentage that this value represents of the maximum queue length for the team in the previous period of the same length.
Team Utilization	Displays the percentage of time that the team was busily engaged with customers (including wrap up time after the call). Also shows the percentage that this value represents of the utilization rating the team had in the same period of the same length.
Associate Activity	Displays a pie chart that depicts the percentage of time associates on the team were either Busy, Available, or Away.
Associate Utilization	Displays a line graph that shows the percentage of time that associates on the team were busy (on a call, including wrapping up an engagement) on each day during the specified period.
Average Engagement Duration	Displays a bar graph that shows the average duration of engagements for each day during the specified period.
Average Response Time	Displays a bar graph that shows the average time that a customer waited in queue to be connected with an associate for each day of the specified period.
Team Member Performance	Displays a table of information broken down by associates belonging to the team. If all teams are being reported on, then this report provides information on all associates. The table includes information about number of engagements, average engagement duration, average response time, amount of logged-in time, and busy time. This report includes a search field so you can search for a specific user if you need.

Use the report filtering controls at the top of the Team Performance Report tab to dynamically regenerate the reports based on specific parameters. The Reporting Period filter regenerates all reports for the Last 24 Hrs, Last 7 days, Last 30 Days, or Last 90 Days, or you can use the date pickers to specify a custom reporting period. The Team filter regenerates all reports for a specific team of associates.

Some reports include additional filters. For example, the Engagements report allows you to report by device type, operating system version, and by app location.

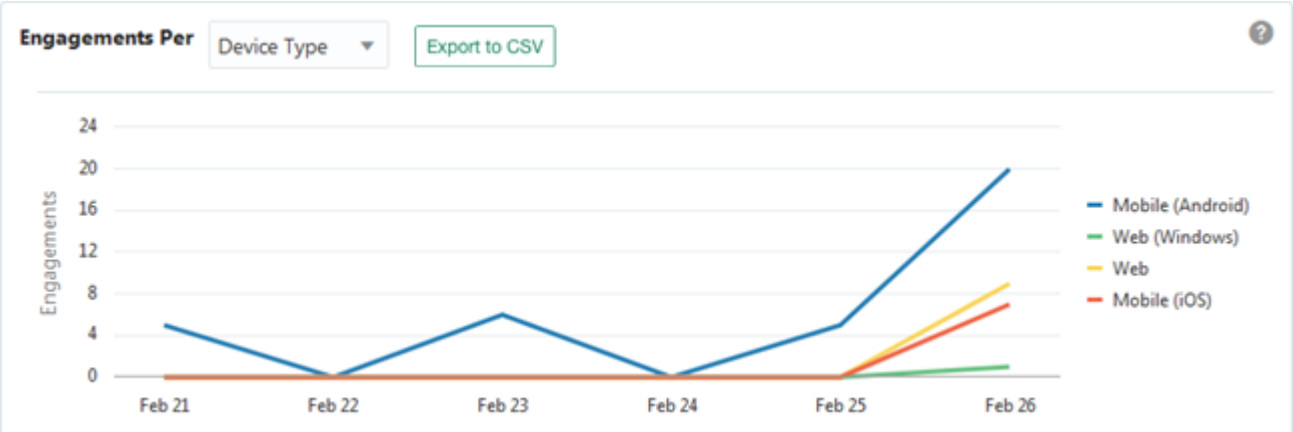
Using Reports

Use reports to find trends, monitor customer feedback, balance resourcing, monitor engagement durations, and monitor individual performance.

Using Reports to Find Trends

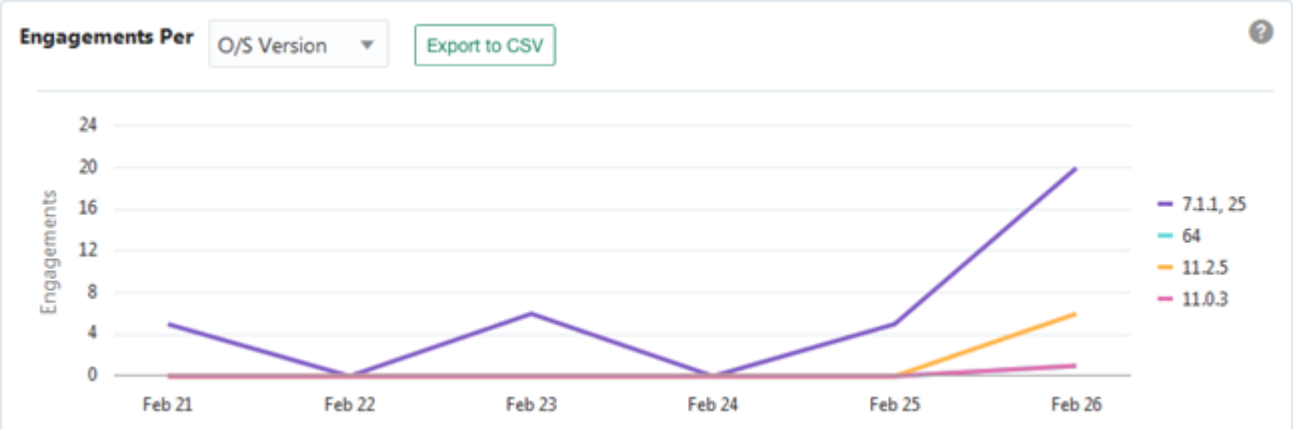
You can use Live Experience reports to identify trends that may indicate developing problems, allowing you to adjust your customer service resources before it's too late.

- You can track the number of engagements per device type.



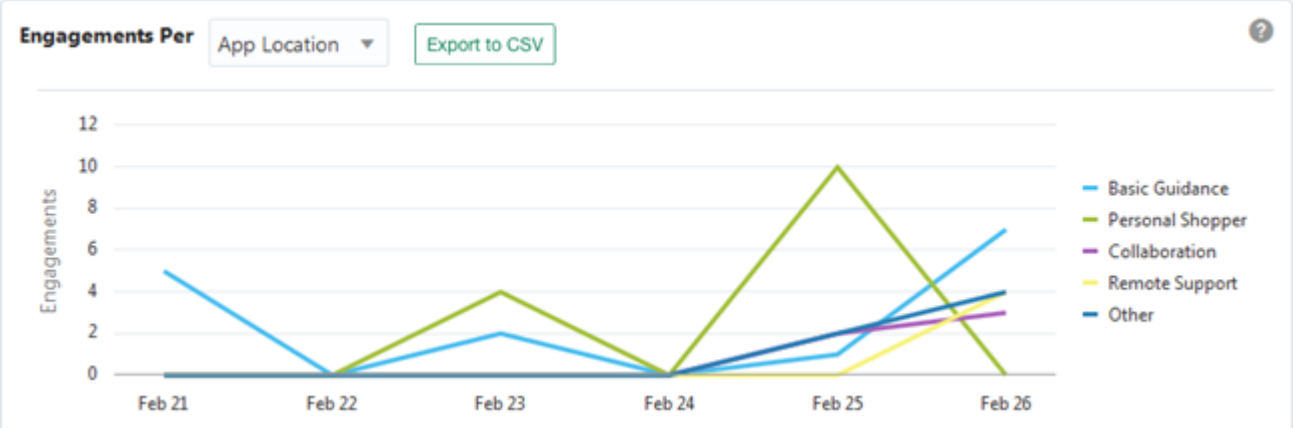
In the above example, one platform is greatly favored over another (Android far outstrips iOS), perhaps meaning that customers are finding one of your particular app platforms less functional.

- You can track engagements by operating system version, which can help you prioritize support resources.



In the graph above, engagements are being generated by Android 7.1 devices at almost 5 times the rate of iOS devices of any version.

- You can identify which locations in your app are generating the most engagements.

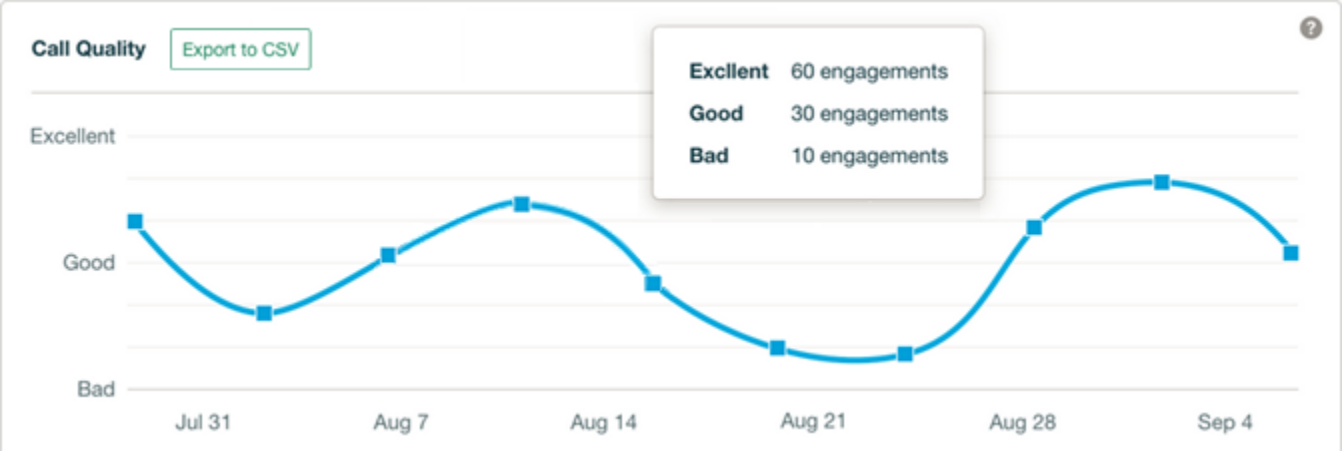


When you add Live Experience to your client app, you can tell Live Experience where the user is in your app by providing a value for the App Location context attribute. When you do this, you are able to track where in your application your customers are choosing to engage with you. For instance you might have an application location for product information, one for product support and another for product purchase and checkout. Using the Engagements Per App Location graph, you can identify at which points in your app your customers are choosing to engage with your associates.

For more details on integrating Live Experience into your own app, see *Developing Live Experience*.

Collecting and Reporting on Customer Feedback

You can configure Live Experience to ask your customers to rate their engagement experience. If you enable this feature, then Live Experience can use the customer feedback to populate the Call Quality report.

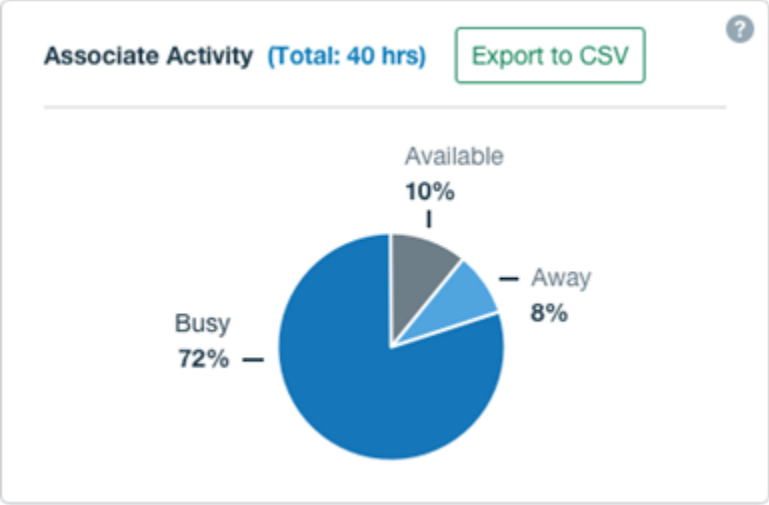


See *Enable Engagement Quality Metrics*. See also *Search for Engagement Details and Recordings* for information about how to search for engagements with a call quality customer feedback filter.

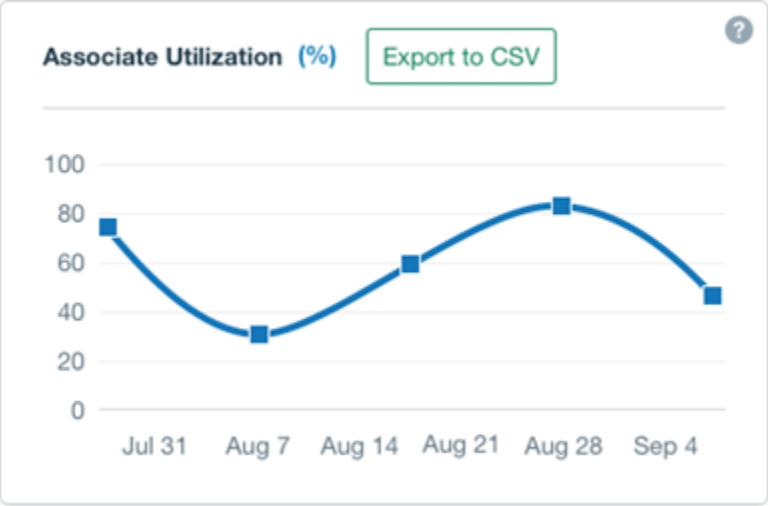
Using Team Reports to Balance Resourcing

The team reports on the Team Performance Report tab are great for helping you make resourcing decisions.

For example, the Associate Activity report shows you how often your associates are engaged with customers. Based on that data, you can determine whether your associates are over or under-utilized and prepare for growth in engagement volume.



Using the Associate Utilization report, you can pinpoint the dates on which your associates have been busiest. You can use this information to anticipate when to have more staff online, and on which days to have fewer staff online.



The Average Response Time report is also valuable for considering resource levels. Higher than desired response times means that your customers were waiting longer in queue to be connected with an associate.

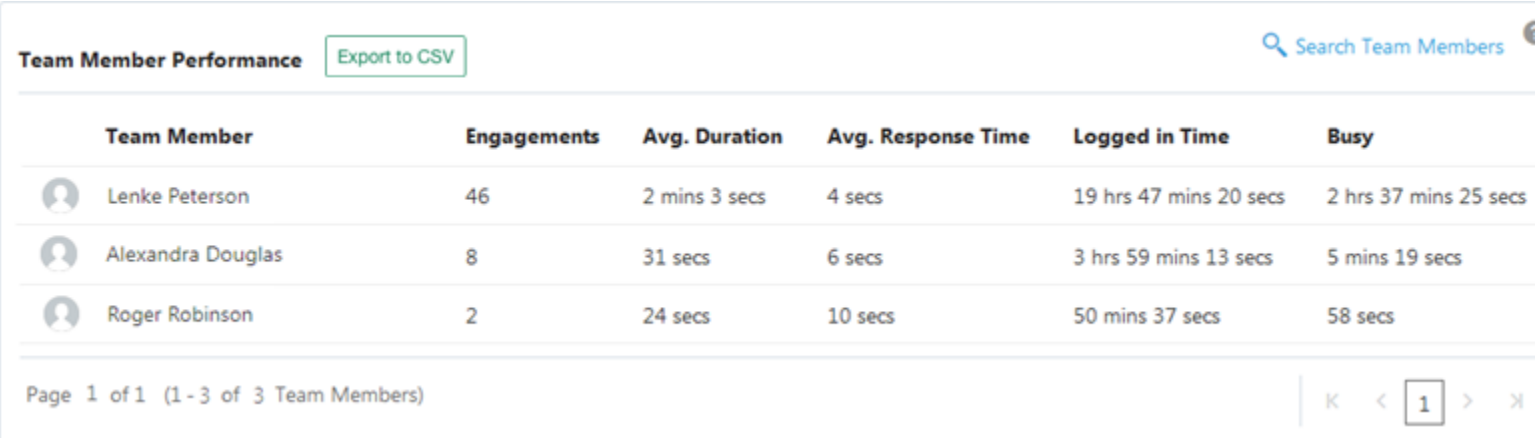
Using Engagement Reports to Monitor Durations

Average engagement duration is a critical metric when you're evaluating your support channels. Spikes or steadily increasing average engagement durations can signal problems that you need to fix.

For example, looking at the report above, the spike in average duration in August could be the result of new associates getting acclimated to your system and workflow, or that customers encountered a brand new product bug that your team hadn't any experience in resolving yet. If the average engagement duration is steadily increasing, it could mean that your team is becoming less efficient at handling certain kinds of issues and that your associates need more training. And if the average engagement duration stabilizes or trends down, it could mean that your new associates have acquired the necessary knowledge to fully contribute to your support operations.

Monitoring Individual Performance

In addition to all of the aggregate data Live Experience tracks, you can also focus on the performance metrics for individual team members.



Using the individual associate metrics you can easily identify which associates are performing exceptionally well and who might benefit from further training. You can also search for and select specific associates so that you can compare them side by side.

Creating Text Records of Your Engagements

When you enable and configure transcription in Oracle Live Experience, you can easily create text transcriptions for any engagement on demand.

Listening and watching to audio and video recordings is a great way to review the many nuances of an engagement between your associates and your customers. Another way of reviewing engagements is to enable transcription of engagements.

You can also define keywords for your Live Experience application. After you create a transcript for an engagement, the keywords you've created are shown below any engagements that contain those keywords in the engagement history.

In the engagement details, you can then select any of the keywords and highlight them in the transcript.

Enable and Configure Engagement Transcription

Enable transcriptions for your customer engagements.

Before you begin, you need to obtain an account with our partner, VoiceBase. After you have an account, request an API key, and follow the instructions in the introduction email. When you have your VoiceBase API key, you can enable transcriptions. After you've enabled transcriptions, you'll be able to request them for new engagements.

> **Note:** VoiceBase is a third-party service and is not free. Visit *https://www.voicebase.com* for information on pricing plans suitable for your requirements.

1. Open the Live Experience Admin Console.
2. From the navigation menu, select **Applications**.
3. On the Applications page, select your application.
4. Select the **Recording** tab.
5. In the Transcription area, toggle the switch to **On**, read the terms and click **Accept**.
6. Paste your VoiceBase API key into the **API Key** field, and set your desired priority from the **Priority** drop down list.
   If you set a lower transcription priority, it'll take longer for Live Experience to generate transcriptions. Select **High** to have transcriptions available in two to three minutes, **Normal** (default) to have transcriptions available within an hour, and **Low** (discounted subscription) to have transcriptions available within twenty-four hours.
7. To disable transcription, toggle **Get voice transcription of recorded calls** to **Off**.

Create Keywords

Before you can search your transcription data, you need to create keywords.

You tag individual engagements with keywords to use in the Live Experience engagement search interface. Any tags that occur in an engagement's transcriptions will be highlighted when you click on the associated keyword.

1. On the Recordings tab for your application, scroll to the **Keywords** area.
2. Click **Add** and enter the keyword.
   Keywords must be single words, and are limited to lowercase alphanumeric characters.

Create a Transcription for an Engagement

After you create keywords and assign them to engagements, you can generate transcriptions for those engagements.

If you have engagements before you enable transcriptions, you won't be able to add transcriptions to those, but any existing transcriptions are retained even if you discontinue your VoiceBase service.

1. Open the Live Experience Admin Console.
2. Select **Engagements** from the Admin Console navigation menu.
3. Search for and select the check box for an engagement that has no transcription and then click **Request Transcript**.
   The status in the Transcription column is set to Pending, but will change to Available once the transcription process is finished. Depending on your setting for transcription priority, the transcription process may take more or less time.

Results:

If the transcription contains any of your defined keywords, you see them listed under the engagement record and you can also search for the engagement by keyword. See *Search for Engagement Details and Recordings*.

Download Engagement Transcripts

You can download transcriptions for any engagements that have them, and you can then use the transcription file as a basis for further analysis.

1. Find the engagement whose transcript you want to download.
2. Open the engagement and expand the **Transcript** section.
3. Select the **Download** icon.

7 Installing Demo Apps

Install the Live Experience Demo App on iOS

The Oracle Live Experience demo app for iOS is on the Apple App Store.

1. On your iOS device, open the Apple App Store.
2. Search for and install Oracle Live Experience.
3. Open the app.

   The first time you open the app, you're presented with the end-user license agreement (EULA). Read it and agree to it. You can't use the Live Experience demo app unless you agree to the terms. See *Oracle Live Experience Demo App End-User License Agreement for iOS*.

4. Open the Settings app on your device and locate General Settings.
5. Locate and tap **Device Management**.
6. Tap **Oracle Corporation (Ent 2)**.
7. Tap **Trust Oracle Corporation (Ent 2)**.
8. Tap **Trust**.
9. Navigate back to the main Settings view.
10. Tap **LiveExperience**.
11. In the LiveExperience app settings, tap **Tenant**.
12. Set the **Tenant** to your allocated tenant name.

    If you haven't already created a Live Experience application, create a new one as described in *Manage Your Applications*, note down the client ID and client secret, and then proceed to step 14.

13. Do the following only if you already have an existing application, and you've forgotten the client ID and client secret:
    a. Navigate to the Live Experience Admin Console: **https://live.oraclecloud.com/ui?tenant=your_tenant_name** , or for EMEA customers, **https://emea.live.oraclecloud.com/ui?tenant=your_tenant_name** , replacing your_tenant_name with your assigned tenant name.
    b. Choose your application from the application list, and then select the **Details** tab.
    c. Make a note of the Client ID.
    d. Click **Display Secret** and then click **Generate**, making a note of the new secret.

    > **Note:** Generating a new secret may cause any authorization configuration you have in place to be invalidated. If you've got any other Android or iOS apps, you'll also need to update the client secret for them as well.

14. Enter your client ID in the **Client ID** text box.
15. Enter your client secret in the **Secret** text box.
16. Tap the home button on your iPhone and tap the **LiveExperience** app.

    After the demo app initializes, you should see a landing page with six demonstration scenarios.

Install the Live Experience Demo App on Android

The Oracle Live Experience demo app for Android is on the Google Play store.

1. On your Android device, open the Google Play store.
2. Search for and install Oracle Live Experience.
3. Open the app.

   The first time you open the app, you're presented with the end-user license agreement (EULA). Read it and agree to it. You can't use the Live Experience demo app unless you agree to the terms. See *Oracle Live Experience Demo App End-User License Agreement for Android*.

4. Set the **Tenant** setting to your allocated tenant name.

   If you haven't already created a Live Experience application, create a new one as described in *Manage Your Applications*, note down the client ID and client secret and skip to step 6.
5. Do the following only if you already have an existing application, and you've forgotten the client ID and client secret:
   a. Navigate to the Live Experience Admin Console: **https://live.oraclecloud.com/ui?tenant=your_tenant_name** , or for EMEA customers, **https://emea.live.oraclecloud.com/ui?tenant=your_tenant_name** , replacing your_tenant_name with your assigned tenant name.
   b. Choose your application from the application list, and then select the **Details** tab.
   c. Make a note of the Client ID.
   d. Click **Display Secret** and then click **Generate**, making a note of the new secret.

      > **Note:** Generating a new secret may cause any authorization configuration you have in place to be invalidated. If you've got any other Android or iOS apps, you'll also need to update the client secret for them as well.

6. Enter your client ID in the **Client ID** text box.
7. Enter your client secret in the **Secret** text box.
8. Relaunch and try out the demo app features.

8 Partner Administration

Manage Your Tenants

As an Oracle Live Experience distribution partner, you're able to create and delete tenants for your own customers quickly and easily through the Partner Admin Console.

1. Go to `https://live.oraclecloud.com/dptui?tenant=your_tenant_name` or, for EMEA customers, `https://emea.live.oraclecloud.com/dptui?tenant=your_tenant_name` to get started.
2. Create a new tenant when you sign up a new customer.
    a. Select **Tenants** from the navigation menu.
    b. On the Tenants page, click **Add New Tenant**.
    c. On the New Tenant screen, provide a name, specify the administrator's email address, and the start and end date for your tenant.
    d. Configure the tenant limits you want:
        - **Live Engagements** to limit the number of concurrent audio, video, or screen-sharing engagements across all associates for this tenant.
        - **SMS Conversations** to limit the number of open SMS conversations across all associates for this tenant.
        - **Provisioned Users** to limit the number of users that can be created on this tenant.
        - **Recording Storage** to limit the amount of storage space for saving recorded engagements for this tenant. When the limit is reached, engagements configured to be recorded won't get saved.
        - **Signed-In Associates** to limit the number of associates that can be signed in to the Associate Desktop at the same time for this tenant.

    The process to provision a new tenant can take about a minute to complete. When you create a tenant, a welcome email is automatically sent to the email address you specified in the new tenant form.

    Using the Admin Console, each tenant configures their account, creates an application in the Admin Console, and adds Live Experience features to their web or mobile apps.

    See *Get Started with Oracle Live Experience* for more information.
3. Select a tenant to modify it.
4. To delete a tenant, select the tenant and select **Delete Tenant**.

> **Note:** If you delete a tenant, you also delete all the tenant's data, such as engagement information and recordings.

View Tenant Usage Reports

As an Oracle Live Experience distribution partner on the Enterprise Plus plan, you can view license or usage reports about all your tenants.

To view Live Experience reports about your own tenancy, see *View Live Experience Reports*.

Live Experience partner reports allow you to track a variety of metrics about your tenants' Live Experience use. You can view Live Experience partner reports in the Partner Admin Console.

1. Go to `https://live.oraclecloud.com/dptui?tenant=your_tenant_name` or, for EMEA customers, `https://emea.live.oraclecloud.com/dptui?tenant=your_tenant_name` to get started.
2. From the navigation menu, click **Reports**.
3. Use the report filtering controls to regenerate reports based on specific parameters.
    a. Use **Reporting Period** to regenerate all the reports for the Last 24 Hrs, Last 7 Days, Last 30 Days, or Last 90 Days. Or, you can use the date pickers to specify a custom reporting period.
    b. Use **Tenant** to regenerate all reports for a specific tenant.
4. Optionally, download a CSV file of the report data for any of the reports.
5. Select the **Tenant Usage Report** tab to see the following reports:
    - Overview information for the selected tenant, such as total number of engagements, average engagement duration, and average customer wait time over the specified reporting period
    - The number of engagements per tenant for the reporting period
    - The number of engagements per tenant by channel for the reporting period
6. Select the **License Usage Report** to see the following reports:
    - Your license usage for the reporting period
    - The number of named users per month for each of your tenants
    - The number of connected seats per month for each of your tenants
    - The number of named users and connected seats per tenant for the reporting period

9 Managing Security

Customer Data Collection and Management

Oracle Live Experience provides a comprehensive set of security tools you can use to manage customer data collection, including auditing, engagement deletion, and engagement data extraction.

All communication to and from Live Experience is encrypted over SSL (SHTTP, websockets, and SRTP). If you enable engagement recordings, the recordings are stored using AES-256 encryption.

- Notifying Customers of a Data Breach

  In the event you suffer a breach of customer data, you can use the Live Experience audit REST operation to return comprehensive details on all Live Experience events on a particular date or date range, and relay that specific information to customers. For complete details on the Live Experience REST API, see the *Oracle Live Experience REST API Reference*.

- Provide Engagement to Customers on Request

  Your customers may wish to request data for any engagements in which they've been involved. You can use the Live Experience engagement REST operation to retrieve a complete record of a customer's engagement data, including URIs for recordings, on a particular date or date range. See the *Oracle Live Experience REST API Reference*.

- Delete Engagements on Customer Request

  Customers may also want to have any data pertaining to them purged from Live Experience. Live Experience provides a delete REST operation you can use to delete either individual or multiple (bulk) engagements. In addition, you can use the Live Experience audit REST operation to retrieve a record of the engagement deletions so you can proved that the request has taken place. See the *Oracle Live Experience REST API Reference*.

- Gathering and Storing Customer Data

  Live Experience doesn't store or hold any personal customer data and any data it does collect is not correlated with any particular customer. It's up to you, therefore, to determine what data you gather from your customers when you're defining the context variables you want to use in each engagement.

  You're responsible for determining the amount of data required to define your engagement scenarios and handle engagement routing, as well as determining what data should be relayed to your associates. You have complete control over the data you choose to gather using Live Experience, how it is presented to associates, and how and if it is stored.

- Customizing the Live Experience Interfaces

  Live Experience lets you customize all customer facing messages to meet your privacy requirements and laws of your region. You can change error message strings, resource request messages, notifications, tool tips, and much more. For information on customizing Live Experience messages see *Customize and Localize the Messages and Text in Live Experience*.

- Controlling Audit Log Retention

  Live Experience lets you control the amount of time your system audit logs are retained. By default, audit logs older than 90 days are automatically purged. If you'd like to change the purge time threshold, contact your Live Experience Oracle support representative.

Transcription Security

For Live Experience to make VoiceBase API calls, you must provide a VoiceBase API key that is stored in the Live Experience database.

Live Experience incorporates the following security considerations for transcription:

- SSL/TLS encryption over HTTPS for the interface to VoiceBase.
- A user-provided API key that Live Experience stores and uses to make VoiceBase API calls. The key is encrypted and stored by Live Experience and is transmitted in encrypted form.
- Transcripts received from VoiceBase are encrypted when they are stored and use the same encryption mechanism that is used for recordings.
- The received transcript is deleted from VoiceBase with an explicit API DELETE call.
- The transcription gateway asserts based on the service administration role and tenant key validation that the correct tenant is using the gateway.
- All transcription data elements stored locally in the database are encrypted.

10 Live Experience Articles

Live Experience Integrated Mobile Channels

Modern customers prefer mobile apps to contact and engage with a business.

When customers contact a business, they expect an easy and rapid resolution for their issue. The following example addresses some problems associated with interactions.

Understanding an Interaction Through a Customer's Eyes

Alice has purchased and installed two stacking ovens from Acme Appliance. Unfortunately, after installation, there's an "unsightly gap" between the two ovens that isn't apparent in the Acme promotional brochures. Using Acme's support app installed on her mobile phone, Alice looks up the installation FAQs and finally decides to call the support number listed in the app. When she taps the phone number, she's routed away from the app and is connected to an Acme customer service associate. After providing the order number, make and model, and further details to the customer service associate, Alice can't convincingly describe the "unsightly gap" issue to the associate, and her problem remains unsolved after spending a lot of time on the call. Alice leaves the interaction unsatisfied.

In-App Digital Engagements

As a remedy to Alice's scenario, in-app digital engagements are perfect for providing the right support to an end user at the right time. A user doesn't have to navigate away from the app to reach support, an action which leaves an associate with no context for the call. Depending on a user's location in the app as well as other context data provided by the app itself, you ensure a frictionless engagement without ever leaving the app itself.

The Live Experience Solution

In Alice's case, if Acme Appliance Corporation integrates their mobile application with Oracle's Live Experience, they can engage Alice directly from the Acme mobile application. All the context information needed to help Alice, including the make and model of the oven, and the order number, is passed to an associate. Equipped with all of the required contextual information and with additional digital channels available, the associate can then escalate the call from voice-only to one-way video shared from Alice's device.

Since Alice is on a mobile phone, she can point the phone's camera at her oven and show her problem to the associate. She can also share her screen to show the images from the installation instructions and use the screen-sharing spotlight feature to highlight the gap so that the associate sees exactly what she sees.

Instead of an impasse, Live Experience lets the associate experience Alice's problem virtually first hand.

The associate suggests an appropriate compromise by offering a trim piece installed at Acme's expense that neatly solves the problem with a minimum of cost and effort. Alice is now a happy Acme customer and an advocate for Acme's customer service.

Live Experience Widgets

The pre-built and customizable Oracle Live Experience widget can be integrated directly into existing mobile and web apps. A business can engage their users with any predefined digital channel combination of audio, video, and screen share, along with many other interactive capabilities.

Overview of User Engagements

Understanding a customer's journey is important in deciding how digital channels can be leveraged to deliver the best possible customer experiences.

As a business, you want to gain insights into common customer issues and proactively engage with customers before they become dissatisfied. In the following example, a business is able to improve customer satisfaction and positively differentiate its brand by connecting to the customer at the point of frustration.

Joe, a fitness enthusiast, uses FitKit, a fitness application on his wearable smartwatch to track his daily fitness activity. The application tracks his fitness data and syncs it with his mobile phone and sends notifications when he reaches his fitness goals for the day. Unfortunately, the FitKit app sometimes takes too long to sync the data from the wearable to the phone, and prevents Joe from tracking his goals. Since the problem occurs intermittently, Joe doesn't seem to ever contact FitKit right when he is having the issue. When Joe manages to find the help desk number and contact an associate at FitKit, the associate asks for a lot of information Joe doesn't have readily available, including device version, app version, and synchronization duration. The overall experience wastes time and frustrates Joe greatly.

To intercept customer issues more timely, Live Experience engagement scenarios let you design engagements based on customer context, so you can interact with your customer at the right time using the right digital channel. Since Live Experience is integrated into a mobile app, a user's entire context, including device, location, device type, and user status, can be gathered and used to determine how to engage the users at the key moments.

In the example above, FitKit integrates their app with Live Experience and whenever the app takes longer than normal to sync, a support cue is triggered that lets FitKit provide live help to a customer right from within the app. The customer calls directly from the app to report the problem, and all of the customer context, such as customer location, status, and app and device version, are passed to the associate. The associate has all of the right, actionable information to solve the problem, and FitKit is able to increase customer retention by proactively engaging with the customers at precisely the right time. Customer frustration is minimized and satisfaction enhanced.

Here are some recommendations to help you create a better engagement experience.

- Determine when to engage with a customer, and set up the engagement rules.

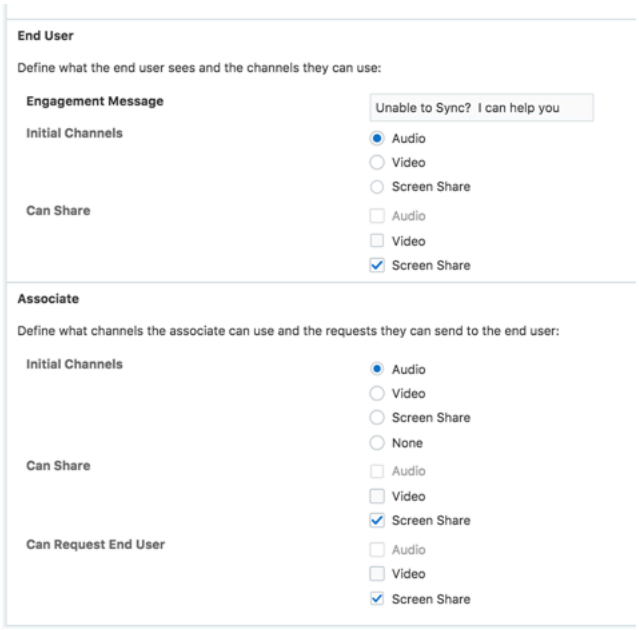
  Figure out the key pain points in the customer journey and proactively engage the customer. In our example, FitKit decided to proactively engage with their premium app subscribers when the app was unable to sync the data after trying three times. Those conditions are then used to create an engagement rule in Live Experience.

- Engage the customer with the right message.

  To catch a customer's attention and make sure they engage with your business, show a personalized, targeted message.

- Engage the customer using the right digital channel.

  Finally, you need to provide the right tools and digital channels. Your customers are more likely to engage using plain audio, so we configure the scenario to share just their microphone. If necessary, however, we can provide a more interactive experience by asking a customer to share their screen, allowing an associate to see what the customer sees in order to better understand a customer's problem.



All the engagements defined in Live Experience are dynamic and don't require you to write a single line of code. You can create an engagement based on your customer journey and after you enabled the scenario in Live Experience, it instantly enables the engagement in your application. No matter whether your customer journey is linear, with a customer progressing from step to step, or more free-form, where a customer dynamically jumps from one point to another, Live Experience lets you define multiple engagement scenarios to cover virtually all of your customer journey requirements.

Overview of Engagement Scenarios

Read a convincing example of creating engagement scenarios to engage your customers at the right time, the right place, and with the right context.

When a customer is on your Live Experience-enabled website or mobile app, they see the Live Experience widget. When they tap on the widget, they initiate an engagement that connects them with an associate.

The features and channels available to your customers and your associates, and how the widget appears, is all controlled by Live Experience engagement scenarios. In fact, as soon as the widget appears on a page, Live Experience already knows, based on context attributes and data points you create and control, which engagement scenario will be used if the customer taps on the widget to start an engagement. When the page containing the widget loads, Live Experience goes through each engagement scenario, one after another, until it finds the first one with rules that fit your

customer's context. If Live Experience goes through all the engagement scenarios without finding one with rules that meet the customer's context, Live Experience hides the widget.

Your goal is to create one or more engagement scenarios so that you can engage your customers at the right time, the right place and with the right context. See also *Manage Engagement Scenarios*.

We recommend following this order to plan and implement your engagement scenarios.

1. *How You Determine the Number of Engagement Scenarios You Need*
2. *How You Implement Your Engagement Scenario Plan*
3. *How You Use Rules to Fine Tune Engagement Scenarios*

See *Example: Define and Configure an Engagement Scenario Rule* for an example of this process.

How You Determine the Number of Engagement Scenarios You Need

Plan and determine how many engagement scenarios you need to meet your business needs.

Consider your website or mobile apps. On which pages do you want the Live Experience widget to appear, and do you want the behavior to be the same on each page, or different? Consider the kinds of issues your customers might have and determine how best to meet their needs.

For example, you could design a single basic engagement scenario with a very loose rule that almost always applies. You could configure this engagement scenario to start as a basic audio call, but grant your associates the flexibility to upgrade the call to use video or screen sharing so that associates have the tools they need to address a wide range of customer issues.

Or, you could design several engagement scenarios, each one with different features and channels, and use order and rules to intelligently determine which engagement scenario will apply in different contexts, such as the page your customer is on, or the services your customer already uses.

How You Implement Your Engagement Scenario Plan

Creating engagement scenarios is quick and easy, so if your plan changes, you can create new or different engagement scenarios.

You can either create brand new engagement scenarios, or you can repurpose the Live Experience default engagement scenarios.

If you are creating new engagement scenarios, you should disable or delete the default ones so that they don't get triggered by accident.

How You Use Rules to Fine Tune Engagement Scenarios

The key to getting the most out of your engagement scenarios is controlling exactly when they apply to any particular engagement.

If you're creating just a few general categories, such as Sales, Support, and Administration, you probably won't need to work with rules very much and can just specify an Application Location. But if your business needs are more advanced, you'll find yourself needing more control, and you will want to create engagement scenario rules.

When creating an engagement scenario rule, you first choose the type of rule set you'd like, either AND or OR, and then add a variety of conditions depending on your requirements. An engagement scenario rule condition consists of the following components:

- A context Attribute containing the data you'd like to examine.
- An Operation determining how you'd like to process the attribute's data (either equals or reg exp [regular expression]).
- A Value that you want to compare to the data contained in the attribute through the Operation.

Live Experience provides some default context attributes, but you have the ability to pass any information you collect in your app or on your website to Live Experience and to capture that as a context attribute. For example, if you allow your customers to log into your site or app, you can communicate whether your customer is logged in to Live Experience. If you have a customer database that ranks your customer by prestige or tier, you can inform Live Experience whether a given customer is a bronze, silver, or gold tier customer. You can then use that information in Live Experience when creating rules for your engagement scenarios.

Custom context attributes and certain default context attributes are not automatically populated by Live Experience. You have to gather the context you're interested in when you create your Live Experience-enabled app or website.

For more information on initializing context variables, depending on your platform, see:

- *Configure Context Information for Your Website*
- *Configure Context Information for your iOS App*
- *Configure Context Information for your Android App*

Example: Define and Configure an Engagement Scenario Rule

Define and configure a rule you might want to use in an engagement scenario.

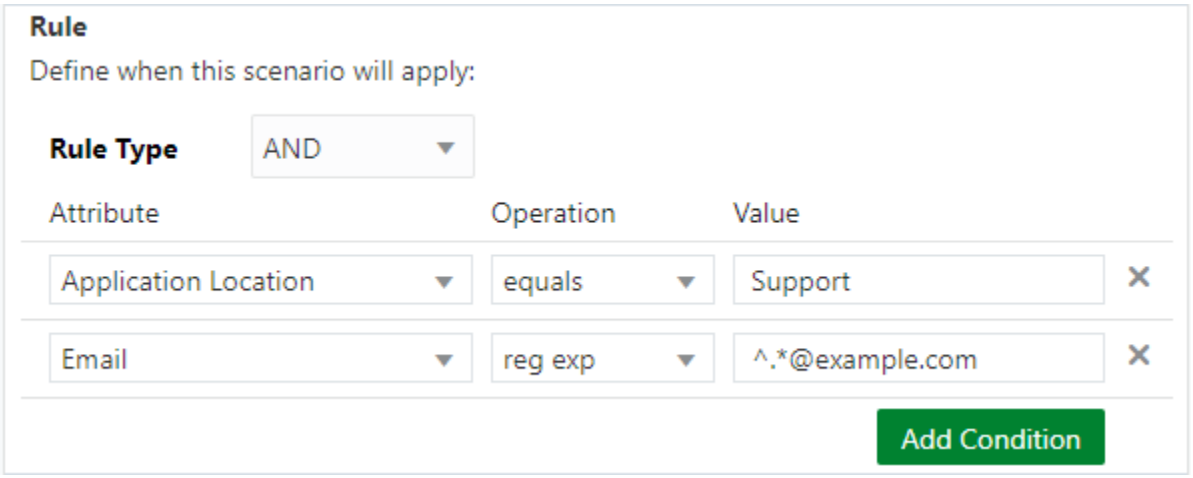
For this example, an engagement request is initiated by a customer from the Support page of your website or mobile app, and the email domain of the customer is example.com.

In this example, the engagement is from a specific page of your website or mobile app. In Live Experience, the context attribute Application Location refers to the location in your app or website from which a customer initiates an engagement request. So, you can add a condition to the rule for your engagement scenario to use the Application Location context attribute with a value equal to **Support**.

Next, since the email domain is also known, you have another piece of information you can use for another rule condition. In this case, you set the Rule Type to AND for this engagement scenario.

Email is a pre-defined context attribute. Add another condition to your rule that uses the Email context attribute. For the operator, use a regular expression with a value of **^.*@example.com**. This regular expression will match any valid email address with an example.com domain. The **^** refers to the beginning of the string, and **.*** matches any characters after the **.** and before **@example.com**.

The engagement scenario configuration should look like the following image.



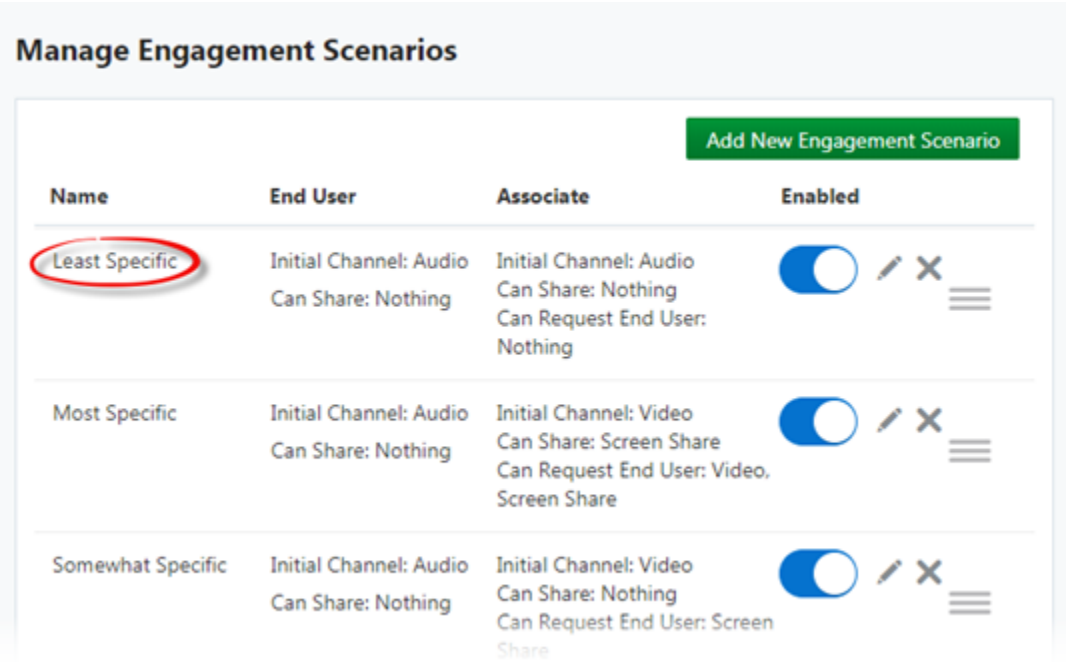
How You Choose the Priority of Your Engagement Scenarios

After you create your engagement scenarios, you need to determine the order in which Live Experience goes through them when determining which scenario applies to an engagement.

The order matters. You can re-order engagement scenarios by selecting a scenario by its handle and dragging and dropping it where you want it.

When an engagement comes into the Live Experience queue, it matches the first engagement scenario it encounters that is least specific. In other words, if you create an engagement scenario with no rules and place it at the top of your list of engagement scenarios, it will match all incoming engagements, preventing matching with any of your other scenarios below it.

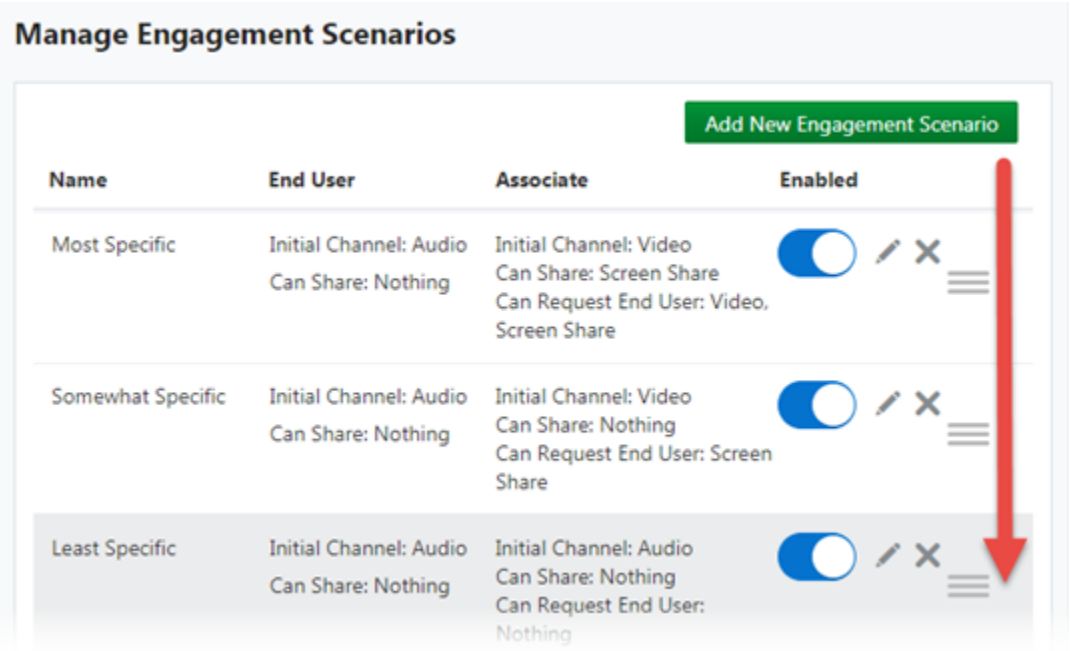
For instance, in the following image, we have an engagement scenario named Least Specific at the top of the list.



The Least Specific engagement scenario, as its name implies, contains no or few conditions on its use.

Notice that we have two other scenarios, Most Specific and Somewhat Specific. As their names imply, they contain conditions that provide additional filtering on incoming engagements, with Most Specific having the greatest number of rule conditions.

If you leave those engagement scenarios in the current order, the Least Specific engagement scenario will match most incoming engagements. The Most Specific and Somewhat Specific scenarios will seldom be applied. To use your scenarios more effectively, always keep your most specific engagement scenarios at the top of the list and continue in descending order of specificity as shown by the arrow.



How to Use Short Codes in Your Engagement Scenarios

It might not be immediately obvious how to use the Short Code feature when planning and determining your needs with respect to engagement scenarios.

Imagine that your company uses other traditional communication tools external to Live Experience for engaging with customers, such as a support telephone number. You may want to escalate an external engagement into a Live Experience engagement to solve your customer's issue best with a video or screen sharing engagement. With the short code feature, the Live Experience widget generates a six-character code when the customer taps on it. The customer can then read the code to the associate, who enters the code into the Associate Desktopto continue the engagement in Live Experience.

Configure your short code engagement scenario with a specific and narrow rule so that it doesn't get triggered by accident. For example, you could configure a condition that looks for an Application Location value of **short code**, and then you could add a "short code" page to your website or app and add the Live Experience widget to that page. Then, when your associates want to escalate a phone call to a Live Experience engagement, they could tell the customer to go to the "short code" page and tap on the widget.

The Short Code Workflow in Practice

With a short code engagement scenario in place, here's an example of how to use the short code functionality.

1. A customer calls your support number and connects with an associate.
2. The associate determines that a screen sharing session would help solve the customer's issue.
3. The associate directs the customer to the location in your mobile app or website that triggers the short code engagement scenario.

4. When the customer gets to the page, they see the widget. The widget shows a screen sharing icon.
5. The customer taps the widget, which then displays a six-character short code.
6. The customer provides that code to the associate over the phone.
7. In the Associate Desktop, the associate starts a meeting using the **Ask them for a short code** option and enters the short code the customer provided them.
8. The associate and your customer are now connected in a Live Experience engagement.

How You Customize Customer Context for Engagement Routing

Context attributes are pieces of data that you gather in your Oracle Live Experience-enabled app.

You define context attributes using the Live Experience Admin Console, and you initialize them in your Live Experience-enabled apps. You can then use those attributes in your engagement scenario rules to determine exactly how you want to handle any customer engagement as well as in routing rules to get your engagements to the right users on the right teams.

Live Experience provides a comprehensive variety of default context attributes and also gives you complete flexibility to create custom ones from the Live Experience Admin Console. In many cases, the default Live Experience context attributes provide everything you need to successfully control your engagements. When you need further flexibility, however, you can create your own custom context attributes in just about any form you can imagine.

For example, you might want to create a custom context attribute that defines whether an employee is a current employee or a former employee. From within your Live Experience-enabled app, you gather that information from your employee database and initialize the context variable value as required. You then create engagement scenario rules or routing rules using that custom context attribute to configure the correct combination of digital engagement channels and the teams to which engagements flagged with the value are assigned.

You can create context variables that take phone numbers, email addresses, URLs, Boolean expressions (true or false values), and more. You can easily define any context attributes you like using the Live Experience Admin Console, and you can choose whether those context variables are displayed in the Live Experience Associate Desktop.

Custom context attributes and certain default context attributes are not automatically populated by Live Experience. You have to gather the context attribute data you're interested in when you create your Live Experience-enabled app.

For more information about creating and using context attributes, see the following:

- *Pre-Defined Context Attributes*
- *Create a Custom Context Attribute*
- *How to Use Context Data to Configure Customer Engagement Scenarios*
- *Use Context Attributes to Route Engagements to the Right Team*

Pre-Defined Context Attributes

Live Experience provides a variety of context attributes that you can use when you're creating engagement scenarios and routing rules.

The selection of pre-defined context attributes is comprehensive. In many cases, you may not need to create any custom context variables at all.

The table below lists the default context attributes and includes the following information:

- Key: The key that you use to initialize the context attribute using the Live Experience web and mobile component SDKs.
- Label: The label that displays next to the value in the Associate Desktop (if you choose to display the value).
- Data Type: The data type of the value for the context attribute.
- Default Value: Any default value for a context attribute value and if the context attribute value is automatically initialized by the Live Experience mobile or web component SDKs.

Default Context Attributes

Key	Label	Data Type	Default Value
email	Email	Email Address	None. Not automatically initialized.
phone	Phone Number	Phone Number	None. Not automatically initialized.
location	Location	URL Location	None. Automatically initialized.
appLocation	Application Location	String	Initialized in the Live Experience SDK. Mandatory.
devType	Device Type	String	Unknown Device Type. Automatically initialized if available.
devDesc	Device Description	String	Unknown Device. Automatically initialized if available.
browser	Browser	String	Unknown. Automatically initialized if available.
browserVersion	Browser version	String	Unknown Device. Automatically initialized if available.
osVersion	O/S Version	String	Unknown OS. Automatically initialized if available.
fullName	Full Name	String	Unknown User. Not automatically initialized.
appName	Application Name	String	Unknown Application. Not automatically initialized.
avatar	Avatar	URL	./images/default.svg. Not automatically initialized.

Key	Label	Data Type	Default Value
targetPhoneNumber	Target Phone Number	Phone Number	None. Not automatically initialized.
url	URL	URL	No default. Automatically initialized if available.
callType	Call Type	String	Web. Initialized in the Live Experience SDK.

Create a Custom Context Attribute

Create new context attributes.

1. From the Admin Console navigation menu, select **Settings** and then select the **Context Attributes** tab.
2. Click **Add New Attribute**.
3. Configure the following information for your new context attribute:
    - Key (required): The key that you'll reference when initializing the context variable in your integration code.
    - Label (required): The label displayed for the context variable content in the Associate Desktop.
    - Type: The data type for the context variable. You can choose from Boolean, Date, Email Address, Location on Page, Number, Phone Number, String, and URL.
    - Default Value: Set a default value if relevant.
    - Visible to Associates: Toggle if you'd like the context variable to be displayed to associates in the Associate Desktop.
    - Hide If Not Present: Toggle if you'd prefer that an empty context variable not be displayed to associates in the Associate Desktop.

> **Tip:** Regarding the Visible to Associates and Hide If Not Present toggles, you generally only want to show context data to associates to help them get their job done most effectively. Extraneous information can make it harder for an associate to focus on relevant data. Likewise, having empty fields with undefined data will similarly take up extra space on the Associate Desktop console and can make customer engagements less efficient. However, you may choose to leave some empty fields visible to your associate if it's important that the associate knows that the customer's information is not in the database, for example.

4. Click **Save**.

Results:

After you initialize the context variable during the mobile or web component integration, it will display in the Associate Desktop during an engagement.

For more information on initializing context variables, depending on your platform, see:

- *Configure Context Information for Your Website*
- *Configure Context Information for your iOS App*

- *Configure Context Information for your Android App*

How to Use Context Data to Configure Customer Engagement Scenarios

After you configure context attributes and integrate Live Experience into your client apps, you can use those context attributes to apply engagement scenarios to particular types of engagements.

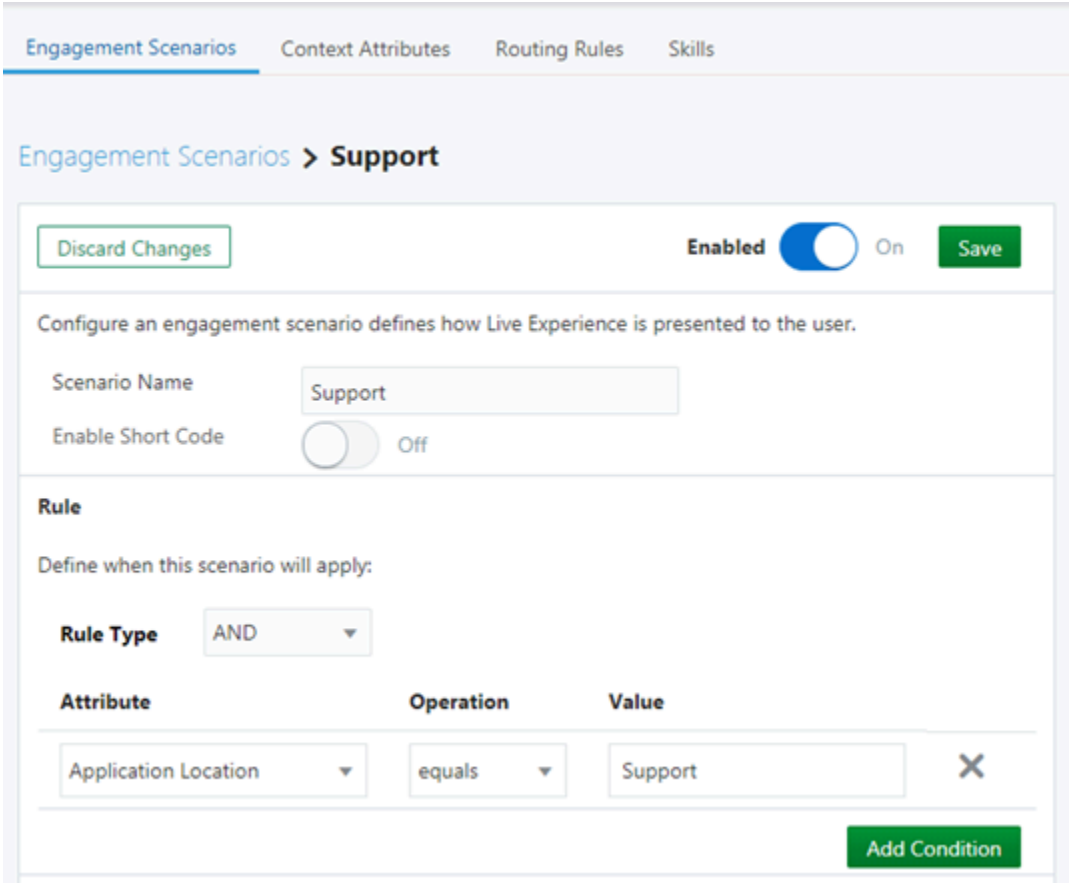
While you can use any context attributes you like, the most important context attribute from an engagement scenario standpoint is Application Location.

The Application Location context attribute specifies the location in your app from which a customer has initiated an engagement. If you only have a single application location, say a Support tab, then you can ignore the Application Location context variable in your engagement scenario definitions. But when your app expands to encompass multiple entry points, you use the Application Location context attribute to define which engagement scenarios you'd like to apply to which engagements.

For instance, if you have a Support page in your app, you probably want to route a customer to a support-specific engagement scenario that allows an associate to request the customer to share their screen or show their surroundings. Likewise, if you have an Administration page, you probably need only audio for both customer and associate without further options.

Using the Live Experience Admin Console, you assign the correct engagement scenario by creating rules that examine the Application Location context variable and enabling the correct digital channels for both customers and associates. For example, if the Application Location value is equal to Support then you would want to apply the Support engagement scenario, and if the Application Location value is equal to Administration, you would want to apply the Administration engagement scenario.

In this case, for a scenario named Support, we've created a rule condition that checks to see if Application Location is equal to Support. If it is, Live Experience applies this particular scenario to the engagement:



For complete details on configuring engagement scenarios, see *Create a Custom Context Attribute*.

For more information on initializing context variables, depending on your platform, see:

- *Configure Context Information for Your Website*
- *Configure Context Information for your Android App*
- *Configure Context Information for your iOS App*

Use Context Attributes to Route Engagements to the Right Team

As with engagements, you can create routing rules that route engagements to particular teams based on context attributes.

You'll likely find many uses for context attributes in your routing rules.

As an example, let's say you have a Canadian company spread throughout several provinces. Based on the geographical location gathered by your Live Experience-enabled app, you probably want to route customers from Quebec to

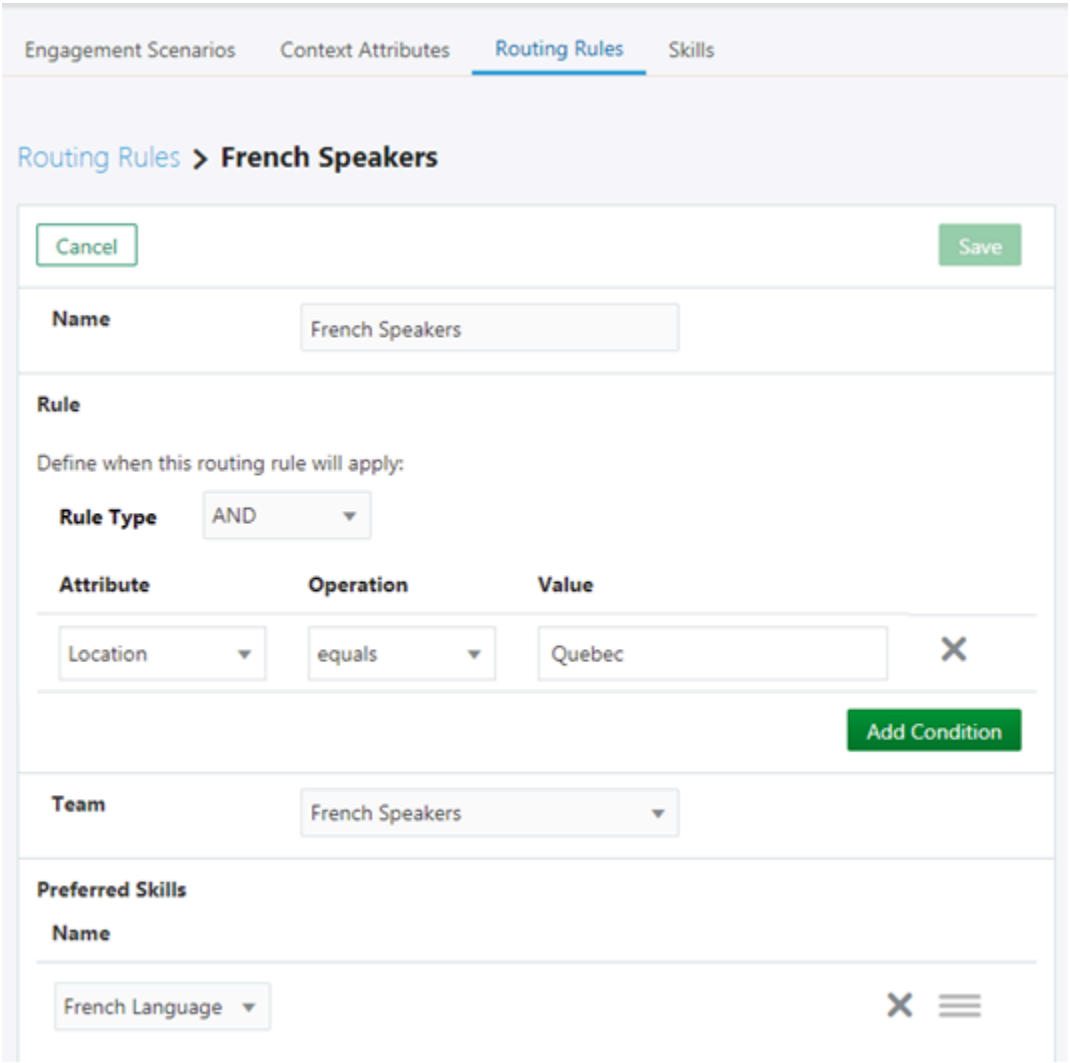
associates with French speaking skills and customers from other provinces (New Brunswick, Alberta, Nova Scotia) to associates with English speaking skills.

You need to complete several steps in the Live Experience Admin Console to handle routing Quebec customers to French speaking associates.

1. Create a new skill, such as French Language, and assign it along with a skill level to your associates as applicable.
2. Create a new team, such as French Speakers, and assign your associates with French speaking skills to the team.
3. Create a new routing rule and add a condition that looks at the Location context variable and compares it to Quebec.

When your app initializes a customer's location as Quebec, that customer will then be routed to your team of French speaking associates, favoring higher skilled ones as available.

That complete routing rule would look like this in the Live Experience Admin Console.



For details on Live Experience teams, users, and skills, see *How You Manage Teams*, *How You Manage Users*, and *How You Use Skills to Route Your Customers to the Right Team*.

For more information on initializing context variables, depending on your platform, see:

- *Configure Context Information for Your Website*
- *Configure Context Information for your Android App*
- *Configure Context Information for your iOS App*

Present a Live Experience Demonstration

Discover how quick and easy it is to demo Oracle Live Experience.

You can easily deliver an impactful sales demo.

1. In a browser, log into your Live Experience demo instance.
   We've already set up several demo accounts. Some of them are standalone Live Experience accounts, some are part of Oracle B2C Service, and others are part of Oracle Fusion Service. Email the **cx-lx-demo-provisioning_ww_grp** alias to request account credentials.
2. On your smartphone mobile device, download and set up the Live Experience demo app.
   See *Install the Live Experience Demo App on iOS* or *Install the Live Experience Demo App on Android*.
3. Use the demo app to make a call.

11 Live Experience Integrations

Enable Oracle Identity Cloud Service (IDCS) Authentication

As an administrator, you can configure IDCS single sign-on (SSO) for authentication to enable agents and supervisors sign in to Desktop Agent Experience (DAE) and Admin Console using IDCS.

You can use IDCS SSO for identification and access control across all user roles and interfaces in Live Experience. After you configure IDCS, users added in IDCS are autoprovisioned in Live Experience, and their roles are autopopulated based on the assigned groups.

Contact your Oracle account manager to enable IDCS authentication. You can then follow these steps to enable SSO using IDCS.

1. Sign in to the Live Experience Admin Console as an administrator.
2. From the Admin Console navigation menu, click **Integration** and click the IDP tab.
3. In the Configure your IDCS application section, note down the values of Entity ID, Assertion Consumer URL, Single Logout URL, and Single Logout URL Callback.
4. Sign in to the IDCS Admin Console as an administrator.
5. From the navigation menu, click **Users**.
6. Add your users.
    a. Click **Add**.
    b. In the Add User dialog box, enter the user details, and click **Finish**.
7. From the navigation menu, click **Groups**.
8. Create the groups LX Administrators, LX Associates, and LX Supervisors.
    a. Click **Add**.
    b. In the Add Group dialog box, enter the group details.
    c. Click **Finish**.
9. From the navigation menu, click **Users**.
10. Click the user you created, and then click the Groups tab.
11. Click **Assign**.
12. In the Assign Groups dialog box, select the groups that you want to assign to the user, and click **OK**.

> **Tip:** You can assign multiple groups to a user and associate a user with multiple roles.

13. From the navigation menu, click **Applications**.
14. On the Applications page, click **Add**.
15. In the Add Application dialog box, click **SAML Application**.
16. In the Add SAML Application page, App Details section, enter the name and description of the application.

17. Enter the application URL that you use to access the application.

> **Note:** Ensure that the Application URL points to Admin Console and not DAE. For example, **/ui/?tenant=tenantname**.

18. In the Display Settings section, select the **Display in My Apps** check box.
19. Click **Next** to move to the SSO Configuration stop.
20. In the General section, enter these details:
    a. Enter the **Entity ID** and the **Assertion Consumer URL** that you noted down from the Live Experience Admin Console.
    b. From the **NameID Format** list, select **Email address.**
    c. From the **NameID Value** list, select **Primary Email**.
21. In the Advanced Settings section, enter these details:
    a. Select the **Enable Single Logout** check box.
    b. From the **Logout Binding** list, select **Redirect**.
    c. Enter the **Single Logout URL** that you noted down from the Live Experience Admin Console.
    d. In the **Logout Response URL** field, enter the **Single Logout URL Callback** that you noted down from the Live Experience Admin Console.
22. In the Attribute Configuration section, click the plus icon next to the attributes, and enter these details:
    a. Enter **memberOf** for the name of the assertion attribute.
    b. From the **Format** list, select **Basic**.
    c. From the **Type** list, select **User Attribute**.
    d. From the attribute **Value** list, select **Group Membership**.
    e. From the **Condition** list, select **Starts with** and in the condition **Value** field, enter **LX**.
    f. Optionally, enter **user.firstName** and **user.lastName** as additional user attributes for **First Name** and **Last Name**. If you don't provision the first name and the last name of the IDCS users, the Live Experience users will use email address as full name.
23. Click **Download Identity Provider Metadata**.

    This downloads the IDCSMetadata.xml file that you need later.
24. Click **Finish** to activate the application.
25. Switch to the Live Experience Admin Console.
26. In the Import IDCS Authentication Identity Provider Configuration section, click **Import**.
27. Import the IDCSMetadata.xml file that you downloaded earlier.
28. Click **Verify**.

    Verification of SSO authenticates and provides users access to the Live Experience Admin Console. Ensure that the user verifying SSO is part of the LX Administrators group in IDCS.

    Existing users won't be able to sign in to IDCS. Delete existing users to avoid any conflicts with autoprovisioned users from IDCS who have configured with the same email address. It's best practice to retain at least one user with administrator privileges in case you accidentally remove the IDCS authentication integration option so you can sign in as admin and add users.

Configure IDCS Authentication for External API

Integrate Oracle Identity Cloud Service (IDCS) with Oracle Live Experience to enable single sign-on authentication in all Live Experience UIs including admin UIs.

After you integrate with IDCS, users can't access the Live Experience REST API using direct authentication.

Here's how to set up IDCS authentication for External API:

1. Create a Confidential Application in IDCS to support client credentials-based authentication.
2. Configure the Confidential Application.
3. Activate the Confidential Application.
4. Note the key security information for the Confidential Application.
5. Enable API access and provide certificate in the Live Experience application.
6. Update the public certificate in the Live Experience application.

Create a Confidential Application in IDCS to Support Client Credentials-Based Authentication

Here's how to configure Live Experience as a confidential application in IDCS to support client credentials-based authentication.

1. Sign in to Oracle Identity Cloud Service.
2. In the Navigator, click **Applications**.
3. On the Applications page, click **Add**.
4. In the Add Application dialog box, select **Confidential Application**.
5. In the Add Confidential Application page, Details stop, enter a name for the application, and click **Next**.
6. In the next three stops, Client, Resources, and Web Tier Policy, click **Skip for later**, and click **Next**.
7. In the Authorization stop, click **Finish**.

Configure the Confidential Application

Here's how you can configure your Confidential Application:

1. In IDCS, in the Navigator, click **Applications** and select the Confidential Application you created.
2. In the Confidential Application page, click the Configuration tab.
3. Expand Client Configuration and click **Register Client**.
4. In the **Allowed Grant Types** field, select **Client Credentials**.
5. In the **Client Type** field, select **Confidential**.
6. In the **Authorized Resources** field, select **Specific**.
7. Click **Save** and collapse the Client Configuration section.
8. Expand Resources and click **Register Resources**.
   The Register Resources fields appear.
9. In the **Primary Audience** field, enter **api**.
10. In the Scopes section, click **Add**.

11. In the Add Scope dialog box, **Scope** field, enter **/**.
12. Click **Add**.
13. Click **Save** and collapse the Resources section.
14. Expand the Client Configuration section, scroll to the Token Issuance Policy subsection, and click **+ Add Scope**.
15. In the Select Scope dialog box, select the new Live Experience Confidential Application you created and click **>**.
16. Select **api/** and click **Add**.

    The Confidential Application you created will appear in the Token Issuance Policy subsection.
17. From the **Authorized Resources** field, select **Specific**.
18. Click **Save**.

Note: No configuration setup is required for Web Tier Policy, Users, and Groups tabs.

Activate the Confidential Application

Here's how to activate the Confidential Application:

1. In IDCS, in the Navigator, click **Applications** and select the Confidential Application you created.
2. In the Confidential Application page, click **Activate**.
3. In the Confirmation dialog box, click **OK**.

If the activation is successful, you'll get a confirmation message.

Note the Key Security Information for the Confidential Application

The credentials associated with the Confidential Application are required to authenticate with IDCS to access the Live Experience REST API. You must provision the public certificate for your IDCS stripe in the Live Experience application.

1. In IDCS, in the Navigator, click **Applications** and select the Confidential Application you created.
2. In the Confidential Application page, click the Configuration tab.
3. Expand the General Information section and make a note of the Client ID.
4. In the **Client Secret** field, click **Show Secret**.
5. In the Client Secret dialog box, make a note of the Client Secret value and click **Close**.

Note: You can get the Client ID and Client Secret by visiting this section. You can also regenerate the Client Secret by clicking **Regenerate** in the **Client Secret** field.

Enable API Access and Provide Public Certificate in the Live Experience Application

Here's how you can retrieve the public certificate for your IDCS stripe in the Live Experience application.

1. In IDCS, in the Navigator, click **Applications** and select SAML application for Live Experience SSO.
2. In the SAML Application page, click the SSO Configuration tab.
3. Click **Download Signing Certificate** to download the public certificate.
4. Open the certificate in a text editor and remove the following lines:
    - `-----BEGIN CERTIFICATE-----`
    - `-----END CERTIFICATE-----`
5. Save the text editor file.

> **Note:** The SAML application is already provisioned in IDCS. In case the SAML application isn't already provisioned in IDCS, see *Enable Oracle Identity Cloud Service (IDCS) Authentication*.

Update the Public Certificate in the Live Experience Application

The public certificate contains a public key which is used to authenticate a signed IDCS access token by verifying its signature. Here's how to update the public certificate in the Live Experience application.

1. Sign in to Oracle Live Experience as an administrator.
2. In the Navigator, click **Integration**.
3. In the Integration page, click the IDP tab.
4. In the Configure API access through IDCS section, **Allow access to Live Experience API** field, click **On**.
5. In the **IDCS Signing Certificate Public Key** field, add the public certificate you downloaded in the Enable the API access and provide the public certificate in the Live Experience application section.

    > **Note:** Make sure that the following lines are excluded in the public certificate:
    >
    > - `-----BEGIN CERTIFICATE-----`
    > - `-----END CERTIFICATE-----`

6. Click **Update Public Key**.

This public key will be saved so that the Live Experience application can use it to verify signatures on runtime.

You've completed the IDCS authentication setup for external API.

Remove an Integration

You can remove an integration between Live Experience and a CRM.

Live Experience can only be integrated with one CRM application at a time. You can remove an integration between Live Experience and a CRM at any time, after which you can create a new integration.

1. From the Admin Console navigation menu, select **Integrations**.
   If you already have a configured integration between Live Experience and a CRM, that integration page appears.
2. Click **Remove Integration**.

3. Confirm that you want to remove the integration.

How You Add Live Experience to B2C Service

Learn how Oracle Live Experience can be seamlessly inserted into your Oracle B2C Service site.

The Live Experience add-in gives B2C Service agents full access to the Live Experience Associate Desktop inside B2C Service. You can send and receive calls, set up meetings, and send and receive SMS messages. You have all of the Live Experience communications features available, such as two-way live video and audio, screen sharing, and annotations.

Live Experience appears as a completely native component add-in to B2C Service agents. When a customer initiates a Live Experience engagement, it can be answered right in B2C Service. The valuable context information embedded in the engagement is displayed in B2C Service. A B2C Service incident is automatically created each time an engagement is answered in B2C Service.

Even though you receive and answer engagements in B2C Service, all your Live Experience engagements and activities are logged and tracked by Live Experience. That means that you can use the Live Experience Admin Console to see detailed real-time reporting metrics or review engagement history and details.

Note: The Admin Console is not part of the B2C Service add-in. You open it in its own tab.

Depending on the way you purchase B2C Service and Live Experience, the procedure to add Live Experience to B2C Service is a bit different.

If you purchase B2C Service and Live Experience together, see *Enable the Live Experience Service in the B2C Service Configuration Assistant*.

If you already own B2C Service and you purchase Live Experience separately, see *Adding Live Experience to an Existing B2C Service Site*.

Enable the Live Experience Service in the B2C Service Configuration Assistant

Add Oracle Live Experience to your Oracle B2C Service sites as a pre-configured add-in.

When you purchase both services at the same time, Live Experience is pre-configured as an add-in service in B2C Service. Just enable Live Experience and complete a few configuration steps.
You need the following information:

- The administrator credentials and URL for Oracle B2C Service Configuration Assistant.
- The administrator credentials and URL for your B2C Service site.
- The welcome email from B2C Service with your administrator credentials and access URLs.

1. Log into the B2C Service Configuration Assistant as an administrator.
2. Select **Integrations**.
3. On the Service Integrations page, select **Enable LX**.
   Enabling the service kicks off several provisioning and orchestration processes that can take a few minutes to complete. Once complete, the button label changes from Enable LX to Download ZIP.

> **Note:** If the Enable LX button isn't available, it could mean a couple of things:
>
> - You are using an older version of B2C Service that isn't pre-configured with an add-in for the Live Experience service.
> - You didn't purchase Live Experience and B2C Service at the same time.
>
> You can still add Live Experience to B2C Service, but you need to follow different steps. See *Adding Live Experience to an Existing B2C Service Site*.

4. Select **Download ZIP** to download the pre-configured Live Experience add-in application. You'll need it later.

What to do next

Next, see *Upload the Live Experience Service Cloud Add-in Package*.

Adding Live Experience to an Existing B2C Service Site

Learn how to add Oracle Live Experience to your existing Oracle B2C Service site.

You need the following information:

- The administrator credentials and URL for Oracle Live Experience.
- The administrator credentials and URL for your B2C Service sites.
- Your welcome emails from Live Experience and B2C Service with your administrator credentials and access URLs when you bought your services.

When you add Live Experience to your existing B2C Service site, you need to enable Single Sign-On and download the Live Experience Add-In. See *Enable Single Sign-On (SSO) Between B2C Service and Live Experience* and *Download the Live Experience Add-In for B2C Service*.

Enable Single Sign-On (SSO) Between B2C Service and Live Experience

B2C Service and Live Experience both support single sign-on (SSO).

When you add Oracle Live Experience to your existing Oracle B2C Service site, you need to enable SSO and configure B2C Service to act as the identity provider for Live Experience. Then, when a B2C Service agent logs in to B2C Service, they're automatically logged in to Live Experience.

> **Note:** Follow these steps only if you are adding Live Experience to your existing Oracle B2C Service site. If you purchased Live Experience and B2C Service together, SSO is already enabled between the products.

To enable SSO between B2C Service and Live Experience, you must contact your Oracle account manager and request the functionality. You also need to request to enable the SEC_END_USER_HTTPS configuration setting so that B2C Service can create the SAML assertion for an HTTPS connection.

1. In the B2C Service Agent Desktop, expand **Navigation** > **Site Configuration**, and then double-click **Single Sign-On Configurations**.
2. Enable the SSO_IDP_ENABLE_EXT_APPS configuration setting.
    a. Search for the SSO_IDP_ENABLE_EXT_APPS configuration setting.

       See *Search for a Configuration Setting* in your B2C Service documentation for more information.

    b. In the Search window Configuration Base section, select **Select All**.
    c. In the Key field, enter **SSO_IDP_ENABLE_EXT_APPS**. and click **Search**.
    d. In the search results, double-click the **SSO_IDP_ENABLE_EXT_APPS** configuration setting.
    e. For the Site configuration base, change the value to **Yes** and click **Save**.
3. Create a navigation set for the administrator that includes the Single Sign-On Configurations option.

   See *Create a Navigation Set for the Administrator* in your B2C Service documentation for more information.
4. On the ribbon, Click **Export IdP Metadata** and save the generated XML file to a convenient location using the filename of your choice.
5. From the Live Experience Admin Console navigation menu, select **Integration** and then select **Oracle Service Cloud**.
6. Click **Browse** and select the IdP Metadata file you saved from B2C Service.
7. After the import is successful, click **Continue**.
8. Scroll to the second step of the Activate B2C Service Integration page, click **Download** and save the **Sp-MetaData.xml** file to a convenient location to export the Live Experience service provider SAML configuration file.

   Note: Don't click Verify until instructed.
9. In the B2C Service Agent Desktop, expand **Navigation** > **Site Configuration**, and then double-click **Single Sign-On Configurations** if you don't still have it open.
10. On the ribbon, click **Import SP Metadata** and choose the **Sp-MetaData.xml** file you downloaded from Live Experience.
11. Click **Save**.
12. In the Live Experience Admin Console, scroll to the second step of the Activate B2C Service Integration screen and select **Verify**.

    Live Experience connects with B2C Service Cloud to verify the SSO configuration.

Download the Live Experience Add-In for B2C Service

Download the Live Experience add-in from the Live Experience Admin Console.

When you add Oracle Live Experience to your existing Oracle B2C Service site, you need to download the Live Experience Add-In.

Note: Follow these steps only if you are adding Live Experience to your existing Oracle B2C Service site.

1. Scroll to the third step of the Activate Service Cloud Integration page.
2. Click **Download**.
3. Save **application-package.zip**.
4. Click **Continue**.

What to do next

Next, *Upload the Live Experience Service Cloud Add-in Package*.

Upload the Live Experience Service Cloud Add-in Package

Upload the Live Experience add-in package into your B2C Service site.

1. In the B2C Service Agent Desktop, expand **Navigation** > **Site Configuration**, and then double-click **Add-In Manager**.
2. Click **New** on the ribbon and select **Agent Browser UI Extension**.
3. In the **Open** window, select the **application-package.zip** file you downloaded.
4. Enter details about the add-in.
    a. At a minimum, enter a meaningful name, such as **live-experience**.
    b. For Extension Type, choose **Console**.
    c. Under Extension Files, for daeAddinInitialize.html, check **Init File**.
5. Click **Save**.

What to do next

Next, *Create a B2C Service Profile for Agents Who Use Live Experience*.

Create a B2C Service Profile for Agents Who Use Live Experience

You need to create a B2C Service profile for your agents who are going to use the Live Experience add-in.

This profile contains the permissions necessary to display the Live Experience component in the B2C Service application.

1. In the B2C Service Agent Desktop, expand **Navigation** > **Staff Management**, and then double-click **Profiles**.
2. Click **New** on the ribbon.
3. Give the profile a meaningful name, such as **LX Associate**.
4. Click **Permissions** on the ribbon.
5. On the **Administration** tab, under Agent Browser User Interface, select **Account Authentication**.
6. Open the **Contacts** tab and select the **Select All** check box next to Contacts and Thread.
7. Open the **Service** tab and select **Select All** next to Incidents.
8. Click **Save**.
9. Click **Analytics** on the ribbon.
10. In the reports section, select **All** for both Open and Edit permissions.
11. Click **Save**.
12. From the B2C Service Agent Desktop Navigation menu, expand **Navigation** > **Site Configuration**, and then double-click **Add-In Manager** and map it to the profile you just created.
13. Open your Live Experience add-in and select **Profile Access** on the ribbon.
14. In the Add-In Access section, under Profiles Allowed to Access, select the profile you created.
15. Under Allowed Interfaces for Agent, select **Select All**.
16. Click **Save**.

Results:

The permissions you assign only let the Live Experience component display in the B2C Service desktop with some basic functionality. You need to customize permissions to enable additional functionality.

What to do next

Next, *Assign the Live Experience Profile to B2C Service Accounts*.

Assign the Live Experience Profile to B2C Service Accounts

With the Live Experience profile created, you need to assign the profile to agents for access to Live Experience.

You can assign the profile to existing accounts, or you can assign the profile as part of creating new accounts. This procedure takes you through the process of creating a new account that uses the Live Experience profile you created earlier.

For more information on provisioning B2C Service users, see *Add or Edit a Staff Account* in your B2C Service documentation.

1. In the B2C Service Agent Desktop, expand **Navigation** > **Staff Management**, and then double-click **Staff Accounts by Profile**.
2. Click **New** on the ribbon.
3. Enter field information.

Staff Account Details

Field	Description
User Name	Enter the email address for the account.
First Name	Enter the first name.
Last Name	Enter the last name.
Display Name	Enter the display name.
Profile	Click the **Search** icon next to this field to open the Profiles window. Select the LX Associate profile and click **OK**.
Group	Click the **Search** icon next to this field to open the Account Groups window where you assign the staff member to a group. See the B2C Service guide to create a new Group if needed.
Default Currency	Click this drop-down list to select the currency you want to associate with the staff account. The United States dollar (USD) is the only currency option in this menu until you add others through the Currencies editor.
Default Country	Click this drop-down list to select the country associated with this staff member.

4. Click **Save**.
5. When prompted, enter a password for the new account.

What to do next

There's no need to create accounts in Live Experience. Accounts are automatically created in Live Experience each time a new B2C Service agent whose account includes the Live Experience profile logs in and opens the Live Experience Associate Desktop extension the first time. See *Add Your Agent Browser UI Address as an Allowed Domain* for next steps.

Add Your Agent Browser UI Address as an Allowed Domain

After you assign the Live Experience profile to the B2C service accounts, add your agent browser UI address as an allowed domain.

Note: If you don't add the fully qualified domain, the Associate Desktop Application won't load.

1. In the Live Experience Admin Console, navigate to the Add your Agent Browser UI address as an allowed domain section, and click **Add New Domain**.
2. In the Add New Domain dialog box, enter the fully qualified domain name of the Agent Browser user interface.
3. Click **Continue**.

What to do next

For next steps, see *Log Callbacks as B2C Service Incidents*.

Log Callbacks as B2C Service Incidents

You can configure Live Experience callbacks to be logged in B2C Service as incidents.

A callback is an option you provide to your customers so they don't need to wait in a call queue. See *Manage Engagement Scenarios*.

1. In the Live Experience Admin Console, on the Activate Service Cloud Integration page, set Log Callbacks as Incidents to **On**.

   If set to Off, and if you enable callbacks, then callback routing is handled in Live Experience.
2. Export the Live Experience identity provider (IdP) meta-data file and import it into B2C Service.
   a. In B2C Service, expand **Navigation** > **Site Configuration**, and then double-click **Single Sign-On Configuration**.
   b. On the ribbon, click **Import IDP Metadata** and choose the file you downloaded from Live Experience.
   c. On the OAuth tab, select the **Live Experience IDP** file.
   d. Select the **Activate** checkbox, and enter the Live Experience tenant name in the **Custom Audience URL** field.
3. Create a profile and user account to access the Live Experience REST API.

   Give the profile a meaningful name, such as **LX-Rest**, and only assign it the SSO Login (SAML 2.0) permission. Give the user account a meaningful name, such as **LX-Rest**. Give the account permission to add contacts and services, and assign it the LX-Rest profile.
4. In Live Experience, click the **Verify** button to confirm you imported the Live Experience IDP properly into B2C Service.

5. Download the Live Experience click-to-call extension file and import it into B2C Service.
    a. In B2C Service, expand **Navigation** > **Site Configuration**, and then double-click **Add-In Manager**.
    b. In the **Open** window, select the click-to-call extension file.
    c. Enter details about the Add-in. At a minimum, give it a meaningful name, such as **click2call**. For Extension Type, choose **Workspace**.
    d. Using the Workspace Designer, modify the incident workspace. On the ribbon, select **Insert Control**, and then drag-and-drop **click2call** somewhere on the incident workspace.
6. In Live Experience, click **Continue**.

What to do next

Next, *Set Up One-Click Meeting Support in B2C Service*.

Set Up One-Click Meeting Support in B2C Service

You can add Live Experience meeting support to tasks in your B2C Service interface.

1. On the Activate B2C Service Integration page, scroll to the Set Up One-Click Meeting section.
2. Select **Download** to download the LX Attach Meeting extension file.
3. Log in to B2C Service.
4. Expand **Navigation** > **Site Configuration**, then double-click **Add-In Manager**.
5. In the Open window, select the **LX Attach Meeting** extension file.
6. Enter details about the Add-in. At a minimum, give it a meaningful name, such as **LX Attach Meeting**. For Extension Type, choose **Workspace**.
7. Expand **Navigation** > **Database**, then double-click **Custom Fields**.
8. Create the following fields under **Task**:
    - LX Meeting URL
    - LX Meeting Code
9. Update the task workspace to include the LX Attach Meeting extension and custom fields.
    a. Expand **Navigation** > **Application Appearance**, then double-click **Workspaces/Workflows**.
    b. From the Workspaces/Workflows Explorer, select the **jaj_BUI** folder and then double-click your task workspace.
    c. On the ribbon, select **Insert Control**, and then drag-and-drop **LX Attach Meeting** somewhere on the task form.
    d. Drag-and-drop the **LX Meeting Code** and **LX Meeting URL** fields onto your workspace wherever you want them to appear.

    We recommend that you set the fields to be read-only so that agents don't accidentally change the meeting URL or code saved to the task.
10. Update your profile access so that your B2C Service users have access to the customized workspace.

What to do next

Next, see *Testing Live Experience with B2C Service*.

Testing Live Experience with B2C Service

Test your B2C Service access to the Live Experience Associate Desktop.

Make sure everything is working properly:

- Log into B2C Service using a new account that includes the Live Experience profile. On the left of the B2C Service interface, expand the Live Experience Associate Desktop extension. The new account should authenticate with Live Experience, and a new Live Experience user should get automatically created. Open the Live Experience Admin Console and confirm a user account with the same user name now exists.

  You can configure each new Live Experience account with skills or assign them to teams to adjust or improve call routing. See *How You Use Skills to Route Your Customers to the Right Team*.
- Log into B2C Service using an account that includes the Live Experience profile. Using your Live Experience-enabled mobile app or website, start an engagement. Confirm that an incoming call notification displays in B2C Service.

  If you don't have access to a Live Experience-enabled app or website, use the Live Experience demo app instead. See *Present a Live Experience Demonstration*.
- Answer an incoming engagement. Notice that B2C Service automatically creates a corresponding incident to track the engagement.

  When you end the engagement in B2C Service, an engagement record is saved in Live Experience. You can search for engagements and review their details. If engagements are configured to be recorded, then you can also replay the engagement. See *Manage Recordings and Quality Options* and *Search for Engagement Details and Recordings*.

Agents use the Live Experience Associate Desktop extension for initiating and answering engagements.

Live Experience Associate Desktop Extension

Icon or Field	Description
X	Click to minimize the Associate Desktop extension
Agent avatar	Click to run diagnostics
Incoming Calls queue	The queue tells you how many calls are in queue waiting to be answered. You can click the chevron to expand the queue and answer an incoming engagement.
Engagement options	Use these options to initiate an engagement of your own. Depending how your Live Experience is set up, you might not have access to all these options which include Start a Meeting, Generate a Meeting Link, Conversations, and Place a Call.
Availability	Click to change your availability status.

Use the Live Experience Demo App with B2C Service

Discover how to use the Oracle Live Experience demo app to experience and demonstrate how Live Experience works in Oracle B2C Service.

1. Set up and configure the Live Experience demo app.

   See *Install the Live Experience Demo App on iOS* or *Install the Live Experience Demo App on Android*, using the following specific configuration values:
   - Cloud Address: Enter **live.oraclecloud.com** or **live.emea.oraclecloud.com** for the EU
   - Tenant: Your assigned tenant name
   - Client ID: Your assigned client ID
   - Secret: Your assigned secret

   Configure the remaining settings as you wish.

2. Log in to B2C Service and create a new contact.

   You may want to do this during your demo, or handle it beforehand.
   a. Log in to B2C Service using an account that has the Live Experience profile.
   b. Create a new contact, ensuring the name and email address match those you configured in the Live Experience demo app.

   B2C Service uses first and last names to look up contact records. You need to have a matching contact in B2C Service or you won't be able to save incidents and show incident history. When you place a call from the Live Experience demo app to B2C Service, you see the contact information in a new incident.

3. Place a call from the Live Experience demo app to B2C Service.

   After you have the Live Experience demo app configured, and you create a matching contact in B2C Service, you can initiate a call from the demo app from any of the scenarios.
   a. Make sure you expand the Associate Desktop extension, or you won't get incoming call notifications.
   b. From the demo app, tap on the widget to initiate a call to Live Experience.

      The call comes into Live Experience.
   c. If you haven't expanded the call queue panel in the extension, when you get an incoming call you see a notification window. Click **Answer** to answer the incoming call.

      A new B2C Service incident is automatically created and your demo contact is open.
   d. Update any of the incident information you like.
   e. Repeat the process as required. Each time you place a call, the contact's incident history is updated and a new incident is created.

How You Add Live Experience to a B2C Service Customer Portal

Learn how to add the Live Experience widget into an Oracle B2C Service Customer Portal.

The Live Experience widget allows customers visiting your Customer Portal to start an engagement with B2C Service agents.

You should know how to access and modify files in your Customer Portal. If you need more info on working with your Customer Portal, see *Using B2C Service Customer Portal*.

Create a Live Experience Application in the Admin Console

A Live Experience application is a set of base configuration parameters identified by a client ID.

You might already have an application you intend to use for your Customer Portal, or you may need to create a new one. Make sure you note down the application client ID and secret. Later, you'll reference the client ID to register the Customer Portal with the Live Experience application.
See *Manage Your Applications* for more information.

1. Open your application and select the **Origin Domains** tab.
2. Add your B2C Service fully-qualified domain name.
   See *Add Origin Domains* for more information.

Create an Authentication Endpoint in the Customer Portal

The Live Experience widget requires a valid authentication token (a JSON web token, or JWT) to be able to establish a connection from inside the Customer Portal back to Live Experience.

The Customer Portal needs to provide a REST endpoint that allows the code running in the browser to retrieve a valid JWT from the Live Experience service and provide that JWT to the Live Experience widget.
You add an authentication endpoint to your Customer Portal by creating a custom controller in the Customer Portal.

See *Custom Controllers*.

1. For your Live Experience authentication endpoint, create a new custom controller in your Customer Portal called **LX.php** in **/cp/customer/development/controllers**.
   Use the following code sample for LX.php:

```
<?php
namespace Custom\Controllers;
class LX extends \RightNow\Controllers\Base
{
 //This is the constructor for the custom controller. Do not modify anything within
 //this function.
 function __construct()
 {
 parent::__construct();
 }
 function auth () {
 load_curl();
 $curl = curl_init();
 curl_setopt_array($curl, array(
 CURLOPT_URL => "https://<LX_DOMAIN>/auth/apps/api/access-token?
grant_type=client_credentials&state=0&scope=optional&nonce=221",
 CURLOPT_RETURNTRANSFER => true,
 CURLOPT_SSL_VERIFYPEER => false,
 CURLOPT_SSL_VERIFYHOST => false,
 CURLOPT_ENCODING => "",
 CURLOPT_MAXREDIRS => 10,
```

```
CURLOPT_TIMEOUT => 30,
CURLOPT_HTTP_VERSION => CURL_HTTP_VERSION_1_1,
CURLOPT_CUSTOMREQUEST => "GET",
CURLOPT_POSTFIELDS => "",
CURLOPT_HTTPHEADER => array(
"Accept: application/json",
"Authorization: Basic " . base64_encode("<CLIENT_ID>:<CLIENT_SECRET>"),
"Origin: https://<RNOW_DOMAIN>/",
"cache-control: no-cache"
),
));
$response = curl_exec($curl);
$err = curl_error($curl);
curl_close($curl);
if ($err) {
echo "cURL Error #:" . $err;
}
else {
echo $response;
}
}
}
```

- Replace <CLIENT_ID> with the client ID of the application you created earlier.
- Replace <CLIENT_SECRET> with the client secret of the application you created earlier.
- Replace <LX_DOMAIN> with the fully qualified domain name of the Live Experience region your tenant is located in: US (Phoenix): live.oraclecloud.com or EMEA (Frankfurt): emea.live.oraclecloud.com
- Replace <RNOW_DOMAIN> with the fully qualified domain name of your Oracle Service Cloud site.

2. When you are done, save the file and upload it back to the server with WebDAV.

Add the Live Experience Widget to Your Site

Add the Live Experience widget on every page in the customer portal.

See *Loading JavaScript Content on Every Page* for more information on adding JavaScript to every customer portal page.

1. Download the Oracle Live Experience JavaScript SDK and unzip the contents into a customer portal folder called lx under **/cp/customer/assets**.
2. Upload the folder back to the server with WebDAV.
3. Edit the `autoload.js` script in the **/cp/customer/development/javascript** directory. Append the script with the following:

```
// Code to add the LX widget to every page
const scriptElement = document.createElement('script');
scriptElement.setAttribute('src', "/euf/assets/lx/lib/require.js");
scriptElement.onload = function() {
 require.config({
 baseUrl: "/euf/assets/lx/js",
 paths: {
 jquery:"../lib/jquery",
 text:"oracle.live.api",
 css:"oracle.live.api",
 "oracle.live.api":"oracle.live.api",
 "oracle.live.style":"oracle.live.style",
 "oracle.live.button":"oracle.live.api",
 "oracle.live.messages":"oracle.live.api",
```

```
"oracle.live.sdk":"oracle.live.api"
},
shim:{jquery:{exports:["jQuery","$"]}}
});
require(["oracle.live.api"], function(liveApi) {
const getAuthToken = (callback) => {
fetch(new Request("/cc/LX/auth"))
.then(response => { return response.json(); })
.then(auth => { callback(auth.access_token, auth.expires_in); });
};
getAuthToken((myAuthToken, myTokenExpiry) => {
liveApi.controller.service.address = "https://<LX_DOMAIN>";
liveApi.controller.service.clientID = "<CLIENT_ID>";
liveApi.controller.service.userID = "<END_USER_EMAIL>";
liveApi.controller.service.tenantID = "<LX_TENANT>";
liveApi.controller.service.authToken = myAuthToken;
liveApi.controller.service.authRefresh(myTokenExpiry, () => {
app.getAuthToken((jwt) => {
liveApi.controller.service.authToken = jwt; });
});
liveApi.controller.contextAttributes.set("appLocation", "Basic Guidance");
liveApi.controller.addComponent();
});
});
};
document.head.appendChild(scriptElement);
```

- Replace <CLIENT_ID> with the client ID of the application you created earlier.
- Replace <LX_TENANT> with the name of your Live Experience tenant.
- Replace <LX_DOMAIN> with the fully qualified domain name of the Live Experience region your tenant is located in: US (Phoenix): live.oraclecloud.com or EMEA (Frankfurt): emea.live.oraclecloud.com.
- Replace <END_USER_EMAIL> with a valid email address. Live Experience does not need this to be a real email address of the customer, for example you can just use anonymous@example.com if your customers are not signed in.

4. When you are done, save the file and upload it back to the server with WebDAV.

Customize and Publish Your Changes

When your changes are saved back to the server, the Live Experience widget should appear on your site in development mode.

1. Go to the Customer Portal admin page and select development mode.

   The Live Experience widget should now be visible and active in the default location of the bottom-right corner of every page in the customer portal.
2. Customize the appearance, placement, and behavior of the widget as well as define how engagements are routed to and handled by your agents.

   For more information, see *Overview of Engagement Scenarios*, *How You Use Skills to Route Your Customers to the Right Team*, *Customize the Appearance of Live Experience*, and *Customize and Localize the Messages and Text in Live Experience*.
3. When you are ready to publish the changes to your site, use the Customer Portal admin page and promote your changes to staging and then production.

How You Add Live Experience to Oracle Sales and Oracle Fusion Service

Learn how to add Oracle Live Experience to your Oracle Sales and Oracle Fusion Service instances.

When you add Live Experience to Oracle Sales or Fusion Service, you put all of the Live Experience communications features at your agents' finger tips, such as two-way live video and audio, screen sharing, and annotations.
Depending on the way you've purchased Sales, Fusion Service, and Live Experience, the procedure to add Live Experience is a bit different.

If you purchase Live Experience together with Sales or Fusion Service, see *Live Experience as a Pre-Configured Service in Sales or Fusion Service*.

If you already own Sales or Fusion Service, and you purchased Live Experience separately, see *How You Add Live Experience to an Existing Sales or Fusion Service Instance*.

Live Experience as a Pre-Configured Service in Sales or Fusion Service

Learn how to add Live Experience to your instance of Oracle Sales or Oracle Fusion Service as a pre-configured service.

When you purchase Live Experience together with Sales or Fusion Service, Sales and Fusion Service include a pre-configured add-in that adds Live Experience to the Sales or Fusion Service media toolbar. Your welcome emails from Sales or Fusion Service and Live Experience have your administrator credentials and access URLs.

Determine the Live Experience Service URL for Sales or Fusion Service

You need to determine and note down the Live Experience service URL for Sales or Fusion Service. You need this URL later to add the Live Experience service to the Sales or Fusion Service media toolbar. The Live Experience service URL syntax is `https://Oracle_cloud_address/eca/html/toolbar.html?tenant=LX_tenant_name`.

You get the values for `Oracle_cloud_address` and `LX_tenant_name` from the Live Experience welcome email you received. The Oracle Cloud address will be either `live.oraclecloud.com` or `emea.live.oraclecloud.com`. Your Live Experience tenant name is a unique identifier that identifies your Live Experience tenancy.

For example, from the following sample URL, `https://live.oraclecloud.com/ui/?tenant=myLXtenant`, we can determine that:

- The Oracle Cloud address is `live.oraclecloud.com`
- The unique Live Experience tenant name is `myLXtenant`

Therefore, the Live Experience service URL that you would need to note down is `https://live.oraclecloud.com/eca/html/toolbar.html?tenant=myLXtenant`.

Next Steps

Next, configure the media toolbar and callbacks to be logged as incidents. Agents have complete access to the Live Experience Associate Desktop, right in Sales or Fusion Service, and the Live Experience Associate Desktop extension

is used for initiating and answering engagements. See *Configure the Media Toolbar in Sales or Fusion Service* and *Log Callbacks as Sales or Fusion Service Requests*.

How You Add Live Experience to an Existing Sales or Fusion Service Instance

Add Oracle Live Experience to your existing instance of Oracle Sales or Fusion Service.

To add Oracle Live Experience to your existing instance of Sales or Fusion Service, you need the following:

- Sales or Fusion Service, Live Experience, and IDCS accounts
- The administrator credentials and URL for your Sales or Fusion Service instance
- The administrator credentials and URL for the Live Experience Admin Console
- The administrator credentials and URL for your Oracle Identity Cloud Service (IDCS) account
- Familiarity with Sales or Fusion Service, including its authentication application, Oracle Access Manager (OAM)

You should have received welcome emails from Live Experinece and Sales or Fusion Service with your administrator credentials and access URLs.

To add Live Experience to your existing instance of Sales or Fusion Service, you configure single sign-on (SSO) between them. SSO is achieved by authenticating Live Experience through IDCS, which is configured as a trusted proxy. When a Sales or Fusion Service agent opens the Live Experience service from the media toolbar, IDCS redirects authentication attempts to Oracle Access Manager (OAM), which is the Sales and Fusion Service authentication application. See *Create a SAML Application for Live Experience in Oracle Identity Cloud Service (IDCS)*.

Create a SAML Application for Live Experience in Oracle Identity Cloud Service (IDCS)

Using IDCS, create and configure a Security Assertion Markup Language (SAML) application for Live Experience.

SSO (Single Sign-On) is achieved by authenticating Live Experience through IDCS, which is configured as a trusted proxy. When a Sales or Fusion Service agent opens the Live Experience service from the media toolbar, IDCS redirects authentication attempts to Oracle Access Manager (OAM), which is the Sales and Fusion Service authentication application. You get your IDCS application configuration settings from the Live Experience Admin Console.
In this procedure, you create and configure a SAML application for Live Experience in IDCS, import the IDCS identity provider, establish a two-way trust relationship between IDCS and Sales or Fusion Service, verify the SSO configuration, and lastly, create matching users in Sales or Fusion Service, Live Experience, and IDCS.

> **Note:** Follow these steps only if you are adding Live Experience to your existing Oracle Sales or Fusion Service site. If you purchased Live Experience and Sales or Fusion Service together, SSO is already enabled between the products.

1. From the Admin Console Navigation menu, select **Integration**.
2. On the CRM Integration page, select **Oracle Engagement Cloud**.
3. In the Configure your IDCS application section, note down the values of Entity ID, Assertion Consumer URL, and Single Logout URL.

4. In IDCS, from the navigation menu on the left, select **Applications**.
5. On the Applications page, select **Add** and choose **SAML Application**.
6. On the App Details page, enter details about your application and click **Next**.
7. On the SSO Configuration page, enter details in the **General** section.
    a. Enter the Entity ID and the Assertion Consumer URL, which you noted down from the Live Experience Admin Console.
    b. For NameID Format, select **Email address**.
    c. For NameID Value, select **Primary Email**.
8. Enter details in the **Advanced** section of the SSO Configuration page.
    a. Select the **Enable Single Logout** option.
    b. For Logout Binding, select **Redirect**.
    c. Enter the Single Logout URL, which you noted down from the Live Experience Admin Console.
    d. For Logout Response URL, enter the same value as for Single Logout URL.
9. In the top-right corner of the page, click **Download Identity Provider Metadata**.

    This downloads the IDCSMetadata.xml file, which you will need later.
10. Click **Finish**.
11. When the page for your new application appears, click **Activate**.
12. In the Live Experience Admin Console, return to the **Activate Engagement Cloud Integration** page.
13. In the Configure your IDCS application section, click **Continue**.

    The Import Engagement Cloud Identity Provider Configuration section appears.
14. Import the **IDCSMetadata.xml** file that you downloaded and click **Import**.
15. Contact your Oracle account manager and request to have federation set up between IDCS and Sales or Fusion Service to establish a two-way trust relationship between IDCS and Sales or Fusion Service.

    In this trust relationship, also known as federation, Sales or Fusion Service acts as the identity provider and IDCS as a service provider (or proxy) to Sales or Fusion Service. In this configuration, IDCS redirects authentication requests between Live Experience and Sales or Fusion Service. The Sales or Fusion Service authentication is managed by OAM.
16. In the Live Experience Admin Console, return to the **Activate Engagement Cloud Integration** page.
17. In the Import Engagement Cloud Identity Provider Configuration section, click **Verify** to test that Live Experience can communicate through IDCS to Sales or Fusion Service.
18. If you get a successful message in Live Experience, click **Continue**.

> **Note:** Although Live Experience takes you to the Configure Media Toolbar in Engagement Cloud section, you need to set up IDCS to communicate with Sales or Fusion Service.

19. In IDCS, from the navigation menu, select **Applications**.
20. On the Applications page, select the Live Experience SAML application you created.
21. Do one of the following tasks:
    - On the Users tab, map IDCS users to the application.
    - On the Groups tab, map a group of IDCS users to the application.

    For every Sales or Fusion Service agent to whom you want to give Live Experience access, create an account in Live Experience and in IDCS. The account user name in Live Experience must be a valid email address. For SSO to work, the email address must match the agent's email address on their Sales or Fusion Service account.

    The users you create in IDCS need to be associated, either individually, or as part of a group, with the Live Experience SAML application.

What to do next

Next, see *Confirm the Sales or Fusion Service Activation*.

Confirm the Sales or Fusion Service Activation

Confirm the activation between Live Experience and Sales or Fusion Service.

> **Note:** Follow these steps only if you are adding Live Experience to your existing Oracle Sales or Fusion Service site. Skip these steps if you purchased Live Experience and Sales or Fusion Service together.

1. In the Live Experience Admin Console, in the Confirm Engagement Cloud Activation section, click **Confirm**.
2. Test that all the components that make up the SSO functionality are working and communicating with each other properly.
3. In IDCS, use the Test functionality to verify that IDCS sends and receives requests to OAM. If it works, then Activate the IdP.
4. Log into Fusion Apps as a user who is also provisioned on Live Experience. In another tab of the same browser, enter the Live Experience Associate Desktop URL and append `#embed=y` to the end of the URL.

   For example: `https://Oracle_cloud_address/dae/?tenant=LX_tenant_name#embed=y`

   If SSO is set up correctly, the Associate Desktop will automatically login as the same user logged into Fusion Apps.

What to do next

Next, see *Configure the Media Toolbar in Sales or Fusion Service*.

Configure the Media Toolbar in Sales or Fusion Service

Configure the Media Toolbar for the Live Experience service.

1. Sign into Sales or Fusion Service as an administrator.
2. Enable the Computer Telephony Integration (CTI) feature.
   a. Open the Setup and Maintenance work area. From the top-right corner, click on your profile, then, under Administration, select **Setup and Maintenance**.
   b. Select the **Actions** button and then select **Go to Offerings**.
   c. Under Offerings, select **Service**, and then select **Opt In Features**.
   d. For the row Communication Channels, select the pen icon in the Feature column. Ensure that **CTI Toolbar** is enabled.

3. Add the Live Experience service to the Media Toolbar.
    a. Return to the Setup and Maintenance work area. Click on the **Tasks** tab icon and then select **Search**.
    b. On the Search page, search for and select the **Manage Media Toolbar Configuration** task.
    c. Add, name, and configure a new toolbar.
        - Set the status to **Enabled**.
        - Set the layout to **Embedded (Horizontal)**.
        - In the Communication Panel URL field, enter the Live Experience service URL, which you noted down earlier.
        - Set Notification to **Off**.
        - Set the toolbar as the default toolbar.
    d. Click **Save and Close**.
4. Add the media toolbar to the profiles of those Sales or Fusion Service agents who need access to Live Experience. If the media toolbar is already configured as the default toolbar for your site, then you can skip this step.
    a. Return to the Setup and Maintenance work area. Click on the **Tasks** tab icon and then select **Search**.
    b. On the Search page, search for and select the **Manage Administrator Profile Values** task.
    c. Search for the SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION profile option code.
    d. Set the Profile level value to **User**. Select each agent's user name and set the Profile Value to the toolbar you created and configured earlier.
    e. Click **Save and Close**.
5. Enable the CTI toolbar.
    a. Return to the Manage Administrator Profile Values work area.
    b. Search for the SVC_PARTNER_MEDIA_TOOLBAR_ENABLED profile option code.
    c. Set the Site Level to **Yes** to enable the toolbar for the whole site. Or, add a User row and set that to Yes, then select agents by user name.
6. Return to the Setup and Maintenance work area. Select the **Actions** button and then select **Edit Implementation Status**. Change the service offering implementation status to **Implemented**.

Results:

For more information about CTI, media toolbars, and implementing services in Sales or Fusion Service, see your Sales or Fusion Service documentation, specifically Sales or Fusion Service Implementing Service.

What to do next

Next, see *Add Your Sales or Fusion Environment Address as an Allowed Domain*.

Add Your Sales or Fusion Environment Address as an Allowed Domain

Add your Fusion environment address as an allowed domain.

> **Note:** If you don't add the fully qualified domain, the Associate Desktop Application won't load.

1. In the Live Experience Admin Console, navigate to the Add your Fusion environment address as an allowed domain section, and click **Add New Domain**.
2. In the Add New Domain dialog box, enter the fully qualified domain name of the Fusion environment.
3. Click **Continue**.

What to do next

For next steps, see *Log Callbacks as Sales or Fusion Service Requests*.

Log Callbacks as Sales or Fusion Service Requests

You can configure Live Experience callbacks to be logged as incidents.

A callback is an option you provide to your customers to spare them from having to wait in a call queue. See *Manage Engagement Scenarios*.

1. In IDCS, create a new OAuth SAML application for accessing Sales or Fusion Service REST APIs. The application needs to have the following specific configurations:
    - Set Allowed Grant Types to Client Credentials and JWT Assertion.
    - For Authorization Resources, select your Sales or Fusion Service server and scope.
2. Note down the client credentials for this application.
3. Contact your account manager and request to have a user account created in Fusion Apps.

   This user account needs to have an ID that matches your IDCS OAuth application and the tenant certificate from your IDCS OAuth application applied to it.
4. In the Live Experience Admin Console, on the Activate Engagement Cloud Integration page, set Log Callbacks as Service Requests to **On**.

   If set to Off, and if you enable callbacks, then callback routing is handled in Live Experience rather than in Sales or Fusion Service.
5. Enter the Sales or Fusion Service REST credentials for the application you created in IDCS.

   You need to enter the Sales or Fusion Service Server URL, the Client ID, and the Client Secret.
6. Click **Verify**.

What to do next

Next, log in to Sales or Fusion Service using an account that has access to the Live Experience service. Using your Live Experience-enabled mobile app or website, start an engagement. Confirm that an incoming call-notification pops up in Sales or Fusion Service.

Using the Live Experience Admin Console, configure the user accounts for your Sales or Fusion Service agents with skills and assign them to teams to improve call routing. See *How You Use Skills to Route Your Customers to the Right Team*.

How to Use Live Experience with Sales or Fusion Service

Sales or Fusion Service agents now have complete access to the Live Experience Associate Desktop, right in Sales or Fusion Service.

Use the Live Experience Associate Desktop extension for initiating and answering engagements. Here are some things you might want to do next:

- Log into Sales or Fusion Service using an account that has access to the Live Experience service. Use your Live Experience-enabled mobile app or website to start an engagement. Confirm that an incoming call notification displays in Sales or Fusion Service.

- Using the Live Experience Admin Console, configure the user accounts for your Sales or Fusion Service agents with skills and assign them to teams to improve call routing. See *How You Use Skills to Route Your Customers to the Right Team*.

How You Use Live Experience with Siebel CRM

When you extend Siebel CRM with Oracle Live Experience, Siebel CRM agents can access the complete Live Experience Associate Desktop from within the Siebel CRM interface.

Your Siebel users benefit from automatic processes that save them time, spare them effort, and reduce errors. Engagements coming from a Live Experience-enabled app or web page automatically open an incident in Siebel. CRM Contextual information already collected in the app or website is automatically added to the Siebel CRM incident. Your customers will notice an improved customer service experience and can avoid calling a support hotline and experiencing interactive voice response (IVR) routing. They get automatically routed to an agent who has their account information and is prepared to help them.

Both your Siebel CRM agents and your customers have access to modern engagement tools, such as video and screen sharing, that you can use to quickly solve problems. For the agents logged into Siebel CRM, Live Experience engagement tools will likely allow them to better understand the customer's problem and increase the likelihood of solving it without having to create a service request.

When you extend Siebel CRM with Oracle Live Experience, you have complete access to Live Experience comprehensive engagement features and capabilities within Siebel CRM, including:

- A complete version of the Associate Desktop available in Siebel CRM: A Siebel agent can see customer CRM records and receive Live Experience calls through the Live Experience Associate Desktop, all from a single convenient UI.
- Single Sign-on Support: Once an associate signs into Siebel CRM, they're automatically signed in to Live Experience. No additional authorization steps are required.
- Siebel Customer Record Retrieval: When a customer call comes into Siebel and is answered by an associate, the corresponding customer record opens automatically. The Siebel agent then has access both to the Live Experience context data as well as complete customer data in Siebel all in a single integrated interface.
- Automatic Activity Reporting: After every Live Experience call, an Activity Report is automatically created in Siebel containing the details about the call. The associate can update the Activity Report after the call is completed.

Integration Overview

- The Siebel CRM user interface needs to be extended to embed the Live Experience Associate Desktop. To do this, you extend an existing web template with a new iframe that calls the Live Experience Associate Desktop. Next, you add a simple button to another web template that expands and collapses the iframe. See *Extend Siebel to Accept the Live Experience Associate Desktop*.
- You build the automatic processes you want Siebel CRM to perform in response to Live Experience events, such as an incoming call. To do this, you create a simple Siebel CRM business service that identifies specific Live Experience activities and prescribes how Siebel CRM responds when they occur. See *Create a Siebel Business Service*.
- The Live Experience Associate Desktop creates JavaScript events and posts them to the parent window when important events occur. These JavaScript events need to be captured and linked to the simple business service.

To do this, you create a JavaScript message handler file in Siebel CRM. See *Link Live Experience Events to the Siebel Business Service*.

- Finally, you set up single sign-on (SSO) so that Siebel agents are logged into Live Experience when they log into Siebel CRM. To do this, you use an identity provider that supports the Siebel OAuth protocol and the Live Experience SAML 2.0 protocol. This solution uses Oracle Identity Cloud Service (IDCS). See *Enable Single Sign-On Between Siebel CRM and Live Experience*.

The following table specifies components and versions used for the Sieble integration.

Components and Versions used for Siebel Integration

Component	Version and Comments
Apache	2.x. Apache is used to protect the Siebel URL.
Apache OpenID module	2.3.0
IDCS	18.2.6-1807031603. IDCS is the identity provider (IdP) and holds the password that is used to log in.
LDAP	Sun-Directory-Server 11.1.1.7.0. Used only by Siebel.
Siebel CRM	IP17 or IP18
Tomcat	8.5.23. Siebel is sensitive to the version of Tomcat deployed with it.

Extend Siebel to Accept the Live Experience Associate Desktop

Extend existing Siebel web templates.

1. Add the Live Experience Associate Desktop iframe to Siebel. Using Siebel Web Tools, modify the CCFrameContentHI web template to include the code below:

```
<div od-switch>
 <div od-case="Communication Panel UI Service, IsCommPanelEnabled">
 <div id="LXPanelContainer" class="siebui-comm-panel-container forcehide">
 <div name="LXPanel" id="LXPanel" marginheight="0" marginwidth="0" scrolling="No" frameborder="1"
 class="siebui-comm-panel-frame">
 <iframe allowtransparency="true" id="LXFrame" src="https://ignite.oraclecloud.com/dae/?
tenant=your_tenant_name" style="height:690px;width:568px" frameborder="off" data-siebel-cd="true"
 allow="microphone;camera"></iframe>
 </div>
 </div>
 <div id="CommunicationPanelContainer" class='siebui-comm-panel-container forcehide'>
```

   Use your Live Experience tenant name for your_tenant_name. The Live Experience Associate Desktop panel appears on the left of the Siebel agent view.

2. Add the toggle button that expands and collapses the Live Experience Associate Desktop panel. Using Siebel Web Tools, modify the CCFrameBanner web template with the code below:

```
<div id="HTMLMessageBar" class="siebui-banner-btn siebui-btn-notify header-top tr"></div>
<div id="LXToggle" class="siebui-banner-btn header-top tr lx" style="color: white;font-weight: bold;text-
shadow: -1px 0 black, 0 1px black, 1px 0 black, 0 -1px black, 0 0 15px white; cursor:pointer">LX</div>
<div od-if="Communication Panel UI Service, IsCommPanelEnabled">
```

   The LX button appears in the top-right corner of the Siebel agent view.

Create a Siebel Business Service

Create a Siebel business service that tells Siebel CRM how to respond to specific events from Live Experience.

Using Siebel Tools, create a business service called **LX Handler Service**. The sample code below performs the following actions:

- When a call is answered (`case "CallStart"`): uses the caller's email address as a lookup key to retrieve the caller's contact details in the Siebel CRM system and display them in the agent view.
- When a call is ended (`case "CallEnd"`): creates a Siebel CRM activity report with all the call details such as call start and end times, session type, and description, and displays it in the agent view.

```
function Service_PreInvokeMethod (MethodName, Inputs, Outputs)
{
 var nReturn = ContinueOperation;
 TheApplication().TraceOn("trace.txt", "Allocation", "All");
 switch (MethodName) {
 case "CallStart":
 var targetView = "FIN Contact Service View";
 var emailAddress = Inputs.GetProperty("emailAddress");
 TheApplication().Trace(emailAddress);
 // establish business context
 var BO = TheApplication().GetBusObject("Contact");
 var BC = BO.GetBusComp("Contact");
 with (BC) {
 ClearToQuery();
 SetSearchSpec("Email Address", emailAddress);
 ExecuteQuery(ForwardBackward);
 }
 // drive to view
 TheApplication().GotoView(targetView, BO);
 nReturn = CancelOperation;
 break;
 case "CallEnd":
 var emailAddress = Inputs.GetProperty("emailAddress");
 var targetView = "Contact Detail View";
 var startTime = new Date(Number(Inputs.GetProperty("startTime"))*1000);
 var endTime = new Date(Number(Inputs.GetProperty("endTime"))*1000);
 var callLocation = Inputs.GetProperty("location");
 var appName = Inputs.GetProperty("appName");
 TheApplication().Trace(emailAddress);
 // establish business context
 var BO = TheApplication().GetBusObject("Contact");
 var BC = BO.GetBusComp("Contact");
 with (BC) {
 ClearToQuery();
 SetSearchSpec("Email Address", emailAddress);
 ExecuteQuery(ForwardBackward);
 }
 var BCAction = BO.GetBusComp("Action");
```

```
with (BCAction) {
NewRecord(NewBefore);
SetFieldValue("Type", "LX Session");
SetFieldValue("Description", "Call from " + callLocation + " using " + appName + " app");
//Siebel Date Format: mm/dd/yyyy hh24:mi:ss
SetFieldValue("Planned", (startTime.getMonth()+1) + "/" + startTime.getDate() + "/" +
startTime.getFullYear() + " " + startTime.getHours() + ":" + startTime.getMinutes() + ":" +
startTime.getSeconds());
SetFieldValue("Planned Completion", (endTime.getMonth()+1) + "/" + endTime.getDate() + "/"
+ endTime.getFullYear() + " " + endTime.getHours() + ":" + endTime.getMinutes() + ":" +
endTime.getSeconds());
WriteRecord();
}
// drive to view
TheApplication().GotoView(targetView, BO);
nReturn = CancelOperation;
break;
}
return (nReturn);
}
```

Link Live Experience Events to the Siebel Business Service

Create a JavaScript message handler file to capture important Live Experience events and communicate them to the Siebel simple business service.

The message handler file also adds functionality to the LX button. The Live Experience Associate Desktop creates JavaScript events for the following Live Experience events.

Live Experience Events Created by JavaScript Events

Event	Description
AgentStatusChange	The event is created whenever the associate's availability in the Live Experience Associate Desktop changes, such as log in, log out, answering a call, or marking themselves as unavailable.
StartDiagnostics	The event is created whenever the diagnostics check starts.
QueueChange	The event is created whenever the associate call queue changes state. The event includes details of the current queue status. This could be used to show a ringing icon on the screen, for example.
StartCall	The event is created whenever the associate starts a call. The event includes the context details of the call, which could be used to populate Siebel activity and contact data. The Context details are configurable in the Live Experience Admin Console, are visible in the Live Experience Associate Desktop during the call, and can include anything configured in the Live Experience client. For example, details could include call start and stop times, associate and client names, client physical and webpage or app locations, and client device details.
EndCall	The event is created whenever the associate ends a call. The event includes the context details of the call, which could be used to populate Siebel activity and contact data.

1. Create a JavaScript file called `LXHandler.js`.

   The following reference message handler file is only concerned with capturing StartCall and EndCall events and communicating specific information from Live Experience to the Siebel business service.

```
top.addEventListener("message",handleLXMessage,false);
function handleLXMessage(messageEvent) {
```

```
console.log("IN LX HANDLER");
event=messageEvent.data;
switch(event.eventName) {
case "QueueChange":
console.log("HANDLE QUEUE CHANGE");
console.log(event.eventData);
break;
case "StartCall":
callDetails=event.eventData.callDetails;
if (typeof callDetails.email != "undefined") {
emailAddress=callDetails.email.value;
} else {
emailAddress="Unavailable";
}
if (typeof callDetails.phone != "undefined") {
phone=callDetails.phone.value;
} else {
phone="Unavailable";
}
console.log("HANDLE CALL START WITH EMAIL: " + emailAddress + " PHONE: " + phone);
console.log(event.eventData);
businessService=SiebelApp.S_App.GetService("LXHandlerService");
inPS=SiebelApp.S_App.NewPropertySet();
inPS.SetProperty("emailAddress", emailAddress);
inPS.SetProperty("phone", phone);
outPS = businessService.InvokeMethod("CallStart",inPS).childArray[0];
break;
case "EndCall":
callDetails=event.eventData.callDetails;
if (typeof callDetails.email != "undefined") {
emailAddress=callDetails.email.value;
} else {
emailAddress="Unavailable";
}
if (typeof callDetails.phone != "undefined") {
phone=callDetails.phone.value;
} else {
phone="Unavailable";
}
if (typeof callDetails.appLocation != "undefined") {
appLocation=callDetails.appLocation.value;
} else {
appLocation="Unavailable";
}
if (typeof callDetails.location != "undefined") {
callLocation=callDetails.location.value;
} else {
callLocation="Unavailable";
}
if (typeof callDetails.appName != "undefined") {
appName=callDetails.appName.value;
} else {
appName="Unavailable";
}
startTime = event.eventData.callStartTime;
endTime = event.eventData.callEndTime;
console.log("HANDLE CALL END WHICH WAS " + (endTime-startTime) + " SECONDS LONG");
console.log(event.eventData);
businessService=SiebelApp.S_App.GetService("LXHandlerService");
inPS=SiebelApp.S_App.NewPropertySet();
inPS.SetProperty("emailAddress", emailAddress);
inPS.SetProperty("phone", phone);
inPS.SetProperty("startTime", startTime);
inPS.SetProperty("endTime", endTime);
inPS.SetProperty("appLocation", appLocation);
inPS.SetProperty("location", callLocation);
```

```
 inPS.SetProperty("appName", appName);
 outPS = businessService.InvokeMethod("CallEnd",inPS).childArray[0];
 break;
 default:
 console.log(event.eventName);
 break;
 }
 console.log(messageEvent.data.eventName);
}
var performResize = function(e) {
 var newWidth = e.clientX;
 // console.log("Resize Performed at " + newWidth);
 if (newWidth > window.innerWidth - 7) {
 newWidth = window.innerWidth - 7;
 // console.log("stopping at max width of " + newWidth);
 }
 if (newWidth > 1000) {
 newWidth = 1000;
 // console.log("stopping at max width of " + newWidth);
 }
 if (newWidth < 250) {
 newWidth = 250;
 // console.log("stopping at min width of " + newWidth);
 }
 document.getElementById("LXPanelContainer").style.width = newWidth + "px";
};
var finaliseResize = function(e) {
 console.log("Resize Finished at " + e.clientX);
 window.removeEventListener("mouseup", finaliseResize, false);
 window.removeEventListener("mousemove", performResize, false);
 document.getElementById("LXFrame").style.pointerEvents = "auto";
 // Send a resize event so that any changed Siebel views know to redraw.
 window.dispatchEvent(new Event('resize'));
};
var initialiseResize = function() {
 console.log("Resize Started");
 document.getElementById("LXFrame").style.pointerEvents = "none";
 window.addEventListener("mouseup", finaliseResize, false);
 window.addEventListener("mousemove", performResize, false);
};
window.setTimeout(createClickHandler,500);
function createClickHandler () {
 var haveButton = $(".lx").length>0;
 var havePanel = $("#LXPanelContainer").length>0;
 var haveHandler = $("#LXResizeHandler").length>0;
 if (haveButton && havePanel && haveHandler) {
 $(".lx").on("click",function() {
 // button click handler
 $("#LXPanelContainer").toggleClass("forcehide");
 $("#LXResizeHandler").toggleClass("forcehide");
 // Send a resize event so that any changed Siebel views know to redraw.
 window.dispatchEvent(new Event('resize'));
 });
 currentSRC=$("iframe").attr('src');
 if (currentSRC=="") {
 // Determine the tenant source from logged in User attributes.
 lxTenant=SiebelApp.S_App.GetProfileAttr('Email Address');
 userName=SiebelApp.S_App.GetUserName();
 if (lxTenant.includes("@") || lxTenant=="") {
 lxTenant="oracle-internal-integration";
 }
 userName = userName + "_" + lxTenant;
 $("iframe").attr('src','https://ignite.oraclecloud.com/dae/?tenant='+lxTenant
+'#embed=y'+"&ext_session="+userName);
 }
 document.getElementById("LXResizeHandler").addEventListener("mousedown", initialiseResize, false);
```

```
 } else {
 setTimeout(createClickHandler,500);
 }
}
```

2. Save `LXHandler.js` and add it to the Siebel CRM system, register it as a Manifest File, and add it to the Siebel PLATFORM INDEPENDENT loadout with no expression for simplicity.

Enable Single Sign-On Between Siebel CRM and Live Experience

Configure the SSO functionality between Siebel CRM and Live Experience.

For SSO to work, you need a common, secure identity store that uses protocols supported by both Siebel CRM and Live Experience. Live Experience authenticates using the SAML 2.0 protocol and Siebel CRM uses OAuth. Siebel CRM does not support SAML natively, so it's not possible for Live Experience to authenticate directly with Siebel.
In this solution, Oracle Identity Cloud Service (IDCS) is used as the identity provider to authenticate Live Experience users and provide single-sign on functionality between Siebel CRM and Live Experience, because IDCS supports both SAML and OAuth.

IDCS supports many protocols and integrations, including Oracle Identity Management and Microsoft Active Directory, which means that IDCS is well positioned to support many existing Siebel installations.

Protect your Siebel Web Application with IDCS

Use IDCS to protect your Siebel CRM web application that is hosted on Apache HTTP Server. Read *https://support.oracle.com/epmos/faces/DocumentDisplay?_afrLoop=521269055438885&id=2364938.1* on My Oracle Support and follow all the instructions.

Set Up Siebel Object Managers

Create an object manager for configuring SSO with IDCS. As an example, enable the Siebel CME Component Group and use **eCommunicationsWireless/enu** as IDCS authentication. Please note, URLs are case sensitive.

To enable SSO for an object manager, the object manager must be configured for LDAP authentication.

Make sure that you have Siebel Administrator SADMIN privilege to access server administration screens. The environment should have GUESTCST configured with appropriate responsibility to give minimum number of views. GUESTCST should be configured in LDAP along with a database user account that can fetch information from user before the actual user logs into Siebel CRM.

Related Topics

- Configure the Apache HTTP Server as a Secure Reverse Proxy
- Configure the Application Interface from Siebel Management Console
- Configure the Object Manager to Enable and Set Up the LDAP Security Adapter in Siebel
- Configure the Logout Workflow
- Configure LDAP for Siebel

Configure the Apache HTTP Server as a Secure Reverse Proxy

You need to configure your Apache HTTP Server as a reverse proxy.

The examples in this section also employ and enable SSL security mechanisms.

1. Modify the file **apache24\conf\httpd.conf** and do all the following:
    - Configure Apache to listen on SSL port 9002.

      ```
      Listen Siebel_domain:9002
      ```
    - Enable reverse proxy by uncommenting the following lines of code.

      ```
      LoadModule proxy_module modules/mod_proxy.so

      LoadModule proxy_html_module modules/mod_proxy_html.so

      LoadModule proxy_http_module modules/mod_proxy_http.so

      LoadModule proxy_http2_module modules/mod_proxy_http2.so
      ```
    - Add or uncomment the xml2enc module.

      ```
      LoadModule xml2enc_module modules/mod_xml2enc.so
      ```
2. Modify the file apache24\conf\httpd-ahssl.conf and do all the following:
    - Change the listen port to 9001.

      ```
      Listen 9001 https
      ```
    - Add the open module ID configuration.

      ```
      LoadModule auth_openidc_module modules/mod_auth_openidc.so
      # IDCS metadata
      OIDCProviderMetadataURL https://
      idcs-9dc9ab4b56ed47dea49033364df8fc5a.identity.oraclecloud.com/.well-known/openid-configuration
      # IDCS Client ID
      OIDCClientID b7a250216b714b73ad63bdf2c7c892bd
      # IDCS Client Secret
      OIDCClientSecret c4a24964-fd4e-440b-91bd-4baf8eb0fa56
      # Token Type
      OIDCProviderTokenEndpointAuth client_secret_basic
      # Disable SSL validation, uncomment it for testing purposes
      OIDCSSLValidateServer Off
      # Scope
      OIDCScope "openid"
      # Action
      OIDCResponseMode form_post
      # Your application's URL plus the "oidc" fake resource needed by OpenID
      # Use HTTP instead of HTTPS for testing purposes
      OIDCRedirectURI https://Siebel_domain:9001/siebel/oidc/
      # Password
      OIDCCryptoPassphrase MyStrongPass00
      OIDCUnAuthAction auth
      ```
    - Define the protected resource.

      ```
      <VirtualHost *:9001>
       SSLEngine on
       SSLProxyEngine on
       SSLProxyVerify none
       SSLProxyCheckPeerCN off
      ```

```
 SSLProxyCheckPeerName off
 ServerName slc16odt:9001
 SSLCertificateFile "C:\Apache24\conf\cert\server.pem"
 SSLCertificateKeyFile "C:\Apache24\conf\cert\serverkey.pem"
 # mod_proxy setup.
 ProxyRequests Off
 Redirect /logout /siebel/oidc/?logout=https://Siebel_domain:9001/siebel/app/
eCommunicationsWireless/enu
 ProxyPass "/siebel" "https://bejar23.oracle.com:9001/siebel" connectiontimeout=600 timeout=600
 ProxyPassReverse "/siebel" "https://bejar23.oracle.com:9001/siebel"
 Timeout 600
 ProxyTimeout 600
 #<Location /eCommunicationsWireless_enu>
 <Location /siebel>
 AuthType openid-connect
 Require valid-user
 </Location>
# This is a fake resource used by mod_auth_openidc
# Users will not access it directly
 <Location /oidc/>
 AuthType openid-connect
 Require valid-user
 </Location>
</virtualhost>
```

Configure the Application Interface from Siebel Management Console

Use the Siebel Management Console (SMC) to configure the application interface.

1. Using the Siebel Management Console (SMC), from the navigation pane, expand **Profiles** and select **Application Interface**.
2. On the Application Interface Profiles page, select the active profile.
3. In the Applications area, select the second tab, expand the **eCommunicationsWireless (enu)** list, then expand the **Enhanced Authentication** list.
4. Select the **Configure Web Single Sign-On (SSO)** check box.
5. Enter a value for Trust Token, for example, **IDCSSIEBEL**.
   The trust token value is used later by the security adapter in the Siebel enterprise profile.
6. Enter **OIDC_CLAIM_sub** for User Specification.
   This value corresponds to the HTTP header variable that OIDC uses to pass the user name to Siebel CRM.

Configure the Object Manager to Enable and Set Up the LDAP Security Adapter in Siebel

Configure several parameters on the eCommunicationsWireless object manager.

1. Log into Siebel CRM as an administrator.
2. Select the **Administration - Server Configuration** tab.
3. On the Enterprises subtab, select **Component Definition using eCommunicationsWireless_enu** object manager.

4. Search for **eCommWirelessObjMgr_enu**.
5. Change the following parameters for the eCommunicationsWireless object manager:
    - Security Adapter Mode: change from `DB` to `LDAP`.
    - Security Adapter Name: change from `DBSecAdpt` to `LDAPSecAdpt`.
    - Enforce SSL: set to `True`.
6. On the **Administration - Server Configuration** tab, select **Profile Configuration using eCommunications_enu** object manager on the Enterprises subtab.
7. Search for profile **LDAP Security Adapter** and set the following parameters:
    - Single Sign-On: set to `True`.
    - Trust Token: set to the value entered in the section Configure the Application Interface from Siebel Management Console. For example, **IDCSSIEBEL**.
8. Stop and restart the Tomcat server for the Siebel Application Interface.

Configure the Logout Workflow

Configure the logout workflow to remove all session information from Siebel CRM, IDCS, Live Experience, and the Apache HTTP server front end.

1. Edit the file apache24\conf\httpd-ahssl.conf as follows: `OIDCRedirectURI https://Siebel_domain:9001/siebel/oidc`.
2. In IDCS, modify the OAuth application configuration as follows:
    - Set the redirect URL to the same value as that provided for OIDCRedirectURI.
    - Set the logout URL to the same value as that provided for OIDCRedirectURI.
    - Set the post-logout redirect URL to `https://Siebel_domain:9001/siebel/app/eCommunicationsWireless/enu`.
3. In the Siebel UI, set the following system preference: `IDP Logoff URL = https://Siebel_domain:9001/logout`

Configure LDAP for Siebel

Follow these steps to configure the LDAP for Siebel.

1. Connect to the Siebel CRM server machine and launch server manager `srvrmgr`.
2. Navigate to the **ldapsecadpt** subsystem.

3. Run the following commands in the server manager console:
    - Change the LDAP server name to the Siebel LDAP server name.

      ```
      change param servername="Siebel_ldap_server.yourdomain.com"
      ```
    - Change the LDAP port to the Siebel LDAP server port.

      ```
      change param port=Siebel_ldap_port
      ```
    - Change the base domain name.

      ```
      change param basedn="ou=people,o=yourdomain.com"
      ```
    - Change the application user.

      ```
      change param applicationuser="uid=appuser,ou=dirdemos,ou=people,o=yourdomain.com"
      ```
    - Change the application password.

      ```
      change param applicationpassword=ldap_password
      ```
    - Change the shared credentials on the domain.

      ```
      change param sharedcredentialsdn="uid=mssql,ou=dbcreds,ou=people,o=yourdomain.com"
      ```
    - Change the roles attribute type

      ```
      change param RolesAttributeType=physical_delivery_office_name
      ```
4. Still using the server manager, navigate to the security adapter for the component such as to eservice ENU application.
    - Change the security adapter mode to LDAP for the eServiceObjMgr_enu component.

      ```
      change param SecAdptMode=ldap
      ```
    - Increase the logging levels for the security manager for the eCommWirelessMgr_enu component.

      ```
      change evtloglvl SecMgrLog=5
      ```
    - Increase the logging levels for the security adapter for the eServiceObjMgr_enu component.

      ```
      change evtloglvl SecAdptLog=5
      ```
5. Restart the Siebel application server.
6. Using SMC, update the user name and password for the AI profile and deploy it.

Create Matching Users in Siebel, Live Experience, and IDCS

For every Siebel CRM agent to whom you want to give access to Live Experience, create an account in Live Experience and in IDCS.

The Live Experience account user name must be a valid email address. For SSO to work, the email address must match the agent's email address on their Siebel CRM account. The IDCS account needs to include the Siebel CRM account user name and the Live Experience account email address. The user name value is case sensitive.

The account credentials are stored only in IDCS. IDCS, as the identity provider, completes the sign on into Siebel CRM and when the Live Experience Associate Desktop is opened in Siebel CRM.

Configure Siebel Applications

Use Siebel Tool to configure Siebel applications.

1. Using Siebel Tool, open **Application User Prop**.
2. Add the LXHandlerService as an application user property on the Siebel Power Communications application.
3. In the Siebel Application, add a new List of Values for Live Experience. Enter **TODO_TYPE** for Type, **LX Session** for Display Value, **LX Session** for LIC, **General** for Parent LIC, and **TODO_TYPE** for Parent Type.

Test the Integration with Siebel

Each time you create a set of SSO accounts, it's important to test that the accounts are properly provisioned.

1. Log into Siebel CRM with the SSO credentials for the new account.

   If you are unable to log in, there might be a problem with the SSO configuration or with the IDCS account. See *Enable Single Sign-On Between Siebel CRM and Live Experience* or *Create Matching Users in Siebel, Live Experience, and IDCS*.
2. Click the button that expands and collapses the Live Experience Associate Desktop panel.

   If the panel does not open, there might be a problem with the iframe or the button. See *Extend Siebel to Accept the Live Experience Associate Desktop* or *Link Live Experience Events to the Siebel Business Service*.

   If the panel opens, but the panel fails to load the Live Experience Associate Desktop, there might be a problem with the SSO configuration or with the IDCS account. See *Enable Single Sign-On Between Siebel CRM and Live Experience* or *Create Matching Users in Siebel, Live Experience, and IDCS*.
3. Open the Live Experience Associate Desktop panel and make a test call.

   If there is no sign of an incoming call, there might be a problem with the tenant configuration embedded in the iframe. Make sure the iframe includes the correct link to your Live Experience tenant. See *Extend Siebel to Accept the Live Experience Associate Desktop*.
4. Answer the call.

   If the caller's contact and account information are not displayed in Siebel CRM, ensure there is an account record in Siebel for the test caller or there might be a problem with the account lookup configuration. See *Create a Siebel Business Service*.
5. End the call.

   If an Activity Report isn't automatically created in Siebel CRM, there might be a problem with the Siebel Business Service. See *Create a Siebel Business Service*.

Use the Associate Desktop in Siebel CRM

This is a typical demo scenario for the Associate Desktop extension.

1. Configure your Live Experience demo app.

   Use your specific configuration instructions for the Live Experience demo app, including the following required information:

   - Cloud Address: **live.oraclecloud.com**
   - Tenant: your assigned tenant name
   - Client ID: your assigned client ID
   - Secret: your assigned secret

   Feel free to configure the remaining settings as you like.

2. Log in to Siebel CRM.
   a. Open Siebel in your browser.
   b. Login using your SSO user ID and password.

      The Siebel CRM home page appears.
3. Access the Live Experience Associate Desktop extension by clicking the LX icon in the top-right corner.
4. Create a new Siebel CRM contact.

   You need to create a new Siebel CRM contact that matches the details you configured in the Live Experience demo app. Alternatively, you can configure the Live Experience demo app to match an existing contact in Siebel CRM. You may want to do this during your demo, or handle it beforehand. If you don't have a matching contact in Siebel CRM, the incoming call from the app won't open the contact information and history.

   a. On the Siebel CRM home page, click **Contacts**.
   b. In the Add area, enter the contact information that matches the details you configured in the Live Experience demo app and select **Add & Go**.

      Now, when you place a call from the Live Experience demo app to Siebel CRM, you see the contact information come up automatically.

      > **Note:** Siebel CRM looks up its contact records using the email address. Make sure the email address you enter is the same as the one you configured in the Live Experience demo app.

5. Place a call from the Live Experience demo app to Siebel CRM.

   After you have the Live Experience demo app configured, and you created a matching contact in Siebel CRM, you can initiate a call from any of the scenarios the Live Experience demo app.

   a. Expand the Associate Desktop panel in Siebel CRM to see incoming call notifications.
   b. From any scenario on the Live Experience demo app, tap the widget in the bottom-right corner.

      An incoming call notification appears in the Associate Desktop extension. Depending on your audio configurations, you might also hear a sound notification.
   c. In Siebel CRM, click **Answer**.

      Siebel CRM displays the contact information when the call is answered.
   d. End the call.

      Siebel CRM automatically creates a new Activity Report and highlights it. Modify the Activity Report as necessary and save it.

What to do next

After ending the call, there are several other actions you could take to enhance the demo. For example:

- Repeat the process of calling Siebel CRM from the Live Experience demo app, each time demonstrating that additional Activity Reports are created.
- Repeat the process of calling Siebel CRM from the Live Experience demo app, and create other Siebel CRM artifacts, such as Service Requests.
- Log into the Live Experience Admin Console and demonstrate the detailed reports and metrics about the calls made to Siebel CRM.
- Log into the Live Experience Admin Console and demonstrate the engagement history functionality for the calls made to Siebel CRM.

> **Note:** There's a known issue, Server Busy Error, that you may experience sometimes during logging in or out from Siebel CRM. To work around this issue, reload your browser and continue with the demo.

Add Live Experience to Zendesk

Add Oracle Live Experience to Zendesk so Zendesk agents can use Live Experience communications features, including instant meetings, voice and video calling, and camera and screen sharing.

Live Experience complements Zendesk to further modernize the customer experience, increase satisfaction and retention, while also improving the Zendesk agent experience. Your agents can use Live Experience to call your customers right from Zendesk, with Live Experience handling the calls over the internet.

1. From the Admin Console navigation menu, click **Integration**.
2. Click the **Zendesk** tile.
3. In the Add Zendesk Account section, enter your Zendesk team name, user name, and API token. Here's how to find these account details:
    a. Sign in to Zendesk as an administrator.
    b. Click **Settings**.
    c. In the Settings window, Channels section, click **API**.
4. Click **Verify**.
5. If the verification is successful, click **Continue**.
6. In the Map Zendesk Roles to Live Experience section, map at least one Zendesk role to a Live Experience role, then click **Continue**.
7. Optionally, in the Select Application for Outbound Calls section, select the default Live Experience application that will be used by Zendesk to make outbound calls, and click **Continue**.
8. In the Add your Zendesk agent workspace address as an allowed domain section, add the fully qualified domain name of the Zendesk agent workspace where you'll add the Live Experience browser UI extension, and click **Continue**.

    > **Note:** If you don't add the fully qualified domain, the Associate Desktop Application won't load.

9. In the Deploy Zendesk Application section, click **Deploy** to deploy the Live Experience Integration application into your Zendesk Team.

    The integration application is generated by Live Experience using the values you entered in the steps above. It can take a minute or two to deploy the application.

10. Click **Continue**.
11. In the Confirm Zendesk Activation section, click **Confirm** to complete the integration.

Related Topics

- How You Use Live Experience in Zendesk
- Enable In-App Customer Calling for Zendesk

How You Use Live Experience in Zendesk

After you enable the Live Experience service in Zendesk, your Zendesk agents have complete access to the Live Experience Associate Desktop, right inside Zendesk.

Your agents can start meetings, send and receive SMS messages, read SMS conversations, call customers, and answer engagements routed to them. Clicking the LX icon in the Zendesk interface opens the Associate Desktop.

- The Zendesk Ticket sidebar is enhanced with a list of Live Experience engagements. When your agents open a ticket, they can quickly see the most recent engagements associated with a ticket. Clicking on an engagement opens the engagement details in the Live Experience Admin Console, where an agent can review the details and even replay the engagement.
- You can configure Live Experience for calling customers. If you do, then your agents also have the ability to call the customer directly by clicking on the Call Customer button in the Ticket sidebar. See *Enable In-App Customer Calling for Zendesk*. After you update your mobile app to receive notifications, and you configure Live Experience to send notifications to your apps, your customers can receive calls from you. These calls are essentially voice over IP calls, sent using Live Experience to your Live Experience-enabled mobile app. The incoming call from Zendesk behaves just like other kinds of calls. For example, the phone rings and a notification is presented to the customer, provided notifications are permitted and the volume isn't muted. The call interface is intuitive and familiar.

  > **Note:** For a customer to receive your call, they need to have your mobile app installed on their phone. The customer needs to configure the app with contextual details. Customer lookup uses the mobile phone number to complete the call. The customer also needs to set up your app to allow notifications. If they don't allow notifications, the app won't notify them of incoming calls.

Enable In-App Customer Calling for Zendesk

You can configure your Live Experience application so that your Zendesk agents can call customers on your Live Experience-enabled mobile app they already use.

Before you start

You already have a fully developed and Live Experience-enabled mobile app. If you don't, or if you need information about developing Live Experience-enabled mobile apps, see the deveoper guide.

Here's what to do

1. Your application developer needs to add notification support to your mobile apps.

   Adding notifications support to your apps allows your apps to understand notification-based events sent by Live Experience, such as for starting a voice call initiated by Live Experience. See *Add Notification Support to your iOS App* or *Add Notification Support to your Android App*.

2. Configure your Live Experience application to send notifications to your mobile app. See *Configure Your Application to Send Notifications*.

   These configurations enable the Call Customer button in the Zendesk Ticket sidebar, allowing your agents to call your customers directly, with the click of a button.

Add Live Experience to Oracle Digital Assistant

Add Oracle Live Experience to Oracle Digital Assistant.

Before you start

Before you begin, you already installed and set up Oracle Digital Assistant on your website and you are familiar with Oracle Digital Assistant, including its customer portal administration interface.

With Live Experience added to Oracle Digital Assistant, you allow your customers an affordable escalation path where they can progress their chat session with the chat bot to start a Live Experience audio or video engagement.

Chat bots are capable of handling simple customer issues, but by adding Live Experience to Oracle Digital Assistant, you enhance the customer's experience. If the chat bot isn't capable of resolving the issue, the chat bot invites the customer to talk with an associate or agent.

To complete the steps outlined here, you need the following:

- A WebDAV client to insert remote code changes directly into the Oracle Digital Assistant Customer Portal views.
- Login credentials and access URLs for the Oracle Digital Assistant Customer Portal.

Here's what to do

1. Add the Live Experience widget into ODA.
   a. Download the Live Experience JavaScript SDK and extract **live-experience-cp-widget-web.zip**.
   b. Unzip **live-experience-cp-widget-web.zip**.
   c. Using your WebDAV client, upload the live experience widget into **customer/development/widgets/custom**.
   d. On the Customer Portal administration page, enter **LiveExperience** into the search bar in the top right corner. On the LXWidget page, in the TR corner, click **Activate this version**.

      This activates the Live Experience widget in the dev environment.
2. Add the LX widget to the views where you want it to work.

   Modify **customer/development/views/templates/fy17.php** to include the following snippet, invoking the LX widget:

```
...
<!-- Start ChatBot (ODA) inlay -->
<rn:widget path="custom/templateSelector/chatBotInlay" />
<!-- Start LX web widget -->
<rn:widget path="custom/templateSelector/LiveExperience" {lx_server="emea.live.oraclecloud.com"}
```

```
lx_tenant="your_tenant_name" lx_client_id="your_client_id" lx_client_secret="your_client_secret" />
```

Don't forget to specify your tenant in the above code snippet:

- your_tenant_name is the name of your Live Experience tenant.
- lx_client_id the client ID for your Live Experience application.
- client_secret is the client secret for your Live Experience application.

By default, the Live Experience widget uses the live.oraclecloud.com server. You can specify the `https://emea.live.oraclecloud.com` server by adding the `lx_server` parameter to the snippet.

3. Customize the ODA widget to share chat-bot messages with the LiveExperience widget.

   In **customer/development/widgets/custom/templateSelector/chatBotInLay/1.0/view.php**, add the following code to the `Bots.on('widget:opened'` handler:

```
Bots.on('widget:opened', function() {
 if (Bots.getConversation().messages != null &&
 Bots.getConversation().messages.length < 1) {
 Bots.sendMessage("Hi");
 }
 // Start LX-specific config
 const lxWidgetElement = $('.rn_LiveExperience').attr('id');
 const lxInstanceID = RightNow.Text.getSubstringAfter(lxWidgetElement, 'rn_');
 const widget = RightNow.Widgets.getWidgetInstance(lxInstanceID);
 if (widget) {
 Bots.on('message:received', widget.interceptAgentRequest.bind(widget));
 } else {
 console.warn("Couldn't find LX widget");
 }
 // End LX-specific config
}
```