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KANA Response Live Organization Administration

KANA Response Live
Version 10 R2

February 2008

KANA Response Live Organization Administration

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Part number: nnn-DOC-nnnWNT-EN

Table of Contents

About This Guide

This chapter describes the typographic conventions used in KANA Response Live documentation, how to request additional help or information about KANA Response Live products, and how to report errors in or make suggestions about KANA Response Live documentation.

About Screen Captures

Screen captures provide a visual representation of what you may see while using this product. What you see on your screen may vary depending on the platform on which KANA Response Live is installed or how the KANA Response Live platform is customized. You should consider the illustrations in this manual as samples.

Typographic Conventions

Table 1 lists the typographic conventions in this document.

Table 1. Typographic Conventions (Sheet 1 of 2)

Visual Clue	Meaning
Bold Type With Initial Capital Letters	■ Command and button names ■ Dialog box titles ■ check box options ■ Dialog box options Examples: ■ Use **Save As** (File menu) to save the file with a different name or extension. ■ Click **Save**. ■ Use the **Save as type** option in the **Save As** dialog box to select the file name extension.
bold type	■ Folder and directory names ■ Disk drive names ■ File names ■ File name extensions Examples: ■ **\kana** folder ■ **d:** drive ■ **kana.exe** file
Italic Type With initial Capital Letters	■ Document and book tiles Example: ■ For more information, refer to the *KANA Response Live User's Guide*.
italic type	■ Key words, such as terms that are defined in the text ■ Variable names are enclosed in angle brackets (<>) and shown in italic type Examples: ■ This is called *cobrowsing.* <*file name*>, <*installation directory*>\kana

Table 1. Typographic Conventions (Sheet 2 of 2)

Visual Clue	Meaning
Initial Capital Letter	■ Keyboard keys ■ Menu names Examples: ■ Delete key ■ Options menu
"Subheading Title"	■ References to sections within a document are enclosed in quotation marks Example: ■ "Typographic Conventions"
`Courier type`	■ Command line input or output ■ Anything that must be typed exactly as it appears ■ Code samples ■ References to parts of files Example: ■ Type `\kana`.
1., 2., 3., and a., b., c., ...	Numbered steps are used in a list of items when the sequence of the items is important, such as the steps in a procedure
↵	The angled arrow indicates you should press the Enter key
■	Bullets are used in a list of items when the sequence of the items is not important
	The exclamation point icon indicates a warning or information that requires more attention.
	The note icon points out information to keep in mind when performing a particular task.
	The book icon directs you to more information on a particular topic

If You Need Help

KANA's support staff can be reached toll-free within the United States at (866) 753-KANA or by e-mail at support@kana.com.

To contact our KANA technical staff, visit support.kana.com.

KANA Product Documentation Assessment

If there's anything we can do to make our documentation better, please let us know. We've put together a few questions below, but feel free to make additional comments. You can send us a hardcopy, e-mail us at support@kana.com, or access this form via the world-wide web at http://www.kana.com

1. Did you find any technical errors or missing tasks in any of the documents you used? If so, please tell us about them.

2. Are there other documents that you need or feel would expand KANA's current product documentation offerings?

3. Please use the space below to provide additional comments about any of KANA's current documentation. We'd like to know what you feel needs improvement as well as what should be addressed in future revisions.

1 Who Should Read this Guide?

You should read the sections of this guide described below that relate to your KANA Response Live role.

This user guide assumes you have already read the "*KANA Response Live Getting Started Guide.*"

Every effort has been made to present the following KANA Response Live information in an easy-to-understand manner. However, the KANA Response Live suite of software products encompasses a significant amount of unique and market-leading functionality. As a a result, some terminology may be new to you. For this reason, a "Glossary" is provided.

Organization Administrators

Organization administrators should read chapters "Chapter 2" through "Chapter 8" and chapters "Chapter 12" through "Chapter 16".

If implementing the Proactive Chat feature, then also read *"Chapter 9: ."*

If implementing the Chat feature, then also read "Chapter 10: Customizing the iChannel Chat Settings."

Supervisors

Supervisors should read the chapters that explain how to log onto the Organization Administration tool, manage agent accounts and groups, and maintain their account profile. These chapters are:

- "Chapter 4: Launching & Signing In to the Organization Administration Tool"
- "Chapter 12: Agent Groups"
- "Chapter 13: Agent Accounts"
- "Chapter 16: Profiles"

Agents

Agents should read only the chapters that explain how to log onto the Organization Administration tool and manage their account profile. These chapters are:

- "Chapter 4: Launching & Signing In to the Organization Administration Tool"
- "Chapter 16: Profiles"

Agents may be provided a separate manual from their company that explains how to sign in and manage their account profile.

2 KANA Response Live Implementation Process

The KANA Response Live implementation process depends on whether your company is hosting its own system or using KANA's hosted service. If your company is hosting its own system, it is referred to as an on-premise implementation.

The implementation process consists of tracks and phases. The tracks denote general job functions. The phases represent the basic implementation time line.

You probably have already seen this chapter in the *"KANA Response Live Getting Started Guide."* Most KANA Response Live documents include this chapter as a road map to guide you during the implementation process. In this user guide, this chapter highlights the steps in the process performed using the Organization Administration tool.

Implementation Tracks

Tables 1 and 2 show one possible breakdown of the implementation tracks. Regardless of the implementation used, the required tasks can be grouped into the following simultaneous implementation tracks:

- **Personnel:** Training of supervisors and agents on how to use a KANA Response Live system.
- **Technical:** Configuring hardware and software required for the KANA Response Live system to function.
- **Business operations:** Planning and configuring the business considerations for the KANA Response Live system.
- **Testing:** Canvassing of your company's Web site to verify that the KANA Response Live features are functioning correctly during the pilot and final launch.

A user role may perform tasks in multiple tracks. A user role may also share tasks with another user role.

Implementation Phases

Tables 1 and 2 show the basic implementation phases most often used by KANA professional services. Your company's phases may differ depending on internal processes for hardware and software deployments.

Tables 1 and 2 show the required implementation tasks grouped by implementation track and phase. These tables also show the user roles and related documentation for each task.

These tables use the following conventions and acronyms:

- Items marked with a * only apply to implementations including chat.
- Items in bold are covered in this document
- The KANA Response Live user roles for each task follow in parentheses () after each task. The user role abbreviations used are as follows:
  - A = Agent
  - K = KANA Software, Inc.
  - M = Manager
  - OA = Organization administrator
  - P = Programmer/web developer
  - QA = Quality assurance engineer
  - S = Supervisor
  - SA = System administrator
- The KANA Response Live documentation for each task follow in brackets [] after each task. The documentation abbreviations used are as follows:
  - OA = *KANA Response Live Organization Administration Tool User Guide*
  - *SA = KANA Response Live System Administrators Tool User Guide*
  - *IG = KANA Response Live Installation Guide*

Hosted Implementation

The fastest way to implement a KANA Response Live system isto use KANA's hosted service. In this implementation, KANA personnel perform many of the required implementation tasks.

Table 1 summarizes the KANA Response Live implementation process when using the KANA hosted service.

Table 1. Required Tasks in a Hosted KANA Response Live Implementation *Note (1)*

Phase	Track			
	Personnel	**Technical**	**Business Operations**	**Testing**
Preliminary			■ Purchase (M) ■ Schedule and budget (M) ■ Understand documentation road map (M) ■ Think about reporting workflow (M)	
Initial setup	■ Train key personnel (M)	■ **Try the meet-me page (OA) [OA]** ■ Create test environment [*SA*]		
Main setup	■ Develop training plan (M)	■ Determine where the live help buttons will be placed (M), (P) ■ Figure out how the KANA Response Live softwarewill be integrated with the company Web site (M), (P)	■ Think about business rules from a business perspective (M) ■ **Set look and feel properties (M, P, OA) [*OA*]** ■ **Configure organization (M, OA) [*OA*]** ■ **Define iChannels (M, OA) [*OA*]** ■ **Create PDRs* (M) [*OA*]** ■ **Localize (M, OA)**	■ Develop canvassing plan (QA) ■ Canvas Web site without business rules (QA) ■ Report significant issues to KANA (M), (QA)
Implementation		■ Design Live Help buttons (P) ■ Implement business rules (SA)	■ **Create agent and supervisor users and agent groups (OA) [*OA*]**	
Final configuration		■ **Incorporate canvassing feedback into configuration (OA) [OA]**	■ **Finish iChannel configuration by including business rules (OA) [*OA*]**	
Staging	Train supervisors and agents (M), (S), (A)	■ Put launch code and Live Help button on a small number of pages on company Web site (P)		■ Test business rules (QA) [See your company's test plan] ■ Test launch code (QA)
Deployment		■ Put launch code and Live Help button on all planned pages on company Web site (P)		
Production			■ Monitor daily reports	

Note to Table 1:

(1) See the text proceeding Table 1 for an explanation of the conventions and acronyms used in this table.

On-Premise Implementations

If your company is implementing the KANA Response Live system on-premise instead of using the KANA hosted service, additional implementation tasks are required by your company. Table 2 lists the required tasks for an on-premise KANA Response Live installation. See the text proceeding Table 1 for an explanation of the conventions and acronyms used in Table 2.

Table 2. Required Tasks in an On-premise KANA Response Live Implementation (Sheet 1 of 2) Note (1)

Phase	Track			
	Personnel	Technical	Business Operations	Testing
Preliminary		■ Order hardware (SA) [*IG*] ■ Determine how KANA Response Live softwarewill be integrated with 3rd party software (SA), (P) ■ Design network (SA)	■ Purchase (M) ■ Schedule and budget (M) ■ Understand documentation road map (M) ■ Think about reporting workflow (M)	
Initial setup	■ Train key personnel (M)	■ **Try the meet-me page (OA) [OA]** ■ Create test environment [*SA*] ■ Install software (SA) ■ Configure initial system (SA) [*SA*] ■ Create database for system (SA) ■ Create organization (SA) [*SA*]		
Main setup	■ Develop training plan (M)	■ Determine where the live help buttons will be placed (M), (P) ■ Figure out how the KANA Response Live softwarewill be integrated with the company Web site (M), (P) ■ Integrate KANA Response Live software with 3rd party software (P)	■ Think about business rules from a business perspective (M) ■ **Set look and feel properties (M, P, OA) [*OA*]** ■ **Configure organization (M, OA) [*OA*]** ■ **Define iChannels (M, OA) [*OA*]** ■ **Create PDRs* (M) [*OA*]** ■ **Localize (M, OA)**	■ Develop canvassing plan (QA) ■ Canvas Web site without business rules (QA) ■ Report significant issues to KANA (M), (QA)
Implementation		■ Design Live Help buttons (P) ■ Implement business rules (SA)	■ **Create agent and supervisor users and agent groups (OA) [*OA*]**	
Final configuration		■ **Incorporate canvassing feedback into configuration (OA) [OA]** ■ Configure hardware (SA) [IG], [SA] ■ Create clusters if using a server farm (SA) [IG], [SA] ■ Configure routers if using a server farm (SA) [IG], SA] ■ ***Configure chat (OA) [IG], [OA]** ■ **Configure monitoring systems (OA)**	■ Finish iChannel configuration by including business rules (OA) [*OA*]	

Table 2. Required Tasks in an On-premise KANA Response Live Implementation (Sheet 2 of 2) Note (1)

Phase	Track			
	Personnel	**Technical**	**Business Operations**	**Testing**
Staging	Train supervisors and agents (M), (S), (A)	■ Put launch code and Live Help button on a small number of pages on company Web site (P)		■ Test business rules (QA) [See your company's test plan] ■ Test launch code (QA)
Deployment		■ Put launch code and Live Help button on all planned pages on company Web site (P)		
Production			■ Monitor daily reports	

Note to Table 2:

(1) See the text proceeding Table 1 for an explanation of the conventions and acronyms used in this table.

3 KANA Response Live Configuration Overview

This chapter provides an outline of the steps that must be completed in the Organization Administration tool to configure the business model of a KANA Response Live system.

This chapter outlines the steps an organization administrator must complete without lengthy text explanations and provides references to figures and chapters later in this user guide.

Building a functional KANA Response Live system requires first that a system administrator set up the hardware and some technical aspects of the software. This guide assumes that a system administrator has completed this work.

Next, an organization administrator must set up the business-related aspects of the software. Organization administrators do not set up hardware. They perform their duties exclusively in the Organization Administration tool.

The organization administrator tasks are as follows:

- Configure iChannels. iChannel settings establish the appearance of KANA Response Live-related windows. iChannels also enable many KANA Response Live features, including Chat, Proactive Chat and pointers. At least one iChannel must be configured.
- Create supervisor and agent accounts and agent groups. At least one agent group must be created. A supervisor account does not need to be created as agent groups do not require a supervisor.
- Set organization properties not set by the system administrator.
- Copy in business rules.
- Maintain his profile.

Refer to the "Glossary" for definitions of KANA Response Live terms with which you are not familiar.

Configuration Outline

This process of creating a business model is straightforward. The following outlines the configuration steps.

1. Log on to the Organization Administration tool. (See "Chapter 4: Launching & Signing In to the Organization Administration Tool.")

2. Configure the organization properties. (See "Chapter 7: Customizing Organization Properties.") Some organization properties have already been set in the System Administration tool.

3. Create and configure at least one iChannel and its Cobrowse properties. (See “Chapter 6: Customizing General iChannel Settings” and “Chapter 8: Customizing iChannel Cobrowse Settings.”) As part of creating an iChannel, you may need to write business rules or have them written for you. (See “Appendix A: Business Rules.”)

4. Configure the Proactive Chat properties, if your company is implementing this product. (See “Chapter 9: .”)

5. Configure the Chat properties, if your company is implementing this product. (See “Chapter 10: Customizing the iChannel Chat Settings.”)

6. Create and configure at least one agent group. (See “Chapter 12: Agent Groups.”)

7. Create and configure at least one supervisor account. (See “Chapter 15: Supervisor Accounts & Agent Assignments.”)

8. Create and configure at least one agent account. (See “Chapter 13: Agent Accounts.”)

9. Configure the Supervisor Console settings. (See “Chapter 10: Customizing the iChannel Chat Settings,” “Chapter 15: Supervisor Accounts & Agent Assignments.” and “Chapter 14: Supervisor Console Settings.”)

Configuring the Organization

In a KANA Response Live system using the Chat product, an organization has associated with it a profane word list and an ignored word list. You need to create these lists. Additionally, you set cobrowse session properties.(See “Chapter 7: Customizing Organization Properties.”)

Creating & Configuring an iChannel

You must create and configure at least one iChannel before you can create other entities in the Organization Administration tool.

General Settings

The general settings are mainly for choosing UI colors and fonts. (See “Chapter 6: Customizing General iChannel Settings.”)

Cobrowse Settings

To create an iChannel and configure its Cobrowse properties refer to “Chapter 8: Customizing iChannel Cobrowse Settings”:

- Create an iChannel.
- Set the iChannel Profile Information, including name and description.
- Set the iChannel Properties, including enabling Cobrowse, Chat or Proactive Chat and language settings.

- Set the iChannel General Interface Settings, including a logo to display, as well as colors and font of KANA Response Live windows.
- Set the cobrowsing Properties, including pointers, maximum cached page size, and image funneling.
- Set the cobrowse Interface Settings, including text of buttons and messages in the user interface control panel, and default home pages for a cobrowsing session.
- Insert a business rules file, if required. Business rules enforce your company's cobrowsing-related policies. For example, *No agent may submit a purchase order for a customer*. Business rules are written in XML. (See "Appendix A: Business Rules.")

Configuring Proactive Chat

Your company may choose to use one or neither of the Proactive Chat or Chat products. (See "Chapter 9: ,")

- Enable the tracker for the agent group monitoring this iChannel on the Agent Groups Properties page.
- Create the tracking rules, startup rules, and run-time rules on the iChannel Tracker Rules page.
- Define actions for the action types listed on the iChannel Tracker Actions page.

Configuring Chat

Your company may choose to use one or neither of the Proactive Chat or Chat products. (See "Chapter 10: Customizing the iChannel Chat Settings.")

If the iChannel uses Chat, set the Chat properties on the following pages:

- **Customer Login Panel:** Text of messages and buttons on panel customer sees when he wishes to request help.
- **Customer Waiting Panel:** Text of panel telling customer that he has entered the queue for the next available agent.
- **Customer In Session Panel:** Text in panel appearing while a customer is in a cobrowsing session.
- **Customer Exit Session Panel:** Text in panel that appears after a customer has left a cobrowsing session.
- **Predefined Responses**: Pre-written frequently used statements and responses to frequently asked questions.

Configuring Agent Groups

After you have created an iChannel, the next step is to create an agent group. The Organization Administration Tool will not allow you to create a supervisor until you have created at least one agent group. For agent groups:

- Create an agent group on the Agent Groups Main page.
- Enter profile information for the group.
- Make at least one iChannel assignment that defines the iChannels in which members of the agent group work.
- Assign agent group properties, including Priorities, Chat properties, Tracker properties, and other miscellaneous properties.

Creating Agent Accounts

After you have createdan agent group, you can populate it with agents. (See “Chapter 13: Agent Accounts.”) For agents:

- Create an agent on the Agents Main page.
- Enter profile information for the agent.
- Assign the agent to an agent group.

Creating Supervisor Accounts

Once you have created all of the above entities, you will be able to create one or more supervisors, who will then be able to take over the task of administering their agents. (See “Chapter 15: Supervisor Accounts & Agent Assignments.”) For supervisors:

- Create a supervisor on the Supervisors Main page
- Set profile information for the supervisor, including name, department, and description.
- Assign iChannels to the supervisor.
- Assign agent groups to the supervisor.
- Assign the supervisor’s home iChannel that he sees when launching the Supervisor Console and how re-assignment of iChannels are prioritized when using the Supervisor Console.

Configuring the Supervisor Console

Configure the Supervisor Console settings. (See “Chapter 10: Customizing the iChannel Chat Settings,” “Chapter 15: Supervisor Accounts & Agent Assignments.” and “Chapter 14: Supervisor Console Settings.”)

4 Launching & Signing In to the Organization Administration Tool

This chapter discusses how to launch and sign in and off the KANA Response Live Organization Administration Web-based application.

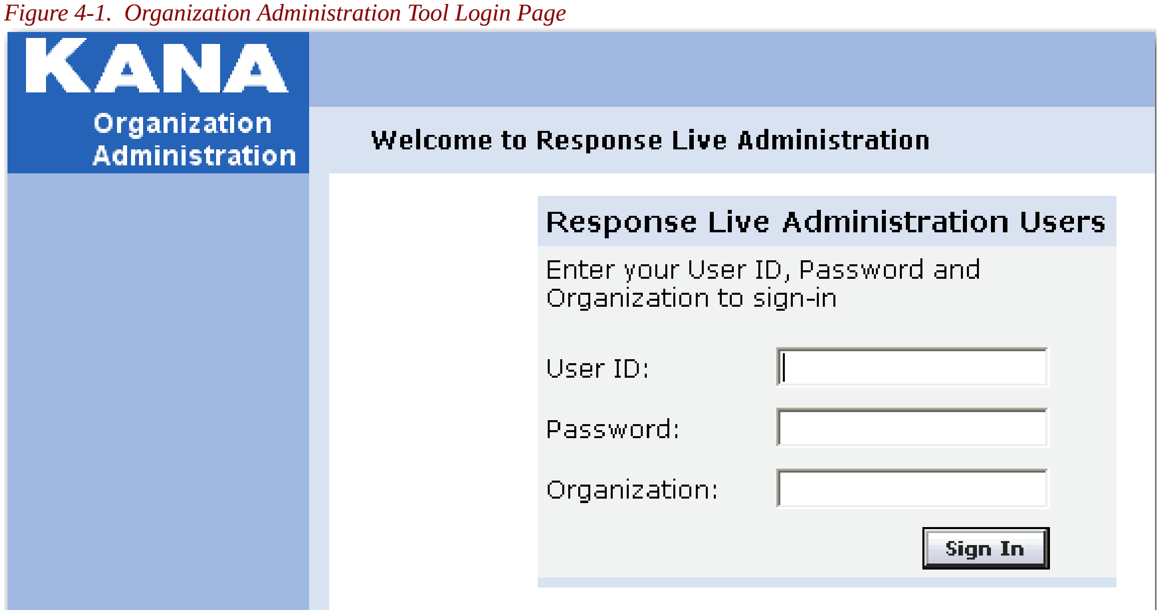
Systems administrators must first create organizations and organization administrator accounts using the Systems Administration tool before organization administrators can use the Organization Administration tool. In turn, an organization administrator must first create supervisor and agent accounts before these users can use the Supervisor and Agent console tools.

Launching the Tool

To launch the Web-based Organization Administration tool, you need its URL. Ask your system administrator, supervisor, or manager for this URL. Use a Web browser to access this URL. The default launch page is http://<*servername*>/CONAV/ORGADMIN.

Figure 4-1 shows an example of what the Welcome page for the tool looks like. The page you see may differ slightly, but should have the tool's name and form for entering your user ID, password, and organization.

Figure 4-1. Organization Administration Tool Login Page



Signing In

To use the Organization Administration tool users must sign in for security reasons.

The following KANA Response Live user roles can sign in:

- Organization administrator
- Supervisor
- Agent

However, the main users of this tool are organization administrators.

Each user that logs into this tool sees a customized menu tailored to the user role. The customized menu assures that a user can only view and modify features appropriate for the user role.

To sign in, you need your user ID, password, and either the organization name or ID number. Ask your system administrator, supervisor, or manager for this information.

To sign in:

1. Type your user ID, password, and organization name or number.

2. Click **Sign In** to display the **Home** page.

The menu items on your home page depend on your user role. If you are:

- An *organization administrator*, you see the **Organizations**, **iChannels**, **Supervisors**, **Supervisor Console**, **Agent Groups**, **Agents**, and **My Profile** menu options.
- A *supervisor*, you see the **Agent Groups**, **Agents**, and **My Profile** menu options.
- An *agent*, you see a page whose title is **My Profile**.

Signing Out

For security reasons, you should sign out by clicking **Sign Out** when leaving your computer unattended.

You will automatically be signed out when you have not used the tool for 10 minutes.

5 The Organization Administration Tool User Interface

The user interface (UI) of the KANA Response Live server Web-based applications is similar across all pages. However, minor differences can exist depending on the products installed and if they are customized per your company's standards.

Please refer to the "Glossary" for definitions of KANA Response Live terms unfamiliar to you.

Page Types

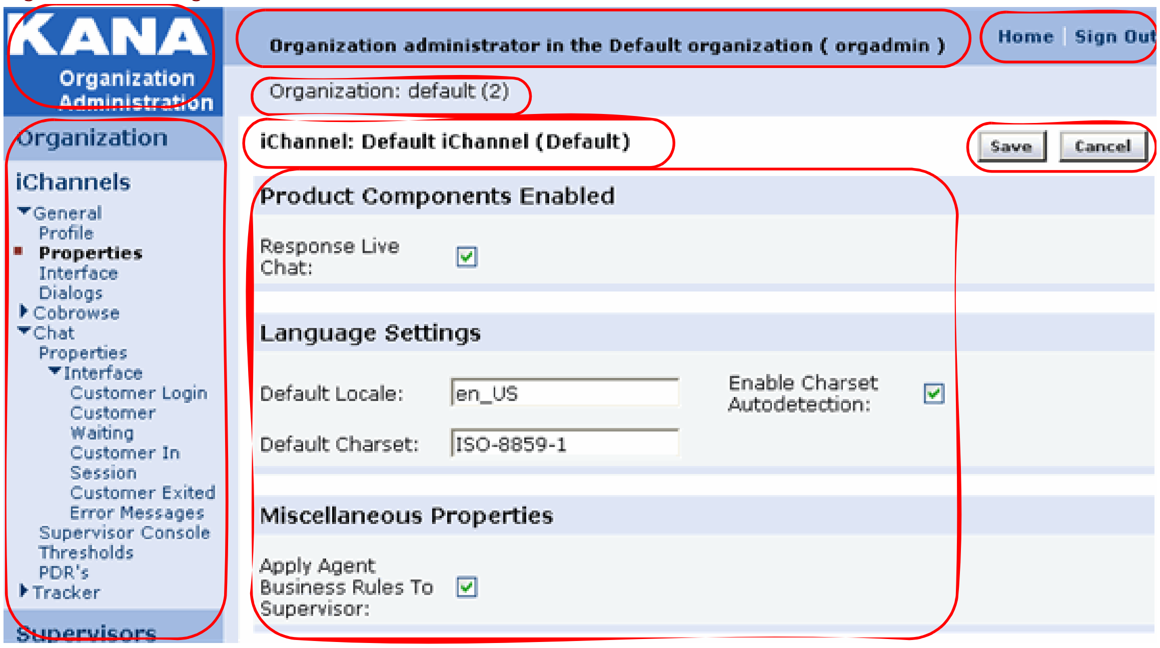
The Organization Administration tool has two main page types: with and without a preview panel. Figures 5-1 and 5-2 show these page types. Each page has similar display areas and features available.

Input fields outlined in heavy lines can be edited. Input fields outlined in light lines cannot be edited. Fields that cannot be edited are those that contain values set automatically by the KANA Response Live system.

These page types share most UI features. These features starting clockwise from the top right in Figures 5-1 and 5-2 are:

- **KANA Response Live Tool Name Area:** This area shows that the KANA Response Live Web-based Organization Administration tool is being used. Currently, the applications include the System Administration and Organization Administration tools.
- **User Name Area:** This area displays the screen and account name for the signed-in user of the application.
- **Top Menu:** This area displays a menu that is the same for every page in the application. **Home** and **Sign Out** are the top menu options.
- **Left Menu:** This menu dynamically changes depending on the products installed and the role of the user signed into the application. This menu also can be expanded and collapsed by the user.
- **Organization/iChannel Name Area:** This area displays the organization, name and, if applicable, the iChannel name with which the user is now working.
- **Message Area:** This area displays messages in response to user actions. The responses can indicate that the requested action was successful or that an error has occurred.
- **Command Button Area:** This area displays the buttons tocontrol actions that are available for the data in the Selection/Configuration area.
- **Selection/Configuration Area:** This area displays input fields that can be customized for each item in the left menu.

Figure 5-1. Tool Page Without a Preview Panel

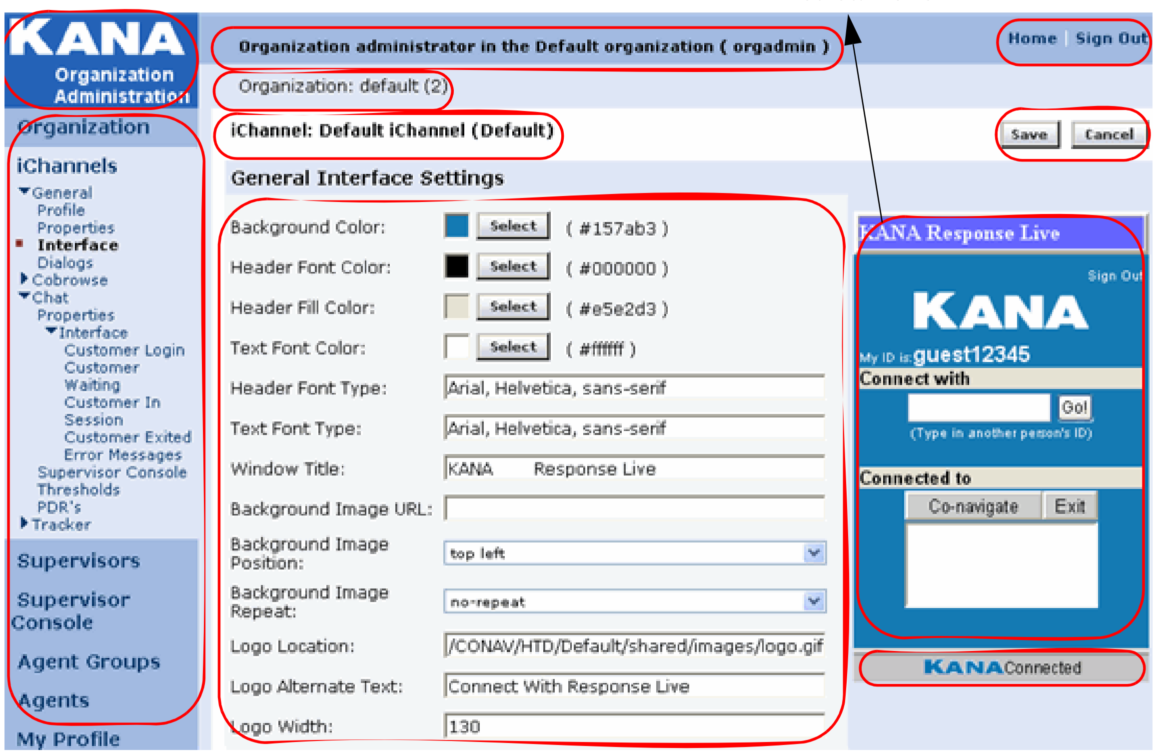


Additionally, pages with a preview panel (see Figure 5-2) have the following UI feature:

- **Preview Panel Area:** This area displays a mock-up of how the specialized user interface components, such as the control panel dialogs, will appear when being used by customers or agents.

Figure 5-2. Tool Page with a Preview Panel

Preview Panel



Tips for Customizing Buttons

When customizing a button, the button resizes itself to accommodate the length of the text typed up to the maximum size of the button. If more characters are typed, the button distorts. The number of characters allowed before the button distorts depends on the font face and size selected.

Tips About Customizing Text

You may use HTML tags to control the appearance of text in customer and control panels. For example,

Welcome!

<i>To Our Live Support Page</i>

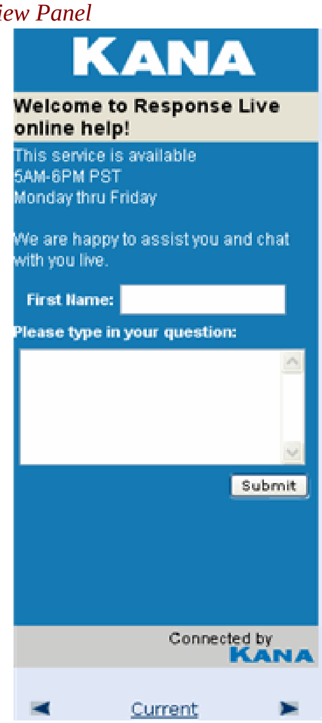
In general, KANA Response Live resizes the panels to accommodate the text length by wrapping the text in the panel. The text is treated as HTML and is formatted. However, if the text is really long, the panels distort. The amount of text that causes the panel to distort depends on the font face and size chosen. Use trial-and-error to determine how much text can be placed on panel before the panel distorts. Words are not divided between lines. New lines are started at spaces between words. Force line breaks in text by using the
 HTML tag.

If a customizable field is left blank, the system default is used. The default value for fields are listed in this document where the fields are described in detail in the following chapters. In some cases, if a field is left blank and it does not have a default value, the field or button appears blank or display the variable name used by the KANA Response Live software. Most fields have default values, if there is a logical default value. In some cases, it is acceptable for a field to be blank, and, therefore, there is no default value.

Tips for Customizing Preview Panels

Use the arrow buttons at the bottom of the preview window to move through other preview windows associated with this section of the iChannel. Click **Current** to return to the preview window currently being edited. This process helps to visualize the flow of the interface. See Figures 5-3 for a sample of a preview panel.

Figure 5-3. Sample Preview Panel



UI Navigation

The browser **Back** and **Forward** buttons can be used to move between pages in the Organization Administration tool. However, it is recommended to use the left and top menu buttons to navigate through the tool.

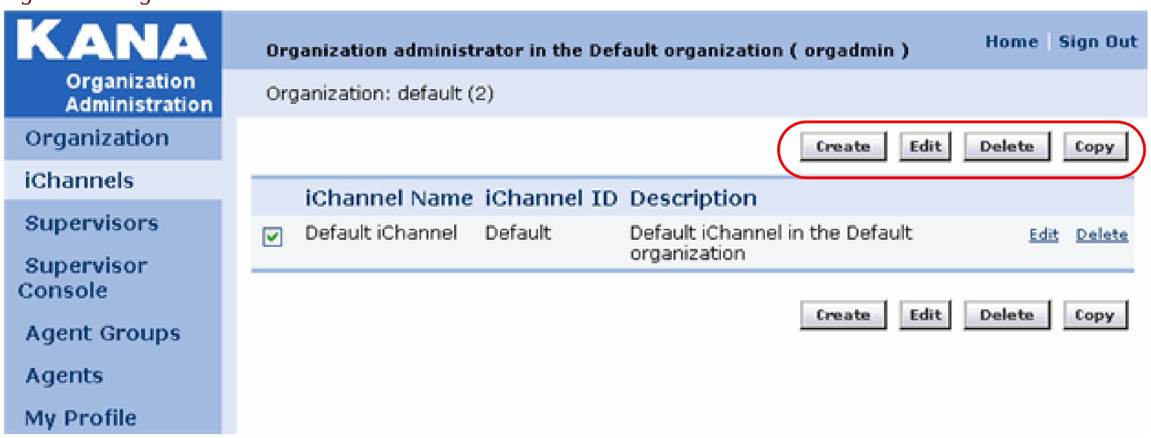
To return to the home page, click **Home.** The home page of this tool is the Organization Properties page.

Sign Out returns you to the sign in page.

UI Actions

Most Organization Administration pages have similar actions that can be performed, some of which are shown in Figure 5-4. Depending on which selection you made on the left pane menu, the actions available for that page can differ slightly. These actions include: Create, Edit, Delete, Copy, Cancel, Move, Apply, and Save.

Figure 5-4. Organization Administrator Actions



Create

The create action makes a new instance of an entity, such as an iChannel or agent group. When **Create** is clicked:

- The page with the basic information for the new entity appears.
- The new entity is based on the default entity.
- The new entity is given a temporary name, which is the text (New) followed by the entity type, such as Agent, and an integer number.

Copy

The copy action makes a new instance of an entity, such as an iChannel or agent group, by copying the selected entity.

When **Copy** is clicked:

- The page with the basic information for the new entity appears.
- The new entity is based on the entity selected.
- The new entity is given a temporary name, which is the text (Copy of) followed by the name of the entity being copied.

Edit

The edit action loads the page with the current settings for the entity's properties. Use Edit to make changes to existing iChannels, supervisor, agent, and administrator accounts, and agent groups.

Delete

The delete action removes the entity from the database.

Caution should be used when deleting entities from the KANA Response Live system. The KANA Response Live system tracks sessions based on organizations, iChannels, supervisors, agents, and agents group entities. If these entities are removed from the system, session transcripts used for auditing will not be as easy to follow. Hence, it is recommended that instead of deleting entities, that the entity be made to not have any function in the system anymore. For instance, delete an agent group by not having any iChannels associated with it or delete an agent account by not having him assigned to any agent group.

Cancel

The cancel action returns the user to the previous page without saving changes made on the current page or the browser reloads the last saved version of the current page. However, if the page has created an entity, clicking **Cancel** does not cancel the creation of the entity. To remove the entity from the KANA Response Live system, use **Delete**.

Move

The move action is used to reassign one or more agents to another agent group.

Apply (Predefined Response Pages Only)

Click **Apply** to make changes to components of a PDR without having to save them permanently.Click **Save** when satisfied with the PDRs to prevent the changes from being lost after signing out of the tool. Applying is useful because it allows movement between pages without saving changes every time. It is recommended, however, to periodically save when making a number of PDRs or significant changes to PDRs.

Save (Non Preview Pane Pages)

The save action commits the modification to the input fields on the page into the KANA Response Live database.

Save (Preview Pane Pages Only)

The save action shows any changes made to the input fields on the page in the preview window on the right and commits these changes to the KANA Response Live database. This statement applies to any pages in the Organization Administration tool that have preview panes.

Error & Confirmation Messages

Error messages appear on the page, if an action, such as Save, is not completed successfully. The error message indicates why the action was not successful. Most often saving is not successful if invalid entries have been made or required entries are blank.

If the save action is successful, a message appears on the page to indicate this.

When deleting entities or exiting pages without saving changes, you are prompted to confirm the deletion or to not save changes.

Using the Color Picker

Use the color picker to select colors in KANA Response Live system windows in an iChannel. To choose a color:

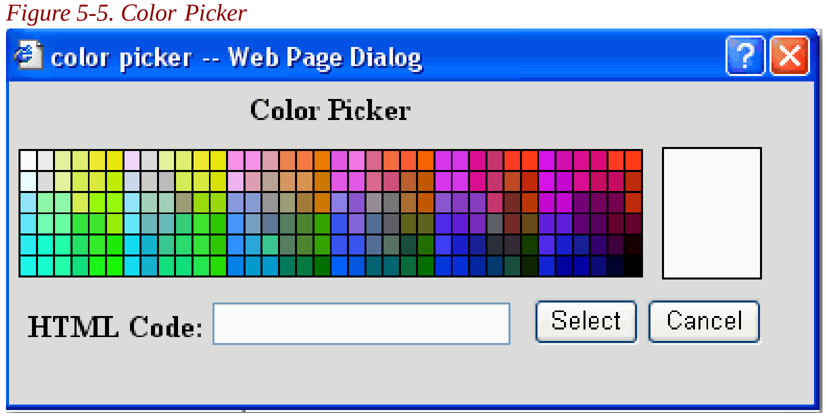
1. Click **Select** for one of the color settings. A **Color Picker** dialog box appears (see Figure 5-5).

2. Mouse over a color in the color palette to display the color in the large, color box on the right side of the dialog box. The hexadecimal color value only changes when the mouse is clicked.

3. Click on a color in the palette to make it appear in color box and its hexadecimal value to appear in the **HTML Code** box. Alternatively, type a hexadecimal code value into the **HTML Code** box.

4. To try this color in the preview panel, click **Select**. The dialog box disappears. Click **Save**, if you want to save the use of this color for the preview panel.

Figure 5-5. Color Picker



Database Caching

In general, there may be up to a 10 minute propagation delay between when changes are made in the Organization Administration tool and when all other servers in the KANA Response Live system receive the changes. This delay is due to how often the database cache is refreshed. The refresh occurs every 10 minutes to lesson the overhead of updating the system, and, hence improve the KANA Response Live system performance.

6 Customizing General iChannel Settings

This chapter describes each iChannel general setting and its default, or initial, value. Interaction channels (iChannels) define how agents interact with customers and customers interact with a KANA Response Live system. iChannels are the backbone of a KANA Response Live system and basic customization is easy. iChannels will require maintenance as the company Web site and business policies evolve. iChannel settings control the appearances of KANA Response Live-related windows and dialog boxes seen by users. iChannel properties also enable many KANA Response Live features, including Chat, Proactive Chat and Pointers.

The Business Model & iChannels

The number of iChannels created and how each iChannel is customized is determined by your company's business model. For example, iChannels can be created based on product lines, security levels, agent skill levels, languages spoken, business units, or service types. The iChannels created most likely will be similar to the structure already existing in the support center.

Usually, the business model, and hence iChannel structure, are determined during the planning stage for a KANA Response Live system. The business model is developed with managers and organization administrators with assistance from KANA's professional services group.

A default iChannel is always created for each organization. It is recommended to customize this default iChannel and then use it as a template for creating other iChannels. Copying this template iChannel as the basis of other channels saves time when customizing multiple iChannels. When using **Create** to make a new iChannel, the basis of the iChannel is the default iChannel.

Configuration Tips

The following are important points to remember when configuring iChannel general properties:

- Customize the default iChannel and use it as a template for creating other iChannels. Copying this template saves time during the customization process.
- The default iChannel settings are sufficient for testing a pilot system.
- Some iChannel properties, such as UI colors and text messages are typically set after pilot level testing. Also, more agents and supervisors can be added after the pilot phase.
- Some iChannel properties, such as business rules, may require maintenance as the business model changes.
- A system administrator has to create an organization before an organization administrator can configure the organization.
- Only organization administrators and supervisors can customize iChannels.
- Most of the general menu items apply to each of the KANA Response Live Cobrowse, Proactive Chat, and Chat products implemented.

- Defining general settings is mandatory. Defining other settings is not required.

After customizing the general properties, there are additional customization properties associated with an iChannel. Subsequent chapters describe the iChannel settings in the following categories:

- Cobrowse. See "Chapter 8: Customizing iChannel Cobrowse Settings."
- For implementations using Proactive Chat functionality. See "Chapter 9: ."
- Chat for implementations using the Chat functionality. See "Chapter 10: Customizing the iChannel Chat Settings."

Creating, Copying, & Deleting iChannels

Only organization administrators can create, copy, and delete iChannels. The main iChannel page lists the iChannels in an organization. To view this page, click **iChannel** on the left menu or **Home** on the top menu. iChannels are created, copied, edited, and deleted starting from this page.

To create an iChannel:

- Click **Create** on the main iChannel page to display the iChannel Profile Page. Use this page to enter the profile information for the new iChannel with the iChannel name **(new) iChannel** or **(new *next integer number*) iChannel**, if the name **(new) iChannel** already exists.

or

- Alternatively, copy an existing iChannel by selecting the existing iChannel and clicking **Copy**. Copying saves time when the new iChannel's settings are to be similar to an existing iChannel's settings.

To edit an iChannel:

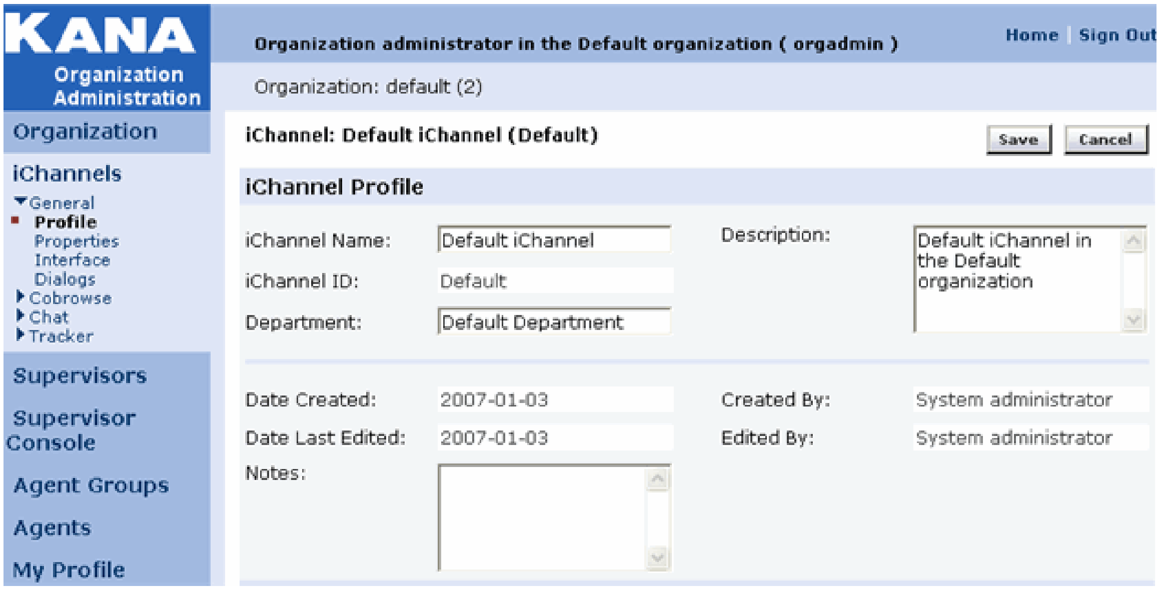
- Click the **edit** link on the same line as the copied iChannel, or check the box next to the iChannel and click **Edit**.

See "Chapter 4: Launching & Signing In to the Organization Administration Tool" for help on using the Organization Administration tool user interface.

iChannel Profile Settings

The iChannel profile page is the first page displayed when creating or editing an iChannel. The profile page also gives access to the sub-menus for the iChannels. (See Figure 6-1.)

Figure 6-1. iChannel General Profile Settings Page



Profile Data Created by KANA Response Live

Response Live automatically creates some profile information when the iChannel is created. The iChannel ID is the most critical information as the KANA Response Live system uses this internally to identify the iChannel. This information can not be modified and includes the following:

- **iChannel ID:** A unique string generated by the KANA Response Live software to identify the iChannel in the organization. This string is used by the launch page code to identify the iChannel in which the agent works.
- **Date Created:** The date the iChannel was created.
- **Created By:** The name of the person who created the iChannel.
- **Last Edited**: The date the iChannel was last modified.
- **Edited By:** The name of the person who last made changes to the iChannel.

Profile Data Created by the Organization Administrator

An organization administrator can provide additional information that does not impact the behavior of the iChannel, but is useful for understanding the business role of the iChannel later in the life cycle of a KANA Response Live system. This information includes the following:

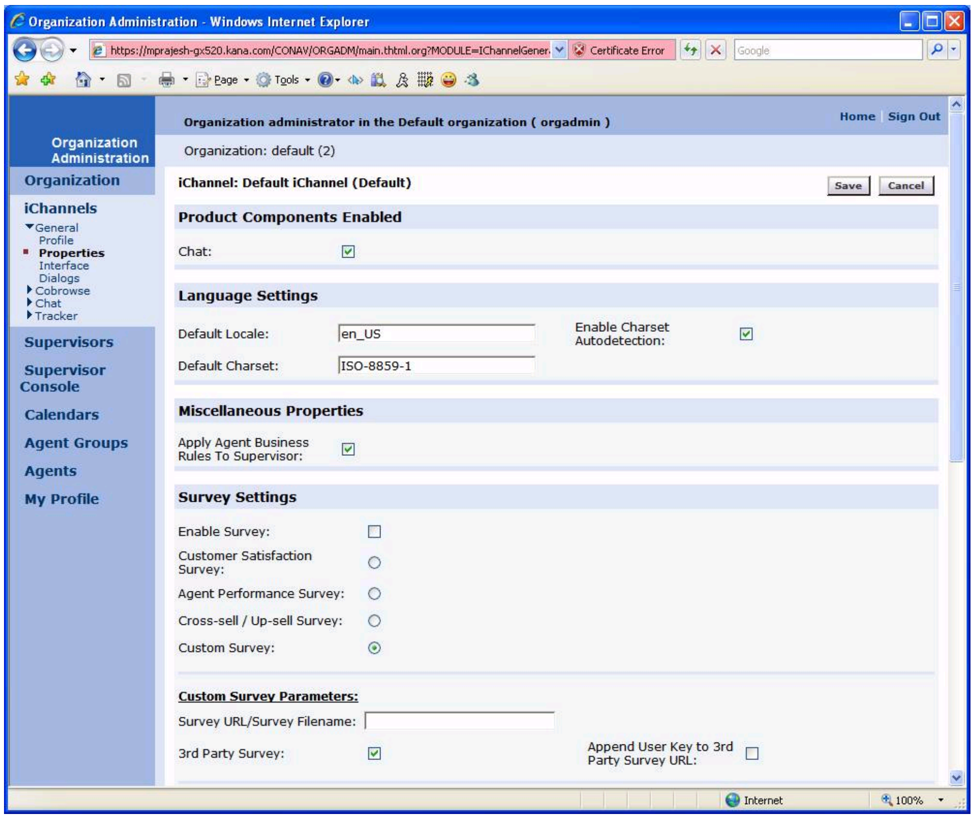
- **iChannel Name:** A unique name for each iChannel in the organization. Leave **Default** as the default iChannels's name.
- **Department:** The company department associated with the iChannel.
- **Description:** A summary of the iChannel's purpose, such as the business use, language, and special characteristics of the iChannel, to help diagnose future problems.

- **Notes:** A good place to document any changes to the iChannel and when these changes were made.

Property Settings

The properties apply to each of the KANA Response Live Cobrowse, Proactive Chat, and Chat productsimplemented. This page is accessed from the **General** > **Properties** (iChannel menu). (See Figure 6-2.)

Figure 6-2. iChannel General Property Settings Page



Product Components Enabled

The system administrator enables the KANA Response Live Cobrowse, Proactive chat, and Chat products at the organization level in the System Administration tool. Chat is enabled and disabled at the iChannel level through the **Product Components Enabled** options. If a product has not been enabled for the organization, it cannot be enabled for any iChannel in the organization.

Language Settings

The language settings properties control the default language and character set for KANA Response Live-related windows and dialog boxes in an iChannel. If these settings are not correct, a user may see text in a language that is unfamiliar or in unreadable symbols.

- **Default Locale:** Sets the default language. For example, type `en_US` for US English or `en_GB` for UK English. If this field is blank, the default is US English. "Appendix C: Locale &

Character Codes" contains a list of the codes for the locales currently supported by KANA Response Live systems.

- **Default Charset:** Sets the default alphabet. If this field is blank, the default is ISO-8859-1. "Appendix C: Locale & Character Codes" contains a list of the codes for the character sets currently supported by KANA Response Live systems.
- **Enable Charset Autodetection:** When this option is turned on, the KANA Response Live system attempts to identify the character set — such as English, Korean,Japanese or French — in use in Web pages it encounters. This feature is useful if customers browse Web pages written in languages other than the default character set. For example, when two people attempt to cobrowse a page written in the Korean character set, and the system recognizes the character set as Korean, the KANA Response Live system displays the page using Korean characters rather than in unreadable text symbols, which would appear otherwise.

  Normally, leave this option on. However, some Web page designers have mistakenly labeled pages with the wrong character set. If these types of pages are viewed frequently, turn off this option.

Miscellaneous Properties

The miscellaneous properties category is a catch-all for KANA Response Live features that require minimal customization.

- **Apply Agent Business Rules to Supervisor:** Turn on this option if supervisors should Cobrowse under the same business rule restrictions as the agents in the iChannel. If this option is turned off, the supervisors are only restricted on pages they can cobrowse to or actions they can perform when cobrowsing by business rules applying only to supervisors or to all users. If writing business rules that apply to specific user types, then it is recommended to turn this option off.

Surveys

Surveys can be used for gathering customer feedback at the end of the Chat/Cobrowse interaction. Your organization can use the information gathered from the customers to make decisions to improve business and enrich the customer experience. Internet based surveys offer a powerful, cost effective, and easy to use tool for gathering customer feedback.

Response Live comes bundled with three surveys and support for Custom Survey. The three bundled surveys are:

- Customer Satisfaction Survey
- Agent Performance Survey
- Cross-Sell/Up-Sell Survey

These are predefined surveys your organization can use to measure customer satisfaction, agent performance and to identify cross-sell and up-sell opportunities.

The Custom Survey feature is used to create your Organizations own surveys instead of the bundled surveys.

NOTE: See “Appendix D: Using Custom Survey”for the instructions to customize the three bundled surveys or to create a new custom survey or to use a Third Party Survey.

You can enable or disable the Survey feature on the iChannel->General->Properties page, as well as select a Survey to use. (See Figure 6-3.) You can also specify the size, location and other Web browser window attributes in which the Survey questionnaire will be shown to the Customer.

Once Survey is enabled for an iChannel, after every chat or cobrowse interaction in that iChannel, the selected Survey appears in the customer Web browser. Once the customer completes and submits the survey, the answers are recorded in the Response Live database and a Thank You page is shown to the Customer. The survey data can later be used for reporting purposes.

Figure 6-3 shows where in Organization Administration you can change the settings for the Survey feature.

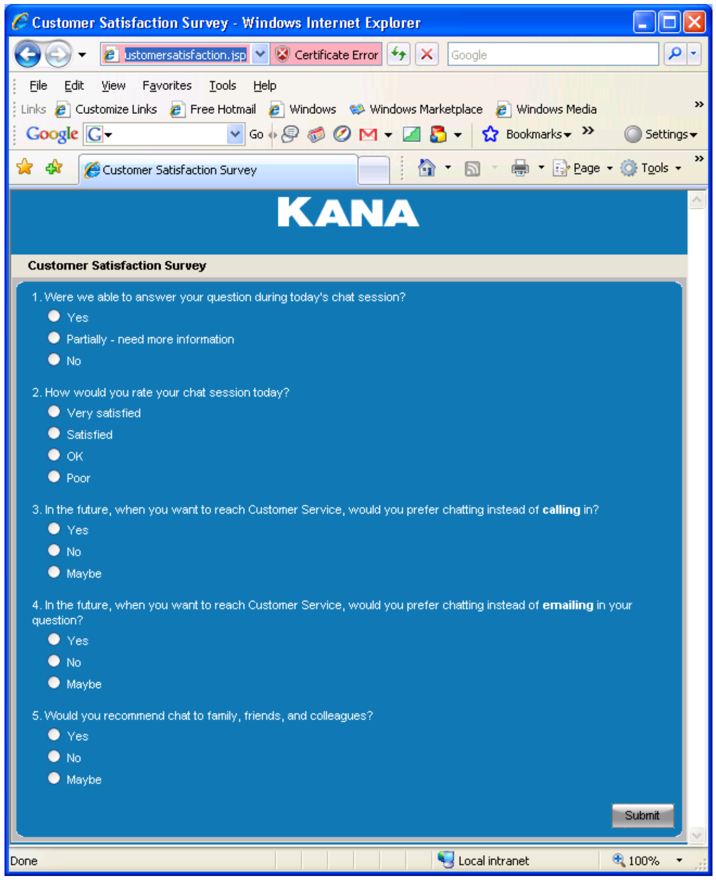
You can also use a third-party survey tool for collecting user input, or you can disable surveys for a particular iChannel, and those users will not be shown any surveys.

Figure 6-3. Survey Pop-Up Window Settings

Customer Satisfaction Survey

Figure 6-4 shows the Customer Satisfaction Survey.

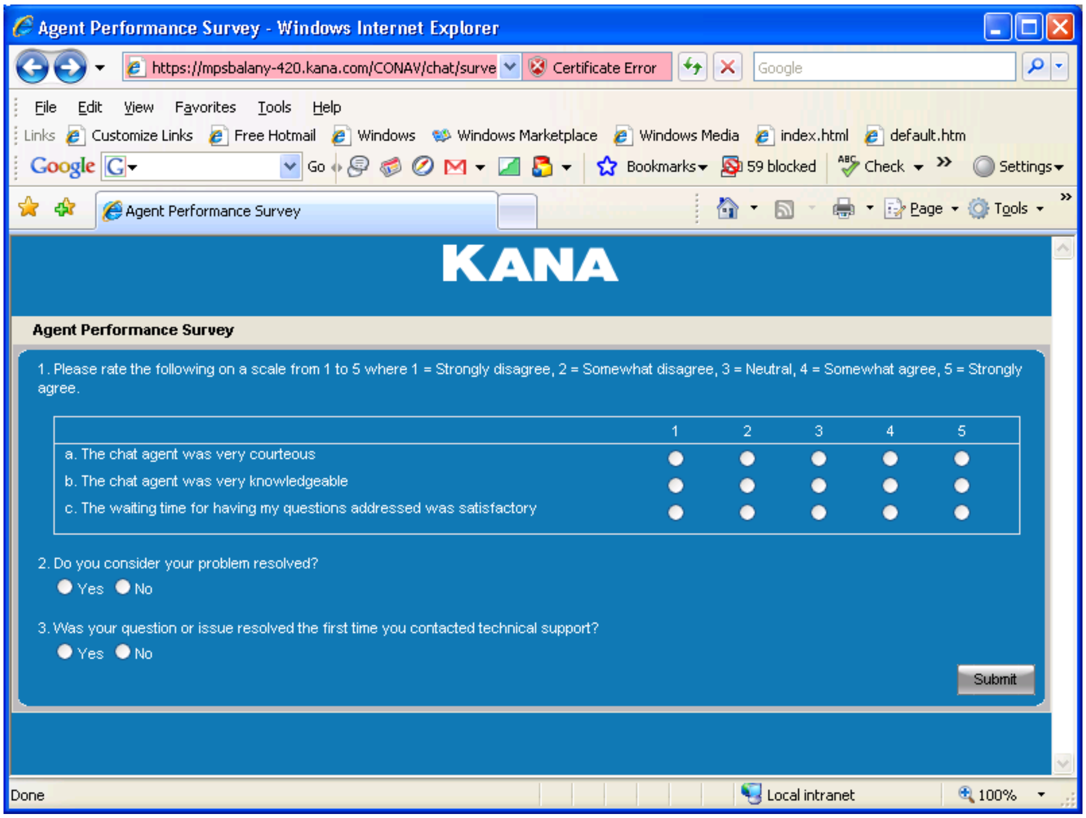
Figure 6-4. Customer Satisfaction Survey Sample



Agent Performance Survey

When the survey, as illustrated in Figure 6-5, is chosen, this pop-up screen appears after the user has ended the cobrowsing/chat session with an agent.

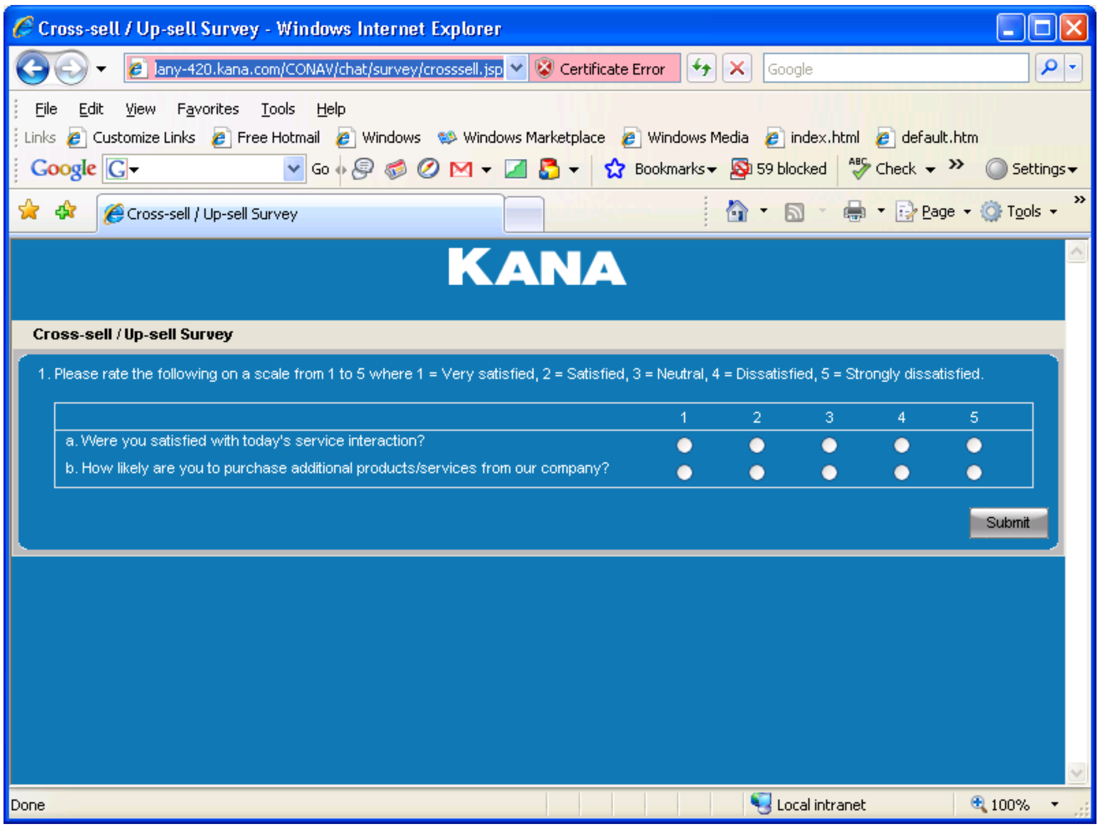
Figure 6-5. Agent Performance Survey



Cross-Sell/Up-Sell Survey

When the survey illustrated in Figure 6-6 is chosen, the pop-up screen appears after the user has ended the cobrowsing/chat session with the agent.

Figure 6-6. Cross Sell/Up-Sell Survey



Custom Survey

A Company can create its own Custom Survey page and assign it to an iChannel for conducting a survey at the end of a Chat/Cobrowse interaction.

To activate the Custom Survey, on the Survey Settings section, select the Custom Survey radio button and enter additional details in the Custom Survey Properties section.

Custom Survey Properties

The Custom Survey can be a newly created survey hosted on the Response Live server or a Third Party Survey hosted on a different web server.

To use a newly created custom survey, in the Survey URL/Survey Filename field, enter just the filename of the custom survey placed in the Response Live survey folder. Leave the Third Party Survey check box field unchecked. See “Appendix D: Using Custom Survey” for instructions on how to create and deploy a custom survey.

To use a Third Party Survey, in the Survey URL/Survey Filename field, enter the complete URL of the survey beginning with either http:// or https:// and check the Third Party Survey check box field. By default, Response Live appends the Response Live User Key to the Third Party Survey URL when the survey is invoked. You can prevent this behavior by clearing the “Append User Key to 3rd Party Survey URL” check box.

In a clustered environment, whether using the predefined or customized surveys, place them in the survey folder in all nodes to ensure the surveys are accessible.

NOTE: Responses to the Third Party Survey will not be captured in the Response Live database.

Survey Window Parameters

This section allows you to specify the window name and other window characteristics of the browser window opened to show the Survey.

- The Window name can only contain alphanumeric characters and underscores.
- The window's width and height are set in pixels.
- The location bar, menu bar, scroll bars, tool bar, and status bar are enabled using the check boxes provided. Resizing is also an option.

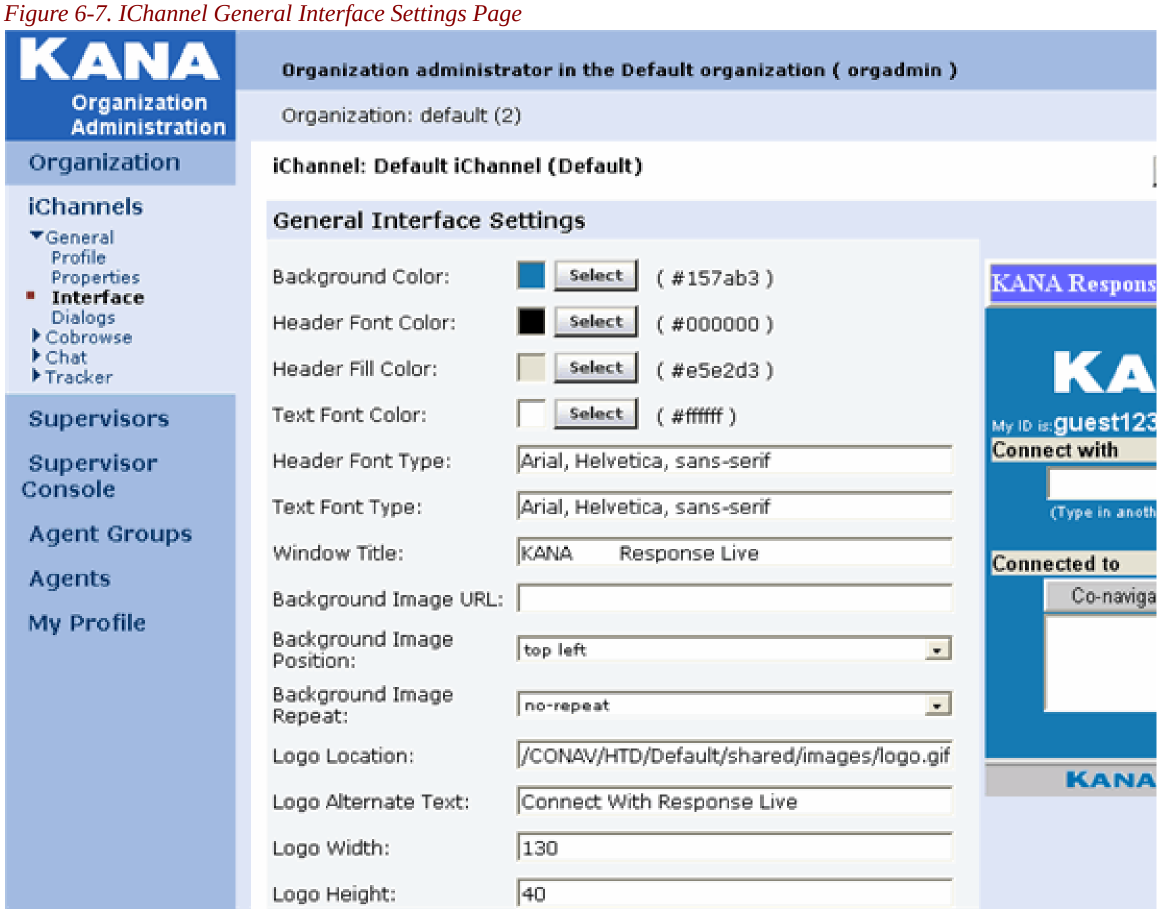
To learn more about setting up a Custom Survey, see “Appendix D: Using Custom Survey.”

iChannel Interface Settings

Use the iChannel Interface Settings page to configure the look and feel of KANA Response Live windows. The color, font, and image settings apply to Cobrowse, Chat, and Proactive Chat panels. This page is accessed from **General** > **Interface** (iChannel menu). (See Figure 6-7.)

See the "Tips for Customizing Preview Panels" section in Chapter 5: "The Organization Administration Tool User Interface" for an illustration of the areas of control panels to help in identifying the header, logo, and text areas.

Figure 6-7. IChannel General Interface Settings Page



The interface settings for an iChannel include the following:

- **Background Color:** The main color for customer interface panels.
- **Header Font Color:** The color used for header text on interface panels.
- **Header Fill Color:** The color for the horizontal bands that contain header text. The number of headers on an interface panel varies.
- **Text Font Color:** The color of any other text in this window. Use the Cobrowse, Proactive Chat, and Chat Interface Settings pages to set the text used on each interface pane.

The **Background Color**, **Header Font Color**, **Header Fill Color**, and **Text Font Color** properties are set with the Color Picker. See the "Using the Color Picker" section in "Chapter 5: The Organization Administration Tool User Interface."

- **Header Font Type:** The font used for header text on interface panels. The font must beavailable in the client browser, if the font is not available the Web browser uses its default fontinstead. If the font cannot be found, the Courier font is used.
- **Window Title:** The text in the title bar for cobrowse interface panels. The browser sets the title bar color. This text also displays when a panel is minimized.

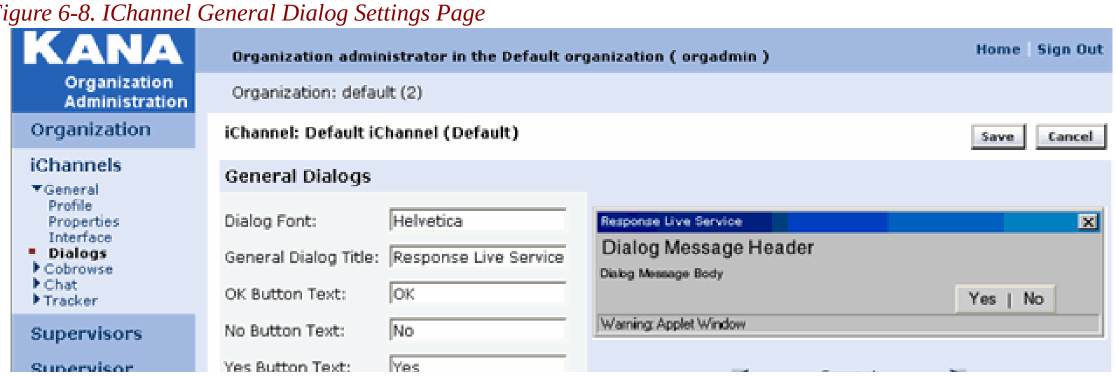
The following interface properties only apply to the customer control panel:

- **Background Image URL**: The location of the background image to place on panels in this iChannel. A background image could be a company logo or an image related to the iChannel. The URL must begin with http:// or https://.
- **Background Image Position:** The position of the background image in the panel. This feature uses the attributes defined in cascading style sheets. The default value is top left.
- **Background Image Repeat:** Use this setting to repeat a small image through interface panels. **Repeat-x** repeats the image horizontally, **Repeat-y** repeats the image vertically, and **Repeat** repeats the image in both directions.
- **Logo Location**: The URL of a company logo in the panels. This logo appears at the bottom of the panel instead of or in addition to a background image. The URL must begin with http:// or https://.
- **Logo Alternate Text:** Text that appears if a user holds his mouse pointer over the logo.
- **Logo Width:** The width of the logo in pixels.
- **Logo Height**: The height of the logo in pixels.

Dialog Settings

Use the iChannel Dialogs page to configure the look and feel of KANA Response Live dialogs. A KANA Response Live system has two types of dialog boxes; administrator and general. Administrator message dialog boxes are generated by a person for purposes such as notifying users that the KANA Response Live system will be unavailable during a maintenance procedure. General message dialog boxes are automatically generated by the KANA Response Live software to send system alerts to users. The dialog box has either an **OK** button or a **Yes**/**No** button pair depending on the message content.

Figure 6-8. IChannel General Dialog Settings Page



This page is accessed from General > Dialogs (iChannel menu). (See Figure 6-8.) This page contains the following settings:

- **Dialog Font:** The font used for the text in dialog boxes. The font must be available on the computer. If the font cannot be found, the Courier font is used.
- **General Dialog Title:** The title text for KANA Response Live system-generated message dialog boxes.
- **OK Button Text:** The default label is OK.
- **No Button Text:** The default label is No.
- **Yes Button Text:** The default label is Yes.

7 Customizing Organization Properties

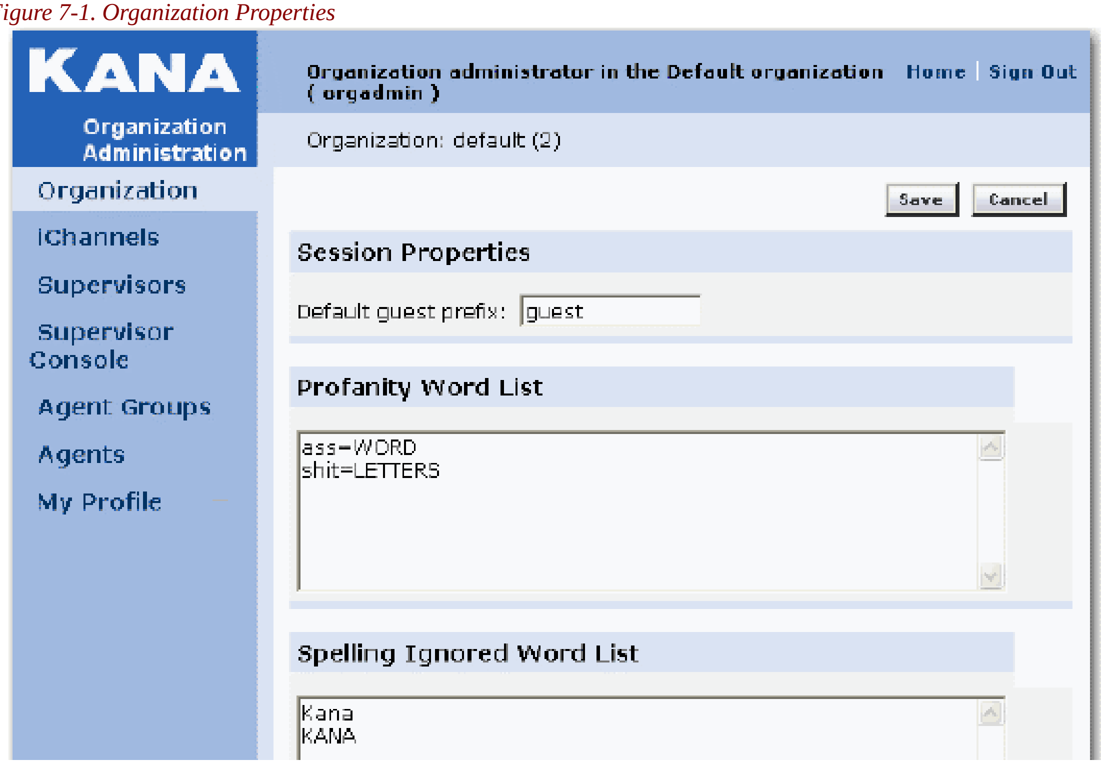
Because an organization is such a high-level entity and organization properties are effective across all iChannels, there aren't many organization properties. Most of the customization of a KANA Response Live system occurs at the iChannel level.

Customize session properties using the Organization page in the Organization Administration tool. For KANA Response Live systems using Chat, also use this page to add to the list of profane word and spell-checking dictionaries.

The system administrator also sets a few organization properties in the System Administrator tool when the organization is created.

See Figure 7-1 for the Organization Main page that is used to set organization properties. This page is accessed from the left menu.

Figure 7-1. Organization Properties



Session Properties

Session properties specify properties that apply to each KANA Response Live session between a customer and agent. This page contains the following properties:

- **Default Guest Prefix:** The text that prefaces the unique and automatically generated customer ID when a customer requests help. The customer ID appears in control panel windows generated by KANA Response Live. This prefix, along with two other numbers, gives each guest a unique ID while he is logged onto KANA Response Live. Guest is the default value for the **Default Guest Prefix**.

A guest ID is structured as follows:

<default guest prefix><iSystem proxy server><random number>

The iSystem proxy server is the number of the iSystem server running the cobrowsing session. The iSystem server number is assigned in the System Administration tool.

The random number is generated by the KANA Response Live system to assign each customer a unique ID each time they log in.

A list of guests as well as the Web pages they visited and other data is maintained by the KANA Response Live system. This information is used for reporting statistical information, studying usage patterns, and regulatory compliance.

Because guest IDs are used for reporting, use a general descriptive noun as a default prefix. Using a general descriptive word lets people analyzing metrics to readily distinguish guests from agents.

Profanity Additional Words

If the profane word checker is enabled for Response Live chat, before an agent message is sent to the customer, the KANA Response Live system checks the message for profane words as listed in the KANA Response Live database. If a message does not contain profane words, it is sent to the customer. If a message does contain profane words, the agent is prompted to remove the offending word and re-send the message.

The profane word checker is:

- Enabled or disabled by an organization administrator using the Organization Administration tool.
- The same for all iChannels in an organization.
- Customized by each company. KANA Response Live does not provide a default list.
- Enabled or disabled at the agent group level.

See Figure 7-2 for an example of the profane word text list. To add words to the list of profane words, type the words in the text input area. The list should have:

- Each word on a separate line (i.e., separated by a carriage return).
- No repeated words, as the words are not case sensitive.
- Each word followed by either `=WORD` or `=LETTERS`.
  - If the word is followed by `=WORD`, the search is for the complete word only.
  - If the word is followed by `=LETTERS`, the search is for any word or phrase containing these letters.

Figure 7-2. Example Profanity Additional Words

```
shirt=WORD
shoes=WORD
shorts=LETTERS
slacks=LETTERS
socks=WORD
```

Spelling Ignored Word List

If the spell checker is enabled for KANA Response Live Chat, before an agent message is sent to the customer, the KANA Response Live system checks the message for misspelled words as listed in the KANA Response Live dictionary and the ignored word list. If a message does not contain misspelled words, it is sent to the customer. If a message does contain misspelled words, the agent is prompted to correct the spelling and re-send the message.

Company and product names are example of words that a company may want to add to the ignored word list.

The spell checker is:

- Enabled or disabled by an organization administrator using the Organization Administrators tool.
- The same for all iChannels in an organization.
- Enabled or disabled at the agent group level.
- The dictionary is US English.

See Figure 7-3 for an example of the text list. To add words to the dictionary, type the words in the text input area. The list should have:

- Each word on a separate line (i.e., separated by a carriage return).
- All valid case variations of a word because the spell checker is case sensitive.

Figure 7-3. Example Spelling Ignored Word List

```
Kana
kana
kaNa
KANA
KANAResponseLive
kanaresponselive
```

8 Customizing iChannel Cobrowse Settings

This chapter describes each iChannel KANA Response Live Cobrowse setting and its default or initial value.

A default iChannel is always created for each organization. It is recommended to customize this default iChannel and then use it as a template for creating other iChannels. New iChannels have the same properties as the default iChannel unless using the copy function to create an iChannel based on an iChannel other than the default one.

Other chapters describe the iChannel settings in the following categories:

- Cobrowse. See "Chapter 6: Customizing General iChannel Settings."
- Proactive Chat. See "Chapter 9: ."
- Chat for implementations using the Chat functionality. See "Chapter 10: Customizing the iChannel Chat Settings."

Successfully configuring an iChannel's Cobrowse settings willrequire some familiarity with XML, if business rules will be implemented.

Properties

The Properties page is accessed from the **Cobrowse** > **Properties** (iChannel Menu). Use the Properties page to specify the KANA Response Live cobrowse properties not related to the interface or business rules. (See Figure 8-1).

The cobrowse properties are as follows:

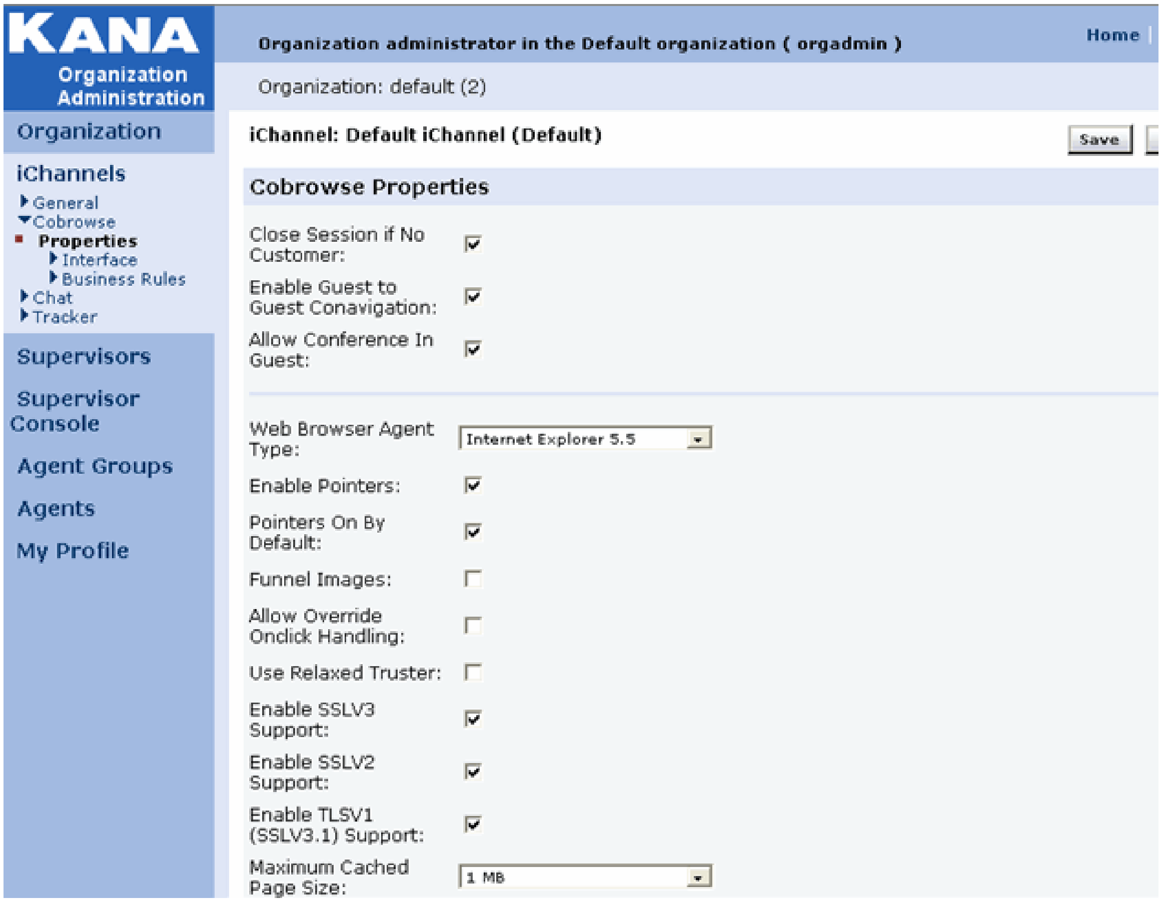
Session properties specify properties that apply to each KANA Response Live session between a customer and agent. This page contains the following properties:

- **Close Session if No Customer:** Turn on this option to automatically close any session when a customer is no longer in the session. It is recommended to turn on this option. By default, this option is on.

- **Enable Guest to Guest Conavigation:** Turn on this option so guests can cobrowse with guests without an agent in the session. It is recommended that this option be turned off. Guest to guest cobrowsing is usually not required. By default, guests cannot cobrowse with guests.

  This property also influences the iChannel cobrowse **Allow Conference In Guest** property. Both of these properties must be enabled for a guest to conference in another guest. This affects the Cobrowse control panels, and the **conference in** feature in Chat.

Figure 8-1. iChannel cobrowse Properties Page



- **Allow Conference In Guest:** Turn on this option to enable a guest user to join an existing session.
  This property also influences the organization **Enable Guest to Guest Conavigation** property. Both of these properties must be enabled for a guest to conference in another guest. This affects the Cobrowse control panels, and the conference in feature in Chat.

- **Web Browser Agent Type:** Specify the Web browser and version that customers will most likely use with the iChannel. This is the browser type the KANA Response Live proxy server uses to fetch Web pages. When fetching Web pages that are browser dependent, this could cause the agent or customer to see pages displayed differently, if they are using different browser types. Hence, it is best to specify the customer, not the agent browser type, so agents, not customers will see incorrect page displays for browser dependent pages. Only supported browsers and versions are available for selection.
- **Enable Pointers:** Turn on this option to display the pointer on/off button on the tool bar of each person's browser. An agent or a customer enables pointing by clicking this button.

A pointer is a brightly colored icon for calling attention to a text link on a Web page. It is also used for autoscrolling. When one person aims the pointer at some text and right clicks, the other person's browser auto scrolls to the same text and displays a pointer there.

- **Pointers on by Default:** If pointers are enabled, turn on this option to automatically activate the pointer on the toolbar. Users only need to right-click on some text to make the pointer appear.
- **Funnel Images:** Turn on this option to configure the KANA Response Live server to fetch images and other binary content on Web pages requested by shared browsers. When this option is turned off, binary content is fetched directly by the browser unless a business rule specifies the content to be funneled by the server. See the "Appendix A: Business Rules" appendix for more information on using business rules to funnel binary content. Turning on this option can slow the cobrowsing process. Normally, this option should be off and business rules used to control image funneling.
- **Allow Override Onclick Handling:** Turn on this option to disallow using JavaScript to assign a value to onclick handlers in Web pages.

  Onclick handling can cause difficulty when cobrowsing. It is recommended that onclick handling not be used.

- **Use Relaxed Truster**: Turn on this option to configure KANA Response Live servers to trust machines without SSL server certificates or with SSL server certificates that do not completely match the server name for which they were issued. This feature is useful during pilot and testing phases when all machines being used are inside your company's firewall. These machines may not have certificates yet as they are usually not required for machines inaccessible from outside the company. Before rolling out the KANA Response Live system to outside customers, this option should be turned off for security reasons. The KANA Response Live server will never trust machines with invalid certificates or issued by unknown authorities.
- **Enable SSLV3 Support:** Turn on this option to configure KANA Response Live servers to trust machines with SSL Version 3.0 server certificates.
- **Enable SSLV2 Support:** Turn on this option to configure KANA Response Live servers to trust machines with SSL Version 2.0 server certificates.
- **Enable SSLV1 Support:** Turn on this option to configure KANA Response Live servers to trust machines with SSL Version 1.0 server certificates.
- **Maximum Cached Page Size:** The maximum size of any cached non-HTML content, e.g., images and PDF files, during a cobrowsing session. The size depends on the system and on the types of documents and pages customers frequently view.

  For example, assume two groups of customers are each served through different iChannels. The first group frequently needs to view.PDF files and images, while the second is less likely to view these file types.The iChannel for the first group requires a higher cache size than the second.

Start the iChannel at 1 MB and monitor the efficiency of this choice through test cobrowsing sessions. Generally, 1 MB is sufficient unless there are pages larger the 1 MB.

If funneling a lot of non-HTML content, such as images,.PDF files, or flash content, and the server is consuming a lot or memory or swapping a lot, consider reducing the value of this parameter.

Interface Settings

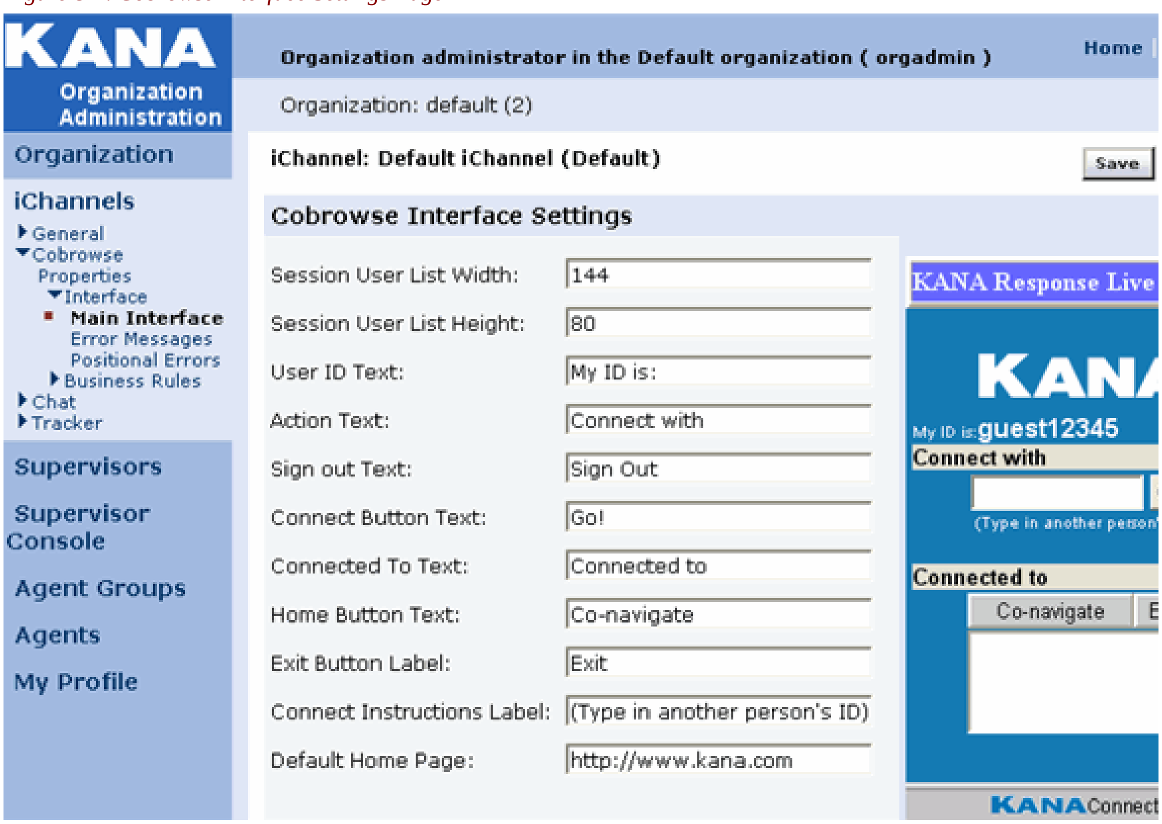
The Cobrowse interface settings complement the general interface settings and determine the text that appears in control panels generated in the iChannel. The interface settings also define error, prompt, and status messages.

Main Interface Settings

The Interface Settings page is accessed from the **Cobrowse > Properties > Main Interface** (iChannel Menu). Use the Main Interface page to define text displayed to customers during a cobrowse session. (See Figure 8-2.)

See the “Tips for Customizing Preview Panels” section in Chapter 5: “The Organization Administration Tool User Interface” for an illustration of the areas of control panels to help in identifying the header, logo, and text areas.

Figure 8-2. Cobrowse Interface Settings Page



This page includes the following settings:

- **Session User List Width**: Sets for the control panel the combined widths of the buttons under the second header (**Connected to** in Figure 8-2) and the width of the field under the header. This field lists users in the cobrowsing session.
- **Session User List Height**: Sets for the control panel the height of the field under the second header. This field lists users in the cobrowsing session.
- **User ID Text:** The text in the control panel that appears next to the identities of user in a cobrowsing session.
  - If a customer is logged in as a guest, his ID is this user ID text followed by a randomly generated number. For example, a customer's ID would be something like Guest84910.
  - If he is an agent, his display name appears in this position.
- **Action Text**: The first header text in the control panel. Customers use this box to initiate cobrowsing with an agent. If a customer and an agent are connected via the telephone, the agent provides an ID number for the customer to enter in the box under this header. After the customer clicks the **Connect** button to the left of the box, the shared browser launches.
- **Sign out Text:** The text in the top right hand corner of the control panel. If an agent or a customer clicks on this text, he will be logged out and will no longer bea part of the cobrowsing session. If he wishes to cobrowse again, he must log back on to KANA Response Live.
- **Connect Button Text:** The text of the **Connect** button in the control panel. This is the button a customer clicks to begin a cobrowse session.
- **Connected To Text:** The second header text in the control panel. The empty box below this header lists everyone who is cobrowsing in the session.
- **Home Button Label:** The text of the button in the control panel that when clicked returns the shared browser to the **Default Home Page**. This page's URL is defined by a general property.
- **Exit Button Label:** The text of the button in the control panel that when clicked removes a person from a cobrowsing session without logging him out of the KANA Response Live system. Clicking **Sign out** logs out a person from the KANA Response Live system entirely. An agent clicks **Exit** to remove himself from a cobrowsing session when he has finished helping a customer and another customer is waiting for help.
- **Connect Instructions Text:** The text in the control panel that appears beneath the **Connected To** field. Typically, this text indicates that the user needs to type the user ID of the person with which to cobrowse.
- **Default Home Page:** The page rendered by a shared browser, when clicking the **Cobrowse** button on a panel. This page is also the starting page if a dynamic start page is not used.

Error Messages

The Error Messages page is accessed from the **Cobrowse > Properties > Error Messages** (iChannel Menu). Use the Error Messages page to define messages sent to customers. The use of most of these error messages is self-explanatory from the message name. Examples of these are wait messages, connection failure messages, or server down messages. Some of the messages are prompts or status indicators rather than error messages.

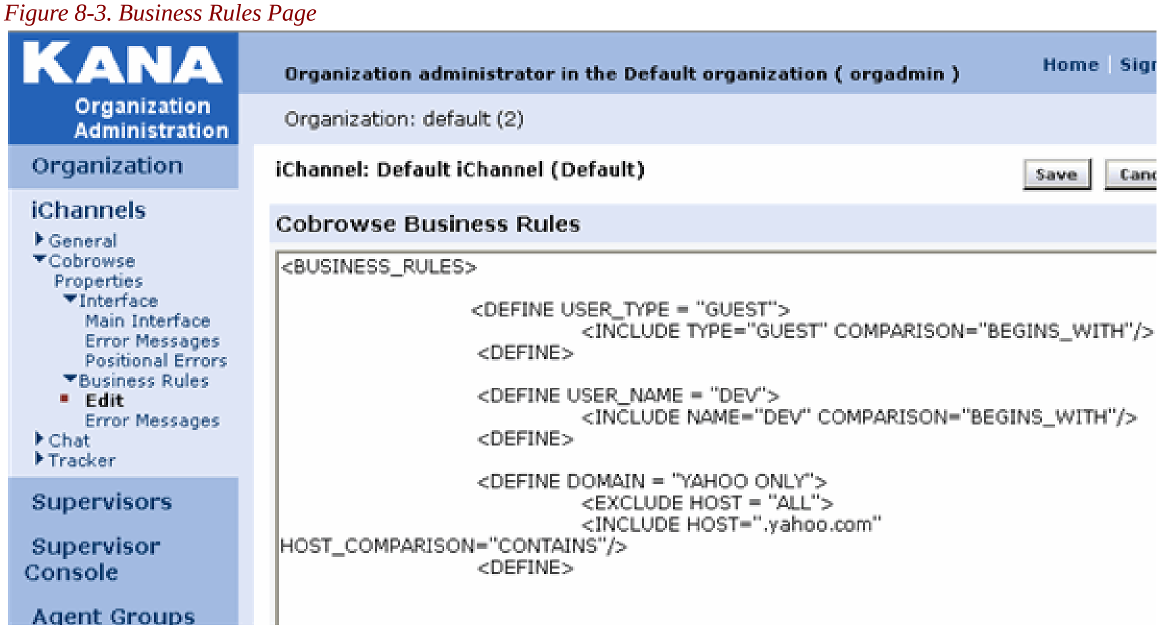
Positional Error Messages

The Positional Error Messages page is accessed from the **Cobrowse > Properties > Positional Errors** (iChannel Menu). Use the Positional Error Messages page to define other messages sent to customers. Standard positional client error messages contain variables that are substituted with session values when the messages are displayed. The use of most of these error messages is self-explanatory from the message name. Exampleshere include those that indicatea connection to another user, or acceptance of a chat invitation. Some of the messages are prompts or status indicators rather than error messages.

Business Rules

The Business Rules page is accessed through the **Cobrowse > Business Rules > Edit** (iChannel Menu). (See Figure 8-3.)

Figure 8-3. Business Rules Page



Companies often need to enforce a variety of legal and corporate policies within the KANA Response Live Platform. Examples of these policies might include “Agents must not see customer passwords or social security numbers” or “Agents may not submit a purchase order on behalf of a customer.”

Business policies are written in KANA Response Live's Business Process Definition Language (BPDL) and enforced at run time by the business rules engine. The BPDL is an XML-based tag language. Business rules are separate from your Web site. As with all KANA Response Live configuration settings, you can alter the business rules without impacting your company's Web site. However, changes to the Web site content or structure may require business rule changes

Business rules are useful for limiting the capabilities of individual parties in a cobrowsing session. They can be focused to the name of an individual user, or they can be specified by agent or agent group. In a typical scenario, most of the restrictions are on agents. By preventing agents from performing actions and barring them from seeing sensitive data, companies can maintain client privacy and prevent a client from later claiming that an agent performed an action that did not have the client's approval.

"Appendix A: Business Rules" of this manual contains a detailed explanation of how to write business rules.

Editing

The Business Rules page is accessed through the **Cobrowse > Business Rules > Edit** (iChannel Menu). Use the Edit Business Rules page to define business rules for an iChannel. To implement business rules, paste or type XML into the box on this page. Use **Cancel** to return to the previously viewed, but unsaved version.

A document type definition (DTD) verifies proper XML syntax. Click the **Download Current DTD** link to open a new browser window with the business rules DTD.

Error Messages

The Business Rules page is accessed through the **Cobrowse > Business Rules > Error Messages** (iChannel Menu). Use the Error Messages page to define messages sent to agents. Business rule error messages are displayed when an agent attempts to perform a cobrowsing action that is not allowed by the business rules. The use of most of these error messages is self-explanatory from the message name. These messages are displayed, for example, when an unauthorized user submits a form, or when a user does not have the authority to modify a field.

9 Customizing the Proactive Chat iChannel Properties

This chapter describes each iChannel KANA Response Live Proactive Chat setting and its default or initial value where applicable.

A default iChannel is always created for each organization. It is recommended that you customize this default iChannel and then use it as a template for creating other iChannels. New iChannels have the same properties as the default iChannel unless the copy function is used to create an iChannel that is not based on the default one.

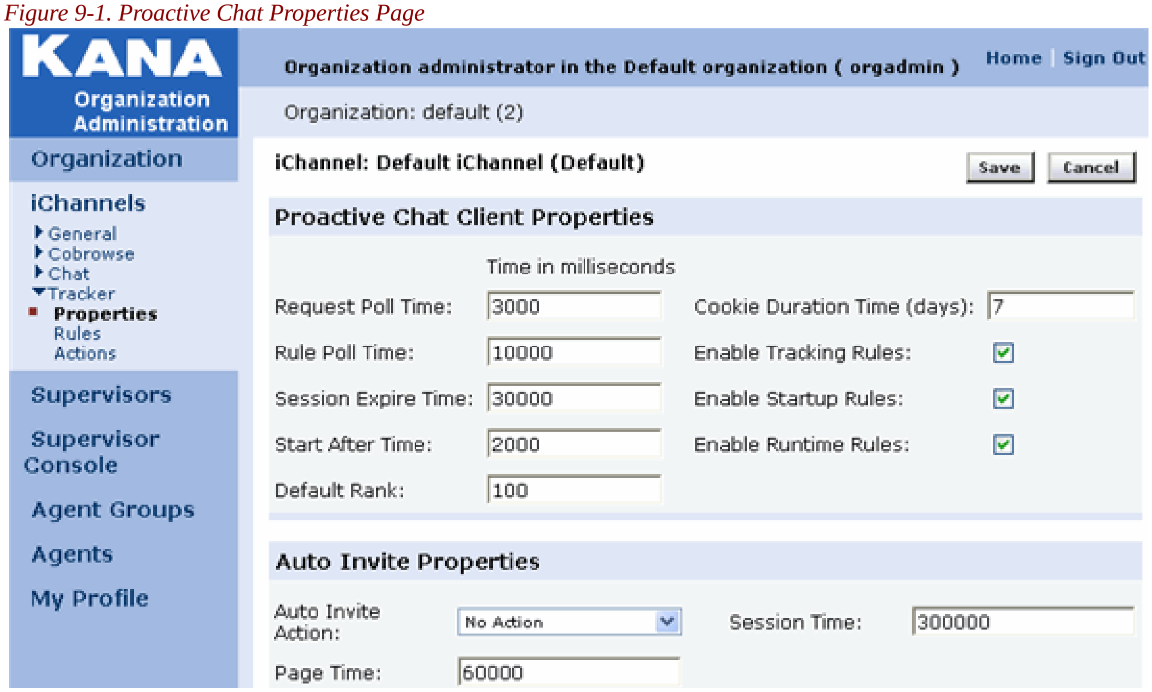
Other chapters describe the iChannel settings in the following categories:

- General. See "Chapter 6: Customizing General iChannel Settings."
- Cobrowse. See "Chapter 8: Customizing iChannel Cobrowse Settings."
- Chat for implementations using the chat functionality. See "Chapter 10: Customizing the iChannel Chat Settings."

Properties

Use the **Tracker** > **Properties** page to set Proactive Chat client properties and Auto Invite properties. (See Figure 9-1.)

Figure 9-1. Proactive Chat Properties Page



Proactive Chat Client Properties

The Proactive Chat Client Properties are a collection of properties related to visitor session activity, and rules for visitor sessions.

- Request Poll Time: This property specifies the interval, in milliseconds, between the sending of client data from the KANA

Response Live Visitor Tracker Client (VTC) running in the Client Browser, to the KANA Response Live Tracker Server.

- **Rule Poll Time:** This property specifies the interval, in milliseconds, between the evaluation of run-time rules.
- Session Expire Time: The amount of time in inactivity, in milliseconds, after which the visitor tracker session will expire.
- Start After Time: The amount of time, in milliseconds, the Visitor Tracker Client will wait once the page is loaded, to start sending client data to the server.
- **Default Rank:** The default number assigned to all Visitor Tracker Sessions when they are started.
- Cookie Duration Time (days): The number of days the Visitor Tracker cookie will be valid on the Visitor computer. 0 (zero) means no tracker cookie will be written to the client computer.
- **Enable Tracking Rules:** A check box which, when checked, enables evaluation of tracking rules for visitor sessions.
- **Enable Startup Rules:** A check box which, when checked, enables evaluation of startup rules for visitor sessions.
- **Enable Run-time Rules:** A check box which, when checked, enables evaluation of run-time rules for visitor sessions.

Auto Invite Properties

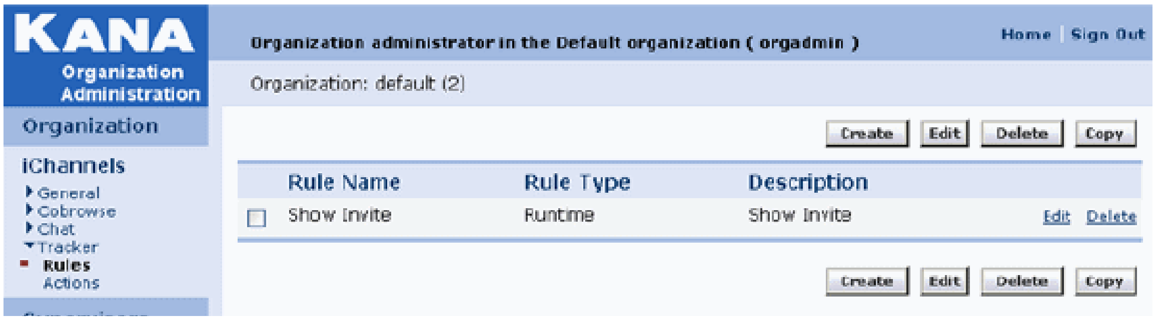
The Auto Invite Properties control the type of invite action to invoke, and when these invite actions should be automatically invoked for a visitor for a particular iChannel.

- Auto Invite Action: A drop down menu listing the available invite actions for this iChannel.
- **Page Time:** The amount of time, in milliseconds, that a visitor should have stayed on a page, after which the invite action specified in **Auto Invite Action** is invoked.
- **Session Time:** The amount of time, in milliseconds, that a visitor should have been active in the current tracking session, after which the invite action specified in **Auto Invite Action** is invoked.

Rules

The Rules page is accessed through the **Tracker** > **Rules** (iChannel Menu). (See Figure 9-2.)

Figure 9-2. Proactive Chat Rules Page



Rules are defined in order to give Organization Administrators some control over which visitors to track when there is a high volume of user activity on their Web site, and specify the actions to take on selected visitors.

The Proactive Chat Rules page allows you to select a rule type to create or edit, and define the properties for that rule. There are three types of rules available: tracking rules, startup rules, and run-time rules.

Tracking Rules

Tracking rules determine whether or not a selected visitor should be tracked. This type of rule is evaluated once when each visitor first comes online and begins browsing your Web site.

Startup Rules

Startup rules are evaluated once it has been determined that a particular visitor will be tracked. These rules determine actions to be executed on visitors, as soon as the determination has been made to begin tracking them using tracking rules. For instance, one startup rule could automatically send a chat invitation to any visitor, provided the visitor met the criteria specified in the tracking rules.

Run-time Rules

Run-time rules can be run multiple times during a customer session. These rules determine automatic actions to be taken during a visitor session, such as sending a selected customer a chat invitation. Invitations are sent automatically to visitors who satisfy the defined run-time rules.

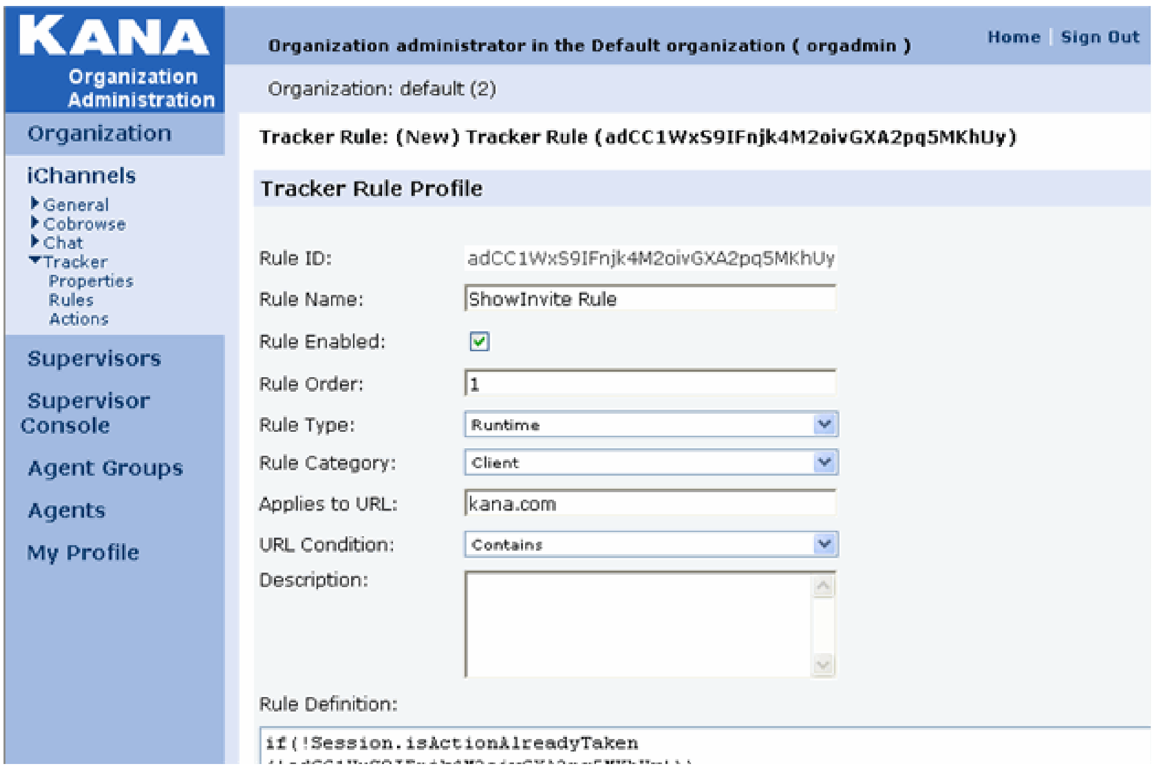
Run-time rules are usually defined in order to send promotional messages, special offers, and ads to visitors who satisfy these rules. They can also be based on certain user-defined system events, such as when a visitor adds a high-value item to their shopping cart. Examples of run-time rules include sending automatic invitations to chat to customers based on their URL, or sending discount coupons to customers based on time spent browsing your Web site.

Defining and Editing

Rules are created by clicking the **Create** button shown in Figure 9-2. These rules are written in the JavaScript language. See Figure 9-3.

Rules can be modified by clicking the **Edit** link for the rule shown in Figure 9-2 or by checking the box next to the rule and then clicking **Edit**. Rules are similarly deleted or copied by clicking **Delete** or **Copy**.

Figure 9-3. Rule Definition Example



- Rule ID: A system generated unique ID for the rule.
- **Rule Name:** A unique rule name provided by the organization administrator.
- Rule Order: A number that indicates the order of this rule. If there are multiple rules defined for this iChannel, the order will determine in which order the rules are applied.
- Rule Enabled: A yes/no switch that indicates whether or not this rule is enabled for this iChannel.
- Rule Type: A drop-down menu where you select the rule type: Tracking, Startup, or Run-time rule.
- Rule Category: A field where you specify whether it is a client or server rule. Client rules will run in the client browser, whereas server rules will run on the server.

- **Applies to URL:** The URL to which the rule applies. This is used in conjunction with the **URL Condition** operator to restrict the scope of the rule.
- **URL Condition:** The condition operator to restrict the scope of the rule, such as: equals, begins with, contains, and ends with. This is used in conjunction with the **Rule applies to URL** to restrict the scope of the rule.
- **Description:** A brief synopsis of the rule purpose and function.
- **Rule Definition:** The definition of a rule is shown in Figure 9-4. This is the code attached to the original Web page, not the page after it is parsed by the KANA Response Live server.

Figure 9-4. Rule Definition Example

```
If (System.ChatEnabled)
{
        var inviteMinutes = 10;
        var currentTime = new Date();
        var inviteTime =  Session.StartTime;
        inviteTime.setMilliseconds(Session.StartTime.getMilliseconds() +
                                        inviteMinutes * 60 * 1000);
        if (currentTime > inviteTime && Session.Status != 'engaged'
                && iChannel.AgentsAvailable > 0)
        {
                return ACTION(System.ActionTypes.ShowInvitePopup,
                                        'chatactionid1');
        }
}
return ACTION(System.ActionTypes.NoAction);
```

Actions

The Actions framework provides the flexibility for creating, managing and invoking actions. Once actions are defined by the administrator and configured per iChannel, agents can select from the list of actions, and perform the action on a selected visitor. See the *KANA Response Live Chat User Guide* (ResponseLiveChatUserGuide.pdf) for more information on how agents select actions to apply to a visitor.

Creating

The Actions page is accessed through the **Tracker** > **Actions** (iChannel Menu). New actions can be created by clicking on the **Create** button. See Figure 9-5.

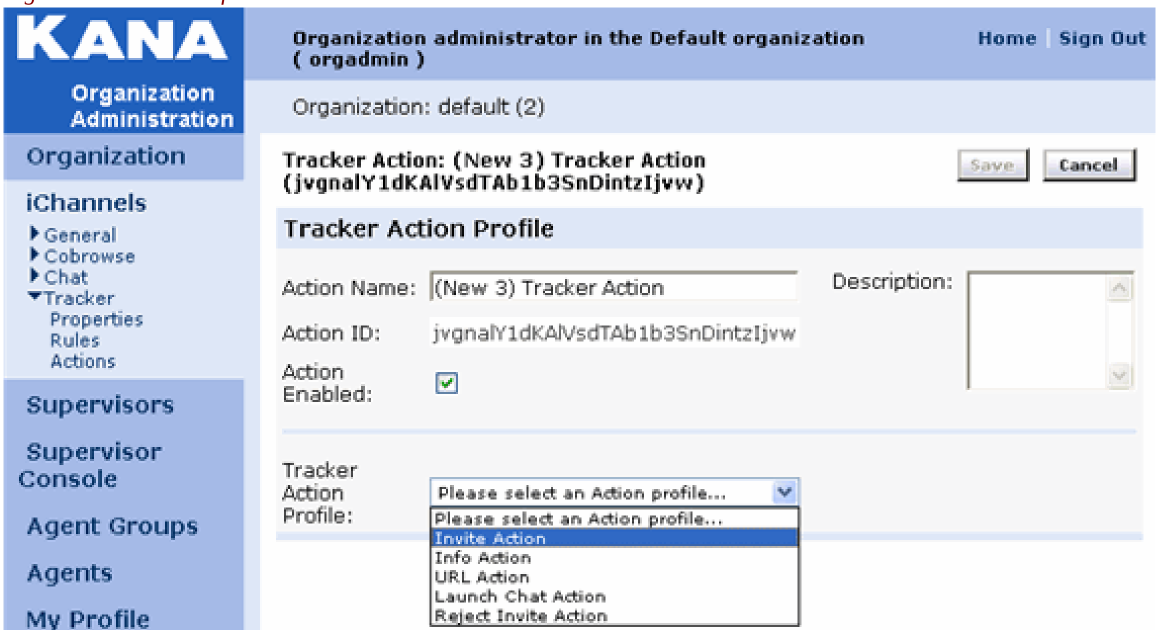
Actions can be modified by clicking the **Edit** link for the action or by checking the box next to the rule and then clicking **Edit**. Rules can also be deleted or copied in the same way by clicking **Delete** or **Copy**.

Figure 9-5. Actions Page

Action Profiles

A number of action profiles are listed under the Tracker Action Profile drop-down menu. See Figure 9-6. Action profile values include: Invite Action, Info Action, URL Action, Launch Chat Action, and Reject Invite Action. These action profiles map to the following actions that are taken on a selected visitor: enable an agent to send a chat invitation to a visitor, display an informational message to the visitor, display an URL or local file to the visitor, enter into a chat session with a visitor, or mark an invitation to chat as rejected.

Figure 9-6. Action Profiles



- **Action Name:** A unique action name provided by the organization administrator.
- Action ID: A system generated unique ID for the action.
- **Action Description:** A brief description of the purpose and function of this action.
- Action Enabled: A yes/no switch that indicates whether or not this action is enabled for this iChannel.
- Tracker Action Profile: A drop-down menu which lists the available action profiles.

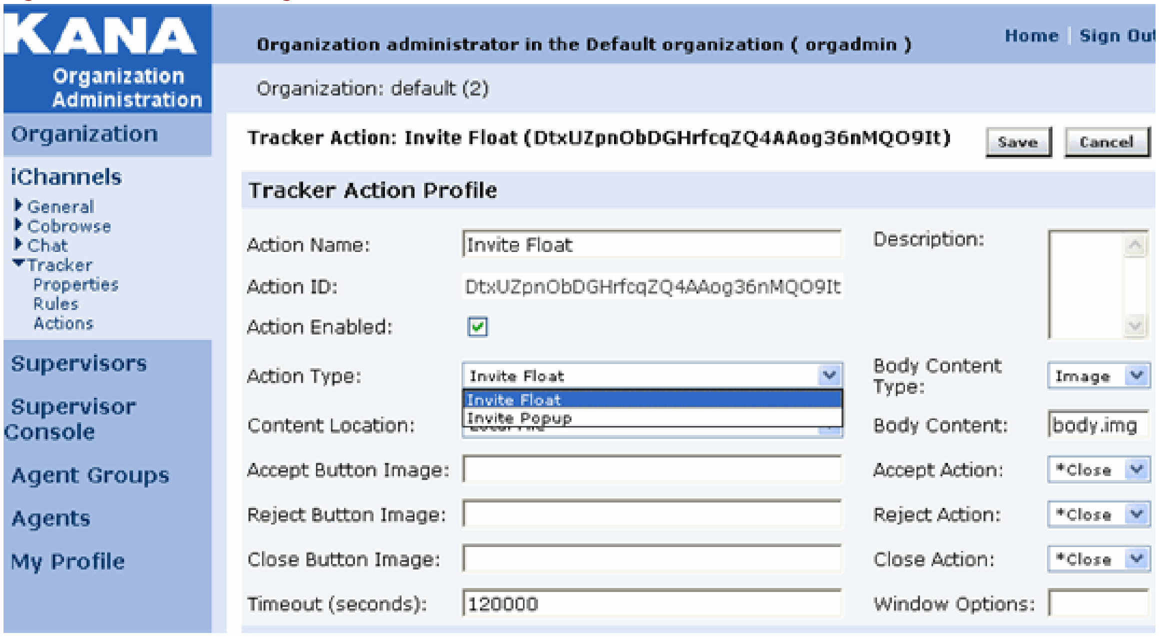
  Selecting one of these action profiles will enable you to define or edit an Action of this action type. For instance, selecting an invite action displays the properties you need to specify for an Invite Action, based on your organization's business needs. You can define several actions with the same action profile, such as "Display a blue chat invitation", or "Display a yellow chat invitation". An agent can select the appropriate action based on internal organization guidelines.

Invite Actions

Depending on the action profile selected, the bottom portion of the Actions page displays only the properties that need to be set for the selected action profile. See Figure 9-7.

Invite Actions can be accessed by selecting the Invite Action option from the Tracker Action Profile menu. The properties for Invite Actions appear on the lower half of the screen shown in Figure 9-7.

Figure 9-7. Invite Actions Page



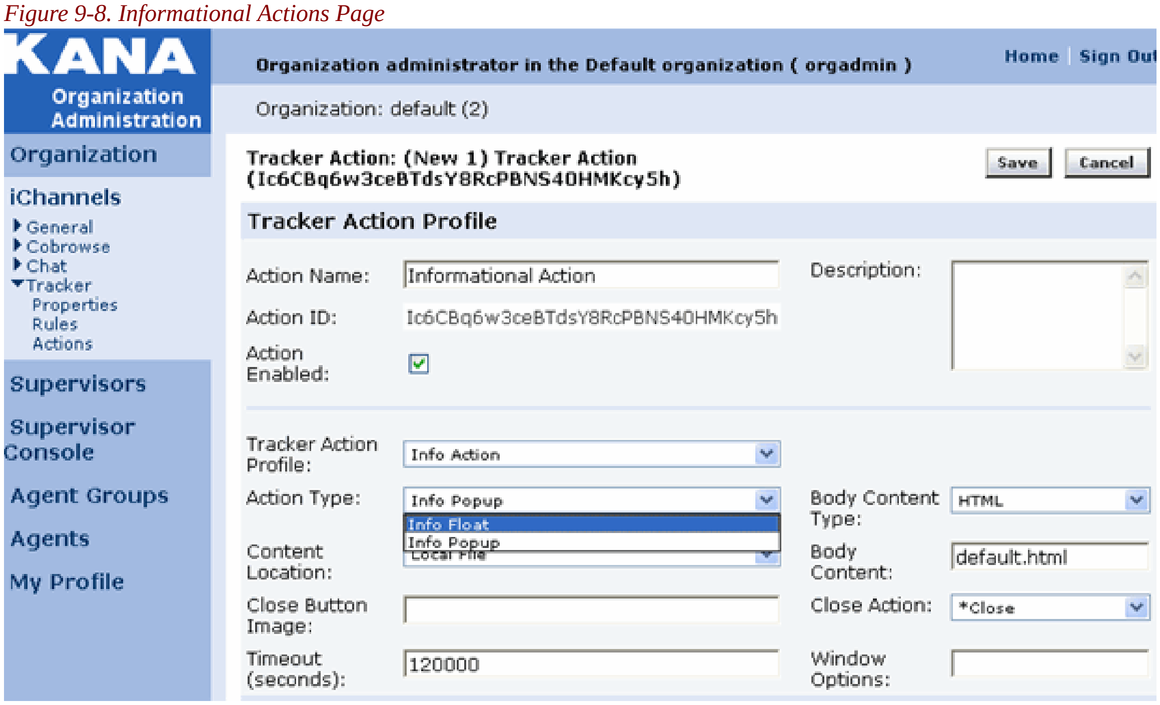
- Action Type: A drop-down menu where you can select the action type: Float, or Popup. As their names suggest, when any one of these actions is executed on a visitor record, the visitor sees the invitation either in a floating window, or in a pop-up window. The floating window has to be an image. The pop-up window can display a stationary image or html content.
- **Content Location:** The location of the local static file or a remote URL that contains the content of the invitation sent to the customer using the **Action Type**.
- **Accept Button Image:** The image file or URL that the customer sees on their accept button.
- **Reject Button Image:** The image file or URL that the customer sees on their reject button.
- **Close Button Image:** The image file or URL that the customer sees on their close button.
- Timeout: The timeout value in seconds after which the invitation window will no longer be available to the visitor.
- **Body Content Type:** Indicates whether the content indicated in the **Body Content** is an html file, image file or image map file.
- **Body Content:** The file in the Contentfolder, or the URL that contains the content of the invitation sent to the customer using the **Action Type**.
- **Accept Action:** The name of the accept action to be executed. The accept action should have been defined separately.

- **Reject Action:** The name of the reject action to be executed. The reject action should have been defined separately.
- **Close Action:** The name of the close action to be executed. The close action should have been defined separately.
- Window Options: The browser display attributes that determine how the invitation window is displayed.

Informational Actions

Informational Actions can be accessed by selecting the Info Action option from the Tracker Action Profile menu. The properties for Info Actions appear on the lower half of the screen shown in Figure 9-8.

Figure 9-8. Informational Actions Page



The action properties on this page are described in the "Action Profiles" section and in the "Invite Actions" section.

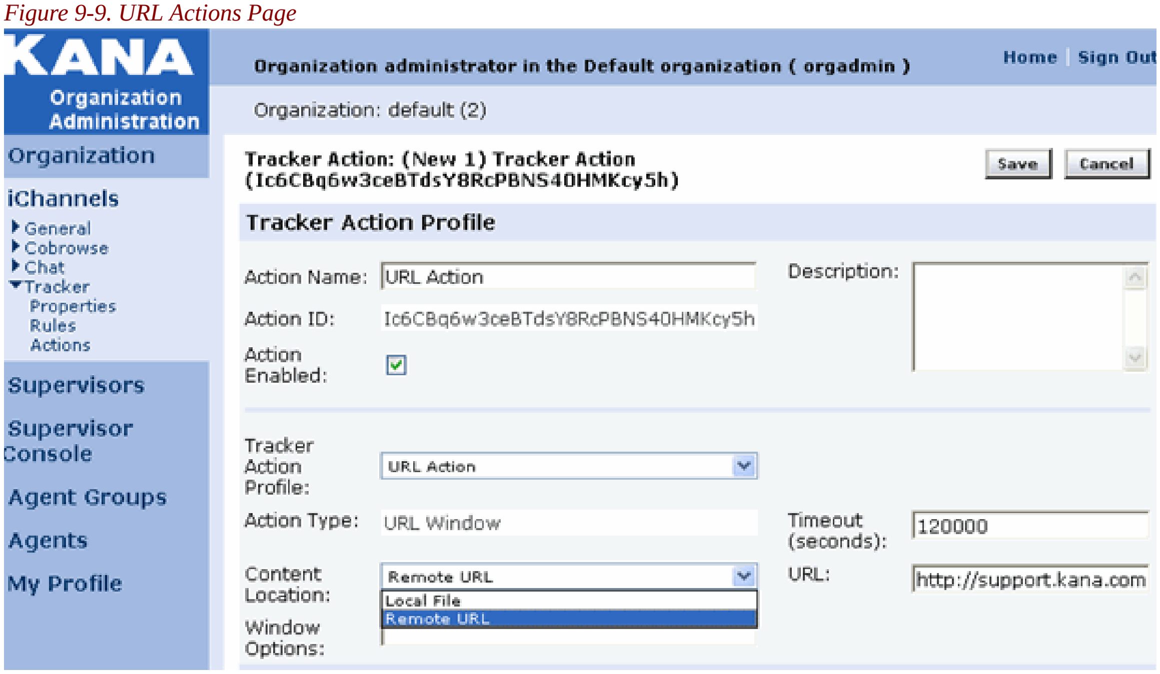
The Informational Actions types that can be defined are described below:

- Action Type: A drop-down menu where you can select the action type: Float, or Popup. As their names suggest, when any one of these actions is executed on a visitor record, the content of the invitation is displayed to the customer either in a floating window, or in a pop-up window. The floating window has to be an image. The pop-up window can display a stationary image or html content.

URL Actions

URL Actions can be accessed by selecting the URL Action option from the Tracker Action Profile menu. The properties for URL Actions appear on the lower half of the screen shown in Figure 9-9.

Figure 9-9. URL Actions Page



The action properties on this page are described in the “Action Profiles” section and in the “Invite Actions” section.

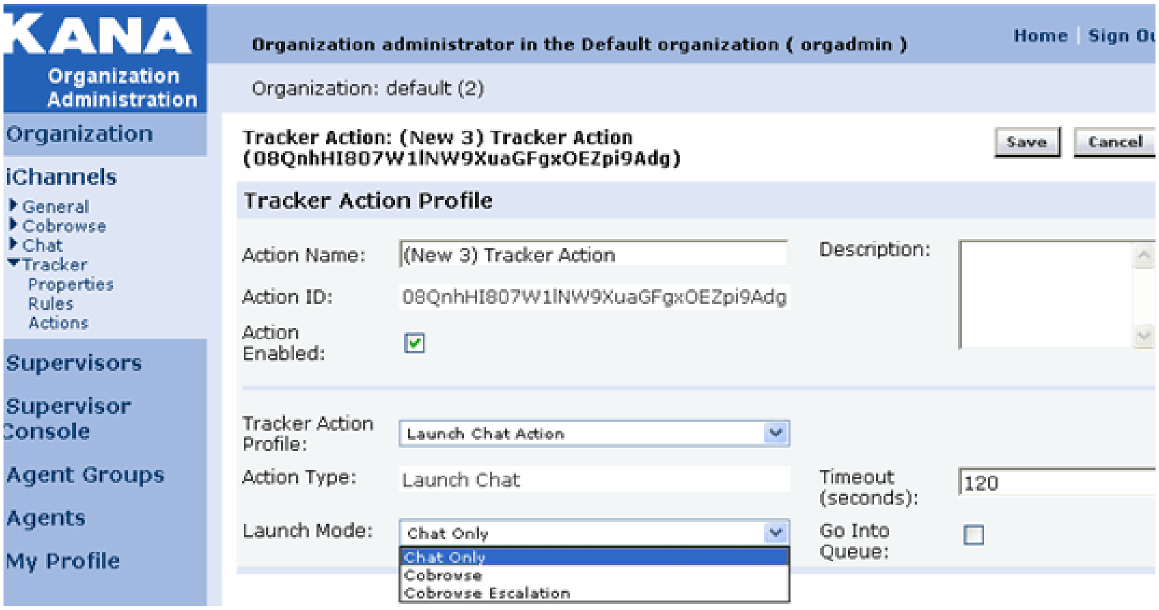
Properties specific to URL Actions types are described below:

- Action Type: The action type which is currently set to ‘URL Window’ by default.
- Content Location: A drop-down menu where you can select the content location: Local File or Remote URL.
- URL: The URL that will be displayed to the visitor as a result of this action.

Launch Chat Actions

Launch Chat Actions can be accessed by selecting the Launch Chat Action option from the Tracker Action Profile menu. Properties for Launch Chat Actions appear on the lower half of the screen shown in Figure 9-10.

Figure 9-10. Launch Actions Page



Common properties on this page including Action Name, Action ID, Action Description, Action Enabled, and Tracker Action Profile are described in the “Action Profiles” section shown in Figure 9-6.

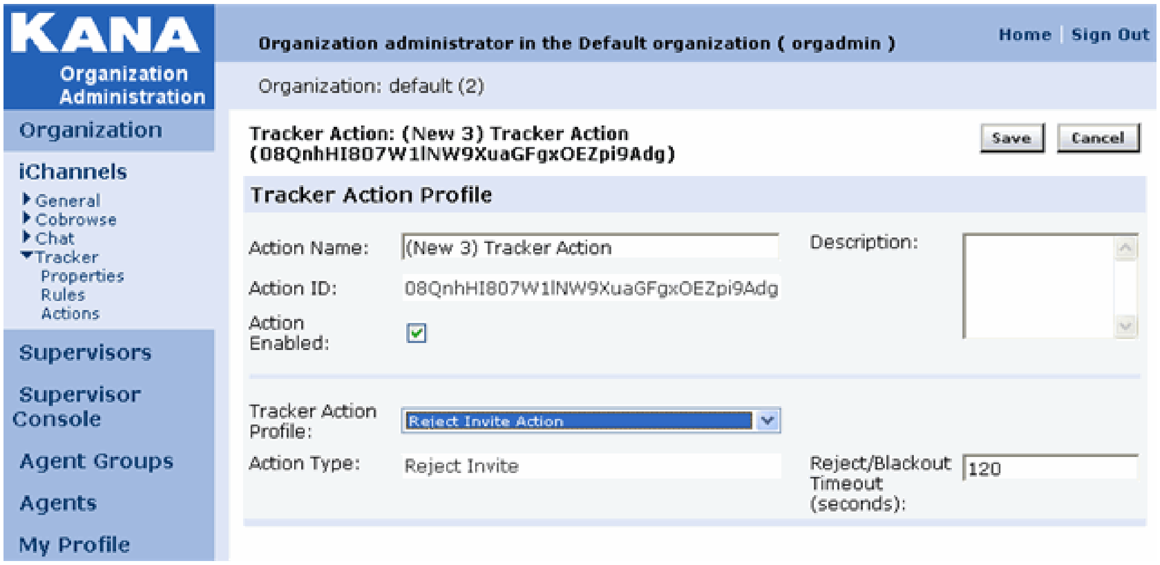
Properties that are specific to Launch Chat Actions include:

- Action Type: The action type which is currently set to ‘Launch Chat’ by default.
- **Launch Mode:** The launch mode should be set to:
  - ‘Chat Only’ if agents can engage their customers in chat sessions only.
  - ‘Cobrowse’ if agents can engage their customers in chat with cobrowse.
  - In cases where agents can engage in cobrowse with escalation, the launch mode should be set to ‘Cobrowse Escalation’.
- **Go Into Queue:** This check box determines whether or not the customer is placed in the online chat queue.

Reject Invite Actions

Reject Invite Actions are accessed by selecting the Reject Invite Action option from the Tracker Action Profile menu. Properties for Reject Invite Actions appear on the lower half of the screen. See Figure 9-11.

Figure 9-11. Reject Actions Page



Common properties on this page including Action Name, Action ID, Action Description, Action Enabled, and Tracker Action Profile are described in the “Action Profiles” section shown in Figure 9-6.

Properties specific to Reject Invite Actions include:

- Action Type: The action type which is currently set to ‘Reject Invite’ by default.
- **Reject/Blackout Timeout:** The timeout value in seconds after which the invitation window will automatically be marked as rejected.

10 Customizing the iChannel Chat Settings

This chapter describes the iChannel chat settings. The Chat product has queues for receiving support via on line chat. The chat functionality is usually combined with the cobrowse functionality.

It is recommended that the default iChannel be customized first and then used as a template for creating other iChannels.

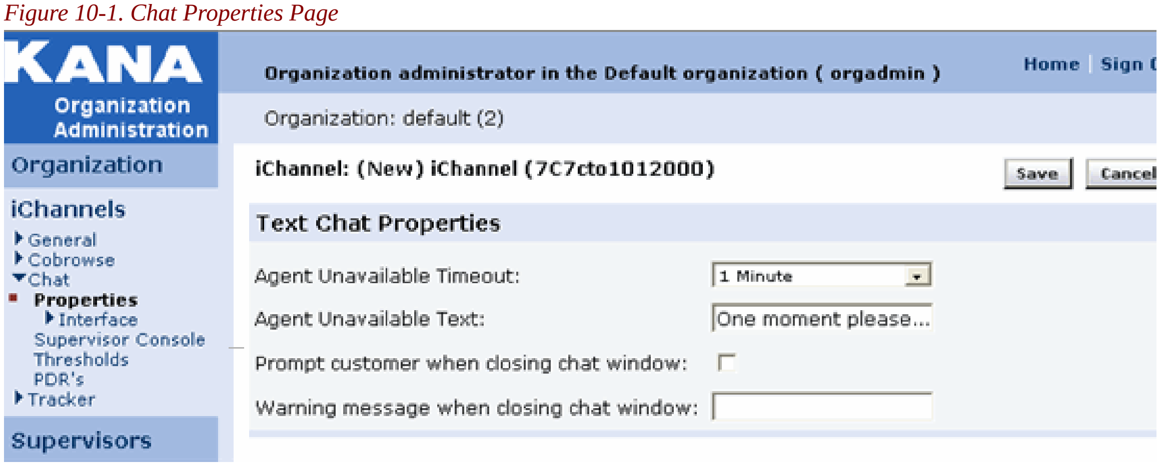
Other chapters describe the iChannel settings in the following categories:

- General. See "Chapter 6: Customizing General iChannel Settings."
- Cobrowse. See "Chapter 8: Customizing iChannel Cobrowse Settings."
- Proactive Chat. See"Chapter 9: ."

Properties

Use the **Chat** > **Properties** page to establish the limits on wait times for an agent to respond to a request, and specify text for unavailable and warning messages. (See Figure 10-1.)

Figure 10-1. Chat Properties Page



- **Agent Unavailable Timeout:** The length of time in minutes that must pass after a customer requests help before the agent unavailable message to appear. Select **None** to deactivate this property.
- **Agent Unavailable Text:** The message customer sees when an agent does not respond within the timeout period. The default message is "One moment please..."

  If a customer sends a message to an agent and the agent does not respond within a certain period of time, the customer receives the agent unavailable message from the KANA Response Live system. For example, when the timeout is set to two minutes and a customer sends a message — either an initial request or a message during a chat session — and has not received a response within two minutes, a message appears on the customer's screen. For example, the customer message could be, "Your agent will be right with you, please wait."

- **Prompt Customer when closing chat window:** A check box which when checked will inform the customer that you are closing the chat window.
- **Warning Message when closing chat window:** The text of the warning message that the customer will see when you are closing the chat window. For example, the customer message could be, "Thank you for using live help. This session will now be terminated. Goodbye."

Interface Settings

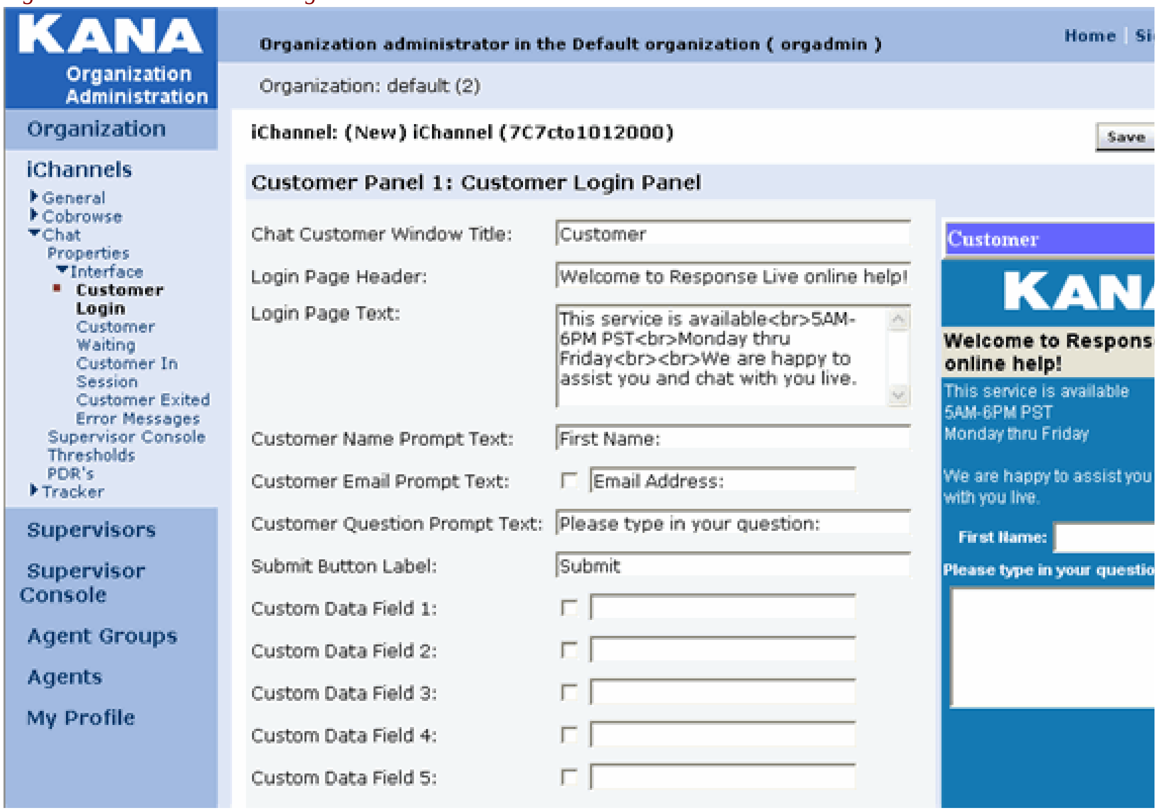
During a session, a customer sees a series of pages: the login, the waiting, and the chat page. The colors and fonts used in these panels are determined by the previously customized general iChannel properties. However, the chat interface pages specify the text on chat panels.

See "Tips for Customizing Preview Panels" in Chapter 5 for an illustration of the areas of control panels to help in identifying the header, logo, and text areas.

Customer Login Panel

Use the **Chat > Properties > Interface > Customer Login** page to customize the text in the chat login page the customer sees when entering the chat system. See Figure 10-2.

Figure 10-2. Chat Customer Login Panel



The information the customer submits with this form is sent to the metrics database, but more importantly, the agent helping the customer sees it in real-time. Asking the customer for information pertinent to his question helps the agent more efficiently help the customer.

- **Chat Customer Window Title:** The text displayed in the title of the customer chat window. For example, this could say ‘Customer’.
- **Login Page Header:** The text displayed in the header.
- **Login Page Text:** Text displayed beneath the header. This text can be a question for or instructions to the customer. For example, “This service is available from 6 am to 6 pm EST.”
- **Customer Name Prompt Text:** The text asking the customer for his name. The agent’s screen displays the name typed in response to this question during a chat session. This name prompt is for only the first text input box. Use the custom data fields to add a second name box. For instance, use two name prompts to ask for both first and last names.
- **Customer Email Prompt Text:** Turn this option on using the check box preceding the text box. The text box next to the check box will contain the text that prompts the customer for his email. The agent’s screen displays the email typed in response to this question during a chat session.

- **Customer Question Prompt Text:** The text asking the customer to enter his question in the text box directly below where this text appears in the control panel.
- **Submit Button Label:** The text displayed on the button, which the customer clicks to send his question and information to the KANA Response Live system.
- **Custom Data Field 1**, **Custom Data Field 2**, **Custom Data Field 3**, **Custom Data Field 4**, and **Custom Data Field 5:** Turn on these options to display additional input fields below the **Customer Name Prompt**. Use these fields to collect additional information that will help the agent answer customer questions quickly.

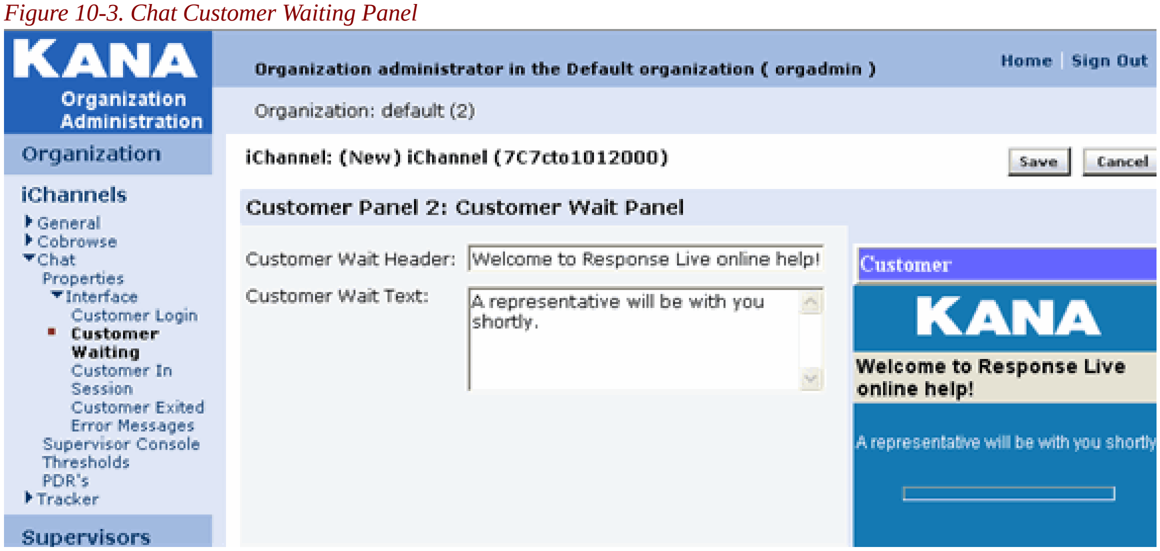
Customer Waiting Panel

Use the **Chat** > **Properties** > **Interface** > **Customer Waiting** page to customize the text the customer sees once he has submitted his help request. At this point the customer is waiting in the queue. After customers submit their personal information, they are placed in a queue to wait for an available agent to establish a Chat/Cobrowse session. The **Customer Wait Page** tells the customer the length of time until an agent is available.

Informing users of their wait time helps them to set approximate response time expectations. Reassuring them of their position in the queue, eliminates user anxiety and uncertainty and demonstrates a heightened level of service.

While waiting, the customer sees the Customer Wait Panel. See Figure 10-3.

Figure 10-3. Chat Customer Waiting Panel



- **Customer Wait Header:** The text displayed in the header.
- **Customer Wait Text**: The text to inform the customer that he is in the help queue. For example, "A representative will be with you shortly." While the customer waits in the queue, the progress indicator becomes animated to let the customer know that he needs to continue to wait.
- **Exit Button:** The text on the **Exit** button of the customer waiting panel is not customizable. A customer can click **Exit** to leave the queue at any time.

- To show the customerposition in the queue and the estimated wait time to chat with an agent, the following pre-defined variables can be used in the Wait Text.

  <%WAIT_POSITION%> : Position in the queue

  <%WAIT_MINUTES%>: Minutes part of the estimated wait time

  <%WAIT_SECONDS%>: Seconds part of the estimated wait time

  For example, enter the Customer Wait Text as follows:

  "A representative will be with you shortly. Your position is <%WAIT_POSITION%> in the queue. Your wait time will be approximately <%WAIT_MINUTES%> minute(s) and <%WAIT_SECONDS%> seconds. Thank you for waiting."

  When a Customer enters the waiting queue, the following text will be displayed along with the progress indicator.

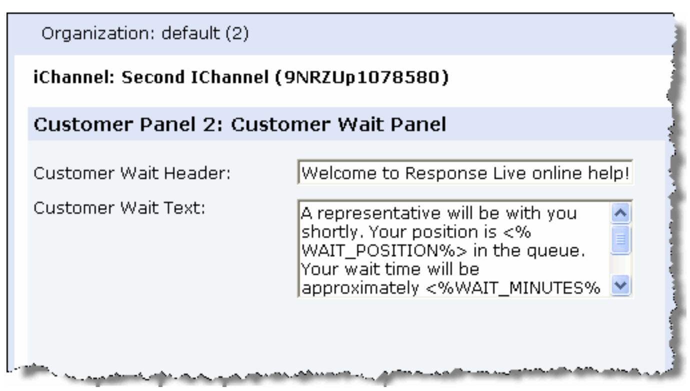
  "*A representative will be with you shortly. Your position is 10 in the queue. Your wait time will be approximately 1 minute(s) and 10 seconds. Thank you for waiting*."

Enhanced Customer Wait Page

Response Live shows five (5) dots that appear after a customer clicks the **Submit** button. The wait time appears above the dots,and will dynamically change to give the customer a real time view of how long it will be before they are connected to an Agent.

If you want to compose a customer facing message directed toward customers in the queue, go to iChannels > Chat Properties > Customer Waiting.

Figure 10-4. Customer Waiting Message

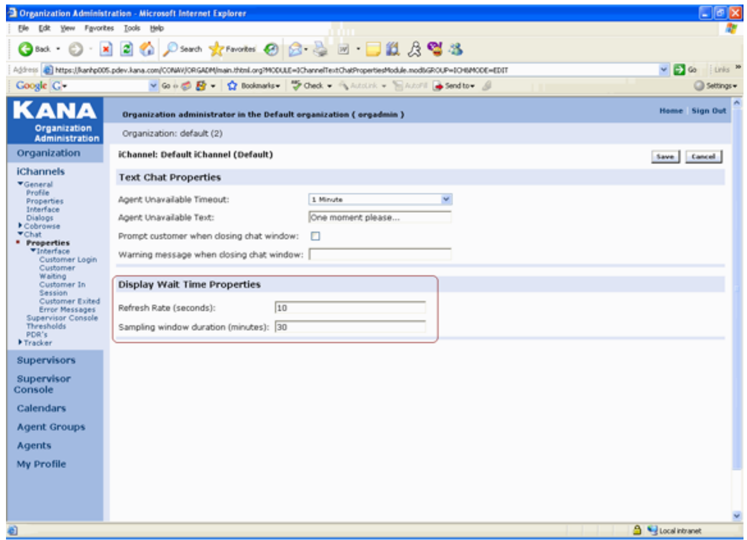


These customer facing messages can be customized or localized by using the following variables in the messages:

<%WAIT_POSITION%> <%WAIT_MINUTES%> and <%WAIT_SECONDS%>.

Configuring the predefined wait time variables does impact performance. . If displaying the wait time is not necessary, remove the following variables from the message: <%WAIT_POSITION%> <%WAIT_MINUTES%> and <%WAIT_SECONDS%>.The system will not calculate the wait times, which will improve performance.

Figure 10-5. Display Wait Times



To configure the Display Wait Time Properties area, navigate to:

Orgadmin > iChannel-Chat > Properties

Refresh Rate (seconds):

This is the frequency at which the Queue Waiting page of the Customer Chat panel is refreshed to reflect the up-to-date estimated waiting time in the queue to talk to an Agent and the current position in the queue.

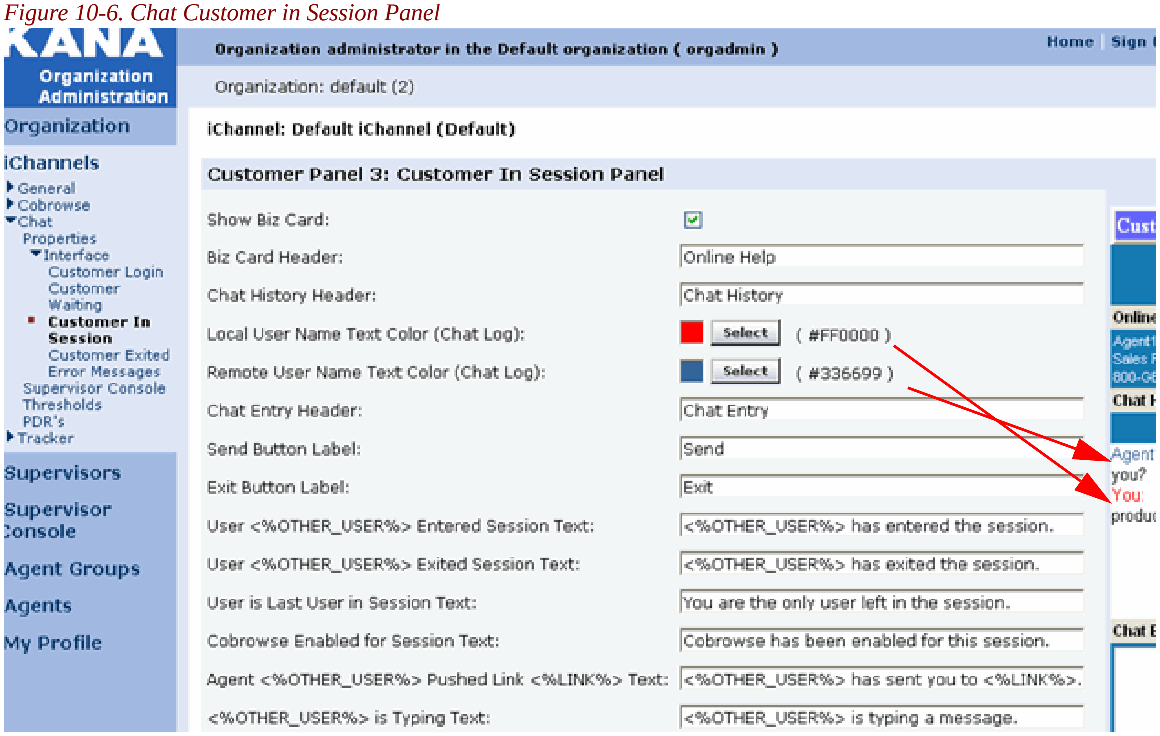
Sampling window duration (minutes):

This is the time period for which the sampling data is collected for calculating the average wait time for a Customer to talk to an Agent, which is used for calculating the estimated wait time in the Queue for a new customer entering the Queue. The sampling data consists of how many customers were serviced (in other words, chatted) during the last sampling window duration and the average timethose customers waited in the queue before being serviced.

Customer In Session Panel

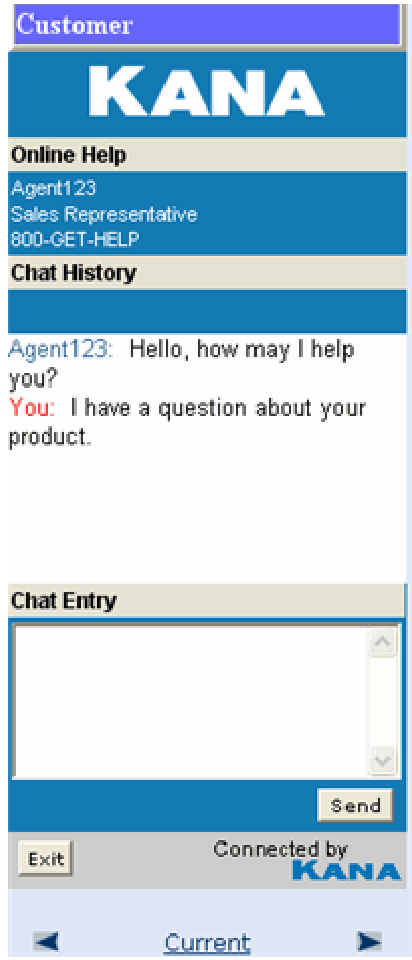
Use the **Chat** > **Properties** > **Interface** > **Customer In Session** page to customize text that customers see during a chat session after being picked up by an agent. See Figure 10-6.

Figure 10-6. Chat Customer in Session Panel



- **Show Biz Card:** A check box that determines whether the customer will see the agent information on the screen.
- **Biz Card Header:** The text displayed in the header. The connected agent's name appears below the header. The KANA Response Live system automatically provides agent identification information. If the agent's profile contains a URL for his photographs, his photograph is also displayed. See "Chapter 16: Profiles" for information about agent profiles.
- **Chat History Header:** The text displayed in the header over the history of the customer-agent exchange.
- **Local User Name Text Color (Chat Log)** and **Remote User Name Text Color (Chat Log):** Select the colors distinguishing what the customer and the agent have typed in the chat window. When **Select** is clicked for either of these categories, a **Color Picker** dialog box appears. For a more detailed explanation of the **Color Picker** box, see "Using the Color Picker" in "Chapter 5: The Organization Administration Tool User Interface."
- **Chat Entry Header:** The text displayed in the header over the text box where the customer enters his questions and comments for the agent. See the Preview panel in Figure 10-7.

Figure 10-7. Chat Customer in Session Preview Panel



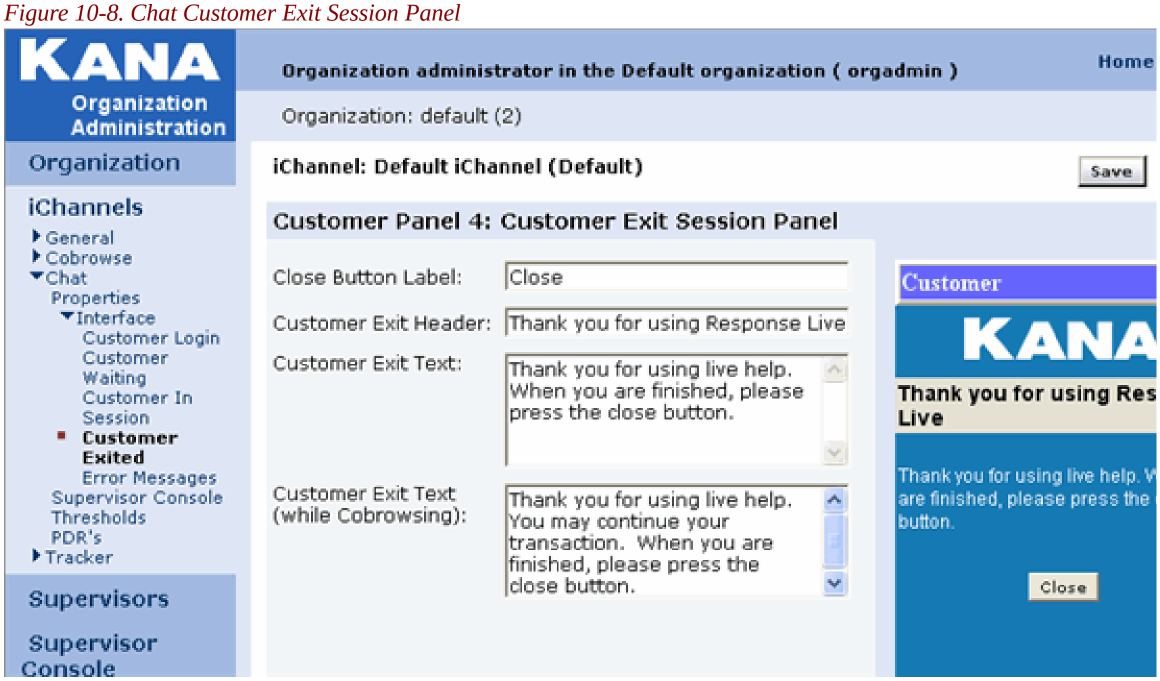
- **Send Button Label:** The text on the button,which when clicked sends the chat text entry to the agent.
- **Exit Button Label:** The text for the button, which when clicked exits the chat session.
- **User <%OTHER_USER%> Entered Session Text:** The text that will appear on the customer screen to indicate that another user has entered the session. The text will also indicate who the other user is.
- **User <%OTHER_USER%> Exited Session Text:** The text that will appear on the customer screen to indicate when another user has exited the session. The text will also indicate who the other user is.
- **User is Last User in Session Text:** The text that will appear on the customer screen to indicate when this user is the last user in this session.
- **Cobrowse Enabled for Session Text:** The text that will appear on the customer screen to indicate when cobrowse has been enabled for this session.
- **Agent <%OTHER_USER%> Pushed Link <%LINK%> Text:** The text that will appear on the customer screen to indicate when another user has forwarded a link.

- **<%OTHER_USER%> is Typing Text:** The text that will appear on the customer screen to indicate when another user is typing a message. The text will also indicate who the other user is, for instance, the name of the agent assisting the customer.

Customer Exit Session Panel

Use the **Chat** > **Properties** > **Interface** > **Customer Exit Session** page to customize text that customers see after the session ends. See Figure 10-8.

Figure 10-8. Chat Customer Exit Session Panel

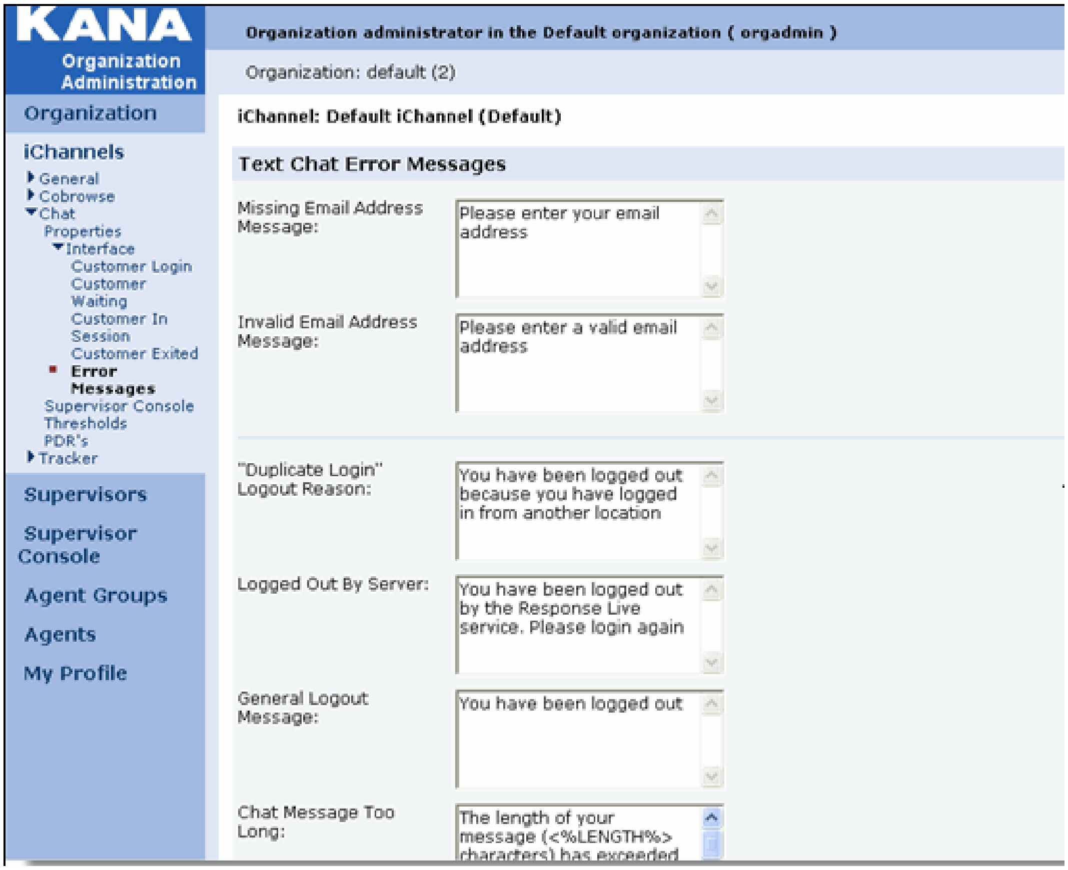


- **Close Button Label:** The text for the button the customer clicks to close the KANA Response Live control panel and end the connection with the agent.
- **Customer Exit Header:** The text in the header for this control panel.
- **Customer Exit Text**: The text for the message sent to the customer after the cobrowse session ends. Some possible uses for this message are to indicate to the customer that he may continue his transaction or browse the Web.
- **Customer Exit Text (while cobrowsing)**: The text for the message sent to the customer during a cobrowse session. Some possible uses for this message are to indicate to the customer that he may continue to browse the Web after the chat session has ended.

Error Messages

The error messages defined on this page relate to possible invalid inputs on this panel or customer software that is not compatible with the KANA Response Live chat features. The use of most of these error messages is self-explanatory from the message name. Some examples are messages prompting for a missing or invalid email address. See Figure 10-9.

Figure 10-9. Chat Error Messages



Supervisor Console

The Supervisor Console is used to by supervisors to monitor the status of the queues for which they are responsible. The organization administrator configures the Supervisor Console at both the iChannel and organization level. This section explains the iChannel settings. See “Chapter 14: Supervisor Console Settings” for the organization level settings. See “Chapter 15: Supervisor Accounts & Agent Assignments” for additional Supervisor Console settings.

Status Indicators

Harvey balls indicate the status of the queue in the Supervisor Console based on the thresholds set in the Organization Administration tool. These thresholds are described following the description of the Harvey balls.

If the Harvey ball is:

Empty, then the queue status is good.

Half filled, then the queue status may approaching critical status.

Solid, then the queue status is critical now.

Primary Indicators

Each primary indicator has a setting for the warning (half filled Harvey ball) and for bad (solid Harvey ball). The following primary indicators are set for the Supervisor Console:

- **Longest Wait Time:** The time for which a customer has been waiting in the queue.
- **Expected Wait Time:** The time for which a customer is expected to wait before picked up by an agent.
- **Too Many People in the Queue:** There are too many people waiting in the queue.
- **Too Few Agents:** There are too few agents servicing the queue.

Thresholds

Thresholds determine the transitions between good, could become critical (warning), and critical (bad) statuses.

Short and Long Time Spans

For each of the thresholds there is an indicator for a short and a long time span. The short time span thresholds are for predicting the queue status in a short period of time. The long time span thresholds are for predicting the queue status during a longer period of time. Thus, the long time span thresholds are an early warning indicator.

- **Too Many Opened Sessions Threshold:** Threshold for the number of sessions opened during a time span.
- **Too Many People Abandoned Threshold:** Threshold for the number of people abandoning the queue during a time span.
- **Too Many People Entered Threshold:** Threshold for the number of people entering the queue during a time span.

Predefined Responses (PDRs)

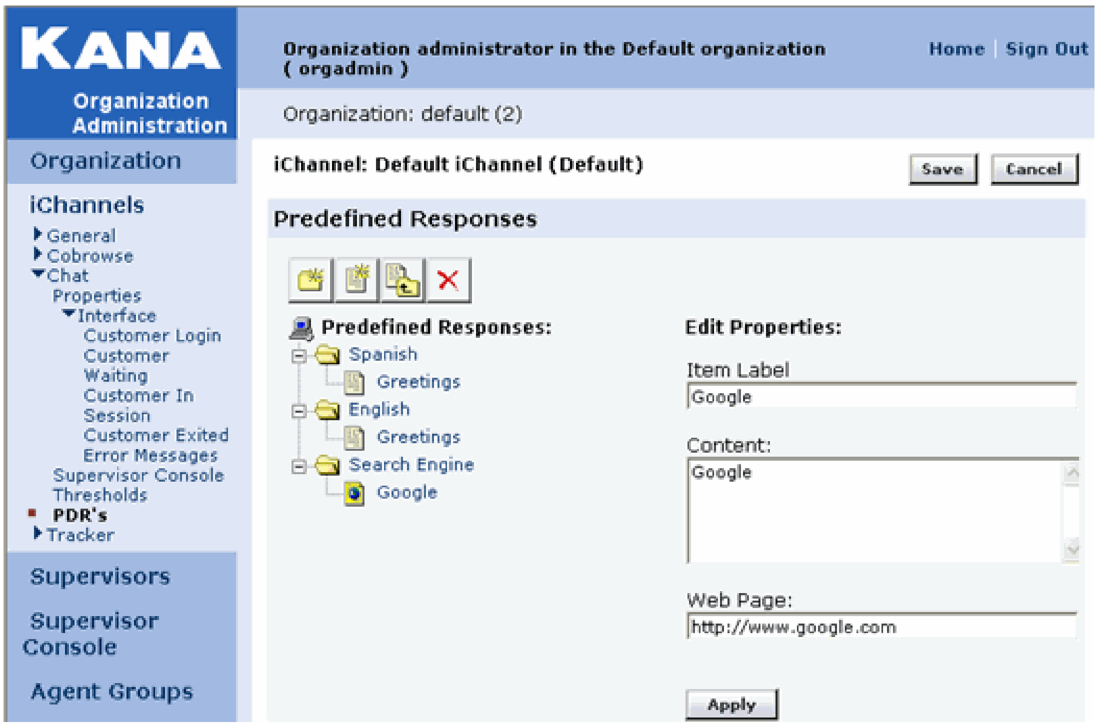
PDRs to frequently asked customer questions or for frequently used statements to customers save agents typing time and help standardize the quality of the responses.

A PDR consists of the content of the message, a label (the equivalent of a file name), and an optional Web page URL. (See Figure 10-10.)

Organize PDRs in folders to make them easy for agents to find. For example, one folder might be labeled *Spanish* and another might be labeled *English* for an iChannel that services both Spanish and English speaking customers.

Each PDR can only be in one folder, so folder names and organization are crucial to how fast agents can locate a PDR.

Figure 10-10. PDR Page



Creating PDRs

First create category folders in whichto organize the PDRentries. Then fill each folder with PDR entries.

To create a category folder:

1. Click the **Add Category** icon located under the phrase Predefined Responses. A folder icon label **<new folder>** appears.

2. Click on the new folder icon so that the **Menu Label** box appears.

Clicked folders and PDRs appear in a different colored font.

3. Type in a name for the new folder and click **Apply**.

To fill a folder with PDR entries:

1. Click on the folder in which to add the PDRs.

2. Click on the **Add Entry** icon to the right of the **Add Category** icon.

3. Type in a label in the PDR in the input field named **Item Label**.

4. Type in the text of the PDR in the input field labeled **Content**.

5. If the PDR has a Web page associated with it, type in its URL in the **Web Page** input field. The URL must begin with http:// or https://. A small globe image appears on the icons of PDRs with URLs associated with them.

6. Click **Apply.**

7. Click **Save.**

Moving Folders and Entries

Reorganize PDR folders and entries by moving them around the PDR directory. An entry or folder can be moved into:

- Another folder.
- The general menu. Items are placed after existing folders or entries

To move a folder or an entry, complete the following steps:

1. Click the item to move.

2. Click the **Move Item** icon. A new window appears.

   The default destination is into or after the first folder in the list. If the first folder was opened on the previous page, the system attempts to move the item into it.

   If it was closed, the system attempts to move the item to the general menu.

3. Click **OK** to move the item to the default position.

4. If the destination the system has chosen is not the correct one, click the correct destination.

5. Click **OK**.

11 Service Availability Management

Introduction

Service Availability Management enhances Chat with an Agent functionality by providing ways to shut down access to the Chat application. This section describes what you can do with Service Availability Management, plus how to implement this functionality.

There are a variety of reasons why you may need to shut down Chat. Perhaps the system is stressed for some reason, or possibly there is more load than the agents can handle and wait times are increasing for customers. In these scenarios Chat can be shut down for the impacted iChannels and queues. The queues can be shut down if no agent is logged on, or when the last agent monitoring the queue logs off. This stops new users from joining the queue and lets the agents service the waiting customers until the load subsides. Customer access to Chat queues can be controlled based on three criteria:

- Calendar based
- Stress based
- Panic Shutdown button (Open/Close buttons)

Also, Proactive Chat rules check the iChannel.chatAvailable property before sending a Chat invite to a customer. You can learn more about these rules in *Business Hour and Service Availability Management for Proactive Chat* on page 74.

Some highlights of Service Availability Management are:

- **Calendar Based Control** provides the option to shut down Chat when your business is closed. Your business hours can be defined in the calendar, giving you an easy way to make Chat unavailable outside of the defined business hours. This feature is described in more detail in *Calendar Based Control* on page 71.

  The Business Calendar is part of the Org Admin module and available at the organization level, but can be overridden by configuring the calendar for each iChannel. The calendar provides create, copy, edit and delete tools, and can be assigned to the organization and iChannels.

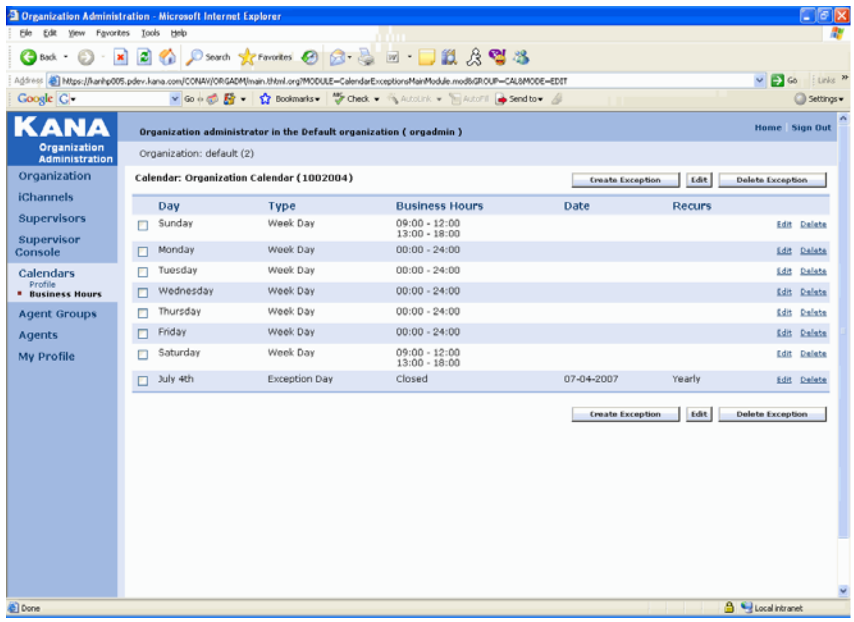
- **Stress Based Control** automatically shuts down an iChannel if there is no agent logged in to monitor that queue. This functionality can be enabled or disabled via the agent availability parameter in the iChannel properties page of organization administration tool. This feature is described in more detail in *Stress Based Control* on page 76.
- **Panic Shutdown Conditions**. This functionality, which is available through the Organization Administration Tool and the Supervisor Console, enables the call center administrator to shut down iChannels in case of panic shutdown situations. For example, Chat may need tobe shut down because of unavalability

of systems used by call center agents to service the end customers, these systems maybe unrelated to Response Live application. This feature is described in more detail in *Panic Shutdown Action* on page 76.

– Panic Shutdown is available in the Supervisor Console in addition to the Organization Administration tool.

Calendar Based Control

Figure 11-1. Calendar Based Control



You can create, copy, edit and delete Business Calendars for an organization in the Org Admin module. A Calendar can be assigned to the organization and iChannels.

The Calendars feature is located on the Org Admin page in the left menu frame, and has two sub menus (each are discussed later):

- Profile
- Business Hours

When you select Calendars, a screen listing all the calendars created for the organization opens. If no calendars exist, the list is empty. This screen has **Create**, **Edit**, **Delete** and **Copy** buttons.

Profile

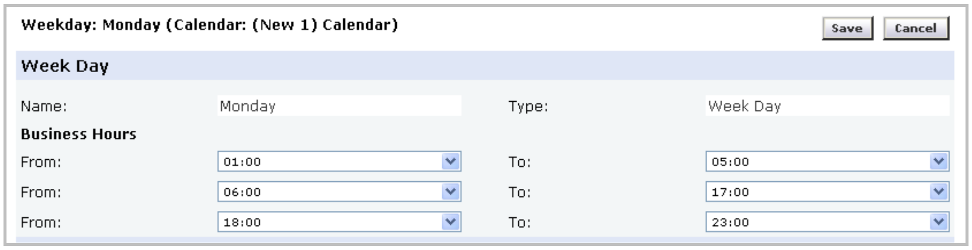
The profile section contains the basic attributes of the calendar:

ID	This is an auto generated ID.
Name	The name of the calendar.
Time zone	This combo box holds all the time zones. This is a mandatory field.
Description	A text area in which you can type a detailed description of the calendar.

Business Hours

The Business Hours page lists the seven days of the week and up to three business hour ranges for each day. Business hours range by the half hour, while time is presented in a 24 hour clock format without A.M. or P.M.

Figure 11-2. Setting Business Hours



For example, using these options you can define the following hours.

Monday

From	To
01:00	05:00
06:00	17:00
18:00	23:00

When you are done, the calendar displays the hour ranges for that day.

Exception Days

The calendar also lists any Exception Days, after the Business Days. Exception Days are used todefine holidays, off days and days with special business hours. You can make Exception Days recurring on a monthly or yearly basis.

Figure 11-3. Exception Days

The Exceptions feature has specific date requirements, similar to the main calendar date requirements:

- Only specific dates can be used in Calendar > Exceptions, such as 07-04-2007 (mm-dd-yyyy).
- All month-day-year values must be filled.
- Recurring values, for example, “Year” in 2008, is not applicable.

To create Exception Days, follow these steps:

1. Click **Create Exception** or **Edit** to open the page where you define Exception Days.

2. Define following attributes for the exception:

   ID*:* This is an auto generated ID.

   Name*:* Name of the exception day. For example, Independence Day.

   Date*:* Date of the exception day. Enter a date in the expected format in this field.

   Recurs*:* Specifies whether the exception day is one time only or recurring. Select monthly, yearly or none from the box.

   Business Hours*:* The behavior will be same as that of week day business hours definitions.

3. Click **Save** to save to the database or click **Cancel** to discard the changes.

Recurring Dates

How does recurring functionality work? Keep the following points in mind:

- When “Year” is selected as the recurring option, only the day and month of the date entered is considered.
- When “Monthly” is selected as the recurring option, only the day of the date entered is considered.
- When “None” is selected as the recurring option, the entire date is considered.

You must enter a valid date for all the above options. For example:

If using a date of 10-22-2007

Yearly recurring: 10-22- (2008, 2009...) will be exception days, for example. 10-22 of every year.

Monthly recurring: (10, 11, 12, 1, 2,...) -22- (2008, 2009...) will be exception days, for example. 22nd of every month.

None recurring: 10-22-2007 will be an exception day.

This feature does not explicitly support first (1st) Monday, second (2nd) Saturday and similar dates, but you can achieve the same result by defining exception days for every first Monday, every second Saturday...

Business Hour and Service Availability Management for Proactive Chat

Proactive Chat is the Response Live product through which agents monitor and prioritize real-time customer lists by using dynamic filtering, and then engage customers in an “invite-to-chat” session.

Service Availability Management enhances Proactive Chat with the addition of the **iChannel.chatAvailable** boolean property to determine Chat availability (Business Hours/Stress based/Panic Action) before sending an invite to the customer.

This property is case sensitive. It can beused to define rules in conjunction with the Page.chatEnabled property, which checks whether Chat Launch Code (**responseLiveChat.js**) is included on the currently tracked page.

Following is an example of this rule checking chat availability:

```
if (iChannel.chatAvailable && Page.chatEnabled)

{ return ShowInvite("<Action ID>");

}
```

For **Agent initiated Chat Invite**, it is assumed it is the Agent's responsibility to **not** to send a Chat Invite outside the business hours.

Assigning a Calendar to an Organization or iChannel

The Calendar can be assigned to an Organization or an iChannel as the current active calendar. The Organization calendar assignment is made on the Organization page. The iChannel calendar assignment is made on the iChannel Properties page and overrides the Organization calendar assignment:

Orgadmin → Organization → Business Hours Support

The **Unavailable Message** specified in the iChannel business hours section overrides the Organization **Unavailable Message**.

This page has two sections pertaining to the calendar:

- Business Hours Support
- Service Availability Settings

Business Hours Support

Use the options in thissection to assign a calendar and enter the unavailable messages to appear when the customer enters the queue during non-business hours.

- *Calendar:* This will be combo box with all the calendars created for this organization.
- *Unavailable Message Type:* Message can be either be text/html based or an external absolute URL. This will be combo box with Text/Html and URL as two options.
- *Unavailable Message:* This will be a text field which allows a text or HTML message or an absolute URL.

iChannel Calendar Properties

The iChannel calendar properties are set in the same way. The path is:

Orgadmin → iChannel → General → Properties

Service Availability Settings

Use the options in this section to create the message that customers see if they enter the queue when the iChannel is closed for Chat through the Supervisor Console.

These settings are available through the Organization level and the iChannel level. If no message is defined at the iChannel level, then the organization level message appears; otherwise, the iChannel levelmessage appears.

The iChannel Service Availability Settings are located in the Orgadmin Tool:

Orgadmin → iChannel → General → Properties

Figure 11-4. Service Availability Settings.

- *Unavailable Message Type:* The message can be text or HTML based or an external absolute URL.
- *Unavailable Message:* This field is where you enter the text or HTML message or an absolute URL.

Service Unavailable Page

When Chat is not available, customers see a Service Unavailable page like the screen in Figure 11-6. The message varies based on the reason the service is unavailable, and the message defined in Organization Admin:

Figure 11-5. Service Unavailable

Stress Based Control

When this functionality is enabled, it automatically shuts down aniChannel if no agent is available to monitor the queue. This control can be activated or disabled through the **Service Availability Settings** in the iChannel Properties page of the Orgadmin Tool:

Orgadmin → iChannel → General → Properties

To use this control:

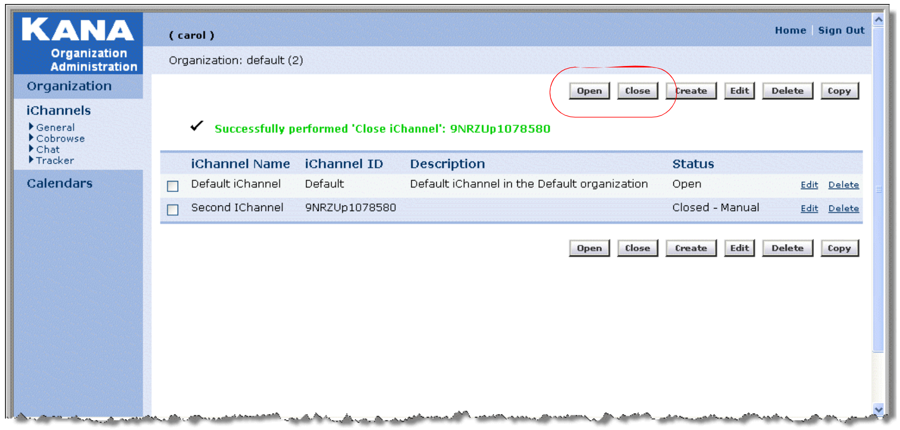
1. Select the check box next to **Make service unavailable when no agent is present** to activate.
2. Select text/HTML or URL from **Unavailable Message Type**.
3. Type the required message in the **Unavailable Message** field.

The queue shuts down when this option is selected and no agents are logged on. It re opens when an agent belonging to that ichannel logs on. The queue is always open when the check box is clear.

Panic Shutdown Action

This feature immediately shuts down an iChannel Chat queue. The **Close** iChannel button is located next to the **Open** button along the upper right area of the Organization page.

Figure 11-6. Location of Open and Close Buttons



Once the iChannel is closed for Chat, no new Chat customers are added for this iChannel and the Status displays a Closed status.

Queue Status: This column displays the current chat queue availability status, which is similarly updated in the Supervisors Console. Some points to remember about the **Queue Status** are:

– If the queue is closed manually using the **Open** and **Close** buttons, the status appears as **Closed-Manual**.
– If the queue is closed due to stress or agent availability, the status appears as **Closed - Stress Based**.
– If the queue is closed due to business hours, the status appears as **Closed - Business Hours**.
– A manual close takes higher precedence than stress based and stress based takes higher precedence than calendar based.

12 Agent Groups

Agent groups are groups of agents who perform similar work. For example, they work in the same set of iChannels and interact with the same groups of customers. This chapter explains how to create agent groups and how to change information relating to them. Organization administrators and supervisors can make changes to agent groups.

Supervisors oversee agent groups and use the Organization Administration tool to perform day-to-day tasks that keep information about their groups up-to-date. They can make changes to agent groups, but they cannot create them.

An organization administrator needs to create agent groups for supervisors. After a supervisor has been assigned to an agent group, the supervisor is able to:

- Add and delete agents from their agent groups.
- Edit agent group properties for their agent groups.
- Edit agent properties for agents in their agent groups.
- Transfer agents between their agent groups.

Creating, Editing, & Deleting Agent Groups

Before creating an agent group in the Organization Administration tool, create at least one iChannel. To create, delete, or edit agent groups use the **Agent Groups Main** page by clicking **Agent Groups** in the left menu. The page lists the existing agent groups with their corresponding descriptions.

The list of agent groups that appear depends on the identity of the person who is signed in. If signed in as an organization administrator, a list of all agent groups is shown. If logged on as a supervisor, a list of the agent groups assigned to that supervisor is shown. Also, a supervisor can create agents and agent groups. These agents and agent groups are automatically assigned to the supervisor that created them. There may be up to a 10 minute delay from the time the supervisor creates the agents and agent groups until they are listed in the Organization Administration tool and Supervisor Console UI. This delay is due to the update cycle of the KANA Response Live system.

To create an agent group:

1. Click **Create**.

2. An entry saying (New) Agent Group appears on the page. Or if (New) Agent Group is already used as a group name, the entry (New *next integer number*) Agent Group appears.

   The **Agent Group Profile Page** is automatically loaded and the new agent group is given an unique ID number.

   Or

Alternatively, you can create an agent group whose properties are similar to the properties of an existing agent group by checking the box next to the existing agent group and clicking **Copy**. Using the **Copy** function can reduce repetitive data entry tasks associated with creating agent groups.

3. Complete the agent group Profile page. See the “Profile” section.
4. Assign the group to iChannels. See the “Assigning Agent Groups to iChannels” section below.
5. Complete the agent group Properties page. See the “Properties” section.

Clicking the **Edit** link or button gives access to the sub-menus in the agent groups menu. To change a property of an agent group, first select it and click **Edit** on the main page.

Profile

The Profile page is accessed through the **Profile** (Agent Groups) menu. The agent group’s ID number appears over the phrase Agent Group Profile. Note the expanded menu list on the left. Use the profile to provide the following information about a newly created agent group or edit information about an existing one:

- The group’s name
- The group’s department
- A short description of the group or any other pertinent information

Assigning Agent Groups to iChannels

The Assign iChannels page is accessed through the **iChannels** (Agent Groups) menu. All agent groups must be assigned to one or more iChannels. Agents in an agent group can only cobrowse or chat with customers in iChannels assigned to the agent group.

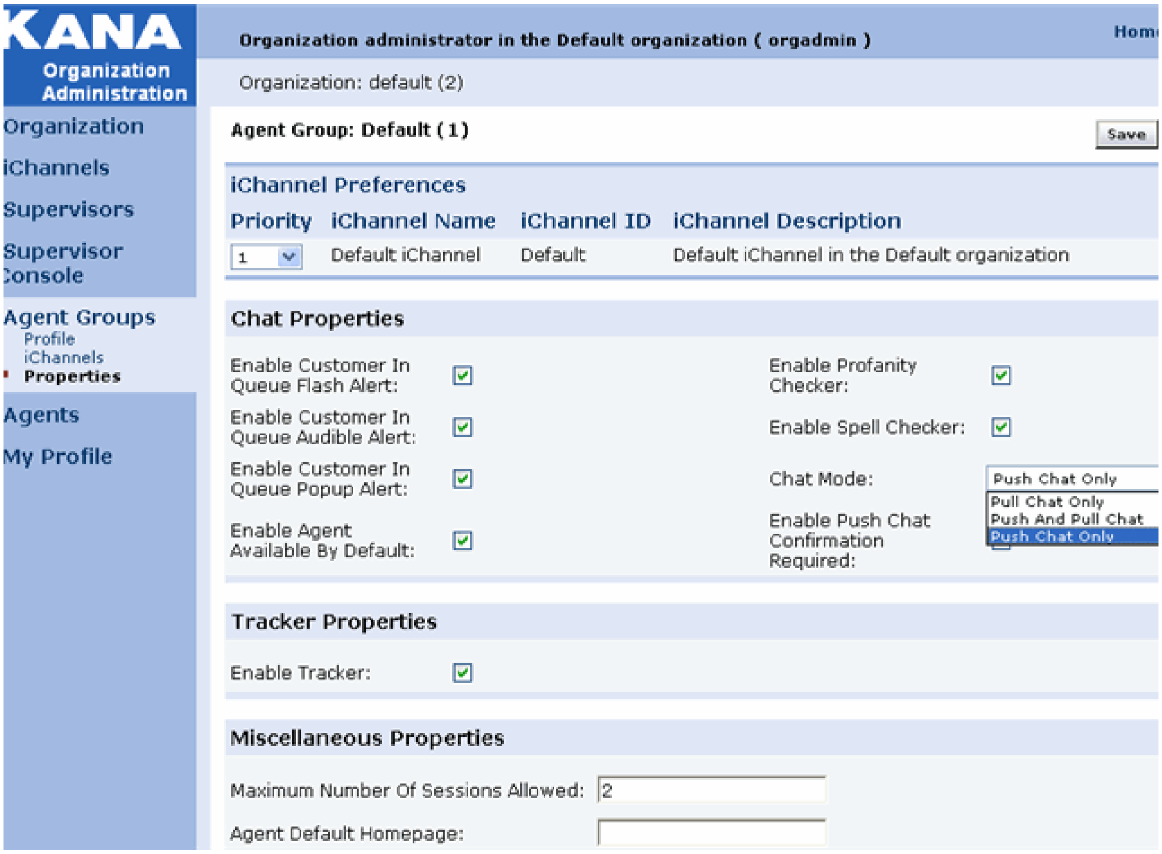
Although an agent group may be assigned to a number of iChannels, an individual agent can only work in one iChannel at a time while interacting with a customer. An agent may move to another iChannel when he begins an interaction with a new customer. With multi-chat, he may work in more than one iChannel at a time. iChannels are assigned to customers at the time they initiate help requests.

The list of iChannels that can be assigned to the agent group is automatically carried over from the iChannels section of the Organization Administration tool.

Properties

For KANA Response Live systems using the chat product, additional agent group properties related to queuing must be set via the Agent Group Properties page. This page is accessed through the **Properties** (Agent Group) menu. See Figure 12-1.

Figure 12-1. Agent Group Properties



iChannel Preferences

The KANA Response Live system maintains a chat queue of customers requesting help. From this queue an agent needs to be able to get the next customer with whom to chat from the queue. The iChannel preferences help configure the queue priorities and how agents are alerted that there are customers waiting for them.

If an agent group has multiple iChannels assigned to it, priorities for answering requests coming from customers placed in different iChannels can be set. For example, your company may classify customers into groups, with each group assigned to a different iChannel. You may wish to answer the requests of a member of one group before a request coming from a member of another group, regardless of who placed a help request first.

Setting priorities is simple: you need only select a priority number from the drop-down menu in the iChannel Preferences section. Lower numbers have higher priority: for example, the channel with the number 1 next to it gets firstpriority. Note that the listof iChannels is automatically carried over from the selections you made in the iChannels subsection of the Agent Groups section.

Chat Properties

Agent Group Chat Properties are usedto define how an agent group is alerted to customers waiting in thequeue, how customers are assigned to agents, and whether or not spelling and use of profane words should be checked.

The KANA Response Live system maintains a chat queue of customers requesting help. KANA Response Live can automatically route customers to an available agent, or allow agents to pull customers from the queue themselves in order to assist them with their questions.

- **Enable Customer in Queue Flash Alert:** If this option is turned on, when the chat window is minimized it blinks when a customer enters the chat queue, or when a customer is pushed to the agent by the system. This alert is useful to agents who are not currently cobrowsing and have minimized their KANA Response Live windows in order to perform other work.
- **Enable Customer in Queue Audible Alert:** If this option is turned on, a doorbell sound indicates to agents that a customer is waiting in the queue, or when a customer is pushed to the agent by the system.
  - If an agent is not in a session, only the doorbell sounds to indicate a customer is waiting.
  - If an agent is in a session, then a pop up window indicates a customer is waiting.
  - If an agent is not in the maximum number of chat sessions, flashing indicates a customer is waiting.
- **Enable Customer in Queue Popup Alert:** If this option is turned on, a popup window indicates to agents that a customer is waiting in the chat queue, or when a customer is pushed to the agent by the system.
- **Enable Agent by Default:** This option only applies to agent groups that are using the automatic Push chat functionality. If this option is turned on, the agent is marked as available for chat as soon as the agent signs into the system. KANA Response Live will push customers to chat with agents marked as available. When this option is not checked, agents can manually set their status to ‘available’ or ‘unavailable’. An agent is considered available if all of these are true:
  - the agent has signed into Response Live
  - the agent has not reached the defined maximum session limit
  - the agent has not been marked unavailable.
- **Enable Profanity Checker:** If this option is turned on, the KANA Response Live system checks chat messages typed by the agent for profane words. The profane word list is maintained by the organization administrator. The agent is notified of the profane word in the message and prompted to eliminate the word before attempting to send the message again. The customer messages are not checked for profane words.
- **Enable Spell Checker:** If this option is turned on, the KANA Response Live system checks chat messages typed by the agent for misspelled words. A list of words to ignore is maintained by the organization administrator for the entire organization. The agent is notified of the misspelled words in the message and prompted to correct the spelling before attempting to send the message again. The customer messages are not checked for misspelled words.

- **Chat Mode:** A pull-down menu where you can specify the agent chat mode:
  - Pull Chat Only. This chat mode allows agents to pick up customers from the queue.
  - Push and Pull Chat. This chat mode enables agents to pick up customers from the queue, as well as have the system assign customers to available agents.
  - Push Chat Only. This chat mode enables the system to assign customers to agents based on their availability. These agents will not have the ability to manually pick up customers from the queue.
- **Enable Push Chat Confirmation Required:** For agent groups that have Push chat enabled, if this option is turned on, KANA Response Live first prompts the chosen agent to accept or reject the chat. The agent is notified of the proposed chat with a pop-up message which is the only alert the agent will see. It will take the place of the **Enable Customer in Queue** alerts in Push chat mode. If the agent either declines this chat or fails to respond in a timely manner, the message will time out, and the agent is marked unavailable until the agent manually becomes available again.

Tracker Properties

- **Enable Tracker:** This check box will determine whether tracking is enabled for the Agent Group, and is related to the Proactive Chat feature. If tracking is enabled, agents who are assigned to this agent group will see a Web Tracker tab with real-time customer lists of customers who are browsing their Web site. See "Chapter 9: Customizing the Proactive Chat iChannel Properties" for information on visitor tracking and proactive chat.
  This option will only be visible if tracking was enabled at the Organization level by the System Administrator.

Miscellaneous Properties

- **Maximum Number of Sessions Allowed:** Sets the limit of the number of concurrent chat sessions each agent may participate in at one time. This number must be between 1 and 4. The default value is 4. The optimal number of concurrent chat sessions depends on agent skill and the complexity of chat questions and exchanges. Having a well-organized set of PDRs helps agents respond more quickly during chat sessions and, thus, enables agents to handle more concurrent chat sessions.
- **Agent Default Homepage:** Sets the homepage that an agent will see by default in the shared browser window.

Pushing Chat

When Push chat is enabled, KANA Response Live will push customers who have issued a chat request to the next available agent. The agent is chosen based on several factors.

- If 'Enable Agent is Available by Default' is not set, an agent is automatically marked as 'Unavailable' upon login.

- Once an agent makes himself ‘Available’, and has not reached the maximum session limit defined for his agent group, the system will push customers to him.
- The system chooses the agent with the least number of open chat sessions. If several agents have the same number of open chat sessions, the agent who has been available for the longest time is selected. When all agents are busy or unavailable, customers are queued until an agent becomes available.
- As soon as an agent reaches the maximum session limit defined for her agent group, customers will no longer be pushed to her.

13 Agent Accounts

This chapter explains how to create agent accounts and change information relating to them. Organization administrators and supervisors are the only people who can make changes in this section of the Organization Administration tool.

Agents work directly with customers. As explained in the Agent Groups chapter of this manual, agents are assigned to one agent group, and this group specifies which iChannels their members will use. An agent may work in more than iChannel at a time, if using the multi-chat feature.

When a customer contacts your organization with a help request through the KANA Response Live system, the customer is assigned an iChannel based on the code behind the button he clicked to initiate the request. It is in this iChannel that the agent will work while he interacts with that customer. He may work in another iChannel with another customer.

Creating Agent Account

To gain access to the Main agent account page, click the **Agents** link on the left menu. The page displays agent login names, display names, and IDs.

To create an agent:

1. Click **Create** and an entry named (New) Agent appears. If the name (New) Agent is already in use, then the name (New *next integer number*) Agent appears.

2. The tool automatically forwards to the Agent Profile page and gives the new agent a unique ID number. This ID number is used internally by the KANA Response Live system to differentiate agent accounts.

3. Modify the properties of an agent in one of two ways:

   a. Click the **Edit** link on the same line as the new agent, or

   b. Check the box to the left of the new agent and click **Edit** at the top of the page.

Deleting Agent Accounts

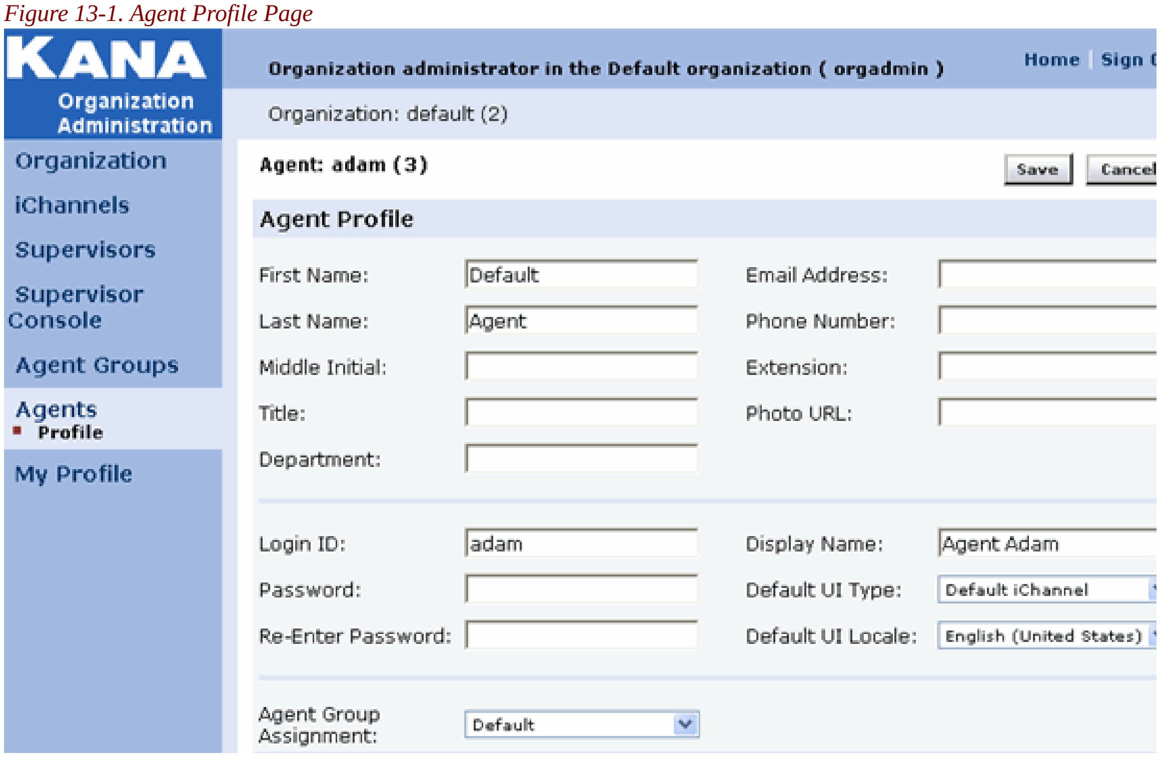
Once an agent is deleted using the Organization Administration tool, the agent is also deleted from the database. Hence, it cannot be undeleted.Care should be taken when deleting agents as information about changes made by these agents are lost if using KANA Response Live's database module to store configuration information. Hence, it is recommended to backup database files regularly or delete agent accounts by moving them to an inactive iChannel.

Because agents can only change personal information, losing the history of their edits is unlikely to cause problems.

Agent Profiles

Click **Edit** on the Agents Main page to see the agent Profile page. (See Figure 13-1.) Go to "Chapter 16: Profiles" for an explanation of the form fields in the Profile page.

Figure 13-1. Agent Profile Page



Assigning Agents to Agent Groups

All agents are assigned to an agent group. When they are cobrowsing with customers, they work within the iChannels defined for this group. They can change iChannels when they move from customer to customer.

The list of agent groups is automatically carried over from the Agent Groups section of the Organization Administration tool.

The list of agent names depends on the identity of the person who is logged on. An organization administrators sees all agent names. A supervisor sees only the agents they oversee through their agent group assignments.

To assign agent group membership:

1. Select the agent group from the **Agent Group Assignment** pull down menu at the bottom of the Profile page.

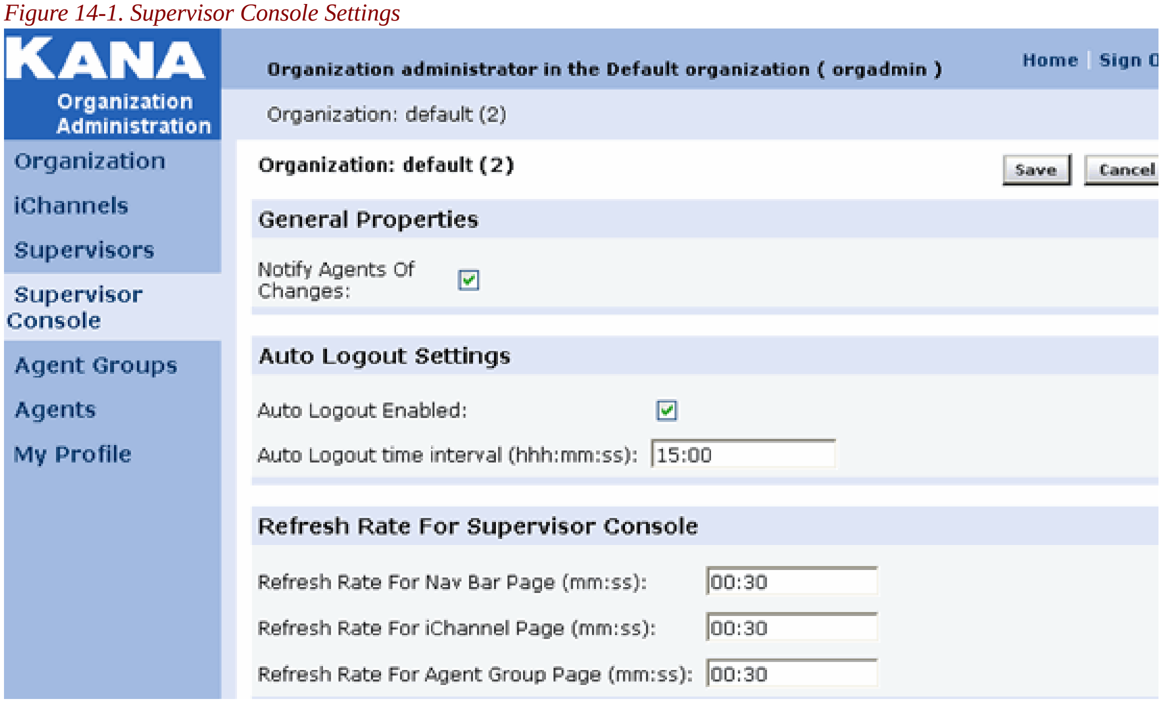
2. Click **Save**.

14 Supervisor Console Settings

The Supervisor Console is used to by supervisors to monitor the status of the queues for which they are responsible. Refer to Figure 14-1.

See "Chapter 10: Customizing the iChannel Chat Settings" and "Chapter 15: Supervisor Accounts & Agent Assignments" for additional Supervisor Console Settings.

Figure 14-1. Supervisor Console Settings



General Properties

Configure the supervisor console with the Supervisor Console pages (Supervisor Console menu).

- **Notify Agents of Changes:** Turn this option on so that agents receive a message in a pop up window informing them when they have been reassigned to another agent group.

Auto Logout Settings

For security reasons, a supervisor can be logged out of the Supervisor Console, if he is not actively using the tool. The following settings configure the auto logout functionality:

- **Auto Logout Enabled:** Turn this option on to automatically log out a Supervisor Console user if there has been no activity for the time specified by the **Auto Logout Interval** setting. The supervisor is prompted as to whether or not he wants to continue using the Supervisor Console after the logout interval.
- **Auto Logout Interval (hh:mm:ss):** The time after which if there has been no activity (no mouse clicks) in the Supervisor Console to logout the supervisor. The supervisor is prompted as to whether

or not he wants to stay logged in about one minute before this logout interval. If he does not click OK within one minute, he is logged out.

Refresh Rate For Supervisor Console

The Supervisor Console is designed to be a real time monitor of queue statuses in the KANA Response Live system. However, a constant flickering of the pages in the Supervisor Console may be distracting to supervisors monitoring the queues. Hence, the refresh rate for the information displayed is adjustable with the following settings:

- **Refresh Rate For Nav Bar Page (mm:ss):** This sets how often the Queue Status page updates in the Supervisor Console. This is the main monitoring page in the Supervisor Console.
- **Refresh Rate For iChannel Page (mm:ss):** This sets how often the Assign iChannels to Agent Group page updates in the Supervisor Console.
- **Refresh Rate For Agent Group Page (mm:ss):** This sets how often the Assign Agents to Agent Group page updates in the Supervisor Console.
-

15 Supervisor Accounts & Agent Assignments

Supervisors oversee agents and agent groups. This chapter explains how organization administrators:

- Create supervisor accounts
- Change information relating to supervisor accounts
- Assign agent groups to supervisors

Supervisors do not have access to any of the pages in described in this chapter.

Supervisor Accounts

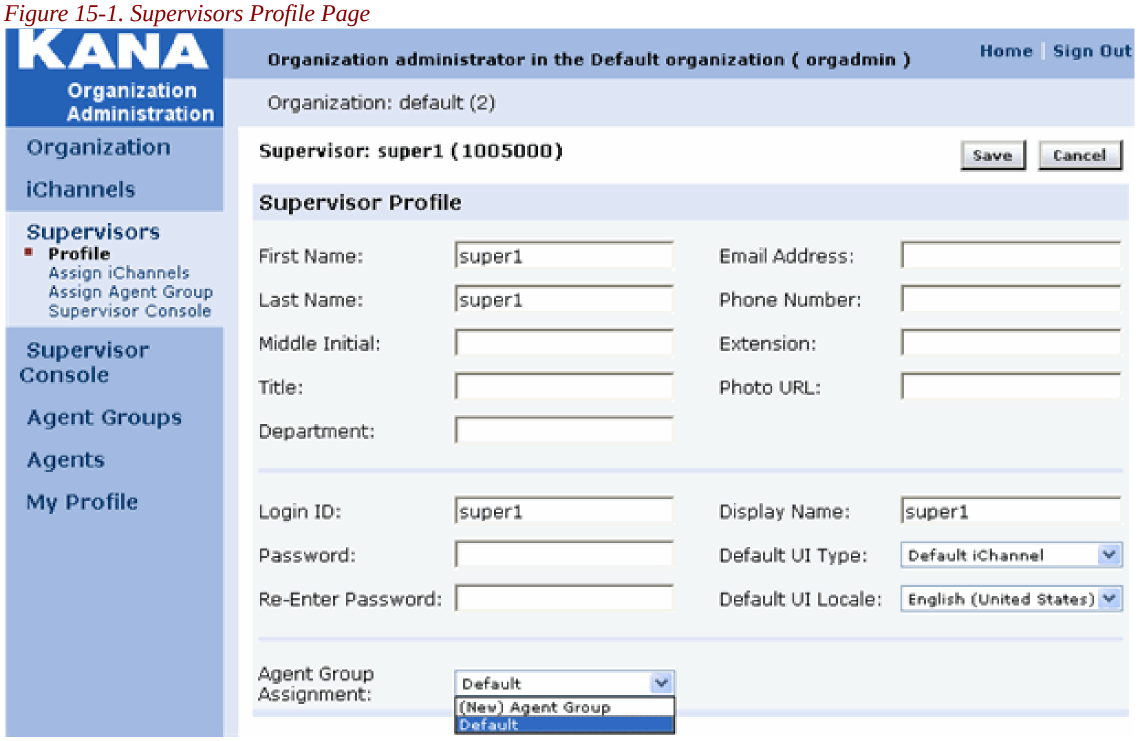
Supervisors manage agent accounts and agent groups for which they have responsibility. The organization administrator assigns these responsibilities when supervisor accounts are created. Supervisors can then log into the Organization Administration tool and manage their agents and agent groups. Hence, supervisors have access to the **Agent** and **Agent Groups** menus.

Creating & Modifying Supervisor Accounts

Create at least one iChannel and at least one agent group before creating a supervisor.

Click **Supervisors** in the left menu to display the Supervisors' Main page. Selecting a supervisor account to edit will display the Profile page. See Figure 15-1.

Figure 15-1. Supervisors Profile Page



The KANA Response Live system assigns a supervisor a unique ID number when the account is created. This ID number is used internally by the KANA Response Live system. This number cannot be changed by an organization administrator.

Deleting Supervisor Accounts

Once a supervisor account is deleted using the Organization Administration tool, the supervisor information is also deleted from the database. Hence, the account cannot be restored. Care should be taken when deleting supervisors as information about changes made by these supervisors are deleted from the KANA Response Live database. Hence, it is recommended to backup database files regularly.

Assigning iChannels to Supervisors

A supervisor is assigned iChannels, which he in turn isauthorized to assign to agent groups. The iChannels Assigned to Supervisors page is accessed through the **Assign iChannels** (Supervisors) menu and is used to assign iChannels to a supervisor. See Figure 15-2.

Figure 15-2. Assigning iChannels to Supervisors

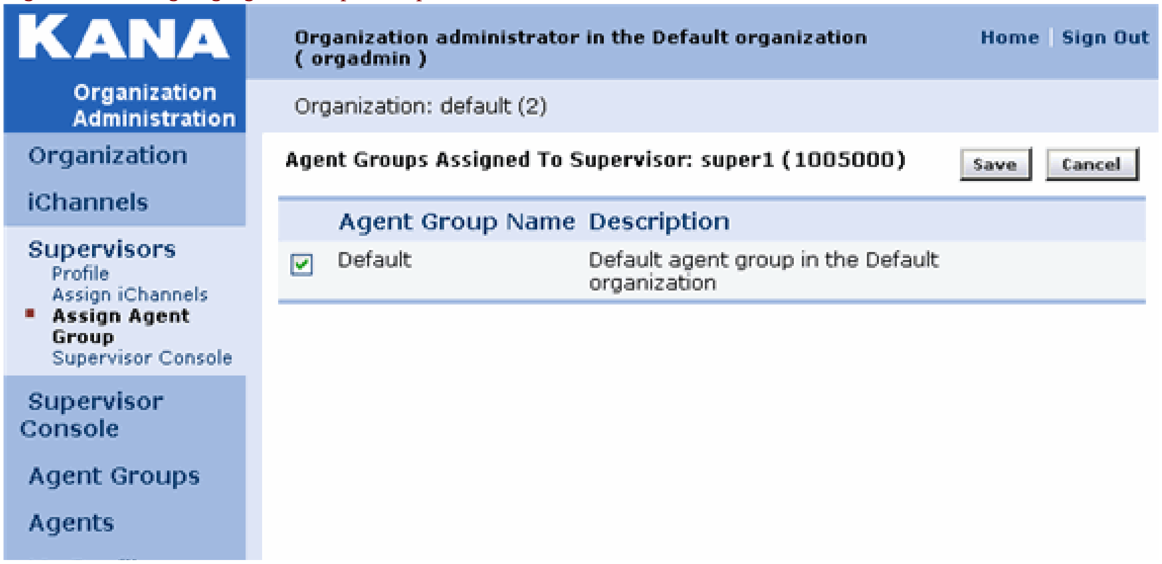
Assigning Agent Groups to Supervisors

Supervisors oversee one or more agent groups. Agents are assigned to supervisors through agent groups as every agent must belong to an agent group.

The **Assign Agent Group** (Supervisors menu) page is used to assign agent groups to a supervisor. See Figure 15-3. For agents, agent groups, and iChannels for which he is responsible, a supervisor can:

- Modify agent account information
- Move agents between agent groups
- Modify agent group profiles
- Reassign iChannels to agent groups

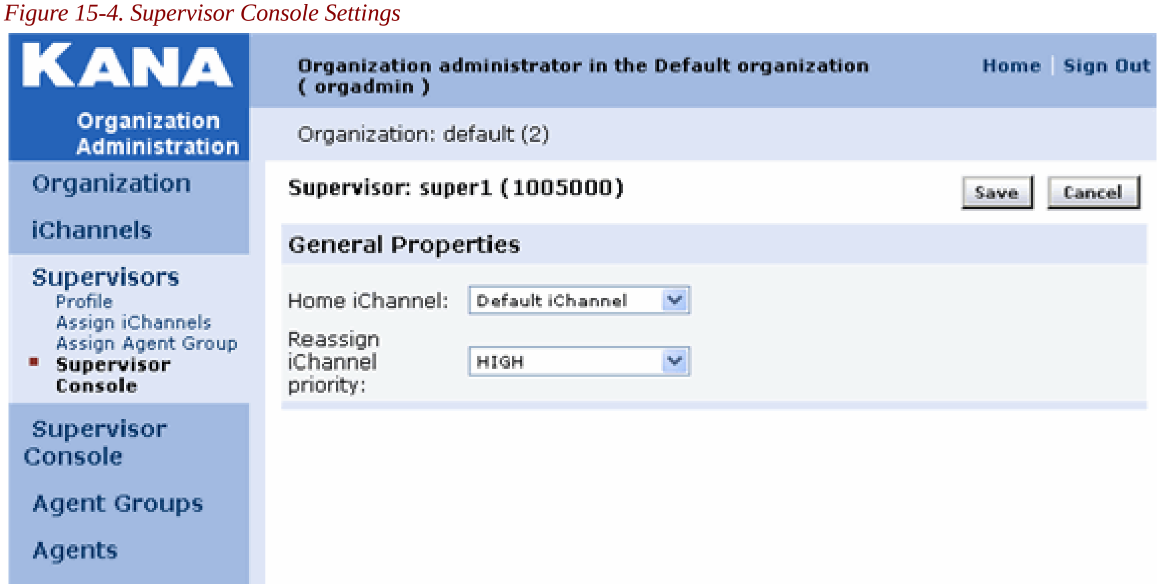
Figure 15-3. Assigning Agent Groups to Supervisors



Supervisor Console

The Supervisor Console application is used only with the Response Live chat product. See "Chapter 14: Supervisor Console Settings" and "Chapter 10: Customizing the iChannel Chat Settings" for additional Supervisor Console settings. The Supervisor Console page is accessed through the **Supervisor Console** (Supervisors) menu and is used to assign iChannel priorities and the default iChannel for a supervisor in the Supervisor Console. See Figure 15-4.

Figure 15-4. Supervisor Console Settings



General Properties

- **Home iChannel:** The default iChannel a supervisor enters when he logs into the Supervisor Console. Only iChannels that have been assigned to the supervisor appear in the pull-down list.
- **Reassign iChannel Priority:** When an iChannel is reassigned, it also gets assigned a priority in thequeue. This option determines whether a reassigned iChannel gets a HIGH or LOW priority in the queue. The

default value is HIGH, which assumes that the main reason to reassign an iChannels is because the iChannel's queue needs more immediate attention.

16 Profiles

Organization administrator, supervisor, and agent accounts all have profiles associated with them. Profiles can be modified as follows:

- Each KANA Response Live user can update his own account information through the My Profile page (My Profile menu) in the Organization Administration tool. Agents can only change their phone number, name, title, department, email address, photo URL, and password. They cannot change the agent group to which they are assigned.
- Supervisors can update agent account profiles for agents under their supervision through the Profile (Agents menu) page.
- Organization administrators can update all agent account profiles through the Profile (Agents menu) page and supervisor account profiles through the Profile (Supervisor menu) page.

Use the My Profile page to edit your personal KANA Response Live user account. Use the Agent Profiles page to modify information for agent accounts. See Figure 16-1. Use the Supervisors Profiles page to modify information for supervisor accounts.

Figure 16-1. Agent Profile Page

The following information determines a user's profile:

- **First Name**, **Last Name**, **Middle Initial**, **Title**, **Department**, **Email Address**, **Phone Number**, and **Extension:** Basic information about the user account.
- **Photo URL:** This optional URL points to the location on an agent photo that a customer sees during a cobrowsing session. The URL must begin with either https:// or http://. Photos of supervisors and organization administrators are never seen by customers.
- **Login ID:** This is the login ID for the user and is shown in the UI to indicate who is logged onto a KANA Response Live Web-based application. This ID must be unique for all users in an organization.
- **Display Name:** This is the name for the agent that a customer sees during a cobrowsing session. This name also appears in the Organization Administrator tool for the logged in user.
- **Password and Re-Enter Password:** These lines appear blank after clicking Save. A supervisor can change his own password.
- **Default UI Type:** Select the default iChannel that an agent enters when he logs onto the KANA Response Live system and has not helped a customer yet. This iChannel determines the UI colors, fonts, and text the user sees when signed in.
- **Default UI Locale:** Specifies the user's language/alphabet, so characters are rendered correctly on the screen.

Appendix A: Business Rules

This chapter explains how to write business rules and how to change information relating to them. Only organization administrators can add business rules through the Organization Administration tool. However, someone else can write the actual rules.

Companies often need to enforce a variety of legal and corporate policies within the KANA Response Live system. Examples of these policies might include “Agents must not see customer passwords or credit card numbers” or “Agents may not submit a purchase order on behalf of a customer.”

Business rules are written in KANA Response Live’s Business Process Definition Language (BPDL), an XML based language. Business rules are enforced at run time by the KANA Response Live business rules engine. An important feature of business rules is that they are completely separate from Web pages. Adding, implementing, and changing business rules do not require changes to your company’s Web site.

Business rules are useful for limiting the capabilities of users in a cobrowsing session. They can apply to an individual user, or they can be specified by agent or customer group. In a typical scenario, most of the restrictions are on agents. By preventing agents from performing sensitive actions and seeing sensitive data, companies can maintain an accurate audit trail for client accounts. A KANA Response Live systems keeps information about cobrowse and chat sessions in a database for the purposes of determining what actions were performed by which users during a KANA Response Live sessions if necessary in the future.

This chapter provides information about writing business rules and using the business rule definition language. This chapter assumes you are familiar with XML.

See “Chapter 8: Customizing iChannel Cobrowse Settings”, **Business Rules** section, for instructions on adding business rules to an iChannel.

Business Rule Document Structure

The business rules document contains an assumed header section and a business rules definition section. The validity of the document is enforced by the document type definition (DTD). The DTD as well as an XML style sheet are provided by the KANA Response Live system.

Document Type Definition (DTD)

The DTD defines an XML document structure with a list of valid elements. The business rule DTD is available for viewing on the **Cobrowse > Business Rules > Edit** (iChannels menu) page. The DTD is set by the KANA Response Live system and cannot be modified through the Organization Administration tool.

Business Rule Definitions Section

The business rule definitions follow the header information. The definitions must be between the <BUSINESS_RULES> and </BUSINESS_RULES> tags. The <BUSINESS_RULES> tag begins the business rule definitions. The </BUSINESS_RULES> tag ends the business rule definitions and must always be the last tag in the document.

The following lines is an example of the business rule definitions section.

```
<BUSINESS_RULES>
        business rule definitions
</BUSINESS_RULES>
```

The business rule definitions are explained in later sections.

Formulating Business Rules

It is useful when formulating business rules to think of them as statements of business functions having *if* and *then* parts. The *if* part specifies the conditions for a rule to be true. The *then* part of a rule states what happens if the rule is true. Once the rules are formulated this way, they can be converted to the KANA Response Live Business Rule Definition Language.

Following are some examples of business rule *if-then* formulations:

- *If* the user is an agent and is submitting a form…. *Then* don't allow the form to be submitted. Instead, tell the agent that this action is not allowed.
- *If* the user is a guest and is entering a password in a form…. *Then* don't display the password to other users in the cobrowsing session.
- *If* the user is clicking on a link that leads the cobrowsing session out of an approved area…. *Then* don't allow the cobrowsing session to traverse the link.

Rule Precedence

Because most of the rules deal with preventing actions for security purposes, KANA Response Live's rules engine takes a pessimistic view of permissions. Thus, if any business rule prohibits an action, the action is not allowed — regardless of whether other business rules allow it.

Business Rules Definitions & Declarations

The business rules definition section consists of conditions and actions tags.

- The condition tags define groups of users or pages.
- The action tags define restrict operations, which can be based on the groups defined with condition tags.

Condition Definitions

Conditions are defined with the DEFINE XML tag and can have the following basic attributes:

- URL or path of a page under consideration (`DOMAIN` attribute). See the “DEFINE DOMAIN” section.
- User type (`USER_TYPE` attribute). See the “DEFINE USER_TYPE” section.
- User name (`USER_NAME` attribute). See the “DEFINE USER_NAME” section.

For each attribute, declare conditions, if desired, by using string comparisons, such as `ENDS_WITH` or `CONTAINS`. For example, < ... *attribute* = “*string*” `COMPARISON = BEGINS_WITH` .../> means if the attribute begins with *string* the condition is true. String comparison operators are not case-sensitive.

Conditions are often declared in `INCLUDE` and `EXCLUDE` tags. Many of the examples later in this appendix show the usage of these tags as well as the definition declarations.

The following is the general syntax for the `DEFINE` tag:

```
<DEFINE DOMAIN = "domainName" | USER_NAME = "userName" |
   USER_TYPE = "userType">
   <INCLUDE TYPE = "AGENT | GUEST"/>
   <EXCLUDE TYPE = "AGENT | GUEST"/>
   <INCLUDE HOST = "HostURL | ALL" HOST_COMPARISON =
      "ENDS_WITH | CONTAINS | EQUALS"/>
   <INCLUDE PATH = "PathURL" PATH_COMPARISON =
      "BEGINS_WITH | ENDS_WITH | CONTAINS | EQUALS"/>
   <INCLUDE NAME = "Name" COMPARISON = "BEGINS_WITH |
      ENDS_WITH | CONTAINS | EQUALS"/>
   <EXCLUDE HOST = "HostURL | ALL" HOST_COMPARISON =
      "ENDS_WITH | CONTAINS | EQUALS"/>
   <EXCLUDE PATH = "PathURL" PATH_COMPARISON =
      "BEGINS_WITH | ENDS_WITH | CONTAINS | EQUALS"/>
   <EXCLUDE NAME = "Name" COMPARISON = "BEGINS_WITH |
      ENDS_WITH | CONTAINS | EQUALS"/>
</DEFINE>
```

DEFINE DOMAIN

The `DEFINE DOMAIN` tag defines Web addresses based on the URLs of destinations to include or exclude from a cobrowsing session. For example, use this tag to exclude people from cobrowsing outside the company’s Web site or viewing beta-version sections of the site while cobrowsing. A defined domain can also be used in conjunction with actions.

The following is the general syntax for the `DEFINE` tag’s `DOMAIN` attribute:

```
<DEFINE DOMAIN = "domainName">
   <INCLUDE TYPE = "AGENT | GUEST"/>
   <EXCLUDE TYPE = "AGENT | GUEST"/>
   <INCLUDE HOST = "HostURL | ALL" HOST_COMPARISON =
      "ENDS_WITH | CONTAINS | EQUALS"/>
   <INCLUDE PATH = "PathURL" PATH_COMPARISON =
      "BEGINS_WITH | ENDS_WITH | CONTAINS | EQUALS"/>
   <INCLUDE NAME = "Name" COMPARISON = "BEGINS_WITH |
      ENDS_WITH | CONTAINS | EQUALS"/>
```

```
    <EXCLUDE HOST = "HostURL | ALL" HOST_COMPARISON =
        "ENDS_WITH | CONTAINS | EQUALS"/>
    <EXCLUDE PATH = "PathURL" PATH_COMPARISON =
        "BEGINS_WITH | ENDS_WITH | CONTAINS | EQUALS"/>
    <EXCLUDE NAME = "Name" COMPARISON = "BEGINS_WITH |
        ENDS_WITH | CONTAINS | EQUALS"/>
</DEFINE>
```

Keep the following points in mind when using the DEFINE DOMAIN tag:

- String comparison operators are not case-sensitive.
- The HOST attribute value ALL excludes or includes all sites.
- <INCLUDE HOST = "ALL"/> is the assumed default tag, if no INCLUDE tags are used in the business rule. Thus, if sites are not specifically excluded, the KANA Response Live system allows cobrowsing to all Web sites.
- It is common to use <EXCLUDE HOST = "ALL"/> as the first tag in a list of <EXCLUDE/> and <INCLUDE/> tags. This tag is followed by a list of <INCLUDE/> tags ordered by increasing specificity. This format makes it easy for a company to limit cobrowsing to areas of its Web site by first excluding all Web sites and then including the desired parts of the company site.
- The KANA Response Live system checks the INCLUDE and EXCLUDE tags starting from the bottom of the list. It moves up the list until it finds a match for the requested URL and acts upon the instruction. If all the tags are evaluated without the URL being excluded or included, then by default the URL is included in the domain.
- The host part of a URL is the portion reading *www.yahoo.com*. The path part of a URL follows the host part. For example *dogs* is the path part of *www.yahoo.com/dogs*.
- HOST_COMPARISON does not have the BEGINS_WITH value because it is not logical due to the way Internet URLs are constructed. A specified URL can always be appended to other URLs, thus, using BEGINS_WITH would not make the comparison true in all cases for the specified URL. Using ENDS_WITH or CONTAINS is common for comparisons.
- When using the PATH attribute, the leading / in the path name is not required as the comparison matches a string.
- When using the PATH attribute, the path name should not include arguments used by the page(s).
- If the USER_NAME attribute is not used, then the rule applies to all users.

- If the USER_TYPE attribute is not used, then the rule applies to all user types.
- A domain can be used in other business rules to restrict actions. For instance, a domain defined as 401K ACCOUNTS can be referred to later as <DESTINITION DEFINITION = “401K ACCOUNTS’/>. See the “Action Declarations: Overview” section.

HOST Declaration Examples

The following example includes only the Bank With Us company’s Web pages in the BANKWITHUS ONLY domain:

```
<DEFINE DOMAIN = "BANKWITHUS ONLY">
    <EXCLUDE HOST = "ALL"/>
    <INCLUDE HOST = ".bankwithus.com" HOST_COMPARISON =
        "CONTAINS"/>
</DEFINE>
```

The following example will not only include the Bank With Us company's Web pages in the BANKWITHUS ONLY domain. It includes all the domains and URLs because by default the DOMAIN definition includes all.:

```
<DEFINE DOMAIN = "BANKWITHUS ONLY">
    <INCLUDE HOST = ".bankwithus.com" HOST_COMPARISON =
        "CONTAINS"/>
</DEFINE>
```

The following example excludes only The Other Bank company’s Web pages in the EXLCLUDE THEOTHERBANK domain:

```
<DEFINE DOMAIN = "EXCLUDE THEOTHERBANK">
    <EXCLUDE HOST = ".theotherbank.com" HOST_COMPARISON =
        "CONTAINS"/>
</DEFINE>
```

The following is an example of a list of included and excluded domains.

```
<DEFINE DOMAIN = "BANKWITHUS AND OTHERS">
    <INCLUDE HOST = "ALL"/>
    <EXCLUDE HOST = ".co.uk"/>
    <INCLUDE HOST = ".bankwithus.com" HOST_COMPARISON =
        "ENDS_WITH"/>
    <EXCLUDE HOST = ".beta.bankwithus.com"/>
</DEFINE>
```

Scenario 1: Is the URL www.bankwithus.com/401K in this domain? The KANA Response Live system compares the host part of thisURL with the last tag in the definition and finds no match. It moves to the previous tag. The KANA Response Live system finds a match on this line, so the site isin the BANKWITHUS AND OTHERS domain. The term `HOST_COMPARISON` = "`ENDS_WITH`" means the KANA Response Live system compares the end of the requested host with what is included in the `INCLUDE HOST` entry. The requested host must end with bankwithus.com in order for the system to deem it a match for the `INCLUDE HOST` entry. If the `HOST_COMPARISON` tag says "`CONTAINS`," the system simply checks to see if the host contains bankwithus.com in any position.

Scenario 2: Is the URL www.theotherbank.co.uk in this domain? No, because all .co.uk sites have been excluded. Any domain not excluded by the exclude tags is in the domain under these rules because the topmost entry uses the `ALL` tag to include all other Web sites.

PATH Declaration Examples

In addition to the `HOST` attribute, which operates on the host name of a Web site, `DEFINE DOMAIN` can also use a `PATH` attribute. This allows the definition to be restricted to subsections of a Web site.

The following example excludes internal pages in the `DO NOT COBROWSE INTERNAL SITES` domain:

```
<DEFINE DOMAIN = "DO NOT COBROWSE INTERNAL SITES">
    <INCLUDE PATH = "ALL"/>
    <INCLUDE PATH = "internal" PATH_COMPARISON =
        "CONTAINS"/>
</DEFINE>
```

The following example shows how to remove a URL containing the word 401K in its path.

```
<DEFINE DOMAIN = "BANKWITHUS NO 401K">
    <EXCLUDE HOST = "ALL"/>
    <INCLUDE HOST = ".bankwithus.com" HOST_COMPARISON =
        "ENDS_WITH"/>
    <EXCLUDE HOST = ".bankwithus.com" HOST_COMPARISON =
        "ENDS_WITH" PATH = "401K" PATH_COMPARISON =
        "CONTAINS" />
</DEFINE>
```

This domain definition includes URLs such as http://www.bankwith.com, but excludes http://www.bankwithus.com/401K.

This process can get tricky. For instance, the exclude tag allows the URL http://401K.yahoo.com because 401K is part of the host name, not the path.

DEFINE USER_TYPE

The DEFINE USER_TYPE tag defines a set of users. The KANA Response Live system has GUEST and AGENT users. Before writing business rules, use the USER_TYPE tag to define more user types as sub-groups of GUEST and AGENT. Making sub-groups gives flexibility by allowing different privileges to be assigned to different sub-groups of users.

- If supervisors are also to be governed by business rules that are agent specific, turn on the iChannel**Apply Agent Business Rules to Supervisor** property on the **General** > **Properties** (iChannel menu) page. See the“Miscellaneous Properties” in Chapter ;“” for more information on the **Apply Agent Business Rules to Supervisor** property.
- If a business rule does not have a user type domain restriction, then it applies to all users; supervisors, agents, and guests as well as any defined user types.

DEFINE USER_TYPE Examples

The following example definitions give different privileges to senior agents. Similarly, customer groups can be defined under the term GUEST and then can give different privileges to members of these groups as distinct from each other or, more commonly, from agents.

```
<DEFINE USER_TYPE = “SENIOR AGENTS”>
   <INCLUDE TYPE = “AGENT” COMPARISON = “BEGINS_WITH”/>
</DEFINE>
```

DEFINE USER_NAME

The DEFINE tags’s USER_NAME attribute allows a user group to be assigned in a more specific manner than the USER_TYPE command. Usually, the tag is used to define a user based on their login name.

The DEFINE tags’s USER_NAME attribute is rarely used.

DEFINE USER_NAME Example

The rule in the following example is useful if, for some reason, Fred needs privileges that are different from everyone else’s. This rule makes For example, Fred may be a senior agent with twenty years experience and, hence, trusted more than other senior agents. Alternatively, he may be a new employee who has not earned any privileges more advanced than the very basic ones, resulting in very restricted privileges.

```
<DEFINE USER_NAME = “FRED”>
   <INCLUDE NAME = “FRED” COMPARISON = “BEGINS_WITH”/>
</DEFINE>
```

Action Declarations: Overview

After declaring the definitions, define actions. Actions are defined using the <ACTION/> tag. The following is the general syntax for an <ACTION/> tag:

```
<ACTION TYPE = "ONLY_ALLOW_URL | FUNNEL IMAGE |
    PREVENT_FORM_SUBMIT | PREVENT_FORM_FILL |
    SECURE_FORM_FILL | PRESERVE_HISTORY">
        Optional tags to restrict action
</ACTION>
```

The optional tags that are valid for each action type are outlined below and then described in detailed in later sections. See "Action Declarations: Detail" below.

The KANA Response Live system has the following business rule actions:

- ONLY_ALLOW_URL. This action prevents an agent and/or customer from leading a cobrowse session to certain URLs.

- PREVENT_FORM_SUBMIT. This action prevents someone from submitting a form. It is typically used to prevent an agent from submitting a form on behalf of a customer. For example, a form that submits a purchase order should only be allowed to be submitted by a customer.

  If a form submit redirects the user to a new Web page, which is restricted by a domain restriction, the user receives an error dialog message stating the action is not allowed and is returned to the page containing the submitted form. To the user, it may appear that his form was not submitted. However, the form information has been sent to the server. The user may re-submit the form and cause multiple form submits to the server. Hence, it is recommended that form submits not redirect users to a new page because, for example, the user could submit the same purchase request multiple times.

- PREVENT_FORM_FILL. This action prevents someone from changing the value of a form field. It is usually used for the same reasons as preventing form submissions. For example, there are many cases when a agent should not edit fields that may alter the amount of money that a customer can spend.

  `PREVENT_FORM_SUBMIT` and `PREVENT_FORM_FILL` are critical actions for security and privacy. These actions:

  – Prevent agents from making decisions that only customers should make.
  – Provide solid evidence that a customer, not an agent, submitted a particular purchase order. This audit trail is critical if, for example, a customer makes a purchase, later regrets his decision, and claims that the agent specified and submitted the order.
  – Alleviate the need for the KANA Response Live system to store confidential information. On the other hand, if agents were allowed to enter confidential information, the audit trail would require that the KANA Response Live system to store this information, which would be a security and privacy issue.

This problem is prevented by allowing only one person — the customer — to enter confidential information.

It is recommended to verify that `PREVENT_FORM_SUBMIT` and `PREVENT_FORM_FILL` have been used correctly by examining the business rule document closely and testing the business rules in a simulated customer-agent cobrowsing session.

- SECURE_FORM_FIELD. This action prevents someone from seeing the value of a form field when it is changed by someone else. It is usually used to provide strong security for fields involving authorization, such as password or credit card fields.

- FUNNEL_IMAGE. This action forces binary content (images, PDFs, and audio) and **.css** files on certain pages to be passed through (funneled) the KANA Response Live's proxy server. Because of the bandwidth cost, by default, most binary content is not passed through the server, but rather goes directly from the source to each browser in a cobrowsing session. Image funneling also degrades system performance. However, image funneling is usually required when a system must validate the requester's identity before it sends the binary content. For example, when a customer requests a bar chart showing asset allocations in his retirement account, the bar chart image should be funneled through the server. Use the action `FUNNEL_IMAGE` to tell the system to funnel binary content from specific pages through the server. This action funnels binary content based on page source, not binary content source.

- PRESERVE_HISTORY. This action helps keep cobrowse sessions on the same page when quickly navigating through a sequence of pages. For example, when using a "wizard," which often executes JavaScript on the computers of all users in a cobrowse session, the JavaScript can get out of sync. This action prevents a user from leaving a page until the other person in the cobrowsing session has loaded the page too. The person leaving a page does not have to wait until all other users in a session have loaded the page. This action in effect slows down the next page loading by up to 30 seconds.

Action Declarations: Detail

The optional tags that are valid for each action type are outlined above and then described in detailed here. See "Action Declarations: Overview" above.

ONLY_ALLOW_URL

The `ONLY_ALLOW_URL` action is the simplest of the business rule actions. By itself, this rule says that no user in a cobrowsing session, either agent or customer, can lead the session to URLs outside the domain named YAHOO ONLY.

The domain is called by its name, but it must actually refer to a domain defined in the conditional section of the rules document.

If a restriction is only intended for certain types of users, or for users with specific names, additional information can be added.

The ONLY_ALLOW_URL syntax is as follows:

```
<ACTION TYPE = “ONLY_ALLOW_URL”>
    <USER_NAME DEFINITION = “name”/>
    <USER_TYPE DEFINITION = “userType”/>
    <DESTINATION DEFINITION = “previouslyDefinedDomain”/>
    <JAVASCRIPT CONTENT = “string” COMPARISON = “BEGINS
        WITH | ENDS_WITH | CONTAINS | EQUALS”/>
</ACTION>
```

- The ONLY_ALLOW_URL action should normally have a DESTINATION definition.
- The USER_NAME and USER_TYPE definition are optional for the ONLY_ALLOW_URL action.
- If the USER_NAME definition is not used, then the rule applies to all users.
- If the USER_TYPE definition is not used, then the rule applies to all user types.
- Domain restrictions in actions are ignored for dynamic start pages that contain live help buttons.
- Using the JAVASCRIPT tag is only enforced onthe client-side. It prevents JavaScript URL executions. JavaScript URLs are generalized link clicks used when some client side operations need to been done before a page transition. For example, when validating form values before submitting a form or displaying a progress bar if a page download will take time because authentication needs to be done.

  An example of a JavaScript URL is:

```
<script>
    function validateAndSubmitForm() {
        if (formIsComplete(theForm)) {
             theForm.submit();
        }
    }
</script>
    <a
        href=”javascript:validateAndSubmitForm(();”>Submit
        </a>
```

If an agent and a customer are cobrowsing, the JavaScript URL executes in both browsers. Thus, of a JavaScript URL is used to submit forms and the agent clicks the URL, both browsers attempt to submit the form. If the agent isn’t allowed to submit the form, the form isn’t submitted to the server, but it appears to have been submitted in the customer’s browser.

Most often the JavaScript URL restriction is used in combination with the user type restriction.

ONLY_ALLOW_URL Action Examples

The following example prevents all users from leading the cobrowsing session to locations outside of BANKWITHUS ONLY.

```
<ACTION TYPE = "ONLY_ALLOW_URL">
    <DOMAIN DEFINITION = "BANKWITHUS ONLY"/>
</ACTION>
```

The following rule simply prohibits certain user from leading the cobrowsing session to locations outside of BANKWITHUS ONLY.

```
<ACTION TYPE = "ONLY_ALLOW_URL">
    <DOMAIN DEFINITION = "BANKWITHUS ONLY"/>
    <USER_NAME DEFINITION = "DAVE"/>
    <USER_TYPE DEFINITION = "GUEST"/>
</ACTION>
```

The following rule prevents allJavaScript URLs from executing when clicked by a guest.

```
<ACTION TYPE = "ONLY_ALLOW_URL">
    <DOMAIN DEFINITION = "BANKWITHUS ONLY"/>
    <USER_TYPE DEFINITION = "GUEST"/>
    <JAVASCRIPT CONTENT = "javascript:" COMPARISON =
       "CONTAINS">
</ACTION>
```

PREVENT_FORM_SUBMIT

The `PREVENT_FORM_SUBMIT` action can prevent certain users from submitting forms. With form-based actions the domain restriction is not related to the Web page being viewed. Instead, it is related to the form target (e.g., the URL of the form action). For this reason, the restriction is named `DESTINATION` rather than `DOMAIN`.

`The PREVENT_FORM_SUBMIT action has the following syntax:`

```
<ACTION TYPE = "PREVENT_FORM_SUBMIT">
    <USER_NAME DEFINITION = "name"/>
    <USER_TYPE DEFINITION = "userType"/>
    <DESTINATION DEFINITION = "previouslyDefinedDomain"/>
    <FORM NAME = "formName" COMPARISON = "BEGINS_WITH |
       ENDS_WITH | CONTAINS | EQUALS"/>
    <WHEN FIELD_NAME = "fieldName" NAME_COMPARISON =
       "BEGINS_WITH | ENDS_WITH | CONTAINS | EQUALS"
       FIELD_VALUE = "fieldValue" VALUE_COMAPRISON =
       "BEGINS_WITH | ENDS_WITH | CONTAINS | EQUALS" />
</ACTION>
```

- The `PREVENT_FORM_SUBMIT` action must have a `DESTINATION` definition.
- If the `USER_NAME` definition is not used, then the rule applies to all users.
- If the `USER_TYPE` definition is not used, then the rule applies to all user types.

- USER_NAME, USER_TYPE, DESTINATION, FORM, and WHEN tags do not need tobe included inthe PREVENT_FORM_SUBMIT action. When none of these tags are included, PREVENT_FORM_SUBMIT prevents all forms from being submitted by all user.
- The WHEN tag prevents form submits based on field values.
- Multiple WHEN tags can exist in a business rule All comparisons must match for the rule to be true. If the comparison matches any field in a form, the rule is true.
- The WHEN tag does not need to specify the FIELD_NAME attribute if itspecifies FIELD_VALUE attribute. In this case, if the value matches any field in the form, the condition is true.

PREVENT_FORM_SUBMIT Action Example

This following declaration example prevents users of type CSR from submitting any form with target in the BANKWITHUS ONLY domain and name containing Buy. CSR would have had to be previously defined as a user type.

```
<ACTION TYPE = “PREVENT_FORM_SUBMIT” >
   <USER_TYPE DEFINITION = “CSR” />
   <DESTINATION DEFINITION = “BANKWITHUS ONLY” />
   <FORM NAME = “Buy” COMPARISON = “CONTAINS” >
</ACTION>
```

The following example uses the WHEN tag to only prevent form submission if the form has a field whose name begins with GUEST and when the value is back.

Assume the Web page has a input form with an HTML such as:

```
<FORM>
   <input type=”text” name=”lastname” value=”type your
      name here”>
   <input type=”submit” name=”submitb value=”back”>
   <input type=”submit” name=”submitf value=”forward”>
</FORM>
```

```
Then a business rule using the
<ACTION TYPE = “PREVENT_FORM_SUBMIT” >
   <USER_TYPE DEFINITION = “GUEST” />
   <WHEN FIELD_NAME = “submit” NAME_COMPARISON =
      “BEGINS_WITH” FIELD_VALUE = “back” VALUE_COMPARISON
      = “CONTAINS” />
</ACTION>
```

PREVENT_FORM_FILL

The PREVENT_FORM_FILL action can prevent certain users from filling out specified fields within a form.

The PREVENT_FORM_FILL action has the following syntax:

```
<ACTION TYPE = “PREVENT_FORM_SUBMIT” >
```

```
    <USER_NAME DEFINITION = "name"/>
    <USER_TYPE DEFINITION = "userType"/>
    <DESTINATION DEFINITION = "previouslyDefinedDomain"/>
    <FORM NAME = "formName" COMPARISON = "BEGINS_WITH |
       ENDS_WITH | CONTAINS | EQUALS"/>
    <FIELD NAME = "formName" COMPARISON = "BEGINS_WITH |
       ENDS_WITH | CONTAINS | EQUALS"/>
</ACTION>
```

- The PREVENT_FORM_FILL action must have a DESTINATION definition.
- If the USER_NAME tag is not used, then the rule applies to all users.
- If the USER_TYPE tag is not used, then the rule applies to all user types.
- USER_NAME, USER_TYPE, DESTINATION, FORM, and FIELD do not need to be included in the PREVENT_FORM_FILL action. When none of these modifiers are included, PREVENT_FORM_FILL prevents all for fields from being filled by all users.
- If the FORM tag, but not the FIELD tag is used, then the rule applies to all fields within that form, but not to all forms.
- If the FIELD tag, but not the FORM tag is used, then the rule applies to any forms having a field with the name designated in the definitions.
- PREVENT_FORM_FILL does not prevent form submits.

In previous KANA Response Live versions form submits were prevented by PREVENT_FORM_FILL .

- Form fields are distinguished by business rules through field names. Hence, form fields that are going to be subject to business rules should have field names.
- If a user with an Internet Explorer browser attempts to type in a form field that they are not authorized to fill, they receive an error dialog box message and the field is reset to its previous value. Most likely the user will not have been able to type any characters in the field before the error dialog box is displayed, and, hence, the field is not reset.
- If a user with a Netscape browser attempts to type in a form field that they are not authorized to fill, they receive an error dialog box message and the field is reset to its previous value. The user may have been able to type a few characters before the error dialog box is displayed and the field reset.
- Metrics are not kept for form fills. Hence, for audit purposes, it is recommended to prevent form fills by agents when the customer could later dispute who completed the form. For example, if a customer orders 1 book, the agent changes the order to 10 books, and the user clicks the submit button, the user can later claim he did not see that the agent had changed the order from 1 to 10 books.

PREVENT_FORM_FILL Declaration Examples

For example, a pair of PREVENT_FORM_FILL action declarations prevent certain users from filling out the Price or Quantity fields in a Buy form:

```
<ACTION TYPE = “PREVENT_FORM_FILL”>
    <USER_TYPE DEFINITION = “AGENT”/>
    <FORM NAME = “Buy” COMPARISON = “CONTAINS”/>
    <FIELD NAME = “Quantity” COMPARISON = “CONTAINS”/>
</ACTION>
```

```
<ACTION TYPE = “PREVENT_FORM_FILL”>
    USER_TYPE DEFINITION = “AGENT”/>
    <FORM NAME = “Buy” COMPARISON = “CONTAINS”/>
    <FIELD NAME = “Price” COMPARISON = “CONTAINS”/>
</ACTION>
```

SECURE_FORM_FIELD

The SECURE_FORM_FIELD tag can prevent agents from seeing confidential customer information, such as passwords, credit card numbers, or other similar information. When a customer types this information during a cobrowsing session, a series of asterisks appears on the agent’s screen.

The SECURE_FORM_FIELD syntax is as follows:

```
<ACTION TYPE = “SECURE_FORM_FIELD”>
    <USER_NAME DEFINITION = “name”/>
    <USER_TYPE DEFINITION = “userType”/>
    <FORM NAME = “formName”/>
    <FIELD NAME = “fieldName”/>
    <DESTINATION DEFINITION = “previously Defined domain”/>
</ACTION>
```

- The SECURE_FORM_FIELD action must have a DESTINATION definition.
- If the USER_NAME tag is not used, then the rule applies to all users.
- If the USER_TYPE tag is not used, then the rule applies to all user types.
- USER_NAME, USER_TYPE, DESTINATION, FORM, and FIELD do not need to be included in the SECURE_FORM_FIELD action. When none of these tags are included, SECURE_FORM_FIELD prevents all fields from being filled out by all users.
- If the FORM tag, but not the FIELD tag is used, then the rule applies to all fields within that form, but not to all forms.
- If the FIELD tag, but not the FORM tag is used, then the rule applies to any forms having a field with the name designated in the definitions.
- SECURE_FORM_FIELD does not prevent form submits.

In previous KANA Response Live versions form submits were prevented by SECURE_FORM_FIELD.

- Form fields are distinguished by business rules through field names. Hence, form fields that are going to be subject to business rules should have field names.

SECURE_FORM_FIELD Declaration Examples

The following example prevents a agent named Bob from seeing the address field in any form.

```
<ACTION TYPE = "SECURE_FORM_FIELD">
   <USER_NAME DEFINITION = "BOB"/>
   <USER_TYPE DEFINITION = "AGENT"/>
   <FORM NAME = "formName"/>
   <FIELD NAME = "address" COMPARISON = "CONTAINS"/>
   <DESTINATION DEFINITION = "BANKWITHUS"/>
</ACTION>
```

FUNNEL_IMAGE

The FUNNEL_IMAGE action determines the binary content on certain pages to be funneled through KANA Response Live's proxy server.

The FUNNEL_IMAGE syntax is as follows:

```
<ACTION TYPE = "FUNNEL_IMAGE">
   <USER_NAME DEFINITION = "name"/>
   <USER_TYPE DEFINITION = "userType"/>
   <DESTINATION DEFINITION = "previouslyDefinedDomain"/>
</ACTION>
```

- The FUNNEL_IMAGE action must have a DESTINATION definition.
- The USER_NAME and USER_TYPE definition are optional for the FUNNEL_IMAGE action and are rarely meaningful in the context of image funneling.
- If the USER_NAME definition is not used, then the rule applies to all users.
- If the USER_TYPE definition is not used, then the rule applies to all user types.
- If the iChannel **Funnel Images** property is turned on from the **Cobrowse** > **Properties** (iChannel menu) page, then all images are funneled for the iChannel regardless of what the business rule says. Hence, if using any FUNNEL_IMAGE actions, turn off the **Funnel Images** property for the iChannel. See the "Properties" in Chapter , "" for more information on the **Funnel Images** property.
- Images that require a cookie in order to be displayed on a Web page, need to be funneled. For example, a user logs onto a Web site to see information about his bank account. In order to get a graph of his bank account balance for the last year, the Web site checks the user's identity via the cookie created when the user logged on. Thus, the image requires a cookie, and the image needs to be funneled.
- Image funneling does not work with docwritten image tags.

FUNNEL_IMAGE Action Example

The following business rule funnels all images from the domain BANKWITHUS ONLY:

```
<ACTION TYPE = "FUNNEL_IMAGE">
   <DESTINATION DEFINITION = "BANKWITHUS ONLY"/>
</ACTION>
```

PRESERVE_HISTORY

The `PRESERVE_HISTORY` action helps keep cobrowse sessions on the same page when quickly navigating through a sequence of pages.

The `PRESERVE_HISTORY` syntax is as follows:

```
<ACTION TYPE = "PRESERVE_HISTORY">
   <USER_NAME DEFINITION = "name'/>
   <USER_TYPE DEFINITION = "userName"/>
   <DESTINATION DEFINITION = "previouslyDefinedDomain"/>
</ACTION>
```

- The `PRESERVE_HISTORY` action must have a `DESTINATION` definition.
- The `USER_NAME` and `USER_TYPE` definition are optional for the `PRESERVE_HISTORY` action and are rarely meaningful in the context of preserving history.
- If the `USER_NAME` tag is not used, then the rule applies to all users.
- If the `USER_TYPE` tag is not used, then the rule applies to all user types.

PRESERVE_HISTORY Action Examples

The following business rule preserves the history in the domain BANKWITHUS ONLY.

```
<ACTION TYPE = "PRESERVE_HISTORY">
   <DESTINATION DEFINITION = "BANKWITHUS ONLY"/>
</ACTION>
```

Business Rule Design Guidelines

For business rules to function properly, Web pages must adhere to the design guidelines in this section. If these design guidelines are not followed, then the business rules will not work as anticipated.

ONCLICK/ONCHANGE

Design Guideline: Do not reset the onclick/onchange of a form field using JavaScript.

If this guideline is not followed, then the client-side validation of entered data for the `PREVENT_FORM_FILL` action does not work and also can overwrite client side event handlers. However, the server-side still prevents the form fill, and hence, the user cannot submit the form.

ONSUBMIT

Design Guideline: Do not change the form state inside the form's `ONSUBMIT` function.

If this guideline is not followed, then the client-side validation of `PREVENT_FORM_SUBMIT` does not work and form fills will not function correctly. However, The server-side `PREVENT_FORM_SUBMIT` does work.

Naming Forms & Fields

Design Guideline: Do not dynamically within the browser set or reset form names, field names, or form actions.

If this guideline is not followed, then the client-side validation of entered data for the `PREVENT_FORM_FILL` action and the client-side restoration of changed field values do not work. Also, the server-side validation for some `SECURE_FORM_FILL` actions does not work.

Consistent Form & Field Names

Design Guideline: Do not use different field or form names or different field orders for Netscape and Internet Explorer rendered pages.

If this guideline is not followed, then the form-filling mechanism may not work (if users have different browsers). However, if the form-filling mechanism works, the business rules still might fail.

URLs

Design Guideline: Do not use mailto or JavaScript URLs in form actions.

Reset Buttons

Design Guideline: Do not use Reset buttons in forms.

If this guideline is not followed, then a user can be prevented from filling fields via the PREVENT_FORM_FILL, but can reset all fields using the Reset button. This causes visual inconsistencies between the two user's browsers.

Appendix B: Tracker Rules

This chapter explains how to write and edit tracker rules. Only organization administrators can add tracker rules through the Organization Administration tool. However, the actual rules can be written by someone else and then handed over to the organization administrator for creation in the tool.

Rules are defined in order to give Organization Administrators some control over which visitors to track when there is a high volume of user activity on their Web site, and specify the actions to take on selected visitors. Examples of rules might include “Increase a visitor’s rank if the visitor has more than $500 in the Shopping Cart” or “Send a chat invitation to a customer who has been browsing the site for at least 10 minutes.”

Tracker Rule Definition

Tracker rules are written in the JavaScript language. They can be created in the Organization Administration Tool, in the **Tracker** -> **Rules** section of the iChannel menu. The rule definition can access the following objects and their properties:

System Object Properties:

Name	Property	Value
Rule Type	ruleType	Client, Server
StartSessionID St	artSessionID	
ContinueID C	ontinueID	
StopSessionID S	topSessionID	
SetRankID S	etRankID	
StartPageID St	artPageID	
StopPageID St	opPageID	
StopVTCID S	topVTCID	
EnableLiveHelpID En	ableLiveHelpID	
DisableLiveHelpID D	isableLiveHelpID	
StopAutoInviteID S	topAutoInviteID	
CloseID Cl	oseID	
Status Types	statusTypes	starting, started, onsite, engaged, chatting, stopped
debug	debug(String)	String to write to debug console for Client-side rules.

Organization object properties:

Name	Property	Value
Id Id		Organization ID
Name N	ame	Organization Name
Active Agents	activeAgents	Number of logged-in agents
Available Agents	availableAgents	Number of logged-in agents available
Active Visitors	activeVisitors	Number of visitor sessions active

iChannel object properties:

Property	Property	Value
Id I	d	iChannel ID
Name Na	me	iChannel Name
Active Agents acti	veAgents N	umber of logged-in agents for this iChannel
Available Agents a	vailableAgents N	umber of logged-in agents available for this iChannel
Active Visitors	activeVisitors	Number of visitor sessions active for this iChannel
Chat Available	chatAvailable	True or False

Visitor object properties:

Name	Property	Value
Visitor ID	visitorId	ID allocated by RL VTC for tracking
Customer ID	customerId	ID provided by Customer web site
Last Visit Date	lastVisitDate	Last visit date time
Last Visit Duration	lastVisitDuration	Duration of last visit
Number of Visits	numberOfVisits	Number of visits till to date
Custom Data	customData	Name/Value pairs of data provided by Customer web site

Session object properties:

Name	Property/ Method	Value
Session ID	sessionId	Browser ID for the session
Start Time	startTime	Session Start Time
Status	status	starting, onsite, engaged
Rank r	ank	Number
Last Page URL	lastPageURL	Referrer URL
Referrer URL	referrerURL	Referrer URL of first page
Visted Pages	visitedPages	Array of page objects
Actions Performed	actionsPerformed	List of comma separated Action IDs
Chat Invite Shown	chatInviteShown	Yes/No
Chat Invite Status	chatInviteStatus	
Last Action Taken	lastAction	Last Action ID
Last Action Status	lastActionStatus	Last Action Status
Last Action Page	lastActionPageURL	URL of the page where last action was taken
Last Action Time	lastActionTime	Last Action taken time
Blackout End Time	blackoutEndTime	DateTime of blackout end time
Custom Data	customData	Name/Value pairs of data provided by Customer web site
Is Action Already Taken	isActionAlreadyTaken(actionId)	Returns true or false
Idle Time	idleTimeSecs	Idle time after last action

Page object properties:

Name	Property	Value
Page ID	pageId	ID allocated by RL VTC
URL p	ageURL	Page URL
Referrer URL	referrerURL	Referrer URL of first page
Start Time	startTime	Page Start Time
Last Action Taken	lastAction	Last Action ID
Last Action Status	lastActionStatus	Last Action Status
Last Action Time	lastActionTime	Last Action taken time
Chat Enabled	chatEnabled	True or False
Custom Data	customData	Name/Value pairs of data provided by Customer web site

Rule Types and their Actions

There are three different rule types: tracking rules, startup rules, and run-time rules.

Tracking rules are evaluated only once per visitor. A tracking rule returns a system action of either START_SESSION or STOP_SESSION to the Rule Evaluator which determines whether the visitor should be tracked or not.

Table 1 lists actions and action IDs that can be used in tracking rules:

Table 1. Tracking Rule Actions:

Action	Action ID
NoAction VT	C_NO_ACTION_ID
StartSession VT	C_START_SESSION_ID
StopSession VT	C_STOP_SESSION_ID
StopVTC VT	C_STOP_VTC_ID

Startup rules are also evaluated only once per visitor, after the visitor session has started. A startup rule returns an Action object to the Rule Evaluator indicating the action to be taken on the visitor.

Table 2 lists Actions that can be used when writing Startup rules.

Table 2. Startup Rule Actions:

Action	Action ID	Action Data
NoAction V	TC_NO_ACTION_ID	
StopSession VT	C_STOP_SESSION_ID	
StopVTC V	TC_STOP_VTC_ID	
SetRank V	TC_SET_RANK_ID	Numeric Rank value
ShowInvite	ID of User-defined Action	
ShowInfo	ID of User-defined Action	
ShowUrl	ID of User-defined Action	
LaunchChat	ID of User-defined Action	

A run-time rule is evaluated multiple times during run time. This type of rule returns an Action object to the Rule Evaluator indicating the action to take on a visitor. For instance, a “Chat Invite” rule will return the ShowInvite Action object, which displays a chat invitation to the visitor.

Table 3 lists actions that can be used when writing run-time rules.

Table 3. Run-time Rule Actions:

Action	Action ID	Action Data
NoAction V	TC_NO_ACTION_ID	
StopSession VT	C_STOP_SESSION_ID	
StopVTC V	TC_STOP_VTC_ID	
SetRank VT	C_SET_RANK_ID	Numeric Rank value
ShowInvite	ID of User-defined Action	
ShowInfo	ID of User-defined Action	
ShowUrl	ID of User-defined Action	
LaunchChat	ID of User-defined Action	

Examples

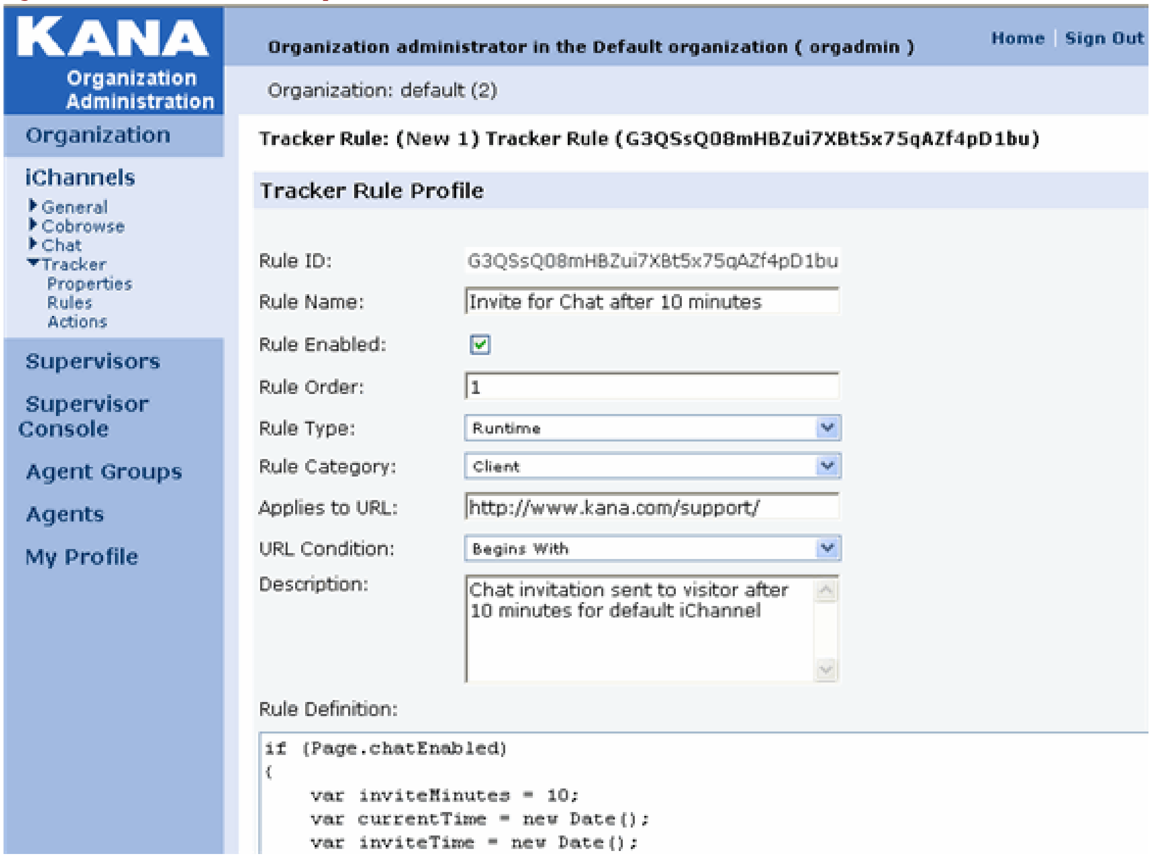
Tracker rules are written in the JavaScript language. They canbe created in the Organization Administration Tool, in the **Tracker** -> **Rules** section of the iChannel menu.

See “Chapter 9: ”, **Rules** section, for instructions on defining and editing tracker rules for an iChannel.

Run-time Rule Example:

See Figure 15-1 for an example of the rule creation user interface in the Organization Administration tool.

Figure 15-1. Run-time Rule Example



This “Invite for Chat after 10 minutes”run-time rule runs on the clientside, and uses a “Begins With” URL condition. The JavaScript code for the rule is entered in the Rule Definition section. See Figure 15-2.

Figure 15-2. Run-time Rule Code Example

```
if (Page.chatEnabled)
{
        var inviteMinutes = 10;
        var currentTime = new Date();
        var inviteTime =  new Date();
 in       viteTime.setTime(Session.startTime.getMilliseconds() +
        inviteMinutes * 60 * 1000);
        if (currentTime > inviteTime
                && Session.status != System.statusTypes.engaged
                && iChannel.agentsAvailable > 0)
 {
                if (!Session.isActionAlreadyTaken('chatinviteactionid1'))
                        return ShowInvite('chatinviteactionid1');
 }
}
return NoAction();
```

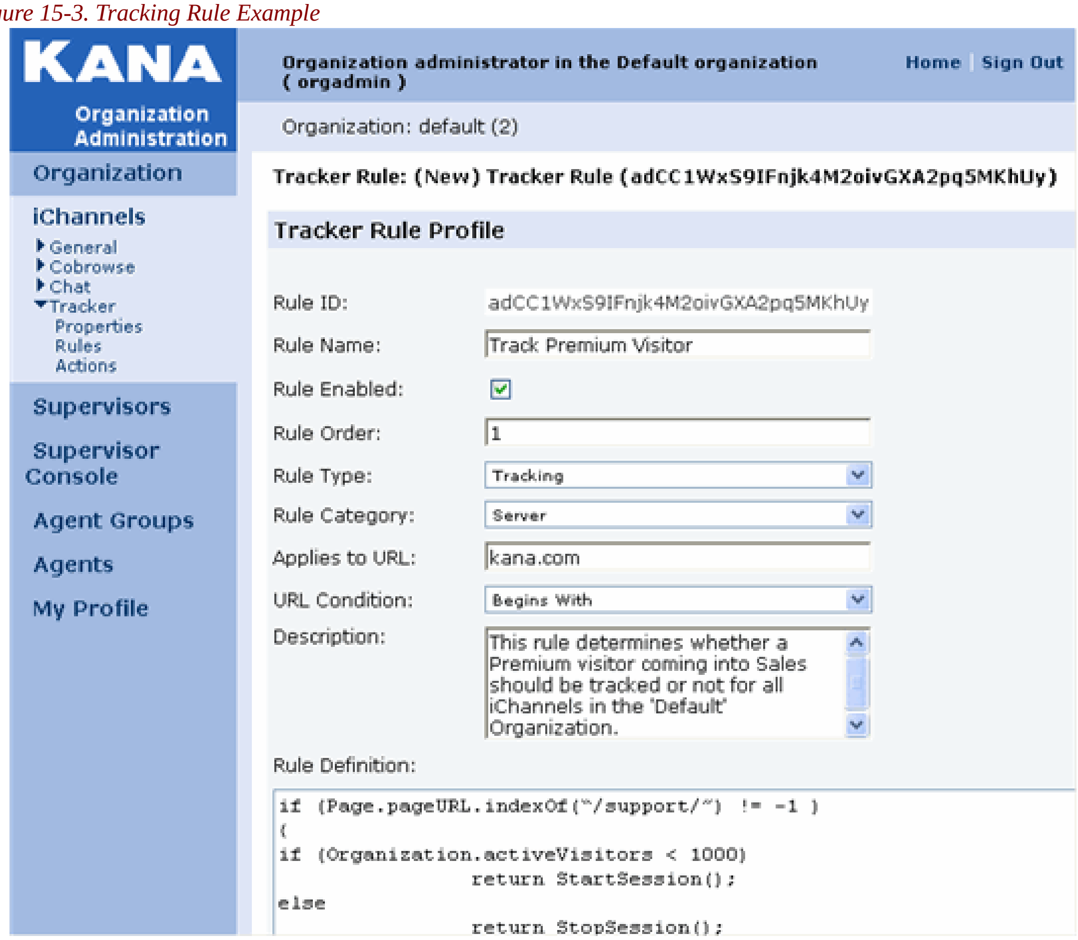
In this run-time rule the Page, Session, System and iChannel objects are accessed, and the ShowInvite action is returned.

The properties used in this rule include: Page.chatEnabled, Session.startTime, Session.status, Session.isActionAlreadyTaken, System.statusTypes, and iChannel.agentsAvailable.

Tracking Rule Example:

See Figure 15-3 for an example of a tracking rule.

Figure 15-3. Tracking Rule Example



This is a server side rule that uses the “Begins With” URL Condition. This tracking rule accesses the Page, Visitor, and Organization objects, and returns the StartSession action.

The properties used in this rule include: Page.pageURL, Session.customData, and Organization.activeVisitors.

Visitor Tracking Rule Example:

A tracking rule that determines whether a visitor coming in through Support should be tracked or not, as in Figure 15-4.

Figure 15-4. Visitor Tracking Rule Example

```
if (Page.pageURL.indexOf("/support/") != -1 )
{
        if (Organization.activeVisitors < 1000)
                return StartSession();
        else
                return StopSession();
}
return NoAction();
```

This is a client side tracking rule, with a "Contains" URL Condition. The Rule accesses the Page and Organization objects, and returns the StartSession or StopSession actions. The properties used in this rule are the Page.pageURL and Organization.activeVisitors.

Start Chat Run-time Rule Example:

Figure 15-5 is an example of a client side run-time rule that starts a chat session when a visitor removes an item from their shopping cart, using a "Contains" URL Condition.

Figure 15-5. Start Chat Run-time Rule

```
if (Page.chatEnabled)
{
        var prevTotal = (Page.customData["PREV_TOTAL_PRICE"]?
                Number(Page.customData["PREV_TOTAL_PRICE"]) : 0);
        var currentTotal = (Page.customData["TOTAL_PRICE"]?
                        Number(Page.customData["TOTAL_PRICE"]) : 0);
        //Did Visitor remove an item from the Shopping Cart?
        if (currentTotal < prevTotal)
 re                turn LaunchChat ('chatactionid1');
}
return NoAction();
```

It accesses the Page object (Page.customData property), and returns the LaunchChat action.

Increase Visitor Rank Run-time Rule Example:

Figure 15-6 is an example of a client side run-time rule which increases a visitor's rank when there is more than $500 in the Shopping Cart, using a "Contains" URL Condition.

Figure 15-6. Increase Visitor Rank Run-time Rule

```
var currentTotal = (Page.customData["TOTAL_PRICE"]?
 Nu        mber(Page.customData["TOTAL_PRICE"]) : 0);
//Did Visitor has big item(s) in the Shopping Cart?
if (currentTotal > 500)
 re        turn SetRank(System.SetRankID, 1);
```

This rule accesses the Page object (Page.customData property), and returns the SetRank action.

Startup Rule Example:

Figure 15-7 is an example of a client side Startup rule which sets a default visitor's rank based on whether the visitor entered through the Sales or Support section of the Web site.

Figure 15-7. Set Default Rank Startup Rule

```
if (Visitor.customData.CustomerType == 'Premium')
 re          turn SetRank(System.SetRankID, 10);
if (Page.pageURL.indexOf("/sales/") != -1)
 re          turn SetRank(System.SetRankID, 50);
if (Page.pageURL.indexOf("/support/") != -1)
 re          turn SetRank(System.SetRankID, 100);
return SetRank(System.SetRankID, 200);
```

This rule uses a "Contains" URL Condition and accesses the Visitor object (Visitor.customData) and the Page object (Page.pageURL property), and returns the SetRank action.

Referrer URL Example

To ensure proactive chat rules are successfully passed, two new properties were added:

- The "referrerURL" property was added to Page object.
- The "referrerURL" and "visitedPages" properties were added to Session object.
  - Session.referrerURL is the referrer url of the first page.
  - Session.visitedPages is the array of Page objects.

Note: Session.visitedPages in the client side rule has only current Page object in its array (not all the visited Page objects).

Example:

```
var x = Session.visitedPages.length - 1;
var p0 = Session.visitedPages[x]; // current page
var p1 = Session.visitedPages[x-1]; // previous page
String.prototype.has = function (o) { return this.indexOf(o)
    != -1; }

if (p1.referrerURL.has("search") && p1.pageURL.has("faq") &&
    p0.pageURL.has("help") {
     return ShowInvite('1n4dvlpGw2twds8m1nU6z57IeCCOWI8m');
}
return NoAction()
```

Appendix C: Locale & Character Codes

Table 1 contains codes to specify the default locale and character set for an iChannel in the KANA Response Live Organization Administration Tool.

Table 1. Locale & Character Set Codes to Specify Default iChannel Language *(Sheet 1 of 2)*

Country	Locale	Character Set
Arabic	ar	ISO-8859-6
Byelorussian	be	ISO-8859-5
Bulgarian	bg	ISO-8859-5
Catalan	ca	ISO-8859-1
Czech	cs	ISO-8859-2
Danish	da	ISO-8859-1
German	de	ISO-8859-1
Greek	el	ISO-8859-7
English (Great Britain)	en_GB	ISO-8859-1
English (United States)	en_US	ISO-8859-1
Spanish	es	ISO-8859-1
Estonian	et	ISO-8859-1
Finnish	fi	ISO-8859-1
French	fr	ISO-8859-1
Croatian	hr	ISO-8859-2
Hungarian	hu	ISO-8859-2
Icelandic	is	ISO-8859-1
Italian	it	ISO-8859-1
Hebrew	iw	ISO-8859-8
Japanese	ja	Shift_JIS
Korean	ko	EUC-KR
Lithuanian	lt	ISO-8859-2
Latvian (Lettish)	lv	ISO-8859-2
Macedonian	mk	ISO-8859-5
Dutch	nl	ISO-8859-1
Norwegian	no	ISO-8859-1
Polish	pl	ISO-8859-2
Portuguese	pt	ISO-8859-1
Portuguese (Brazilian)	pt-BR	windows-1252
Romanian	ro	ISO-8859-2
Russian	ru	windows-1251
Serbo-Croatian	sh	ISO-8859-5
Slovak	sk	ISO-8859-2
Slovenian	sl	ISO-8859-2
Albanian	sq	ISO-8859-2
Serbian	sr	ISO-8859-5
Swedish	sv	ISO-8859-1
Thai	th-TH	windows-874
Turkish	tr	ISO-8859-9

Table 1. Locale & Character Set Codes to Specify Default iChannel Language *(Sheet 2 of 2)*

Country	Locale	Character Set
Ukrainian	uk	ISO-8859-5
Vietnamese	vi-VN	windows-1258
Chinese (Simplified)	zh_CN	GB2312
Chinese (Traditional)	zh_TW	Big5

Appendix D: Using Custom Survey

The Custom Survey feature can be used either by modifying the bundled surveys or by creating a new survey.

Customizing Bundled Surveys

If you want to customize any of the bundled surveys with questions better suited to your products and services, follow the steps in this section. This will ensure the responses from the customers are recorded in the Response Live database. After customizing the chosen survey, make sure to select that survey as the active survey on the Survey Settings section in the Organization Administration tool.

The JSP files for bundled surveys can be found under: <ResponseLive_Install_Folder>/hbroot/chat/survey/ folder.

The file names are:

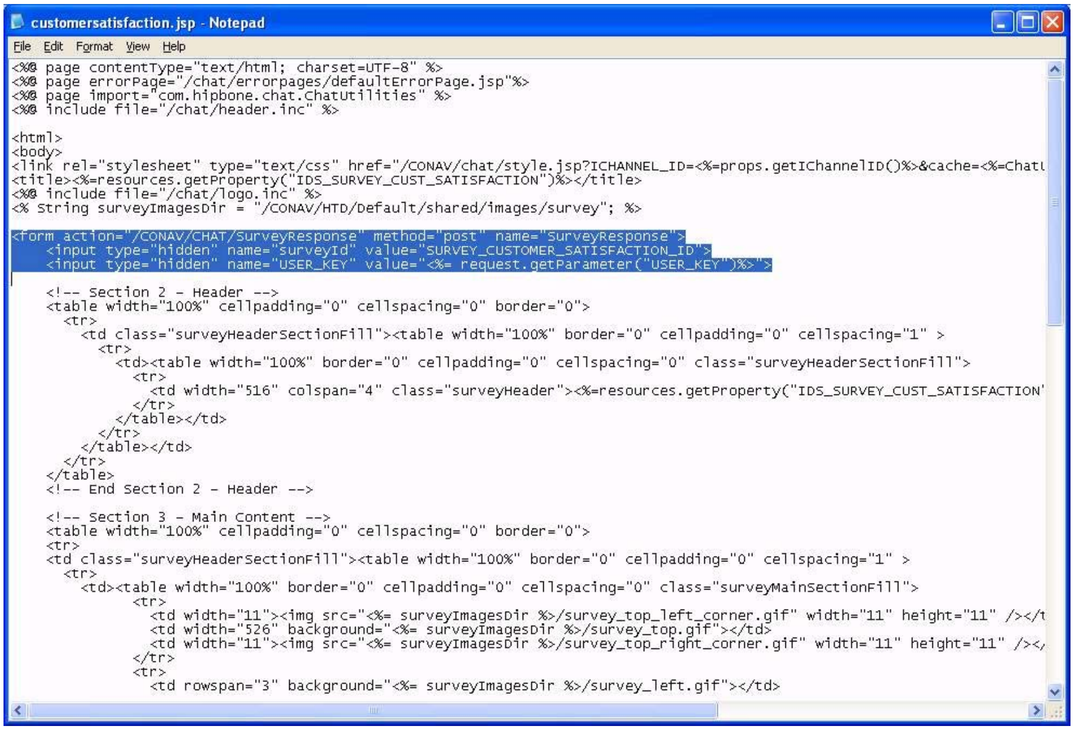
- Customer Satisfaction Survey: customersatisfaction.jsp
- Agent Performance Survey: agentperformance.jsp
- Cross-Sell/Up-Sell Survey: crosssell.jsp

Here are the steps to customize a survey, using the Customer Satisfaction Survey as an example:

1. Make a backup of the customersatisfaction.jsp file. You can find this file at this location: <ResponseLive_Install_Folder>/hbroot/chat/survey/customersatisfaction.jsp.

2. Open the customersatisfaction.jsp file in a Text Editor, such as Notepad. The file contents you see will be similar to Figure D-1.

Figure D-1. Customer Satisfaction JavaScript



customersatisfaction.jsp - Notepad

File Edit Format View Help

```
<%@ page contentType="text/html; charset=UTF-8" %>
<%@ page errorPage="/chat/errorpages/defaultErrorPage.jsp"%>
<%@ page import="com.hipbone.chat.ChatUtilities" %>
<%@ include file="/chat/header.inc" %>

<html>
<body>
<link rel="stylesheet" type="text/css" href="/CONAV/chat/style.jsp?ICHANNEL_ID=<%=props.getIChannelID()%>&cache=<%=Chatl
<title><%=resources.getProperty("IDS_SURVEY_CUST_SATISFACTION")%></title>
<%@ include file="/chat/logo.inc" %>
<% String surveyImagesDir = "/CONAV/HTD/Default/shared/images/survey"; %>

<form action="/CONAV/CHAT/SurveyResponse" method="post" name="SurveyResponse">
    <input type="hidden" name="surveyId" value="SURVEY_CUSTOMER_SATISFACTION_ID">
    <input type="hidden" name="USER_KEY" value="<%= request.getParameter("USER_KEY")%>">

    <!-- Section 2 - Header -->
    <table width="100%" cellpadding="0" cellspacing="0" border="0">
      <tr>
        <td class="surveyHeaderSectionFill"><table width="100%" border="0" cellpadding="0" cellspacing="1" >
          <tr>
            <td><table width="100%" border="0" cellpadding="0" cellspacing="0" class="surveyHeaderSectionFill">
              <tr>
                <td width="516" colspan="4" class="surveyHeader"><%=resources.getProperty("IDS_SURVEY_CUST_SATISFACTION'
              </tr>
            </table></td>
          </tr>
        </table></td>
      </tr>
    </table>
    <!-- End Section 2 - Header -->

    <!-- Section 3 - Main Content -->
    <table width="100%" cellpadding="0" cellspacing="0" border="0">
    <tr>
    <td class="surveyHeaderSectionFill"><table width="100%" border="0" cellpadding="0" cellspacing="1" >
      <tr>
        <td><table width="100%" border="0" cellpadding="0" cellspacing="0" class="surveyMainSectionFill">
              <tr>
                <td width="11"><img src="<%= surveyImagesDir %>/survey_top_left_corner.gif" width="11" height="11" /></t
                <td width="526" background="<%= surveyImagesDir %>/survey_top.gif"></td>
                <td width="11"><img src="<%= surveyImagesDir %>/survey_top_right_corner.gif" width="11" height="11" /></
              </tr>
              <tr>
                <td rowspan="3" background="<%= surveyImagesDir %>/survey_left.gif"></td>
```

3. Modify the <title> tag to include a title for your custom survey. This tag affects the text appearing on the title bar of the browser window that shows the survey. For example, modify the tag to be: `<title>Custom Survey</title>`.

4. Modify the <td> tag for the “headerBar”. This tag affects the text appearing on the header-bar, which is just above the survey questions. For example, modify the tag to be: `<td class="headerBar">Membership Survey</td>`.

5. Modify, add or remove the questions according to your requirements. Keep in mind:

   The name attribute of the HTML input element to capture the answers must start with the letter Q. Some examples are Q1, Q2, Q_database_type and Qcomments. The values for each answer can be up to 2000 characters. The questions appear in the order they are inserted in the file—from top to bottom.

Creating a new custom survey

To create a new custom survey to be hosted on Response Live server, follow these steps:

1. Make a copy of any one of the bundled surveys. For example, copy customersatisfaction.jsp as feedback.jsp.

2. Open feedback.jsp in a text Editor.

3. Modify the 'surveyId' hidden parameter to include a unique ID for your custom survey. For example, modify the parameter to be:

   ```
   <input type="hidden" name="surveyId"
   value="CUSTOM_SURVEY_ID">.
   ```

4. The following two lines in the file must be kept as it is:

   ```
   <form action="/CONAV/CHAT/SurveyResponse" method="post"
   name="SurveyResponse">
   <input type="hidden" name="USER_KEY" value="<%=
   request.getParameter("USER_KEY")%>">
   ```

5. You can modify rest of the file as you please to fulfill your survey requirement. See the “Examples” section below for samples on using different types of HTML input elements in the survey.

6. Place feedback.jsp file in the survey folder at <ResponseLive_Install_Folder>/hbroot/chat/survey/.

7. To use this custom survey, check the "Enable Survey" check box and the "Custom Survey" radio button field under the Survey Settings section in the General iChannel Settings page.

8. Enter feedback.jsp as the input for the "Survey URL/Survey Filename" field under the Custom Survey Properties section in the General iChannel Settings page.

Place surveys in all nodes

In a clustered environment, whether using the predefined or customized surveys, place them in the survey folder in all nodes to ensure the surveys are accessible.

Examples

Note: The "name" attribute of the HTML field must start with the letter 'Q' (upper case Q).

If this requirement is not met, the response to the question is not stored in the Response Live database.

Using radio buttons in the survey

Here is an example of a question in a survey where the customer is required to enter only one answer:

```
<li>Were we able to answer your question during today's chat
 session?</li><br>
<input type="radio" name="Q1" value="1">Yes<br>
<input type="radio" name="Q1" value="2">Partially<br>
<input type="radio" name="Q1" value="3">No<br>
```

Using check boxes for multiple answers

Here is an example of a question in a survey where the customer can enter multiple answers:

```
<li>What application servers does your company use?</li><br>
<input type="checkbox" name="Q7_BEA" value=”Weblogic”>BEA
 Weblogic<br>
<input type="checkbox" name="Q7_IBM" value=”Websphere”>IBM
 Websphere<br>
<input type="checkbox" name="Q7_JBoss"
 value=”JBoss”>JBoss<br>
```

In the above case,multiple rows will be added to SurveyResponse table for each check box checked.

If you want the answers to be stored in a single row, then give the same name to all the check boxes as follows.

```
<li>What application servers does your company use?</li><br>
<input type="checkbox" name="Q7" value=”Weblogic”>BEA
 Weblogic<br>
<input type="checkbox" name="Q7" value=”Websphere”>IBM
 Websphere<br>
<input type="checkbox" name="Q7" value=”JBoss”>JBoss<br>
```

In the above case, the answers will be stored as a single string in a single row in the Survey Response table with each selected answer concatenated together with semicolon (;) as the separator.

Using text input fields for free-form single line text

Here is an example of a question in a survey where the customer must enter text in his answer:

```
<li>What is your designation?</li><input type="text"
 name="Q3">
```

Using <textarea> field for multi-line Comments text

Here is an example of a multi-line Comments field:

```
<li>Please enter any additional comments that you may have
 about our product</li><br>
<textarea name="Q2" rows=5 cols=80></textarea>
```

Place surveys in all nodes

Whether using the predefined or customized surveys, place them in the survey folder in all nodes to ensure the surveys are accessible.

Glossary

A

Active Cluster / Active Clustering KANA Response Live's implementation of clustering. Active clustering provides failover and system monitoring capabilities at an application level. Usually denotes/implies that separate copies of an application are running concurrently on all active server nodes. I.e., all are doing work, there are not hot spares.

Administrator An administrator is a registered user who can edit all or part of the KANA Response Live data model. There are two types of administrators: organization administrators and systems administrators.

Administration Tools These are the Web-based tools provided as part of the KANA Response Live suite which enable an administrator to edit the KANA Response Live Data Model. There are two tools: the Organization Administration tool and the Systems Administration tool.

Agent An agent is an registered user whose primary role is to interact directly with customers. He must log into the KANA Response Live platform using one of the authentication systems available. In chat only an agent can initiate a cobrowse session.

Agent Console A KANA Response Live application that enables agents to interact with customers, using chat, cobrowse and proactive chat.

Agent Group A named group of agents, typically corresponding to a group of people within a business organization who perform similar roles and have similar skill sets. Agent groups are used within chat to determine which customers are picked up by agents. The KANA Response Live Organization Administration tool allows administrators to reassign individual agents or entire agent groups.

API An acronym for application programming interface. APIs define layers in programs and are used to isolate functionality that can be re-implemented in a different manner by an on-premise customer. The KANA Response Live platform currently uses the following APIs: metrics, authentication, iChannel management, organization structure, and client.

Applet See Java applet.

Authenticating a Request The process by which a Web server makes sure that confidential information is only sent to authenticated users. Many Web sites use a login process using a name and password combination in order to authenticate requests.

B

Barge In A term used in the call centerindustry to denote that a supervisor, who has been monitoring a customer-agent interaction, is preparing to enter the interaction directly. In Response Live chat, the supervisor must click on the **Barge In** button before he can directly interact with the customer.

Business Data Model This refers tothe business data required to run an iSystem or cluster of iSystems. It consists of organizations, iChannels, agents, and agent groups.

Business Rules Define business policies that are enforced by the KANA Response Live System when cobrowsing. Business rules are written in an XML-based tag language. Most often business rules restrict agents from performing certain actions and barring them from seeing sensitive customer data.

C

Callback Response Live cobrowse feature that enables customers requesting Live Help to enter their phone numbers and get a call back to that number from an appropriate agent.

Canvass The process of evaluating a Web site for cobrowse compatibility with KANA Response Live software.

Chat A KANA Response Live product that combines real-time chat functionality with cobrowse capabilities. In chat, agents pick up customers from queues and interact with them. Depending on the deployment model, the interaction can be entirely text-chat based or can have both text-chat and cobrowse components.

Chat Transcript The entire sequence of events from within a chat session. The chat transcript begins when an agent connects to a customer and encapsulates all chat events (such as messages), session events (such as people entering or exiting the session) and cobrowse events (such as link clicks).

Client / Client Application Refer to the portion of the KANA Response Live application which are visible inside a Web browser. The differentiation is between the server (interaction system) and the Web browser that the end users are using

Cluster A cluster is a group of similarly configured servers that appear to be a single server to end users, and provide failover capabilities. The goal in using clustering is to minimize the impact of a hardware failure.

Cobrowse Cobrowsing is the process by which multiple people navigate a Web site as a single unit. Each person uses a separate Web browser, but all the session participants are looking at the same Web content. In addition, the session participants have the ability to discuss what they are viewing either via the phone or through a live chat application.

Conavigate Cobrowse and conavigate are interchangeable terms used to refer to the process by which multiple people navigate a Web site as a single unit. See Cobrowse.

Configuration Directory The KANA Response Live application software uses several configuration files to store information which it needs in order to run. Typically, this is information about the network configuration. These configuration files are all stored in a single directory called the configuration directory.

Control Panel In Response Live cobrowse, a separate window that contains information about the users in a session.

Customer In KANA Response Live terminology, the end-users are divided into two categories: agents, who are official representatives of a company and must authenticate themselves. And customers, who are not authenticated. Agents and customers play very different roles within the KANA Response Live platform and may have different levels of permissions even within a cobrowsing session because of business rules.

D

Daemon A program that idles continuously in the background until it is activated by a specified event.

Data Center. A facility, usually located away from the rest of the corporation, where large numbers of computers (e.g. a set of servers) are installed. Customers using the hosted service are implicitly using KANA's data center.

Dynamic Start Page A technical term referring to the way in which a KANA Response Live server can preserve the state of the Web page a customer was on when the customer clicked the **Live Help** button. This enables the cobrowsing session to start on the page the customer had questions about.

E

End user Someone who is using the client application, usually a customer or an agent

F

Failover Failover refers to any of a number of ways of providing safeguards against hardware failures. It usually involves either clustering servers to provide additional resources or having a “hot backup” machine. KANA Response Live software installations use clustering.

FileShare FileShare is an extension to the core suite of KANA Response Live software products which enables users to publish Microsoft Office™ documents to a secure server and cobrowse them. This is frequently used in circumstances when collaboration with a remoteuser is desirable and the collaboration involves situation-specific content, for example, a sales presentation.

Firewall A component, usually hardware, which prevents computers from sending messages to each other. Firewalls are usually used to enforce security policies by preventing unauthorizedmachines from accessing sensitive data.

Funnel Images See Image Funneling.

H

Harvey Balls Small circles drawn on the user interface that can be filled with color to indicate the status or condition of a parameter and are named after their inventor, Harvey Poppel, not Harvey Ball, the inventor of the yellow, smiley face.

KANA Directory The KANA Response Live application software is typically installed into a single directory on the server machine. This directory is often referred to as the KANA directory.

Hosted Service The hosted service involves using KANA Response Live servers run by KANA Software, Inc. KANA functions as an application service provider (ASP). In this deployment model, the interaction systems themselves run inside the KANA datacenter.

Hot Backup A hot backup is a server which is used to provide redundancy in a data center. The hot backup's sole role is to be available and fully initialized in the case that a server fails and it must assume/take over the failed servers workload.

I

iChannel Commonly used abbreviation for interaction channel.

Image Funneling A process by which images and other non-text content are passed through the interaction server. The usual mode of operation is for Web browsers to directly retrieve images from the original Web server. Image funneling is usually necessary if the original Web server is authenticating the image request.

Interaction Channel An interaction channel is a grouping of user interaction properties that, taken as a whole, represent the portions of a KANA Response Live session that can be configured by an organization administrator. Properties such as background colors and icons, or the text of messages that may appear during the course of a session, are set in the interaction channel. Sessions are assigned an interaction channel when they are created.

Interaction System An interaction system is the name for a particular type of KANA Response Live server. The interaction system consists of a Web-server, a servlet engine, and several supporting processes. Users are hosted by and logged into a specific interaction system, and any sessions they are participating in are also managed by the same interaction system.

iSystem Commonly used abbreviation for interaction system.

J

Java applet A small application written in the Java language which can be embedded in a Web page.

L

Live Help Button A button or clickable-image on a Web page which begins the cobrowsing process. The customer clickson the live help button and is connected to an agent, either through callback or chat. Live help buttons are often used in conjunction with dynamic start page.

Login server The login server is one of the supporting processes in an interaction system.

M

Meet Me page A static Web page which is used to connect customers and agents. Unlike the live help button, meet-me pages require the agent and customer to already have communicated usually via a telephone call.

Monitoring System / Monitoring Tool One of the most important characteristics of a live interaction system such as KANA Response Live's is that it must be available on a 24 by 7 basis. In order to provide this level of reliability, even in the face of hardware failures, KANA Response Live has a monitoring system. The monitoring system's sole role in a KANA Response Live deployment is to detect system failures and notify the appropriate people usually by e-mail.

O

On-premise Solution A term used to refer to the installation and use of KANA Response Live platforms which are not maintained by KANA personnel. In this deployment model, the interaction systems are run outside the KANA data center.

Organization An organization is an abstraction used by the KANA Response Live platform to group together related, business-level, information and properties. An organization consists of a set of iChannels (which control the interaction and look-and-feel of a cobrowsing session), a set of agents (including authorization information), and, in the case of chat, a set of agent groups (which determine chat-related functionality, such as which customers can be picked up by a particular agent).

Organization Administration Tool A Web-based application that an organization administrator uses to configure organizations, iChannels, agents, and agent groups. It is best thought of as a tool to configure the "business part" of a KANA Response Live installation as opposed to the "hardware and software part".

Organization Administrator A registered user who has the ability to modify the configuration of an organization using the Organization Administration tool. Typically, an organization administrator is a business specialist who understands the business uses of live interaction. There can be more than one organization administrator for an organization.

Original Web Server A KANA Response Live term referring to the original source of Web pages for cobrowsed Web pages. For example, in a scenario where two people are cobrowsing www.kana.com, KANA's Web server is the original Web server.

P

Panel A window that serves as the interface between the KANA Response Live server and an agent or customer.

PDR Acronym for predefined response.

Pointer A special, arrow-shaped icon which can be used to highlight ("point at") sections of a Web page. Typically, an agent will point at certain fields or areas of a Web page when helping a customer with a specific question or when performing training.

Predefined Response An agent productivity feature of the Response Live chat product. A predefined responses (PDR) is a carefully worded statement that answers a commonly asked question with one click by an agent. PDR are entered into the business data model by either a supervisor or an organization administrator and are then available to agents who are participating in a chat session.

Proactive Chat A permission-based feature of the Response Live product through which agents can monitor and prioritize real-time customer lists, use dynamic filtering, and engage them in an "invite-to-chat" session.

Q

Queueing Server / Queue Serve . A specialized server that maintains the queues for a chat system.

R

Registered User A registered user is a user of a KANA Response Live product who must be authenticated (e.g. provide a sign in ID and a password). There are four types of registered users: agents, supervisors, organization administrators, and system administrators. Each of the different types of registered users plays a distinct role in a KANA Response Live deployment.

Relaxed Truster A special setting which is often useful when testing Web sites on a staging server, but which is rarely used in production settings. Enabling this setting allows the interaction server to ignore invalid or missing SSL certificates.

Router See KANA Response Live router.

S

Servlet engine A servlet engine is an extension to a Web server that enables content to be dynamically generated by a Java servlet. In the KANA Response Live architecture, servlets are used to implement most server-side functionality.

Session A session refers to two or more people using a KANA Response Live product to work in tandem. It is created when the collaboration begins (for example, when the agent clicks the "get next customer" button in a chat scenario) and lasts until the last participant is no longer involved (e.g. the session can survive the departure of one or more of its participants).

Shared Browser A KANA Response Live term for the "Webbrowser" part of an interaction session (as opposed to the control panel or the chat transcript).

SSL Acronym for Secure Sockets Layer.

SSL Certificate An SSL certificate is a document, signed by a recognized certificate authority (such as Verisign or Belsign), which verifies that a particular server can be trusted.

Supervisor A supervisor in a KANA Response Live platform, is a registered user who monitors agents (and uses the Supervisor Console to monitor overall system status). He is not able to directly connect with agents, but must instead enter supervisor mode and then barge in.

Supervisor Console A KANA Response Live application that enables real-time monitoring of chat servers and clusters. The Supervisor Console is used to detect and resolve customer service problems, such as customers spending an excessive amount of time waiting for an agent.

Supervisor Mode A special mode of interaction specific to supervisors that enables a supervisor to silently monitor an agent's interactions. The supervisor attaches to an agent and then may barge in to specific sessions.

KANA Response Live Data Model An aggregate term referring toall the datathat a KANA Response Live platform needs in order to function correctly. The KANA Response Live data model is composed of the business data model and the systems data model.

KANA Response Live Router / Router An interaction server that has been specially configured to act as a front end for one or more active clusters. The router performs task-based routing and load-balancing functions, but does not host any sessions.

Systems Administration Tool A Web based tool used for editing the systems data model.

Systems Administrator A registered user who has permission to edit the systems data model. A person who is logged in as a systems administrator can not interact with customers.

Systems Data Model The portion of the KANA Response Live data model referring to hardware and machine configuration. The systems data model is usually administered by someone with substantial technical knowledge.

KANA Response Live application server The KANA Response Live software that manages a cobrowse session.

KANA Response Live proxy architecture The KANA Response Live platform architecture. The KANA Response Live platform acts as a proxy between the agent and customer on one end and the Web site that they are cobrowsing on the other end.

System A KANA Response Live software implementation.

U

UI Commonly used abbreviation for user interface.

User key The randomly generated 50-character string assigned to user when they log in.

W

Web Tracker A KANA Response Live term for the visitor tracking area of the agent console.

Whisper / Whispering Whispering is a process by which a supervisor sends a message to an agent he is supervising. This message can be directed to specific agents and is only delivered if the agent is logged on. Customers never receive whisper messages.