



Getting Started with Avaya Automated Chat

Release 2.0
Issue 1.0
August 2013

© 2013 Avaya Inc.

All Rights Reserved.

Notice

While reasonable efforts have been made to ensure that the information in this document is complete and accurate at the time of printing, Avaya assumes no liability for any errors. Avaya reserves the right to make changes and corrections to the information in this document without the obligation to notify any person or organization of such changes.

Documentation disclaimer

“Documentation” means information published by Avaya in varying mediums which may include product information, operating instructions and performance specifications that Avaya generally makes available to users of its products and Hosted Services. Documentation does not include marketing materials. Avaya shall not be responsible for any modifications, additions, or deletions to the original published version of documentation unless such modifications, additions, or deletions were performed by Avaya. End User agrees to indemnify and hold harmless Avaya, Avaya's agents, servants and employees against all claims, lawsuits, demands and judgments arising out of, or in connection with, subsequent modifications, additions or deletions to this documentation, to the extent made by End User.

Link disclaimer

Avaya is not responsible for the contents or reliability of any linked websites referenced within this site or documentation provided by Avaya. Avaya is not responsible for the accuracy of any information, statement or content provided on these sites and does not necessarily endorse the products, services, or information described or offered within them. Avaya does not guarantee that these links will work all the time and has no control over the availability of the linked pages.

Warranty

Avaya provides a limited warranty on its hardware and Software (“Product(s)”). Refer to your sales agreement to establish the terms of the limited warranty. In addition, Avaya’s standard warranty language, as well as information regarding support for this Product while under warranty is available to Avaya customers and other parties through the Avaya Support website:

<http://www.avaya.com/support>

Please note that if you acquired the Product(s) from an authorized Avaya reseller outside of the United States and Canada, the warranty is provided to you by said Avaya reseller and not by Avaya. “Software” means computer programs in object code, provided by Avaya or an authorized Avaya reseller, whether as stand-alone products or pre-installed on hardware products, and any upgrades, updates, bug fixes, or modified versions thereto. Hosted Service means a hosted service subscription that you acquire from either Avaya or an authorized Avaya reseller (as applicable) and which is described further in Hosted SAS or other service description documentation regarding the applicable hosted service. If you purchase a Hosted Service subscription, the foregoing limited warranty may not apply but you may be entitled to support services in connection with the Hosted Service as described further in your service description documents for the applicable Hosted Service. Contact Avaya or authorized Avaya reseller (as applicable) for more information.

Hosted Service

The following applies if you purchase a Hosted Service subscription from Avaya or an authorized Avaya reseller (as applicable), THE TERMS OF USE FOR HOSTED SERVICES ARE AVAILABLE ON THE AVAYA WEBSITE, <http://support.avaya.com/LicenseInfo/> (“TERMS OF USE”), AND ARE APPLICABLE TO ANYONE WHO ACCESSES OR USES THE HOSTED SERVICE. BY ACCESSING OR USING THE HOSTED SERVICE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU

ARE DOING SO (HEREINAFTER REFERRED TO INTERCHANGEABLY AS “YOU” AND “END USER”), AGREE TO THE TERMS OF USE. IF YOU ARE ACCEPTING THE TERMS OF USE ON BEHALF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY TO THESE TERMS OF USE. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT WISH TO ACCEPT THESE TERMS OF USE, YOU MUST NOT ACCESS OR USE THE HOSTED SERVICE OR AUTHORIZE ANYONE TO ACCESS OR USE THE HOSTED SERVICE. YOUR USE OF THE HOSTED SERVICE SHALL BE LIMITED BY THE NUMBER AND TYPE OF LICENSES PURCHASED UNDER YOUR CONTRACT FOR THE HOSTED SERVICE, PROVIDED, HOWEVER, THAT FOR CERTAIN HOSTED SERVICES IF APPLICABLE, YOU MAY HAVE THE OPPORTUNITY TO USE FLEX LICENSES, WHICH WILL BE INVOICED ACCORDING TO ACTUAL USAGE ABOVE THE CONTRACT LICENSE LEVEL. CONTACT AVAYA OR AVAYA’S AUTHORIZED RESELLER FOR MORE INFORMATION ABOUT THE LICENSES FOR THE APPLICABLE HOSTED SERVICE, THE AVAILABILITY OF ANY FLEX LICENSES (IF APPLICABLE), PRICING AND BILLING INFORMATION, ANY MINIMUM LICENSE COMMITMENTS (IF APPLICABLE), AND OTHER IMPORTANT INFORMATION REGARDING THE HOSTED SERVICE.

Copyright

Except where expressly stated otherwise, no use should be made of materials on this site, the Documentation, Software, Hosted Service, or hardware provided by Avaya. All content on this site, the documentation, Hosted Service, and the Product provided by Avaya including the selection, arrangement and design of the content is owned either by Avaya or its licensors and is protected by copyright and other intellectual property laws including the sui generis rights relating to the protection of databases. You may not modify, copy, reproduce, republish, upload, post, transmit or distribute in any way any content, in whole or in part, including any code and software unless expressly authorized by

Avaya. Unauthorized reproduction, transmission, dissemination, storage, and or use without the express written consent of Avaya can be a criminal, as well as a civil offense under the applicable law.

Third Party Components

“Third Party Components” mean certain software programs or portions thereof included in the Software or Hosted Service which may contain software (including open source software) distributed under third party agreements (“Third Party Components”), which contain terms regarding the rights to use certain portions of the Software (“Third Party Terms”). As required, information regarding distributed Linux OS source code (for those Products that have distributed Linux OS source code) and identifying the copyright holders of the Third Party Components and the Third Party Terms that apply is available in the Documentation or on Avaya’s website at:

<http://support.avaya.com/Copyright>. You agree to the Third Party Terms for any such Third Party Components.

Preventing Toll Fraud

“Toll Fraud” is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or is not working on your company's behalf). Be aware that there can be a risk of Toll Fraud associated with your system and that, if Toll Fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya Toll Fraud intervention

If you suspect that you are being victimized by Toll Fraud and you need technical assistance or support, call Technical Service Center Toll Fraud Intervention Hotline at +1-800-643-2353 for the United States and Canada. For additional support telephone numbers, see the Avaya Support website:

<http://support.avaya.com>. Suspected security vulnerabilities with Avaya products should be

reported to Avaya by sending mail to:
securityalerts@avaya.com.

Trademarks

The trademarks, logos and service marks ("Marks") displayed in this site, the Documentation, Hosted Service(s), and Product(s) provided by Avaya are the registered or unregistered Marks of Avaya, its affiliates, or other third parties. Users are not permitted to use such Marks without prior written consent from Avaya or such third party which may own the Mark. Nothing contained in this site, the Documentation, Hosted Service(s) and Product(s) should be construed as granting, by implication, estoppel, or otherwise, any license or right in and to the Marks without the express written permission of Avaya or the applicable third party.

Avaya is a registered trademark of Avaya Inc.

All non-Avaya trademarks are the property of their respective owners.

Linux® is the registered trademark of Linus Torvalds in the U.S. and other countries.

Downloading Documentation

For the most current versions of Documentation, see the Avaya Support website: <http://support.avaya.com>.

Contact Avaya Support

See the Avaya Support website: <http://support.avaya.com> for Product or Hosted Service notices and articles, or to report a problem with your Avaya Product or Hosted Service. For a list of support telephone numbers and contact addresses, go to the Avaya Support website: <http://support.avaya.com>, scroll to the bottom of the page, and select Contact Avaya Support.

Contents

Chapter 1: Introduction	7
Purpose	7
Intended audience	7
Related resources	7
Documentation	7
Support.....	8
Chapter 2: Automated Chat Management Interface overview	9
Chapter 3: Setup and scripting	10
Create users and assigning roles overview	10
Creating a new user	11
Editing branch details.....	12
Editing sites for agent	13
Changing a password	13
Creating a project.....	14
Create project files.....	15
Creating an AnswerBase file	16
Add files to a project.....	17
Assigning the AnswerBase file to a project.....	17
Define conversational scripts in the project.....	19
Opening an AnswerBase file	19
Adding a topic in an AnswerBase file.....	20
Adding a rule in a topic	20
Adding an input in a rule.....	21
Adding an output in a rule	22
Branch label	23
Creating a branch label	23
Conversation engine	24
Creating a conversation engine	25
Chat site	26
Creating a chat site	26
Chapter 4: Test, approve, and deploy	29
Test the project.....	29

Publishing and simulating the project	29
Commit the changes	31
Committing the changes of a project branch	31
Approval branch.....	32
Creating an approval branch.....	32
Deploying a project branch.....	33
Verifying the deployment	34
Chapter 5: Chat as an agent	36
Chat dashboard	36
Gaining access to the chat feature	36
Chatting with a visitor	37
Appendix 1: Additional procedures.....	39
Enabling Rule search	39
Defining an external search engine	40
Approval group	41
Creating an approval group	41
Approving an approval branch for deployment.....	42
Glossary.....	44
Index	48

Chapter 1: Introduction

Purpose

This document describes how to set up the system for chat conversations between agents and visitors and script, test, approve, and deploy knowledge for the automated engine.

Intended audience

This document is for users of Automated Chat Management Interface who want to know how to start the Avaya Automated Chat system after the deployment installation.

Related resources

Documentation

The following table lists the documents related to Avaya Automated Chat 2.0. Download the documents from the Avaya Support website at <http://support.avaya.com>.

Title	Description	Audience
<i>Maintaining and Troubleshooting Avaya Automated Chat</i>	Provides maintenance and troubleshooting procedures of Avaya Automated Chat.	<ul style="list-style-type: none">• Sales engineers• BusinessPartners• Implementation engineers
<i>Upgrading Avaya Automated Chat</i>	Provides the sequence to upgrade Avaya Automated Chat.	<ul style="list-style-type: none">• Sales engineers• BusinessPartners• Implementation engineers

Title	Description	Audience
<i>Using Avaya Automated Chat</i>	Provides the procedures to use Avaya Automated Chat.	<ul style="list-style-type: none"> • Customers • Sales engineers • BusinessPartners • Implementation engineers
<i>Avaya Automated Chat Reference Manual</i>	Provides the procedures to use Avaya Automated Chat in an online format.	<ul style="list-style-type: none"> • Customers • Sales engineers • BusinessPartners • Implementation engineers
<i>Installing Avaya Automated Chat</i>	Provides installation instructions to install Avaya Automated Chat.	<ul style="list-style-type: none"> • Sales engineers • Business Partners • Implementation engineers

Support

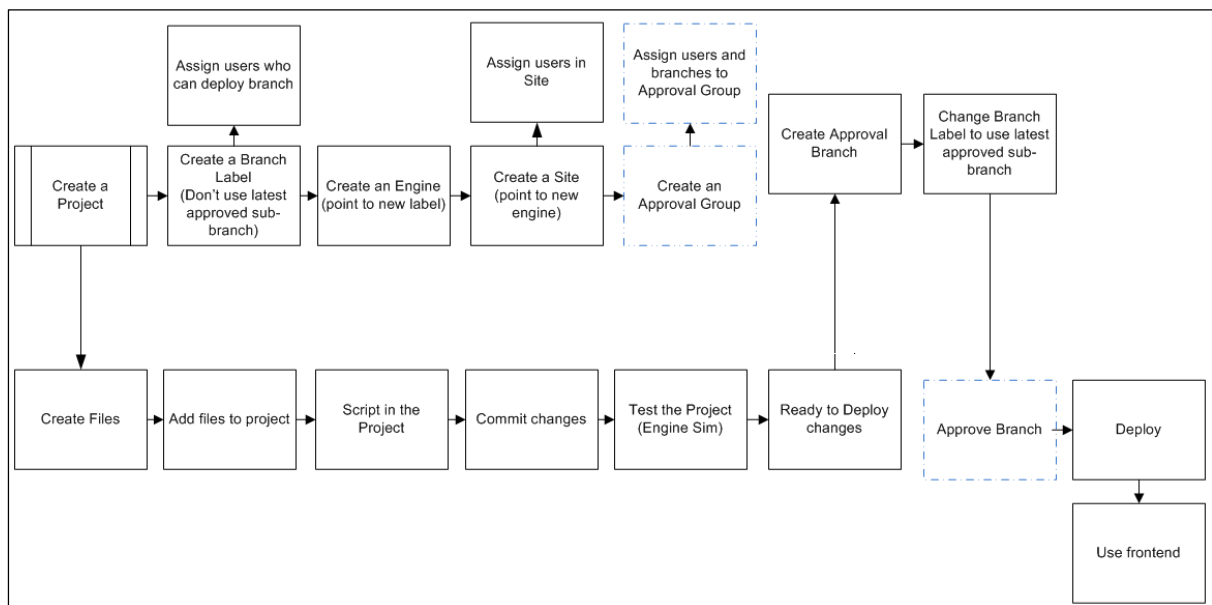
Go to the Avaya Support website at <http://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for notices, release notes, downloads, user guides, and resolutions to issues. Use the Web service request system to create a service request. Chat with live agents to get answers to questions. If an issue requires additional expertise, agents can quickly connect you to a support team.

Chapter 2: Automated Chat Management Interface overview

Avaya offers Avaya Automated Chat in a Software as a Service (SaaS) model. In this model, enterprises gain access only to the interfaces, and as the SaaS provider, Avaya centrally deploys and manages all components.

The Automated Chat Management Interface application combines natural language, artificial intelligence, and intelligent algorithms to create a Q & A self-help application. The application integrates automatic conversation and live chat into a superior customer experience. Automated Chat Management Interface publishes the files in a format that the Conversation Engine uses to deploy Avaya Automated Chat.

The following diagram shows an overview of the process flow. You might follow the process flow while creating a project, getting the project ready for deployment, and setting up sites for visitors and agents.



Chapter 3: Setup and scripting

To install and script a project in Automated Chat Management Interface, you must perform the procedures described in this chapter. Start by creating user accounts with roles, and then create files and define conversational scripts. You must also create a branch label, configure a conversation engine, and then create the chat site.

After you test and deploy the project, agents can chat with site visitors.

Create users and assigning roles overview

When you install Automated Chat Management Interface, you will have one super user installed with the name install. You can create following types of users:

- **Admin:** Administrators create and manage user accounts, project branches, branch labels, chat engines and sites, and perform additional tasks using Automated Chat Management Interface.

An administrator can be a super user or a user that you create using the administrator access while installing Automated Chat Management Interface.

- **Agent:** Agents chat with visitors to specific sites, view chat logs, and run chat reports.
- **Supervisor:** Supervisors manage agents, monitor agent chats, view chat logs, and run reports. The reports include analysis of agent activity, statistics and trends for the client, and tools for managing and improving automated features.
- **Knowledge Manager:** Knowledge Managers create and manage the scripting rules for a visitor chat system for specific project branches.
- **AnswerDesk User:** Phone agents join conversations with online agents, ask the automated engine questions, and perform external searches.

After you log in to Automated Chat Management Interface:

- Create one or more users with the appropriate log in access to log in to Automated Chat Management Interface.
- Change the temporary password of the super user account that you created while installing Avaya Automated Chat.

Creating a new user

Before you begin

Get the credentials to log in to Automated Chat Management Interface as an administrator.

About this task

Create one or more respective users with the required class.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Users**.

Automated Chat Management Interface displays the administer users page.

3. Click **Add new User** () next to the **Users** list.

Automated Chat Management Interface displays a **New User** dialog box for entering the user information.

4. In the **New User** dialog box, enter the details in the following fields:
 - **User Name:** Enter a unique user name. After you create a user, you cannot change the user name later.
 - **Chat Display Name:** Enter the chat display name. This name appears when the user is chatting with any other user or site visitor.
The chat display name can be the same as the user name or can be different from the user name.
 - **Email:** Enter a valid email address for the user. Avaya Automated Chat uses the email address to send password retrieval emails to users who forget or lose the passwords.
 - **Password and Confirm Password:** Enter the password and reenter the password. You can change the password later.
5. Click **Create**.
6. In the **User Details** section, enter the details in the following fields:
 - **Chat Display Name:** Displays the name that you have entered in the New User dialog box. You can modify this name.
 - **Email:** Displays the email address of the user. You can modify this email address.
 - **User Classes:** Select the required **User Classes** for the user. You can select multiple roles for the user.

- **Use Override:** Select this field to display the **Max Chats Override** field.
 - **Max Chats Override:** Set the maximum number of concurrent chat conversations for the user by overriding the default value.
 To set the maximum number of concurrent chat conversations for all users, set the **Default Max Chats** field on the Account Details page.
- 7. (Optional) If you selected **Agent** class access, in the **Sites for User** section, edit the sites for the branches that the user needs access to.
- 8. (Optional) If you selected **Knowledge Manager** class access, in the **Branch Details** section, edit the specific **Role Name** for the branches that the user needs access to.
- 9. Click **Save**.

Editing branch details

Before you begin

Ensure that the user has **Knowledge Manager** class access.

About this task

Assign specific roles to a Knowledge Manager for each project branch so that the Knowledge Manager can gain access to the script.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Users**.
 Automated Chat Management Interface displays the administer users page.
3. In the **Users** list, click the user name to change the branch details of a user.
 In the **User Details** section, if the user has **Knowledge Manager** class access, Automated Chat Management Interface displays the **Branch Details** section.
4. In the **Branch Details** section, enter the specific **Role Name** for the branches that you must provide access to the user.
5. Click **Save**.

Editing sites for agent

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface as an administrator.

About this task

Assign an agent role to a user to provide access to specific chat sites.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Users**.
Automated Chat Management Interface displays the administer users page.
3. In the **Users** list, click the user name to change the site access of a user.
Automated Chat Management Interface displays the **User Details** section.
If the user has **Agent** class access, Automated Chat Management Interface displays the **Sites for User** section.
4. In the **Sites for User** section, select the sites for the project branches that you must provide access to the user.
Note: A chat site is visible in the **Sites for User** list after the administrator defines the site access in Automated Chat Management Interface.
5. Click **Save**.

Results

Agents can sign in to Automated Chat Management Interface and chat with visitors in the selected sites.

Changing a password

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface as an administrator.

About this task

Use this procedure to change the password of a user.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Users**.
Automated Chat Management Interface displays the administer users page.
3. In the **Users** list, click the user name to change the password of a user.
Automated Chat Management Interface displays the **User Details** section.
4. In the **User Details** section, click the **Change Password** link.
Automated Chat Management Interface displays the **Change Password** dialog box.
5. In the **New Password** field, type a new password.
6. In the **Confirm New Password** field, reenter the same password.
7. Click **Change Password**.
The system saves the new password for this user account. You can notify the user about the new password.

Creating a project

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface as an administrator.

About this task

To create a new chat system, you must first create a project in Automated Chat Management Interface. After you script the project, get the approval from the approval group, and then deploy the project for a visitor to gain access to the chat site.

Use this procedure to create a new project in Automated Chat Management Interface.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Project Branches**.
Automated Chat Management Interface displays the administer project branches page.
3. Click the **New Project** link at the top of the project list.
Automated Chat Management Interface displays a new window.

4. In the **Project** field, type the new project name.
5. Click **Create New Project**.

Automated Chat Management Interface displays the new project name and details in the Project list.

Create project files

You can create different types of project files in a project branch. The AnswerBase file is the primary file in a project for defining conversational rules. The different project files are:

- **AnswerBases:** Contain the conversational rules. The system uses the rules to process the questions that the visitors type in the automated chat system. You can create a new AnswerBase on the Administer Account Files page, or add an AnswerBase to a project.

If you do not include any AnswerBases in the project, the AnswerBases do not appear in the File menu.
- **Procedures:** Help you to gather specific information from the front-end user, such as data for a form and when you must present a sequence of information to the user. Procedures are different from user-directed conversations, which the inputs and outputs of your AnswerBase rules handle.
- **Synonym Sets:** Help the engine to match variations of the Input text to a rule without requiring you to write additional inputs to handle words with similar meanings.
- **Code Modules:** Contain computer programming methods. You can use code modules to organize methods into groups that the conversational rules and different project branches can process.
- **Points Tables:** Apply to every rule and AnswerBase in the project. The point value that the engine assigns to a word depends on the importance of the word to all AnswerBases in that project.
- **Data Types:** Provide you the option to store and organize information that you want to gain access to the conversational rules. Each data type object defines one or more columns or attributes and enables you to assign values to each column.
- **Replacement Profiles:** Provide a way to replace input text that a front-end user enters or to replace output text that the text-to-speech program generates.

For more information about the project files, see *Automated Chat Management Interface Reference Manual*.

Creating an AnswerBase file

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface as an administrator.

About this task

Create an AnswerBase file to define the rules and conversational inputs and outputs that the knowledge manager uses to automate a chat system for site visitors.

You can add an AnswerBase file in multiple projects and edit the file separately for each project.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.

2. Click **Administer > Account Files**.

Automated Chat Management Interface displays the administer account files page.

3. In the **Account File** field, click the drop-down arrow and select **AnswerBases**.

Automated Chat Management Interface displays the AnswerBase list.

4. Click the **New AnswerBase** link at the top of the AnswerBase list.

Automated Chat Management Interface displays a new window to create a new AnswerBase file.

5. In the **AnswerBase** field, type the name of the new AnswerBase file.

6. Click **Create AnswerBase**.

Results

Automated Chat Management Interface creates and displays the new AnswerBase file alphabetically in the list of AnswerBase files.

To include the AnswerBase file in the project, you must add the AnswerBase file to a project.

Next steps

Assign the AnswerBase file to a project.

Add files to a project

For a new project, the File menu only shows the Project Alias and Shortcut options. As you create project files and add files to the project, the File menu expands to provide you access to these files.

Avaya Automated Chat groups the new files according to the following file types:

AnswerBases, Procedures, Synonym Sets, Code Modules, Data Types, Points Tables, Replacement Profiles, Variables, and Cue Cards.

Assigning the AnswerBase file to a project

Before you begin



Get the knowledge manager credentials to log in to Automated Chat Management Interface.

Create the AnswerBase file.

About this task

Assign the AnswerBase file to a project to make the file available to the project.


Procedure

1. Log in to Automated Chat Management Interface as a knowledge manager.
2. Click **Automate > Script**.
Automated Chat Management Interface displays the Script page.
3. Click the project branch menu () and select an existing project from the list of projects.
4. Click the select file menu ().
Automated Chat Management Interface displays the list of files and links to **Project Aliases**, **Shortcuts**, **Variables**, **Cue Cards**, and **Project Details**.
5. Click **Project Details** from the menu.
Automated Chat Management Interface displays the following sections related to the project.

- **Minimum Percent To Match:** Specifies the visitor input must match the Input words of a rule. This field is auto-populated with the default setting of 0.95.
 - **Language:** Assign and deploy a spell-checking dictionary for the front-end users of the project.
 - **AnswerBases:** List of the AnswerBase files that exist in Automated Chat Management Interface.
 - **Procedures:** List of the procedures files that exist in Automated Chat Management Interface.
 - **Synonym Sets:** List of the synonym sets files that exist in Automated Chat Management Interface.
 - **Code Modules:** List of the code modules files that exist in Automated Chat Management Interface.
 - **Points Table:** List of the points table files that exist in Automated Chat Management Interface.
 - **Data Types:** List of the data types files that exist in Automated Chat Management Interface.
 - **Replacement Profiles:** List of the replacement profiles files that exist in Automated Chat Management Interface.
6. Click the **AnswerBases** section to view the list of AnswerBase files that exist in Automated Chat Management Interface.
 7. Select the AnswerBase files that you must include as part of the project.
You can clear any of the previous selected AnswerBase files to exclude the file from the project.
 8. Click **Update**.

Result

Automated Chat Management Interface updates the project with the new file. If you clear any of the files in Step 7, the system removes the file from the project.

You can see the newly included file in the select file menu () on the Script page.

Automated Chat Management Interface also displays an asterisk next to the project name on the Script page to indicate that the project has uncommitted changes. To commit the changes, see [Commit the changes on page 31](#).

Define conversational scripts in the project

Create topics and rules in the AnswerBase files to handle conversations with the visitors of a chat system. Topics are group of related rules. Rules are a collection of inputs to test against a visitor type. You must pair the inputs with one or more outputs to display to the visitor if the input matches.

Opening an AnswerBase file



Before you begin

Get the knowledge manager credentials to log in to Automated Chat Management Interface.

About this task

Open the AnswerBase file that you assigned to a specific project.

Procedure

1. Log in to Automated Chat Management Interface as a knowledge manager.
2. Click **Automate > Script**.
Automated Chat Management Interface displays the Script page.
3. Click the project branch menu () and select the project that contains the AnswerBase file.
4. Click the select file menu () and select the AnswerBase file that you must edit.

Result

Automated Chat Management Interface displays the **Topics** list. In this window, you can create topics, rules, and inputs and outputs, to script automated conversations with visitors.

Next steps

Add a topic in an AnswerBase file.

Adding a topic in an AnswerBase file



Before you begin

Open the AnswerBase file to which you must add the topic and rules.

About this task

Add a topic in an AnswerBase file to group related rules. You must add at least a topic.

Procedure

1. In the **Topics** section, click **Add new topic** ().
2. In the text field, type the name of the new topic.
3. Click **Add Category** () to save the new topic name.

Automated Chat Management Interface saves the new topic in the AnswerBase file and displays the new topic in the **Topics** section.

Next steps

Add a rule in a topic.

Adding a rule in a topic

Before you begin

Open the AnswerBase file and add a topic.

About this task

Rules are the key building blocks of a conversational process with the visitor.


Rules are a collection of inputs to test against visitor text, paired with an output to display to the visitor if the system matches the inputs with the visitor text.


You can define a child rule for a parent rule to handle specific responses when the parent rule matches the child rule.

Procedure

1. Click the topic for which you must add rules.
2. In the **Rules** text field, type the name of the new rule.

Note

If the **Rules** text field is not visible, click **Add new rule** () next to **Rules**. Type the name of the new rule in the text field.

3. Click **Add Rule** () to save the new rule name.

Automated Chat Management Interface saves the new rule in the current topic and displays the new rule in the **Rules** section.

Result

For the new rule, Automated Chat Management Interface opens the **Inputs** and **Outputs** section.

You must define a default rule for each project to process any input from the visitor that does not match any other specific rule. For information about how to define a default rule, see *Automated Chat Management Interface Reference Manual*.

Next steps

Add an input in a rule.

Adding an input in a rule

Before you begin

Open the AnswerBase file, and add a topic in a rule.


About this task


Inputs for a rule describe what text from a visitor matches the rule. You can add multiple inputs for a single rule so that the engine can match with greater accuracy.

Procedure

1. In the **Inputs** text field, type the input for the newly created rule.

Note:

If the **Inputs** text field is not visible, click **Add new input** () next to **Inputs**. Type the name of the input in the text field.

2. Click **Add Input** () to save the new input name.

Automated Chat Management Interface saves the new input in the current rule and displays the new input name in the **Inputs** list.

3. In the **Inputs** list, click the input to add **Input Details**.
4. In the **Input Details** section, enter the details in the following fields:

- **Input:** Do not change the displayed input name. If you change the name and click **Save**, the system displays the changed input name in the **Inputs** list.

- **Synonyms:** Include synonyms that control whether an input matches the visitor text.

For more information about synonyms, see *Automated Chat Management Interface Reference Manual*.

- **Condition:** Include conditions that control whether an input matches the visitor text.

For more information about condition, see *Automated Chat Management Interface Reference Manual*.

Next steps

Add an output in a rule.

Adding an output in a rule

Before you begin

Open the AnswerBase file and add a topic, a rule, and an input.


About this task


Outputs of a rule define the exact text or other information that the system displays to a visitor based on the input that the visitor submits.

Procedure

1. In the **Outputs** text field, type the output for the newly created rule.

Note:

If the **Outputs** text field is not visible, click **Add new output** () next to **Outputs**. Type the name of the output in the text field.

2. Click **Add Output** () to save the new output name.

Automated Chat Management Interface saves the new output in the current rule and displays the output name in the **Outputs** list.

3. In the **Outputs** list, click the output to add **Output Details**.
4. In the **Output Details** section, enter the details in the following fields:
 - **Output:** Do not change the displayed output name. If you change the name and click **Save**, the system displays the changed output name in the **Outputs** list

- **Condition:** Include conditions that control what output the system must display to the visitor.

For more information about conditions, see *Automated Chat Management Interface Reference Manual*.

- **External Commands:** Include external commands to specify the action that the system performs when the system displays an output to the visitor.

For more information about external commands, see *Automated Chat Management Interface Reference Manual*.

Branch label

A branch label always points to the most recent version of the project and you can use the branch label to deploy projects to the chat site. You can also use a branch label to update only the required setting files instead of updating all setting files each time.

To create project branches, approvals, and deployments:

- Create a project branch label and point the project branch to a project.
- Create an approval branch before deploying the branch to production.
- Change the branch label to use Latest Approved Sub Branch.
- Deploy the branch through the branch label.
- Create a new approval branch and continue deploying the same branch label for each subsequent deployment to production.

Creating a branch label

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Use this procedure to create a branch label of a project.


Procedure


1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Branch Labels**.

Automated Chat Management Interface displays the administer branch labels page.

3. In the **Labels** text field, type the name of the label for the newly created project.

Note:

If the **Labels** text field is not visible, click **Add new Label** () next to **Labels**. Type the name of the label in the text field.

4. Click **Add Label** () to save the new label name.

Automated Chat Management Interface saves the new label and displays the new name of the label in the **Labels** list.

In the center and right panes, Automated Chat Management Interface also displays the related settings to define the new branch label.

5. In the center pane, enter the details in the following fields:
 - a. **Name:** Do not change the displayed label name. If you change the name and click **Save**, the system displays the changed label name in the **Labels** list.
 - b. **Branch:** Click the required project branch from the drop-down list.

Automated Chat Management Interface associates the selected label to the specific branch.
 - c. **Use latest approved sub-branch:** Select this check box and use approval branches for each new set of changes to deploy. Because a scripter might not need to select this check box to simplify the scripting and deployment process.
6. In the **Users that can Deploy** section, select the users who can deploy the branch associated to this label.
7. Click **Save**.

Conversation engine

A chat engine configuration defines a conversation engine that provides automated chat answers directly to visitors and offers real-time suggested answers for chat agents.

Creating a conversation engine

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Use this procedure to create a conversation engine for a project.


Procedure


1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Engine Configs**.

Automated Chat Management Interface displays the administer engine configs page.

3. In the **Engine Name** text field, type the new engine name.

Note:

If the **Engine Name** text field is not visible, click **Add new Engine** () next to **Engine Name**. Type the new name of the engine in the text field.

4. Click **Add Engine** () to save the new engine name.

Automated Chat Management Interface saves the new engine name and displays the new engine name in the **Engine Name** list.

Automated Chat Management Interface also displays the **Conversation Engine Settings** and the **Backend Rule Search Settings** sections to define the new engine.

5. In the **Conversation Engine Settings** section, enter the details in the following fields:
 - a. **Name:** Do not change the displayed conversation engine name. If you change the name and click **Save**, the system displays the changed conversation engine name in the **Engine Name** list.
 - b. **Base URL:** Define the server location where you installed the conversation engine. The standard format is:
`http://<servername>/enginepost/`.

If you installed the conversation engine and Automated Chat Management Interface on the same server, the **Base URL** is:
`http://localhost/enginepost`.
 - c. **Label:** Click the required branch label from the drop-down list.

- d. **Min Autosend CF:** Specify the minimum Confidence Factor (CF). If the CF value is less than the specified value, the conversation engine does not send an automatic response but provides a suggestion to the live chat Agent. The default value is 0.8.
 - e. **Min Suggestion CF:** Specify the minimum Confidence Factor. If the CF value is less than the specified value, the conversation engine does not send an automatic response but provides a suggestion to the live chat Agent. The default value is 0.5.
6. In the **Backend Rule Search Settings** section, do not change the values of the fields. If you must select Rule Search, see [Enabling Rule Search on page 39](#).
 7. Click **Save**.

Chat site

After you define an engine configuration, you must create a site. A site defines which engine configuration the front end must use when interacting with either the automated agent or when assigning a visitor to a live agent. You can assign live agents to various sites.

Creating a chat site

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

An administrator can assign an engine to the site, assign users to the site, and assign optional external search engines.


Procedure


1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Sites**.

Automated Chat Management Interface displays the administer sites page.

3. In the **Sites** text field, type the name of the new chat site.

Note:

If the **Sites** text field is not visible, click **Add new Site** () next to **Sites**. Type the new name of the chat site in the text field.

4. Click **Add Site** () to save the new chat site.

Automated Chat Management Interface saves the new chat site and displays the new chat site in the **Sites** list.

Automated Chat Management Interface also displays the **Details**, **Agents**, **External Search Engines**, and **Message Masks** sections to define the new chat site.

5. In the **Details** section, enter the details in the following fields:
 - a. **Site Name**: Do not change the display name of the chat site. If you change the name and click **Save**, the system displays the changed site name in the **Sites** list.
 - b. **Conversation Engine**: Click the required conversation engine that you must associate with this chat site from the drop-down list.

For information about how to create a conversation engine, see [Creating a conversation engine on page 25](#).
 - c. **Site Code**: Read-only field. A site code is a unique identifier. The system uses the site code for the frontend interface to identify the engine configuration the system must use.

The system also uses the site code dynamically within an answerbase to reassign the current interaction to a new engine configuration.
 - d. **AnswerDesk Site**: Specify the site as an AnswerDesk site. The site is found as a list when an agent logs in to the AnswerDesk system.
 - e. **Agent Survey**: Assign a survey that appears to agents chatting in this site.
 - f. **Description**: (Optional) Type comments to provide information about the new chat site.

6. In the **Agents** section, select **Select All** to assign all agents to the chat site. You can also select individual agents from the list.

Only the selected agents receive visitor chats from this chat site.

7. In the **External Search Engines** section, select the external search engines sites if you must allow agents to perform external website searches to get answers for questions of visitors.

For information about how to define an external search engine, see [Defining an external search engine on page 40](#).

8. In the **Message Masks** section, select the message masks that you must apply to this chat site.
9. Click **Save**.

Automated Chat Management Interface creates the chat site with the selected settings.

When you are ready to verify the deployment, return to this page and click the **Open Sample Frontend** link. For more information about how to verify the deployment, see [Verifying the deployment on page 34](#)

Chapter 4: Test, approve, and deploy

After you set up and script a project, you need to test, approve, and deploy the project to enable agents to chat with site visitors.

Test the project

After you make changes to the automated chat rules of a project, you must test the rules in the chat engine simulator. If the test results are satisfactory, you can deploy the changes to the project.

Publishing and simulating the project

Before you begin

Publish the changes to a testing location, and then run the engine simulator to test the changes with specific simulated visitor inputs.

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task


Use this procedure to run the engine simulator to test the project with specific user inputs. You can simulate the project based on the uncommitted changes, and the system tests the changes without affecting others working on the project.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Automate > Test Branch**.

Automated Chat Management Interface displays the automate test branch page.

Note:

To see the automate test branch page, you can also click **Test Branch** () on the Script page after selecting a project.

3. In the **automate test branch** field, click the required branch that you must test locally from the drop-down list.

4. Click **Publish for Testing** to publish the uncommitted changes into a local testing area.

Automated Chat Management Interface displays the list of publishing actions ending with the message: `Publishing Complete`.

5. Click **Engine Sim** to begin testing the uncommitted changes in the simulator.

Automated Chat Management Interface displays the Engine Simulator window. In this window, you can enter the inputs and test the AnswerBase rules.

6. In the **Simulator** section, click **Input** from the drop-down list to test conversational text.

7. Click **Send** to send the `_startup` input that the system prepopulates in the text field.

Automated Chat Management Interface starts loading the project files into system memory. Before typing other inputs, you must wait until Automated Chat Management Interface displays the `Project finished loading` message.

8. In the text field, type additional conversational inputs that you must test.

You can test this input by texting the way visitors might type and see how the conversation engine responds to the chat.

9. Click **Send**.

The simulator processes the input as if the input is sent from the visitor. After the conversation engine processes the input, simulator displays the information in the **Response**, **Debug**, and **Details** section.

You can verify the additional conversational inputs by repeating Step 8 and Step 9.

In the Engine Simulator window, the **History Log**, **Match Verifier**, **Regression Tester** and **Code Error Log** tabs provide additional information about how the system simulated the inputs.

For more information about the engine simulator, see *Automated Chat Management Interface Reference Manual*.

10. Click **Close**.

Commit the changes

In a project branch, you must commit the changes to deploy the branch to the chat system. Until you comment the changes, other users who are working on the same project cannot see the changes.

Committing the changes of a project branch

Before you begin

Get the knowledge manager credentials to log in to Automated Chat Management Interface.

About this task

Use this procedure to commit the changes of a project branch.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.

2. Click **Automate > Commit Changes**.

Automated Chat Management Interface displays the automate commit changes page.

3. In the **Select Branch** list, click the required branch with the changes that you want to commit.


The system lists the branches that include changes in the menu with an asterisk beside the name.

The system also displays the list of changes that the scripter makes to objects in the branch.

4. On the Object Changes page, click the **view** link for each objects and perform the following actions:

- a. Click **Show History** (🕒) to see the branch name, author name, when the change is made to the object, to delete working changes of an object, and to view the details of object.

Automated Chat Management Interface displays a window with the history details. You can click the **View Details** link to review the details of the object. You can click **Delete Working Change** (🚫) to delete a particular object.

- b. Click **Show Object Details** () to review the details of the object.
5. In the **Commit Comments** field, type a description for reference.
6. Perform the following actions:
 - Click **Commit Working Changes**.

If the commit is successful, Automated Chat Management Interface displays the message: `Data Committed Successfully. No Conflicts Detected`. You can click the **Back To Last Object Scripted** link to return to the automate script page.

If conflicts occur when you commit the changes, Automated Chat Management Interface automatically overrides the previous changes with your changes.

A conflict can occur when you are editing a rule in your Automated Chat Management Interface account, and another scripter edits the same rule and commits the change before your change.
 - Click **Rollback Working Changes**.

Automated Chat Management Interface displays a message to confirm if you want to delete all working changes. If you click **Ok**, Automated Chat Management Interface abandons all uncommitted changes in the selected branch.

Result

Automated Chat Management Interface commits all objects and makes the branch available for deployment or for approval if you set up optionally.

Approval branch

When new conversational scripting is ready for visitors to use on a chat site, you can create, approve, and deploy an approval branch.

Creating an approval branch

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Create an approval branch when a project branch is ready for approval and deployment.

Approve an approval branch before deployment if you create an approval group for the branch.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Project Branches**.

Automated Chat Management Interface displays the administer project branches page.

3. In the **Create Branch For Approval** column, click the **Create** link for the project branch that is ready to approve.

If a user makes the changes to the branch but did not commit yet, the system displays the message: *There are Uncommitted Objects in this branch. Do you want to create a branch for approval.*

4. Perform the following actions:
 - Click **Yes**, to create an approval branch without committing the changes. The uncommitted changes are not part of the new approval branch.

Automated Chat Management Interface displays a window for entering the name of the approval branch.

- Click **No**, to commit the changes before you create the new approval branch.

In this case, you must review the changes, commit the changes, and perform the creating an approval branch procedure.

5. In the **New Branch for Approval** field, type the name of the approval branch name.
6. Click **Create Approval Branch**.

Result

Automated Chat Management Interface takes a snapshot of the branch and creates an approval branch that you can deploy. However, if you define an approval process for the project, you must get the approval of the branch before you deploy.

Deploying a project branch

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Deploy the changes that you made to a project branch for visitors to use in the chat system. If you define an approval process for the project, the user from the approval group must approve the project branch before you deploy the project branch.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Automate > Deploy**.

Automated Chat Management Interface displays the automate deploy page.

3. In the **Automate Deploy** text field, click the required label for the branch that you must deploy.

Note:

If you define an approval group for the project, the system displays a list of approved project branches in the automate deploy field.

4. Click **Deploy**.

Automated Chat Management Interface displays a list of deployment actions ending with the message: `Deployment process finished`.

Result

Automated Chat Management Interface deploys the project files and makes the files available to the chat system.

Verifying the deployment

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

After you deploy a project branch, you can connect to the new chat system and verify that the chat system is working.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Sites**.

Automated Chat Management Interface displays the administer sites page.

3. In the **Sites** list, click the required site.

Automated Chat Management Interface displays information about the sites.

4. In the **Details** tab, click the **Open Sample Frontend** link.

Automated Chat Management Interface displays a new window where you can chat as a site visitor and receive outputs from an agent or Avaya Automated Chat.

5. Enter text in the text fields, and then click **Send**.

The chat engine assigned to this site processes the input text.

6. Continue sending text to the engine as if you are a site visitor.

Automated Chat Management Interface interacts with the conversational text according to the scripted rules in the deployed project branch.

7. Close the browser window.

Chapter 5: Chat as an agent

When the chat site is running and available for visitors, a chat agent can join conversations with site visitors. The agent must first gain access to the chat feature for the system to assign the chats. Then the agent can chat with a live visitor that the system assigns.

The chat page displays the chat dashboard and a link to Start Chatting and Start AnswerDesk.

Chat dashboard

The chat page shows a dashboard summary of the list of sites, with statistics on agents, conversations, and duration of each conversation. Automated Chat Management Interface updates the statistics automatically.

You can click a site name to see the summary of the workforce and visitors sections.

- The workforce section displays the information about the chat agents, who are currently logged in to Automated Chat Management Interface.
- The visitors section displays information about users of the chat system, who are conversing with either the engine, an agent, or who are waiting to chat with an agent.

Gaining access to the chat feature

Before you begin

Get the agent credentials to log in to Automated Chat Management Interface.

About this task

An agent can join conversations with site visitors after gaining access to the chat feature.

Procedure

1. Log in to Automated Chat Management Interface as an agent.
 1. Click **Chat > Start Chatting**.
The system displays the Avaya Automated Chat window.
2. In the **Status** field at the top of the page, click **UNAVAILABLE**.

Automated Chat Management Interface changes the status to **AVAILABLE**.

Note:

For users with only agent access, the default status is **AVAILABLE**.

Automated Chat Management Interface automatically assigns new visitor chats to agents who are available, and who are chatting with fewer visitors than the number specified in the **Max Chats** setting for the agent.

The Conversations tab displays the `No Conversations` message until the agent enters a conversation. The system lists each agent conversations with a chat icon to indicate the status of the conversation and adds the new conversations to the list.

When an available agent receives a new chat from the system, the center chat box displays the text of the conversation that the visitor might have had with another agent or the automated chat system.

If the agent chat browser window is not in focus, Automated Chat Management Interface displays a New Conversation notification in a pop-up window.

Note:

Disable the pop-up blocker for your browser to receive notifications of new conversations.

Next steps

Chat with a visitor.

Chatting with a visitor

Before you begin

Gain access to the chat feature.

About this task

When the system assigns a visitor chat to an available agent, the agent can communicate with the visitor.

Procedure

1. Read the visitors question in the scrolling chat box above the **Chat** tab.
2. Click the **Chat** tab at the bottom of the chat box, if the **Chat** tab is not already active.
3. In the **Say** field, type your response to the visitor.

4. Click **Send**.

Automated Chat Management Interface displays your response in the scrolling chat box and in the visitors chat session.

5. Continue conversing with the visitor to answer questions.

For more information about additional functionality of agent chats, see *Automated Chat Management Interface Reference Manual*.

Appendix 1: Additional procedures

Enabling Rule search

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Configure an engine to enable agents who are chatting with visitors to search the current AnswerBase in a project. Agents can use the search results to provide more information to the visitor.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Engine Configs**.

Automated Chat Management Interface displays the administer engine configs page.

3. In the **Engine Name** section, click the engine for which you must enable the Rule search.

Automated Chat Management Interface displays the **Conversation Engine Settings** and the **Backend Rule Search Settings** sections for the engine.

4. In the **Backend Rule Search Settings** section, enter the details for the following fields:

- a. **Disable Rule Search:** Verify that the **Disable Rule Search** field is selected. If not, select this field to search the AnswerBase in a project.

- b. **Base URL:** Define the server location of Automated Chat Management Interface. The standard format is:
`http://<servername>/enginepost/`.

If you installed the conversation engine and Automated Chat Management Interface on the same server, the **Base URL** is:
`http://localhost/enginepost`.

- c. **Number of Results:** Type the maximum number of results that Automated Chat Management Interface must display to an agent during each Rule search.
 - d. **Minimum Score:** Specify the minimum score, which is the score that the system requires to send a result to an agent. The minimum score is the confidence factor.
5. Click **Save**.

Defining an external search engine

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Configure each chat site to enable agents who are chatting with visitors to perform searches. Agents can use external search engines, such as Google.com, or locally installed search engines such as Windows Search. Agents can use the results to provide additional information to the visitor.


Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > External Search Configs**.

Automated Chat Management Interface displays the administer external search configs page.

3. In the **External Search Name** text field, type the name of the new search site.

Note:

If the **External Search Name** text field is not visible, click **Add new External Search** () next to **External Search Name**. Type the new name of the search site in the text field.

4. Click **Add External Search** () to save the new external search site.

Automated Chat Management Interface saves the new external search site and displays the new search site in the **External Search Name** list.

Automated Chat Management Interface also displays the fields to define the new engine.

5. In the **Name** field, do not change the display name of the search site. If you change the name and click **Save**, the system displays the changed site name in the External Search Name list.

6. In the **Base URL** field, type the server location of the external search engine.
7. In the **Param Name** field, type the parameters that you must send to the search engine.
8. In the **Method** field, click the required method from the drop-down list. The options are **GET** or **POST**.
9. Click **Save**.

Approval group

You can configure Automated Chat Management Interface to request an approval group for a project before you deploy the project for visitors to gain access. An approval group is optional and you can set the approval group when you need specific Automated Chat Management Interface users to approve the changes in a project.

The first step of creating an approval process is to define an approval group which specifies the Automated Chat Management Interface users who can approve the changes in a project. If you create an approval branch for the project, one member of the approval group must approve the changes before you deploy the changes.

Creating an approval group

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Use this procedure to create an approval group.


Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Administer > Approvals**.

Automated Chat Management Interface displays the administer approval page.

3. In the **Approval Groups** field, type the name of the new approval groups.

Note:

If the **Approval Groups** text field is not visible, click **Add new Approval Group** () next to **Approval Groups**. Type the name of the new approval groups in the text field.

4. Click **Add Approval Group** () to save the new approval groups.

Automated Chat Management Interface saves the new approval groups and displays the new approval groups in the **Approval Groups** list.

Automated Chat Management Interface also displays the list of users and project branches that you can assign to the new approval group.

5. In the **Users in Approval Group** list, select **Select All** to assign all users to the approval group. You can also select individual users from the list.
6. In the **Branches** list, select the projects that you must assign to the approval group.
7. Click **Save**.

Approving an approval branch for deployment

Before you begin

Get the administrator credentials to log in to Automated Chat Management Interface.

About this task

Approving an approval branch before deploying is an optional step of Automated Chat Management Interface.

To approve an approval branch, first create an approval group for the project. Then the approved Automated Chat Management Interface users who are defined in the approval group can approve the approval branch.

Procedure

1. Log in to Automated Chat Management Interface as an administrator.
2. Click **Automate > Approve**.

Automated Chat Management Interface displays the automate approve page.

3. Click the **Project** drop-down list and choose the approval branch that you must approve.

Automated Chat Management Interface displays the **Commits Summary Since Branch Last Approval** and **Approval Summary** sections.

In the **Commits Summary Since Branch Last Approval** section, Automated Chat Management Interface displays the list of the users of the approval groups who have committed the changes since the last approval.

In the **Approval Summary** section, Automated Chat Management Interface displays the changes that are ready to approve, grouped by the type of object.

4. In the **Comments Summary Since Branch Last Approval** section, click the **view** link to view the comments that are inserted by the users of the approval groups.
5. In the **Approval Summary** section, click the **view** link for each object type to review the specific objects that changed.
6. In the view window, click the **View Details** link for each object, add optional **Comments**, and if require, assign the objects to users to request information.
7. In the view window, click **Save Comments** if you added comments.
8. Click **close** from the view window to return to the automate approve page.
9. In the **Comments** field, type a summary of the changes that you make.
10. Perform the following actions:

- Click **Approve** to approve the branch.

Automated Chat Management Interface displays the message: You Have Successfully Approved The Branch.

The project branch appears in the Project window of the list of branches that you can deploy.

- Click **Reject** to reject the project branch and add your comments in the **Comments** field.

Note:

If any user from the approval group approves the project branch, the system approves the branch.

After you approve the branch, you can deploy the project branch to the chat system.

Glossary

A

administrator: Creates and manages user accounts, project branches, branch labels, chat engines and sites.

agent: Chat with front-end visitors, view chat logs, and run some reports.

alias: Used as embedded variables within a project.

AnswerBase: A set of conversational Rules that the chat engine uses to process front-end user inputs.

approval branch: An optional branch of a project that can be approved and deployed.

approval group: A group of users who can approve project branches for deploying.

approve: An approval group can approve a project branch before deploying.

B

back-end user: Agents, Supervisors who chat with visitors (front-end users).

BGate module: Extensible software modules defined in a Code Module to access customer-specific back-office systems.

C

CF: Confidence factor.

chat: Front-end users type input messages to receive help from agents.

code module: Contains a set of computer programming methods that are written in the C# (C-Sharp) programming language to organize methods into groups that make sense to the conversational rules and different project branches.

commit changes: Allows changes to be seen by other Automated Chat Management Interface users who are working on the same project.

conditions: Controls exactly when a rule matches the user's text.

confidence factor: Determines whether an answer generated by the engine is sent directly to the user or presented to the Agent as a suggested response. The is calculated by total matching word points divided by the total word points in the user's input (aka CF).

Conversation Engine: Automated Conversive Engine provides automated chat answers directly to front-end users.

CSR: Customer Service Representative.

CSV: Automated Chat Management Interface can export chat logs into a Comma Separated Value file.

D

data type: Stores and organizes information that can be accessed in rules.

default max chats: The default maximum number of chat conversations that Agents may enter at one time, this can be overridden for a specific Agent in the Max Chats Override.

deploy: Changes in a project can be deployed for visitors to the website.

E

engine configuration: Defines a Conversation Engine which provides automated chat answers to visitors.

external command: Additional functions that are performed after a specific Rule Output or Procedure Output matches successfully and the output text is displayed to the front-end user.

F

file: Store Automated Chat Management Interface data and are listed in the File menu of the Script page. For example, AnswerBase file.

front-end user: Visitors to the chat site who converse with Agents or the automated Automated Chat Management Interface system.

I

input: Text from a front-end user; the part of a Rules that defines what front-end user text will match the rule and causes it to be fired.

K

knowledge manager: Creates and manages the scripting rules for a visitor chat system.

M

max chats override: Defines the maximum number of chats for a specific Agent, instead of using the Default Max Chats setting.

O

output: Defines the exact text or other information that is displayed to a user based on the input they submitted.

P

points table: A list of words and values which identify which words will be given more importance during engine matching.

procedures: Define a step-by-step conversation that can be used to guide the user through a sequence of information.

project branch: Multiple branches provide control over workflow in Automated Chat Management Interface.

R

replacement profile: Replace the text that was entered by the front-end user with other text, or specifies the output text for speech engines.

roles: Types of users with different permissions and access in Automated Chat Management Interface.

rule: Basic conversational unit in a chat system, consisting of inputs and outputs to define which user text matches and what is displayed.

Rule Search: Agents can search the answerbase that is associated to the current chat.

S

sample frontend: A window that allows text to be sent the chat site for testing user inputs.

scripting: Defines AnswerBase rules to process the input text of front-end users of a chat site.

shortcut: Provides easier access to rules that have been defined in the current project branch.

simulator: Runs a project to test the user inputs against the AnswerBase.

step: A single section in a procedure.

suggestion: Displayed to an agent by Automated Chat Management Interface when the front-end user types input text that the engine recognizes.

supervisor: Manage Agents, monitor chats, view chat logs, and run some reports.

synonym groups: Reduce the number of Inputs you need to define in a rule by identifying words with similar meanings.

T

topic: Groups of rules.

U

user: Accounts in the Automated Chat Management Interface system.

V

variable: Store values that can be used in various Automated Chat Management Interface objects.

Index

A

Add files to a project	17
Adding a rule in a topic	20
Adding a topic in an AnswerBase file	20
Adding an input in a rule	21
Adding an output in a rule	22
Agent role	10
AnswerBases	15
AnswerDesk User	10
Approving an approval branch for deploying	42
Assigning the AnswerBase file to a project	17

C

Changing a password	13
Chat dashboard	36
Chat Display Name	11
Chatting with a visitor	37
Code Modules	15
Committing the changes of a project branch	31
Create project files	15
Creating a branch label	23
Creating a chat site	26
Creating a conversation engine	25
Creating a new user	11
Creating a project	14
Creating an AnswerBase file	16
Creating an approval branch	32
Creating an approval group	41

D

Data Types	15
Default Max Chats	12
Define conversational scripts in the project	19
Defining an external search engine	40
Deploying a project branch	33
Different type of roles	10
Documentation	7

E

Editing branch details	12
Editing sites for agent	13
Enabling Rule search	39

G

Gaining access to the chat feature	36
------------------------------------------	----

I

Intended audience	7
-------------------------	---

K

Knowledge Manager role	10
------------------------------	----

M

Max Chats Override	12
--------------------------	----

O

Opening an AnswerBase file	19
----------------------------------	----

P

Points Tables	15
Procedures	15
Process flow diagram	9
Publishing and simulating the project	29
Purpose	7

R

Replacement Profiles	15
Roles	10

S

Simulating the project	29
Supervisor role.....	10
Support	8

Synonym Sets.....	15
-------------------	----

T

Test the project.....	29
-----------------------	----

V

Verifying the deployment	34
--------------------------------	----