Jive Live Assistant™

Admin Console
Quick Start Guide

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Table of Contents

Getting Started

Help. For additional help using the Admin Console or configuring Live Assistant, refer to Live Assistant's online Help, available from the Help link on the Admin Console.

For information about using Live Assistant's Agent Console, refer to the *Live Assistant Agent Console Quick Start Guide*.

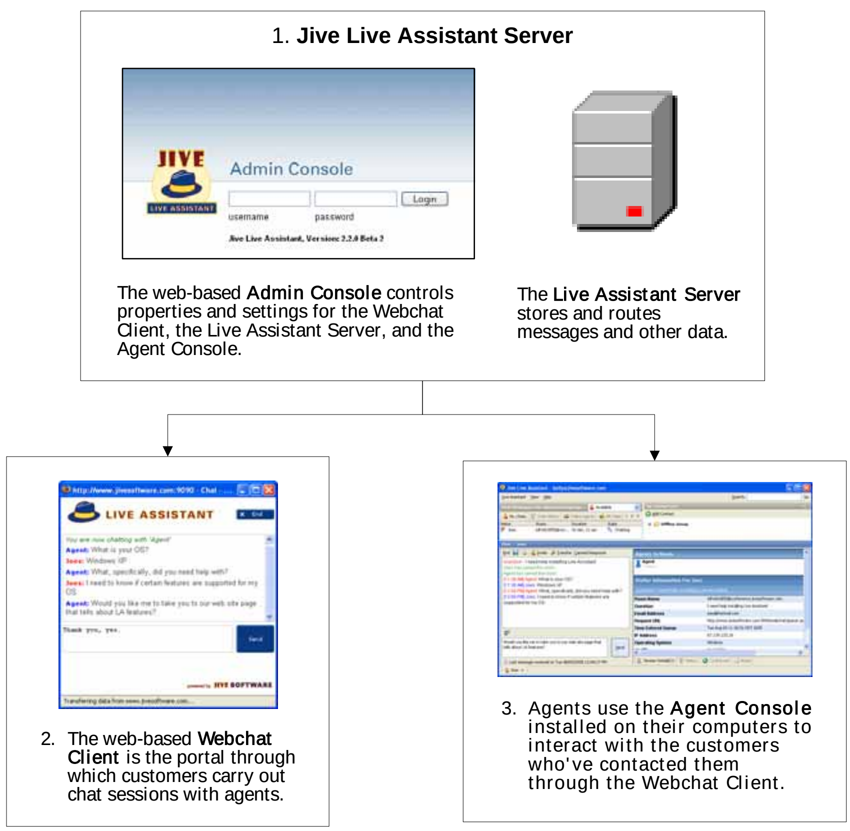
As an administrator, you'll use the Jive Live Assistant Admin Console to configure and manage your installation of Jive Live Assistant. This guide is designed to get you up and running quickly with the Admin Console. Starting with an overview of Live Assistant, you'll see how the parts of the system work together, and then, using the default installation, use the demo agent account and workgroup to test the system and see that it works correctly. Next, you'll do some basic configuring, and then deploy the Webchat Client web application and, if desired, the Agent web application, to your application server.

Note: The screen shots and components shown in this guide are for illustration purposes and may differ somewhat from your implementation.

Live Assistant overview

Jive Live Assistant™ is a secure environment for real-time business-to-customer chat. Before configuring Live Assistant, you need to understand how its three related components, the Webchat Client, the Agent Console, and the Admin Console, work together.

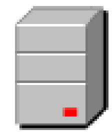
Live Assistant system components



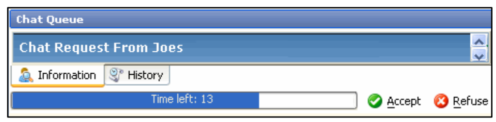
How the chat process works

1. Customer clicks request help **link** on your website...

2. ...which opens the **Webchat Client**. Customer types info into fields and clicks Start Chat to send chat request.



3. Chat request is routed to a queue within a workgroup on the **Live Assistant Server** based on the queue's routing rules.



4. Routed chat request appears in **Agent Console** on agent's computer. The agent can accept or reject the request.

5. When the agent accepts the chat request, the **Chat window** opens in the Agent Console.

6. Customer types questions and responses into lower box of **Webchat Client**. Both customer's entries and agent's responses display in upper box.

Terminology

Understanding the following terms used in this guide makes using the Admin Console easier.

Admin Console: The web-based administration tool used to manage Live Assistant.

Administrator: The person who will use the Admin Console to configure and manage Live Assistant.

Agent: Any system user who uses the Live Assistant Agent Console to provide direct, chat-based assistance to a customer.

Agent Console: The client application an agent uses to handle incoming chat requests, monitor queue status, and manage multiple chat sessions.

Agent group: A cluster of agents. Agent groups allow you to add multiple agents as a single entity to workgroups without having to add each agent individually.

Chat session: A text-based conversation between a Live Assistant agent and a customer.

Group: A collection of users assigned to a contact list.

Queue: A request queue holds the caller in place and routes the call to an available agent based on routing rules.

Request offer: An incoming chat request offered to an agent. The agent can accept the offer, decline it, or wait until it times out and is routed elsewhere.

User: A person who has been added to the Live Assistant system and assigned a password. Users can be added to workgroups to become agents.

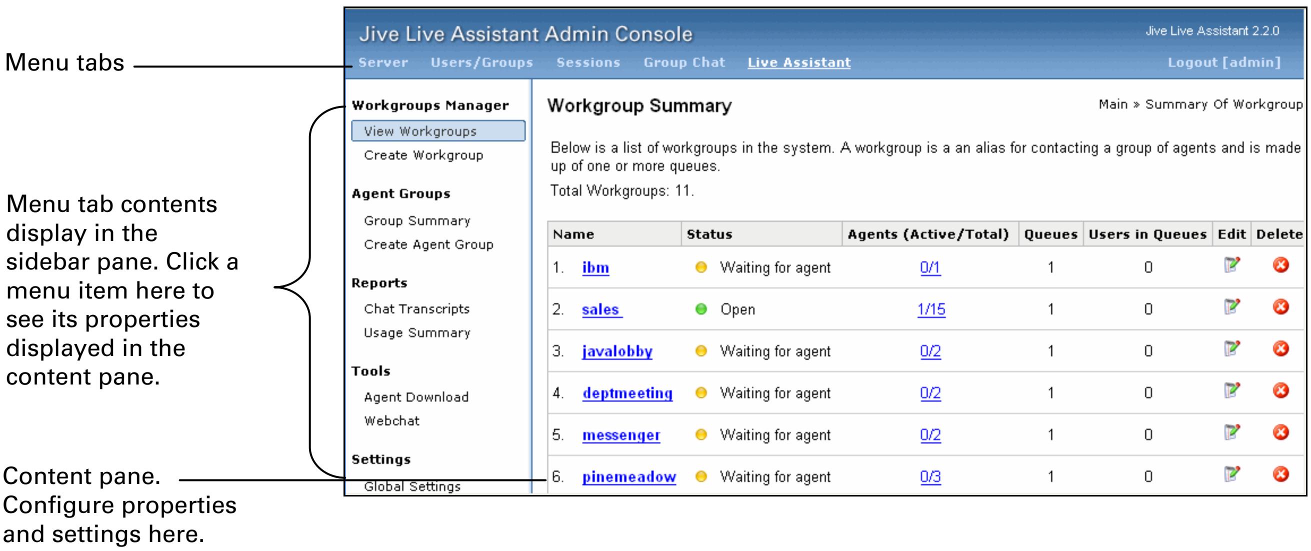
Webchat Client: A client for communicating with a Live Assistant agent through a web browser.

Workgroup: A cluster of request queues and associated agents. Workgroups are usually defined by a particular set of business responsibilities (such as “sales” or “support”). For example, a workgroup could be devoted to answering customer inquiries about a particular product the company sells.

Admin Console overview

The Live Assistant Admin Console allows you to set up, configure, and administer the Live Assistant program and its users. Administrative tasks include:

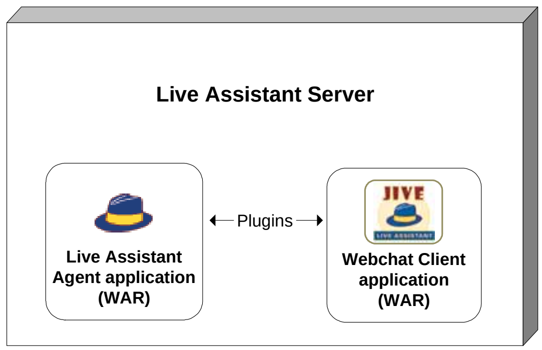
- Monitoring and managing the chat server and associated database
- Creating agent accounts
- Setting up agent groups, workgroups, and queues
- Monitoring chat sessions and queue activity
- Viewing server, workgroup, and queue statistics



Using Live Assistant for the first time

When you use Live Assistant for the first time, you'll use the demo workgroup and the demo agent account to begin setting up your system and to see how the Live Assistant components work together.

In the default installation of Live Assistant Server, the Live Assistant Agent Download application and the Webchat Client application are installed on the Live Assistant Server as plugins (see illustration below). These are bundled together initially so that you can see, as you work with the default system setup, how the Agent, Server, and Webchat Client work together. Later you can install the Webchat and Agent applications to your own application server to fit the needs of your deployment.



Run the Agent installer

As part of setting up and testing the Live Assistant system, you'll need to download the Agent Console installer on the computers your agents will be using. For the purpose of setup and testing, just install on one agent computer for now.

To download and run the Agent installer:

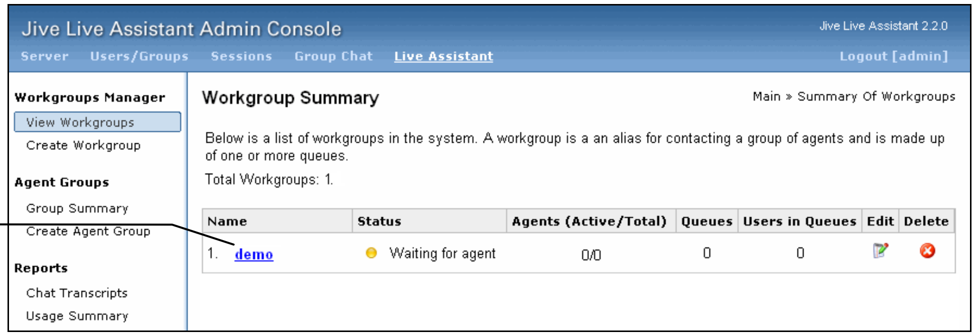
1. After the Live Assistant server has been installed, navigate to your Admin Console website (the default is http://localhost:9090/).
2. Log in to the Admin Console using the credentials you set when you installed the Live Assistant server. If you did not set up new credentials, use the default ones:

   username: admin

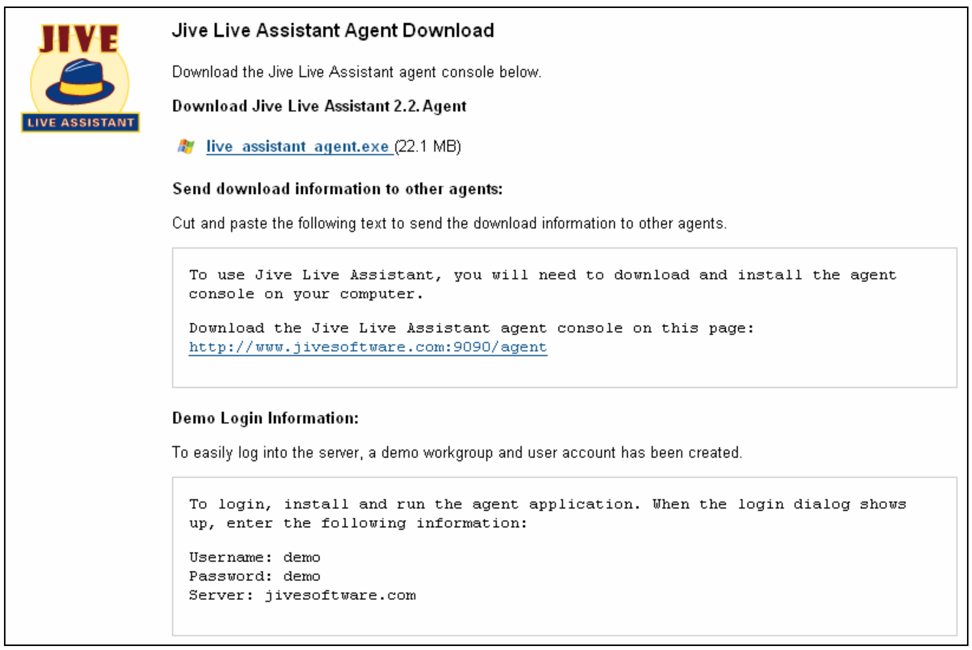
   password: admin
3. In the Admin Console, click the **Live Assistant** tab. The Workgroup Summary screen displays, showing a summary of all workgroups currently in the system. Verify that the demo workgroup exists.

   Note: The demo workgroup is set up automatically during installation. You can delete the demo workgroup when you no longer need it.

If the **demo** workgroup was created successfully, you will see it in the list of workgroups.



4. On the first computer on which you want to install the Agent Console, in your web browser, navigate to the Admin Console, log in, and click the **Live Assistant** tab.
5. In the sidebar pane under *Tools*, click **Agent Download**. The Agent download page on your local host displays. Click the link to download the file **live_assistant_agent.exe**.



6. Follow the onscreen instructions to run the file and install the Live Assistant Agent Console.

Run a test chat session

By running a test chat session, you'll see how the Webchat Client and the Agent Console work during a basic chat session. You'll use the demo workgroup that came with the installation for this. Later, once you know how to set up your own workgroups, you can delete the demo workgroup if you want.

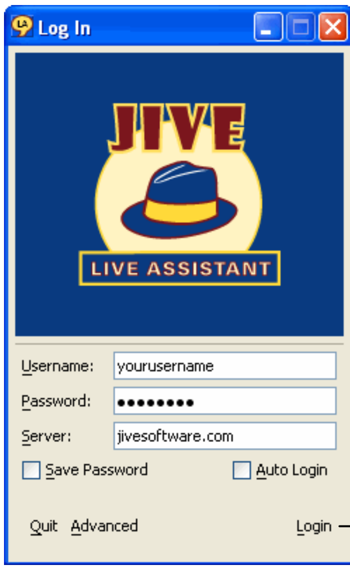
To log in to the Agent Console and run a test chat session:

1. After installation, start the Agent Console and log in using the demo credentials and the name of your server.

   Username: demo

   Password: demo

If you don't know the name of your server, log in to the Admin Console and view the server name on the Server Settings page (refer to the picture on page 6).



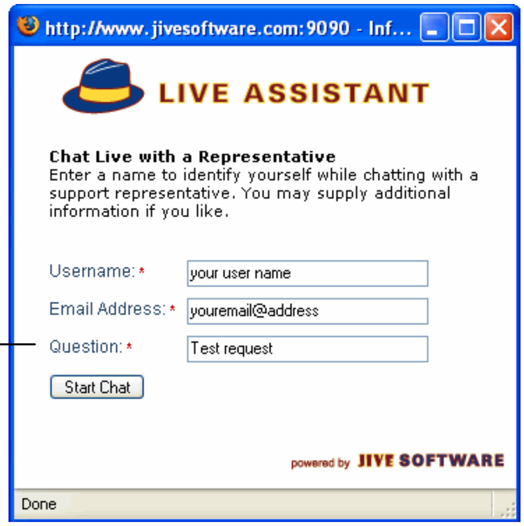
Click to log in.

   When you log in, Live Assistant automatically logs you in to the demo workgroup.

2. Run a test chat session as follows.

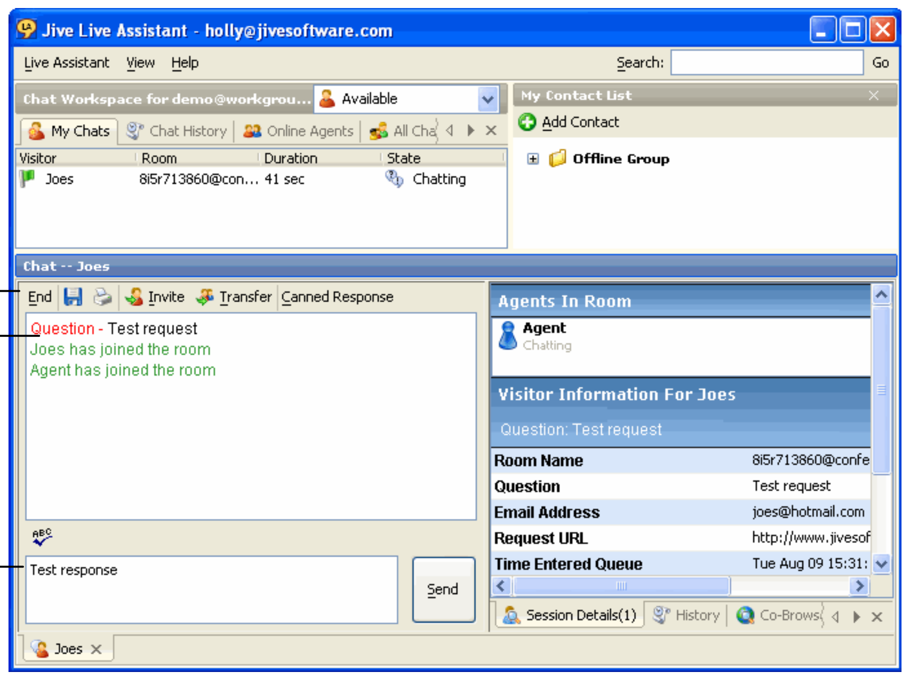
3. Navigate to the Webchat webpage on your local host and click the live help link to initiate a request for a chat session (or, in the Admin Console, click the **Live Assistant** tab and then, in the sidebar pane under *Tools*, click **Webchat** to go to the host page and click the live help link).

4. In the Webchat window, fill in the required fields, including a brief test message, and then click the **Start Chat** button.



Type "Test request" in this field.

5. Switch back to the Agent Console to see if the chat request came through. A chat request window should be open in the upper left of the Console. Click the **Accept** button. The Chat window opens.



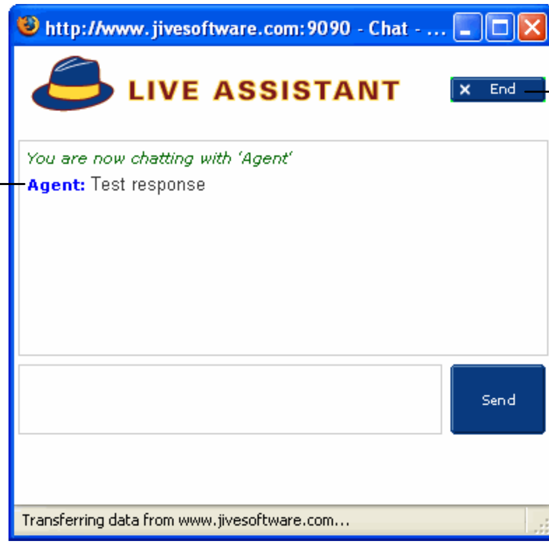
Chat window

The test request you sent from the Webchat Client displays here.

Type your test response here and then click the **Send** button.

6. Switch back to the Webchat Client to see that your response went through.

The test response you sent from the Admin Console's Chat window displays in the Webchat Client window.

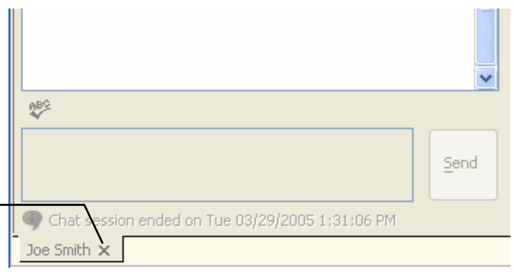


Click to end the chat session.

7. Close the chat session in both the Agent Console and the Webchat Client:

- In the Webchat Client, click **X End** and then close the Webchat window.
- In the Agent Console, click the **X** on the chat tab to close the Chat window and then click **Yes** to confirm.

In the Agent Console, click to close Chat window.



Configuring Live Assistant

Now that you've installed the Agent Console and tested the system, you can configure your installation.

Configuring Live Assistant involves the following basic steps:

1. Creating users for your Live Assistant system.
2. Creating agent groups.
3. Creating workgroups and workgroup queues.
4. Adding agents and agent groups to workgroup queues.

For the purpose of getting started, you can use most of Live Assistant's default server and other settings.

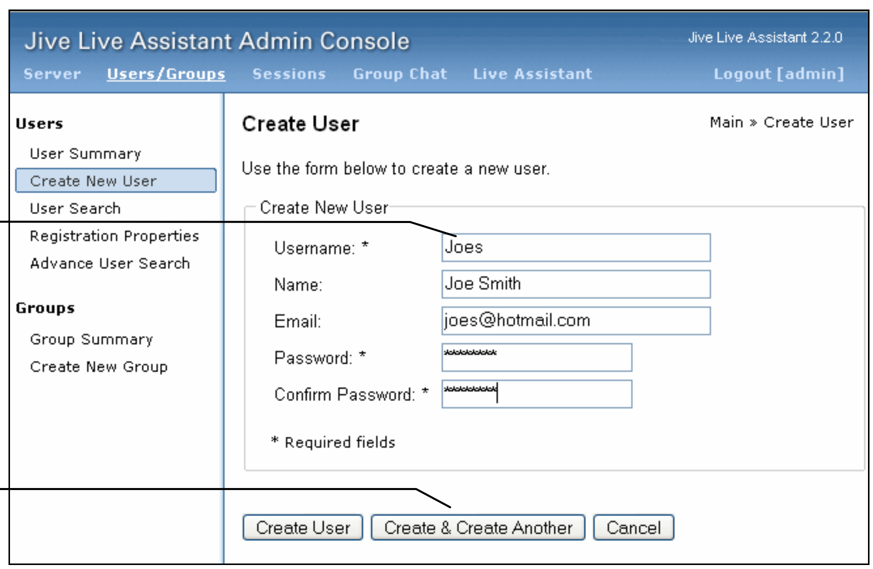
Create users

After verifying your Live Assistant installation, you'll need to add users to the Live Assistant system.

Users vs. Agents. Live Assistant makes a distinction between *users* and *agents*. *Users* are general system users who may or may not also be agents. All *agents*, however, are users.

To create a new user:

1. In the Admin Console, click the **Users/Groups** tab, then, in the sidebar pane under *Users*, click **Create New User**.



Enter a username for the user here. Once you set a username, you can't change it. You can change all the other information, however.

To keep the Create User screen open so you can add another user after adding the first one, click the **Create & Create Another** button.

2. In the Create User screen, complete the fields. Required fields have an asterisk to the right of their names. When finished, click the **Create User** button.

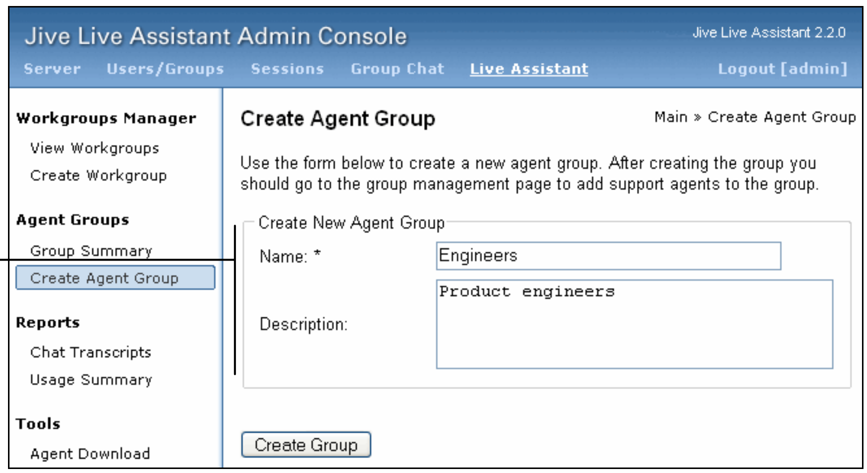
Create agent groups

Agents can be assigned to more than one queue and more than one workgroup. In fact, there is no limit to the number of queues and workgroups to which an agent can be assigned. Suppose you want to add the same three or more agents to different queues or workgroups. Rather than having to add each agent individually to each queue or workgroup, you can create agent groups and then simply add the groups to the queue or workgroup.

To create an agent group:

1. In the Admin Console, click the **Live Assistant** tab and then, in the sidebar pane under *Agent Groups*, click **Create Agent Group**.

Type a name for the agent group (required), and then type a description (optional).



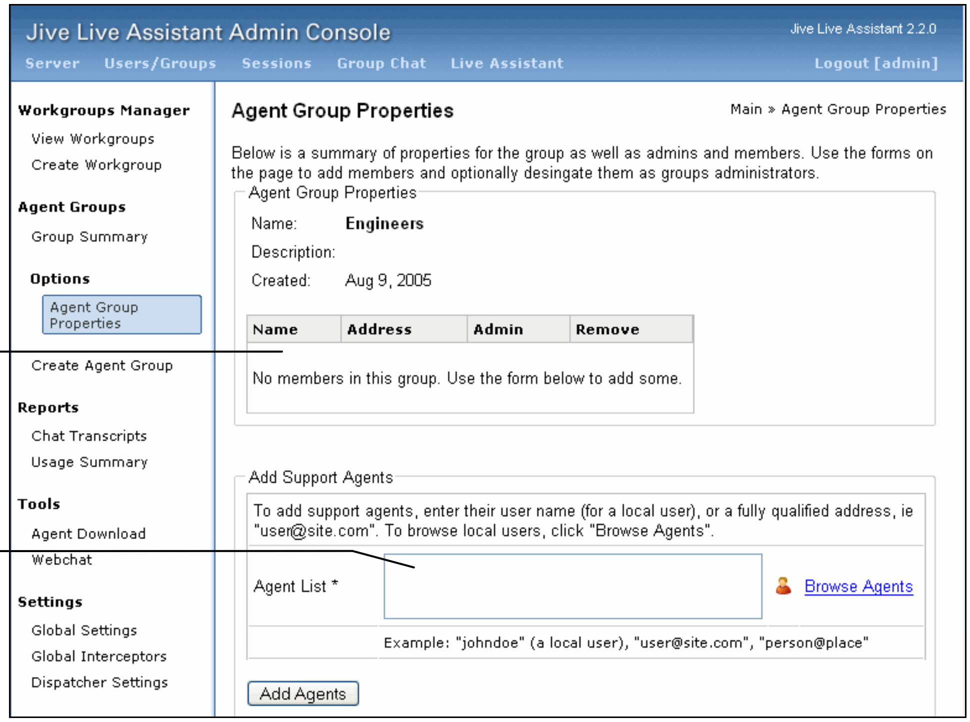
2. When finished, click the **Create Group** button. The Agent screen refreshes, confirming the group was created successfully.

Click to create another agent group.

3. Click the **Go to Group Details** button to add agents to this group. The Agent Group Properties screen displays a summary of the new group's properties.

Members box.

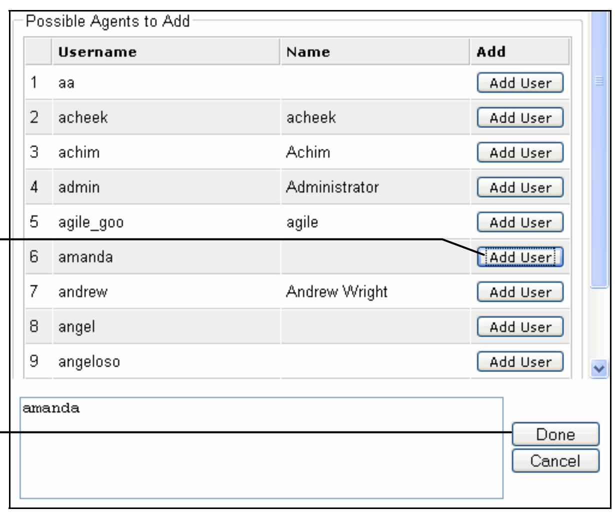
The names of the agents you selected display here.



4. Click the **Browse Agents** link and then select the desired agents from the *Possible Agents to Add* dialog box.

Click to add the user in the row.

Click when finished adding users to the group.



5. When finished, click the **Add Agents** button at the bottom of the Agent Group Properties screen. The screen refreshes to display the agents' names in the *Members* box:

To change a group member's status or to delete the member, click the check box for that member and then click the **Update** or **Remove** buttons, respectively.

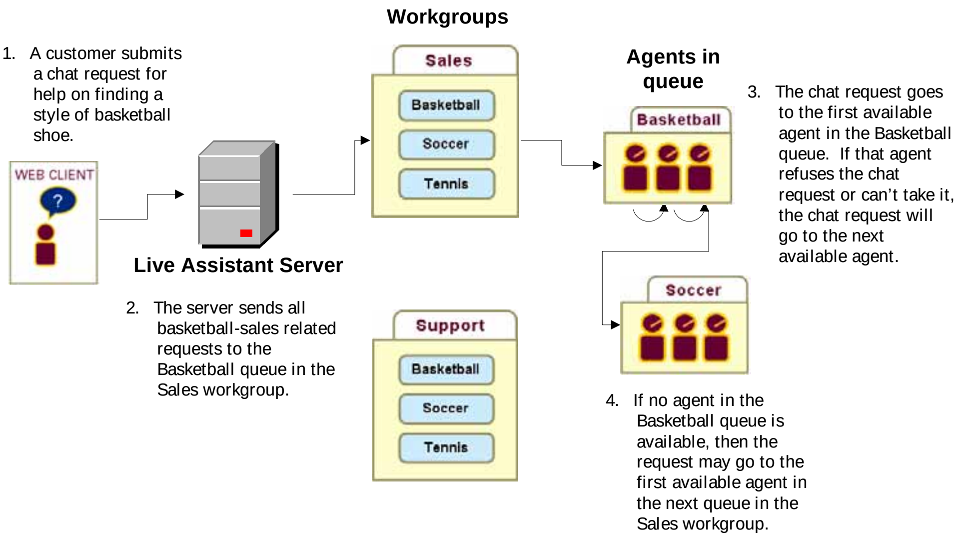
Create workgroups and workgroup queues

Help. For more information on setting up routing rules for workgroups, refer to the Admin Console online Help.

In Live Assistant, you use workgroups to organize chat request queues and agents into entities that reflect the way you do business. Workgroups are usually organized by function or specialty. Each workgroup contains queues that manage chat requests coming in from customers. The Live Assistant server routes chat requests to workgroup queues based on routing rules you set up for each queue.

The following example shows chat request routing for a company that sells sports equipment. The company has divided its support agents into workgroups based on the roles of sales and support, and queues within each workgroup based on the sport.

Chat Request Routing



Create a workgroup and add initial users

When you create a workgroup, you give it a name, description, and its initial members. New workgroups also come with a default queue. You can add more queues at any time.

Note. Agents have to belong to at least one workgroup queue to receive chat requests.

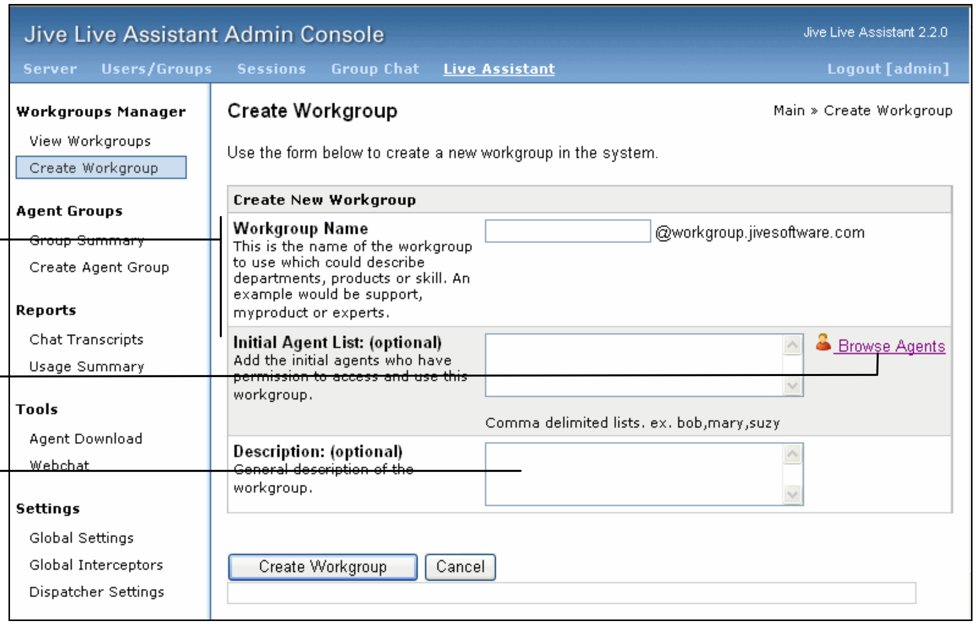
To create a workgroup:

1. In the Admin Console, click the **Live Assistant** tab, and then, in the sidebar pane under *Workgroups Manager*, click **Create Workgroup**.

Type a name for the workgroup (lowercase) and then enter a description if desired.

Click to browse for agents to add to your workgroup.

Type a description for this workgroup (optional).



2. Complete the fields and then click the **Create Workgroup** button. The Workgroup Queues screen displays.

In the next section, you'll add a queue to a workgroup.

Add a queue to a workgroup

This example shows you how to add a queue to the new workgroup you created.

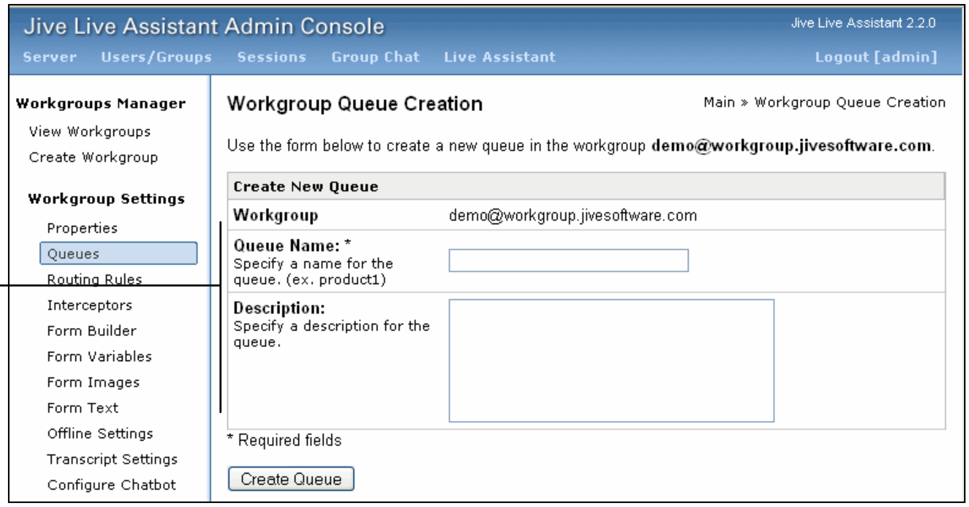
To add a queue to a workgroup:

1. In the Admin Console, click the **Live Assistant** tab.
2. In the *Name* column of the Workgroup Summary screen, click the name of the workgroup you created.
3. In the sidebar pane under *Workgroup Settings*, click **Queues**.
4. In the Workgroup Queues screen, click the **Create New Queue** link next to *Queue Tasks*.

Click to open the Workgroup Queue Creation screen.

The Workgroup Queue Creation screen displays:

Type a name for the new queue, and, if desired, a description.



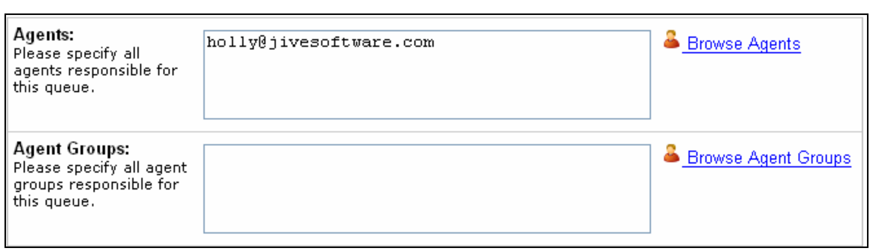
5. Complete the fields as described and then click the **Create Queue** button. The Workgroup Queues screen displays, showing the newly created queue. Next, you'll add agents and agent groups to your queue.

Add agents and agent groups to queues

In the previous section, you created a new queue for the workgroup you created. In this section, you'll see how to add additional users and user groups.

To add users and user groups:

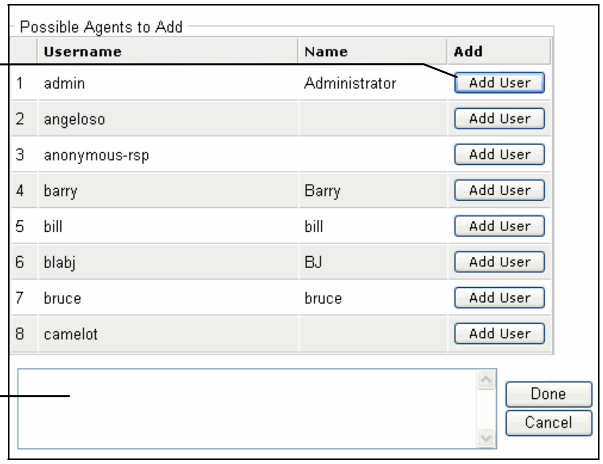
1. In the Admin Console, click the **Live Assistant** tab and then, in the *Name* column of the Workgroups Summary screen, click the name of your workgroup.
2. In the sidebar pane under *Workgroup Settings*, click **Queues**.
3. In the Workgroup Queues screen, click the name of the desired queue. The Manage Queue screen displays.
4. Scroll down to the *Agents* section and click the **Browse Agents** link to the right of the *Agents* box.



The Possible Agents to Add dialog box displays.

Click to add the user named in the row.

Selected users will display in this box.



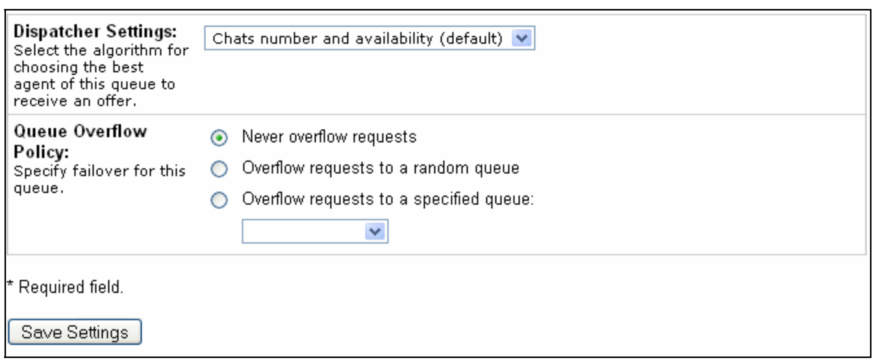
5. After selecting the desired agents to add, click the **Done** button.

   The Possible Agents to Add dialog box closes and you are returned to the Manage Queue screen.

6. To add agent groups, click the **Browse Agent Groups** link, then select the desired groups from the popup dialog box and then click the **Done** button. The dialog box closes and you are returned to the Manage Queue screen.

7. In the *Dispatcher Settings* section, select how you want Live Assistant to determine which agent is the best choice to receive a request offer.

If, when this queue has more questions than it can handle at a time, you want the overflow questions to go to another queue, select an option here.



8. When finished, click the **Save Settings** button.

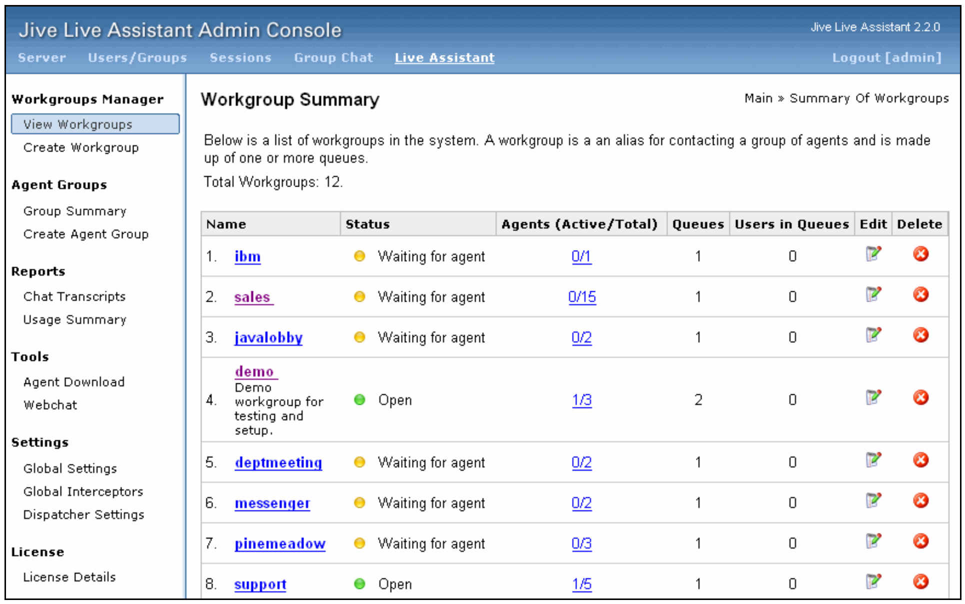
View the summary of workgroup activity

The workgroup summary screen shows you how many agents are assigned to each workgroup and how many of the total are currently engaged in an active chat session. You can also see the number of queues and agents in the queues.

Workgroup status. "Open" status indicates an agent is currently signed in to the workgroup through the Agent Console and the workgroup is currently accepting chat requests. "Waiting for agent" means the workgroup is not accepting chat requests because no agent is available to chat. "Closed" means the workgroup is not accepting chat requests. For more information about workgroups, refer to the Admin Console online Help.

To view the workgroup activity summary:

1. In the Admin Console, click the **Live Assistant** tab. The Workgroup Summary screen displays.



Set a schedule for a workgroup

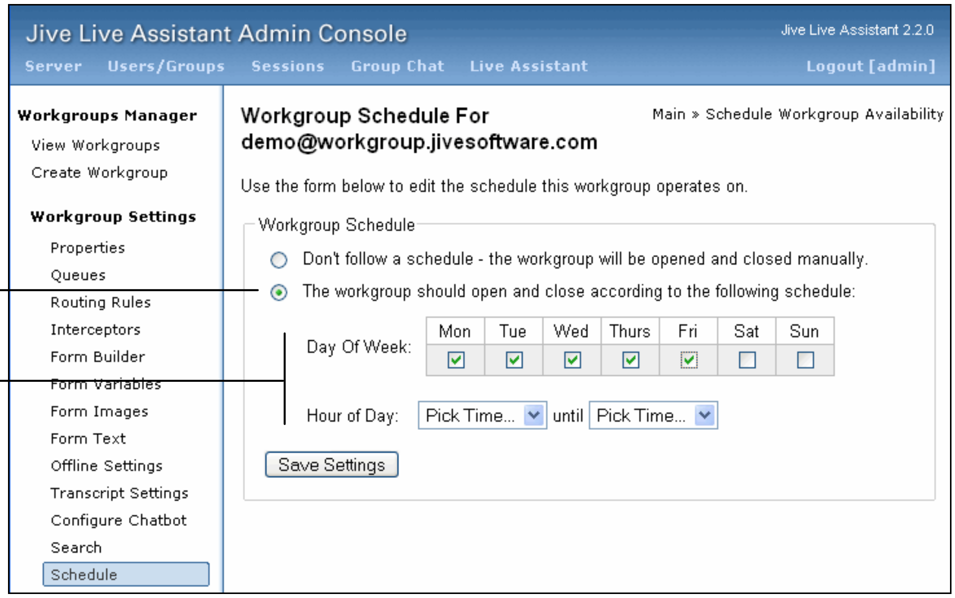
You can set the hours a workgroup is "open" for business—the hours it will accept chat requests into its queues. The workgroup will open and close according to the schedule you set.

To set a schedule for a workgroup:

1. In the Admin Console, click the **Live Assistan**t tab and then, in the Workgroup Summary screen, click the name of the workgroup.
2. In the sidebar pane under *Workgroup Settings*, click **Schedule**. The Workgroup Schedule screen displays.

Click to enable scheduling for this workgroup.

Select the days of the week the workgroup will be open, then select the hours it will open and close.



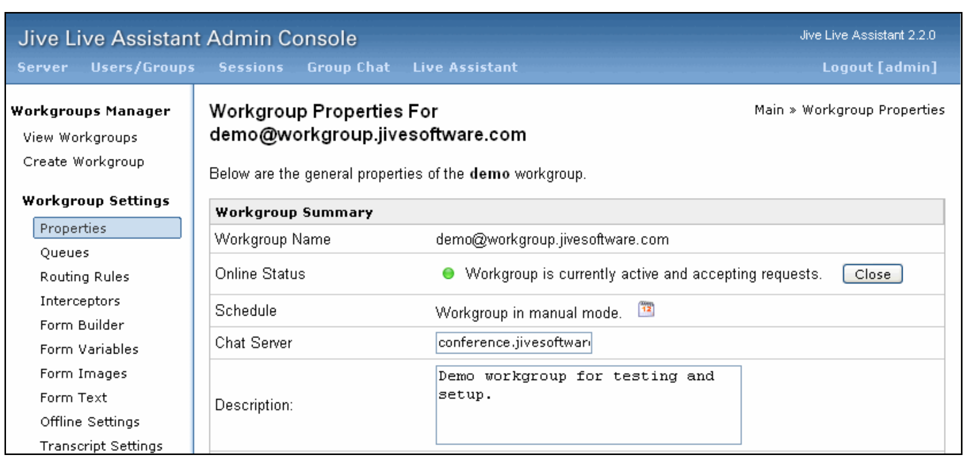
3. Change the settings as desired and then click the **Save Settings** button.

Open or close a workgroup manually

Suppose your support center is closed for the day and you want to prevent new requests from being received but you don't want to shut out the customers who are already in the workgroup queue or are being helped by an agent. If you do not have a schedule set up for the workgroup, you can manually close the workgroup to new requests.

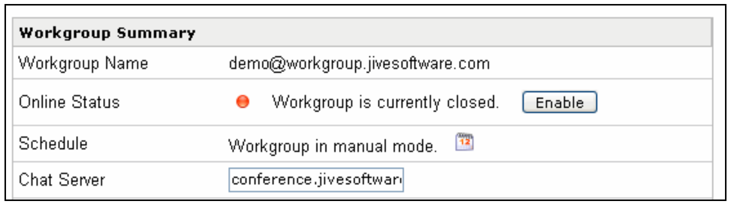
To manually close a workgroup to new requests:

1. In the Admin Console, click the **Live Assistant** tab.
2. In the Workgroup Summary screen, click the name of the workgroup. The Workgroup Properties screen displays for that workgroup.



3. To close the workgroup, in the *Online Status* row, click the **Close** button. The button changes to read "Enable" and the green dot icon

indicating an open status changes to red:



4. To open the workgroup, click the **Enable** button.

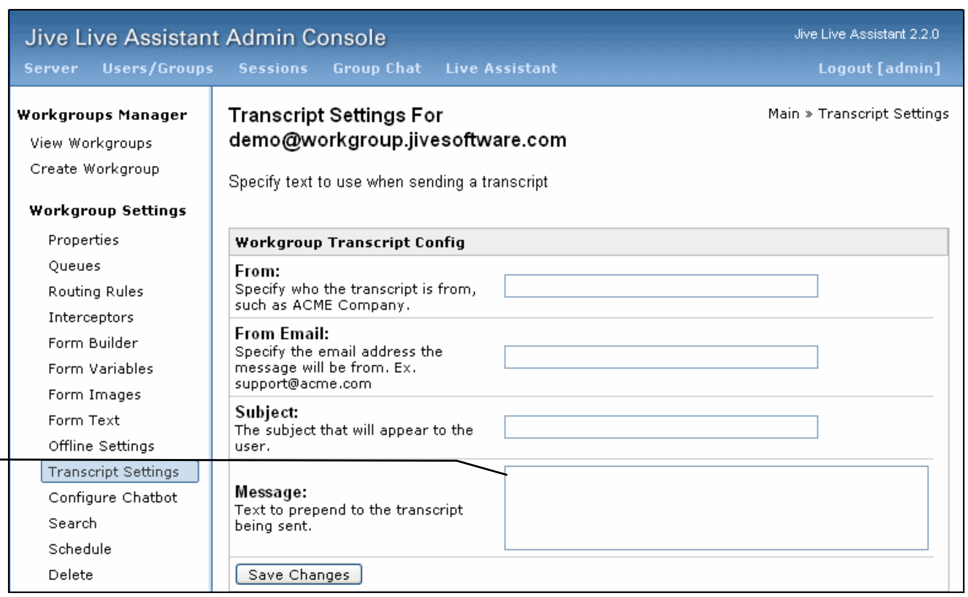
Set workgroup email transcript properties

The system will occasionally need to send emails of session transcripts to customers. You'll need to set up a workgroup email account to make this possible.

To set up email transcript capability for a workgroup:

1. In the Admin Console, click the **Live Assistant** tab and then, in the Workgroups Summary screen, click the name of the workgroup for which you want to set up email.
2. In the sidebar pane under *Workgroup Settings*, click **Transcript Settings**. The Transcript Settings screen displays.

If desired, create a message that will accompany the transcript.



3. Type in email account information for the workgroup in the fields provided, including subject and message. When finished, click the **Save Changes** button.

   Note: SMTP settings are controlled under Email Settings in the Server tab of the Admin Console. For more information, refer to the Admin Console online Help.

Set workgroup offline properties

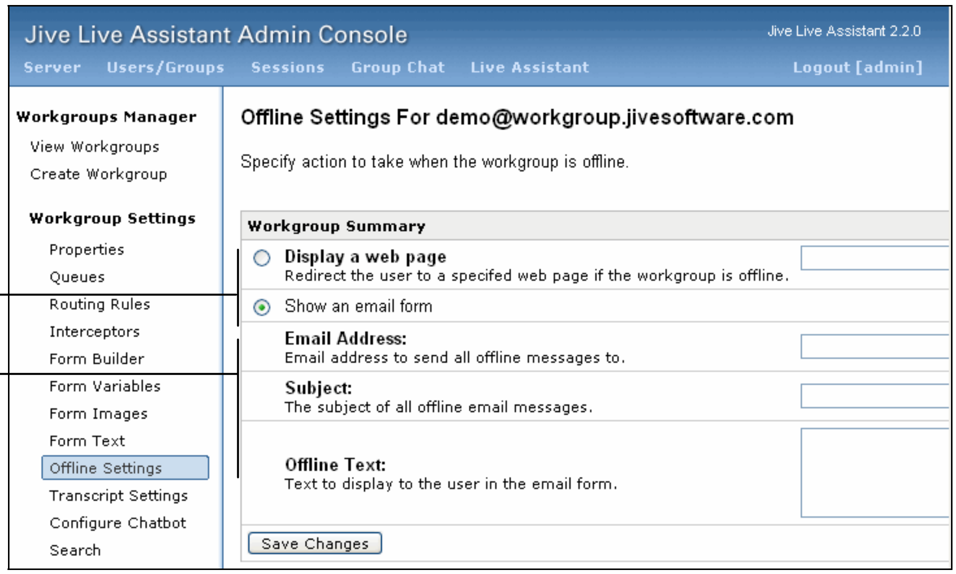
Use the workgroup offline settings to display a message to customers when the workgroup is closed.

To set offline properties for a workgroup:

1. In the Admin Console, click the **Live Assistant** tab and then, in the Workgroup Summary screen, click the name of the workgroup.
2. In the sidebar pane under *Workgroup Settings*, click **Offline Settings**. The Workgroup Offline screen displays.

Select to display either a webpage or an email form to customers.

Enter an email address for your SMTP server, then enter a message to be displayed to customers when the workgroup is offline.



3. Type in the offline message information and then click the **Save Changes** button.

Deploying the Webchat Client and Agent web applications

To make the chat service work on your website, you need to deploy the Webchat Client application to your application server (the server must have Servlet 2.3 or greater support). You can deploy both the Webchat Client and the Agent web applications.

Deploy the Webchat Client application

To deploy the Webchat Client application:

1. The files you will need are located in the *plugins* directory of your Jive Live Assistant installation. From the *plugins* directory, copy the file **webchat.war** to the *webapps* directory of your application server. Copying the WAR file to the directory automatically installs it.

   Note: Some application servers may require using a deploy tool to install a WAR file instead of copying the WAR file to a *webapps* directory.

2. Using your web browser, navigate to the web application (for example, http://www.example.com/webchat). You will be automatically taken to the beginning of the setup process. Follow the onscreen instructions.

3. Next, you will need to set up a “chat now” button, or some equivalent, on your webpage that customers can click to request a chat session. Include the following html code on the webpage where you want the Chat Now icon to appear, except substitute your website address for the placeholder address shown in bold, and the desired workgroup address for the placeholder workgroup address also shown in bold.

   ```
   <!-- Insert this snippet where you would like the Chat
   button image to show up -->

   <script language="JavaScript" type="text/javascript"
   src="http://www.example.com/webchat/jivelive.jsp"></scri
   pt>

   <script>

       showChatButton('your@workgroup.example.com');

   </script>

   <!-- End of Live Assistant Snippet -->
   ```

Deploy the Agent application

To deploy the Agent application:

1. The files you will need are located in the *plugins* directory of your Jive Live Assistant installation. From the *plugins* directory, copy the file **agent.war** to the *webapps* directory of your application server. Copying the WAR file to the directory automatically installs it.

   Note: Some application servers may require using a deploy tool to install a WAR file instead of copying the WAR file to a *webapps* directory.

2. Using your web browser, navigate to the web application (for example, http://www.example.com/agent). You will be automatically taken to the beginning of the setup process. Follow the onscreen instructions.

3. Download the **live_assistant_agent.exe** file, then send a link to this page to all agents.