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KANA Response Live Cobrowse User Guide

KANA Response Live
Version 10 R1

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KANA Response Live Cobrowse User Guide

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Preface

Purpose

The *KANA Response Live Cobrowse User Guide* describes cobrowse features and functionality and how to use Response Live cobrowse for online customer service.

Audience

This book is intended for KANA Response sales administrators, service representatives, and customer agents.

This book assumes some familiarity with both the KANA Response Live and KANA Response products.

For more information see *KANA Response Live User Guide* and the *KANA Response online help*.

Organization

KANA Response Live Cobrowse User Guide is organized as follows:

Chapter	Description
Chapter 1, KANA Response Live Cobrowse Overview	Provides a brief description of KANA Response Live cobrowse for online customer service.
Chapter 2, KANA Response Live Cobrowse User Interface	Describes the user interface layout, menus, navigation, and actions.
Chapter 3, Connecting With Customers	Describes several ways to connect and cobrowse with customers.
Chapter 4, Cobrowsing Restrictions for Agents & Customers	Describes cobrowse features and functionality not covered in previous chapters.
Appendix A, KANA Response Live Cobrowse System Requirements	Provides the software requirements for agent and customer machines to run Response Live cobrowse

Typographical Conventions

This document uses the following typographical conventions:

Convention	Usage
Bold	File names and URLs
Input	User input and system output
<i>Italic</i>	Emphasis and book titles
Arrow (▶)	Indicates the start of a procedure
Pipe symbol ()	Identifies the path of menu commands used in a procedure (File Save, for example)

Other Product Documentation

The following KANA Response Live and KANA Response manuals can help get you acquainted with the products if you are not already familiar

with them. They also provide detailed information on the concepts discussed in the *KANA Response Live Cobrowse User Guide*.

KANA Response Live documentation

Book Title	Description
<i>KANA Response Live Getting Started Guide</i>	Describes for both technical and non-technical users what a KANA Response Live platform is and its use in customer service and training. Introduces cobrowsing, user roles, implementation types and scopes, and KANA Response Live technology through simple scenarios. A more detailed scenario describes more technical KANA Response Live details for technical users.
<i>KANA Response Live Chat User Guide</i>	Describes the basic multi-chat user experience from an agent's perspective. Includes how to log in, what to expect, and how to perform common operations.
<i>KANA Response Live Chat Deployment Guide</i>	Describes the basic steps in deploying a KANA Response Live installation, including installing and customizing the launch code.
<i>KANA Response Live Cobrowse User Guide</i>	Describes the agent and customer KANA Response Live user experience for cobrowsing.
<i>KANA Response Live Organization Administration Tool User Guide</i>	Describes creating and editing iChannels, creating supervisor accounts, assigning agents to supervisors, creating agent accounts and agent groups, and writing business rules. Also, describes the log on process.
<i>KANA Response Live Active Clustering Guide</i>	Highlights the scalability, load balancing, and reliability aspects of a KANA Response Live deployment, and describes how KANA Response Live active clustering is used to improve your system deployment.
<i>KANA Response Live Metrics API Guide</i>	Describes the Metrics API and authentication API used to enhance, integrate, or implement KANA Response Live functionality.
<i>KANA Response Live Supervisor Console User Guide</i>	Describes a supervisor's experience using the KANA Response Live Supervisor Console. Includes how to log in, what are the queue statistics, and how to use the action dialogs to make changes that will increase queue performance.

Book Title	Description
<i>KANA Response Live Server Installation Guide</i>	Describes how to install a KANA Response Live server for Windows, Solaris and Linux operating systems for on-premise implementations. Includes hardware requirements, creating a default start page, testing the installation, and troubleshooting tips.
<i>KANA Response Live System Administration Tool User Guide</i>	Describes how system administrators configure iSystems, organizations, routers, queue managers, and queue containers and create organization administrator accounts for on-premise implementations. Also, describes the log on process.

KANA Response documentation

Book Title	Description
<i>Installation and Configuration Guide</i>	Contains pre-installation requirements and installation instructions for each component of KANA Response.
<i>KANA Response Upgrade Guide</i>	Gives step-by-step instructions for upgrading to the latest version of KANA Response.
<i>KANA Response Reports Online Help</i>	Explains how to use the KANA Reports portion of the KANA Response client.
<i>KANA Response Agent Online Help</i>	Explains how to use the KANA Agent portion of the KANA Response client.
<i>KANA Response Cluster Manager Online Help</i>	Explains how to use the KANA Cluster Manager portion of the KANA Response client.
<i>KANA Response Administration Online Help</i>	Explains how to use the KANA Administration portion of the KANA Response client.
<i>Forms Guide</i>	Contains instructions for using KANA Forms, the KANA Response component that supports web form messages.
<i>KANA REM SDK Guide</i>	Describes the events and ways subscribers gain REM services.
<i>KANA REM Installation Guide</i>	Explains how to install the REM SDK.

Third Party Documentation

In addition to KANA Response and KANA Response Live documentation, the following third-party documentation is also recommended.

- SSL Certificates:

Documentation on installing SSL certificates from Verisign is available online at:

<http://www.verisign.com/support/site/secure/install.html>

Available formats

Technical documentation for this product is available in

- Portable Document Format (PDF)
- The online Help format

Note: You need Adobe Acrobat Reader to read PDF documents. This product is available free from Adobe at the following location:

<http://www.adobe.com/products/acrobat/readstep.html>

Other Sources of Information

You might need information that is not contained in the printed or online documentation, or you might have questions that are not related to a particular product. Following are some additional resources for you.

Company news

To learn more about KANA products, services, and company news, visit our Web site at **www.kana.com**.

Technical Support

To contact KANA Technical Support:

- Visit **support.kana.com**
- Call (866) 753-KANA
- Write **support@kana.com**

KANA Response Live Cobrowse Overview

A KANA Response Live system is a web browser-based application that facilitates sales representatives or agents in helping remote customers to view, navigate, and complete forms on web sites. Customers can view the changes or initiate changes in their own browsers. This is called *cobrowsing*. The customer and agent can stay in contact while cobrowsing by talking on the phone or communicating via online chat.

Agents can use a KANA Response Live system along with customers to:

- Make purchases online
- Complete online transactions
- Give a guided tour of a website
- Navigate web sites together
- Jointly conduct online transactions
- Collaboratively fill out web forms
- Interact with web-based software applications
- Download files, play audio, or watch video streams together

Chapter

2

KANA Response Live Cobrowse User Interface

This chapter explains the features of the KANA Response Live cobrowse user interface (UI). The Response Live cobrowse user interface consists of two parts: the control panel and the shared browser window.

In this chapter

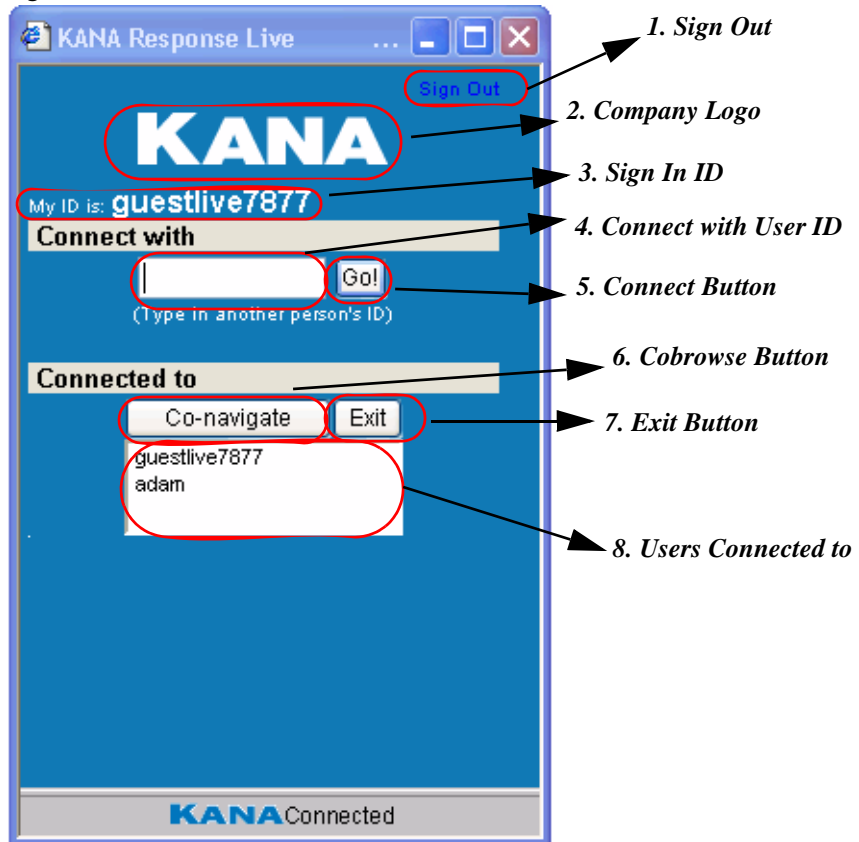
This chapter covers the following sections:

Section	Page
Control Panel	4
Shared Browser Window	6

Control Panel

The cobrowse Control panel is where you sign out, connect to and disconnect from customers or other agents. See [Figure 1](#).

Figure 1 Control Panel UI



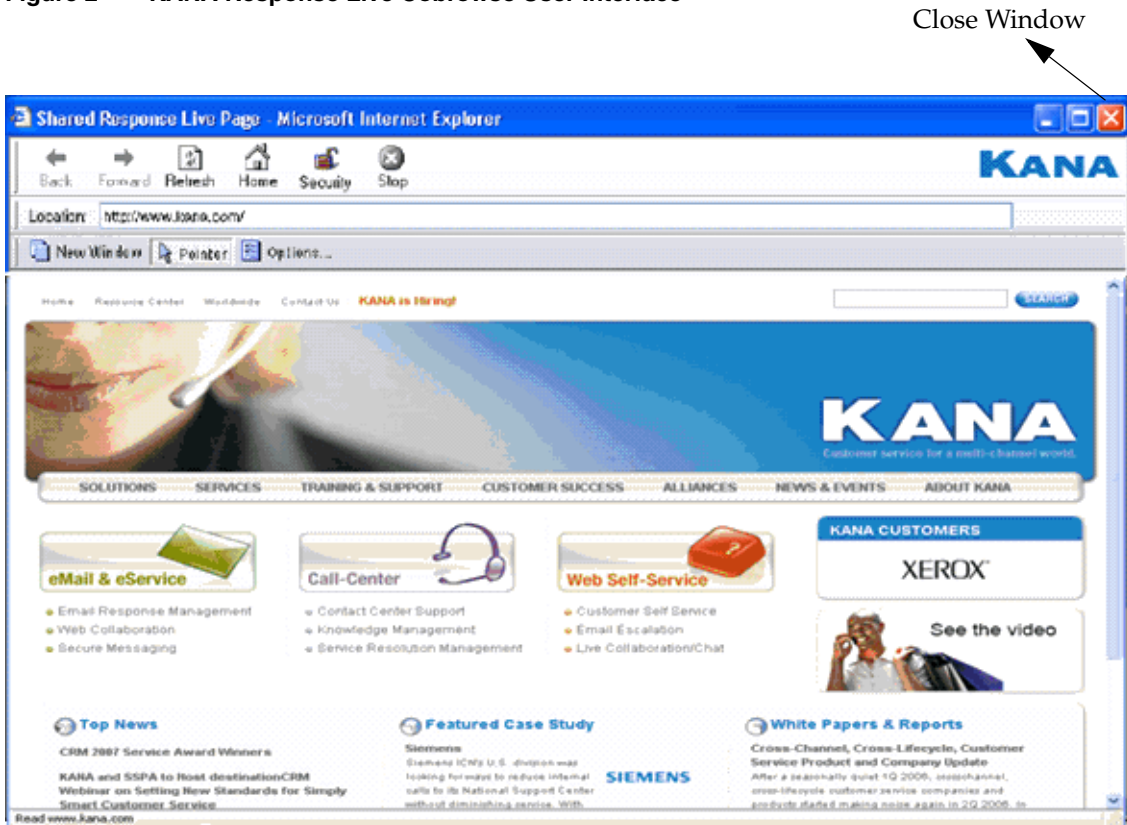
- 1 Sign Out:** This button is located at the top right of the Control panel. Clicking **Sign Out** ends chat sessions that you are engaged in and returns you to the Response Live cobrowse sign-in panel.
- 2 Your Company's Logo:** This area usually has your company's logo. In [Figure 1](#) the KANA logo is used to show the location of the logo.

- 3 Your Sign ID:** The ID that was assigned to you when you launched Response Live cobrowse. This ID will most likely be different each time you launch Response Live cobrowse.
- 4 User To Connect With:** If you wish to connect to a user, either an agent or customer, type their ID in this area and click **Go!**.
- 5 Connect Button:** When this button is clicked, the Response Live cobrowse software connects you to the user whose ID you typed into the **User To Connect With** box. In [Figure 1](#) this button is labeled **Go!**. However, your company may have customized the button's label so it looks different, or has different text.
- 6 Cobrowse Button:** When this button is clicked, a shared browser window opens on each connected user's computer.
- 7 Exit Button:** Ends the current cobrowse session without signing you out of Response Live cobrowse. **Exit** is how to end a session after you have resolved a customer's issue. You should use **Exit** to complete a customer session as opposed to **Sign Out**, which closes the session and signs you out of Response Live chat.
- 8 Users Connected To:** This area lists the users in the current cobrowse session. Your user ID as well as your customer's ID appear in this area. If other agents have joined the session, their IDs are also listed.

Shared Browser Window

Once a cobrowse session is established, a shared browser window is shown to both the customer and you. You can resize the Shared Browser window.

Figure 2 KANA Response Live Cobrowse User Interface



- 1 Close Shared Browser Button:** You or the customer may close the shared browser at anytime by clicking this button. This only closes the shared browser. You and the customer are still connected, so a new shared browser can still be opened.
- 2 Shared Browser Toolbar:** The browser toolbar is the same toolbar as normally appears on your browser. However, the toolbar also contains

the KANA logo to indicate that it is now a shared browser. See [Figure 3](#).

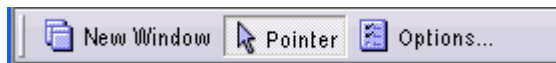
- 3 **Cobrowse Indicator:** The browser toolbar contains the KANA logo to indicate it is now a shared browser. The words “Shared Response Live Page” appear above the browser menu to indicate that it is a cobrowse window. See [Figure 3](#).

Figure 3 Browser Toolbar & Cobrowse Indicator



- 4 **Shared Browser URL:** This is the address (URL) of the Web page that you and your customer are viewing.
- 5 **Cobrowse Menu:** The cobrowse menu appears below the shared browser URL. The cobrowse menu is shown in [Figure 4](#).

Figure 4 Cobrowse Menu



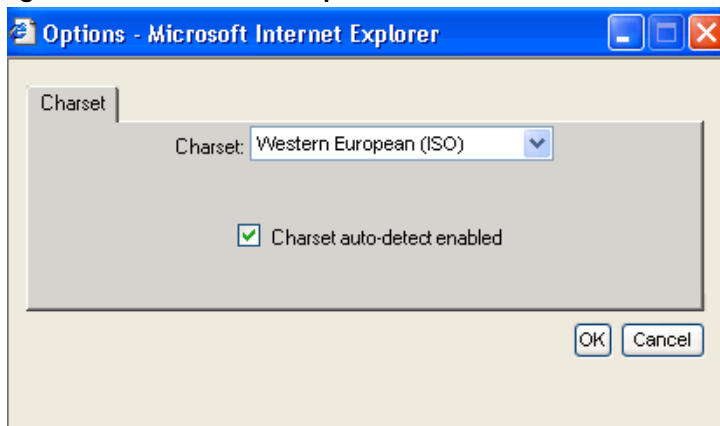
- a **New Window:** Opens a new shared browser window without a chat window. Customers can also open additional shared browsers.
- b **Pointer:** Toggles the pointer option on and off. Use the pointer to point to an area of the shared browser to guide customers to information, form fields, or hyperlinks. [Figure 5](#) shows the pointer. Enable the pointer by clicking **Pointer** on the tool bar. Then, right-click to turn on the pointer and move it to the desired location. The customer's web page scrolls if necessary to bring the pointer into view. Customers can also use the pointer.

Figure 5 Pointer



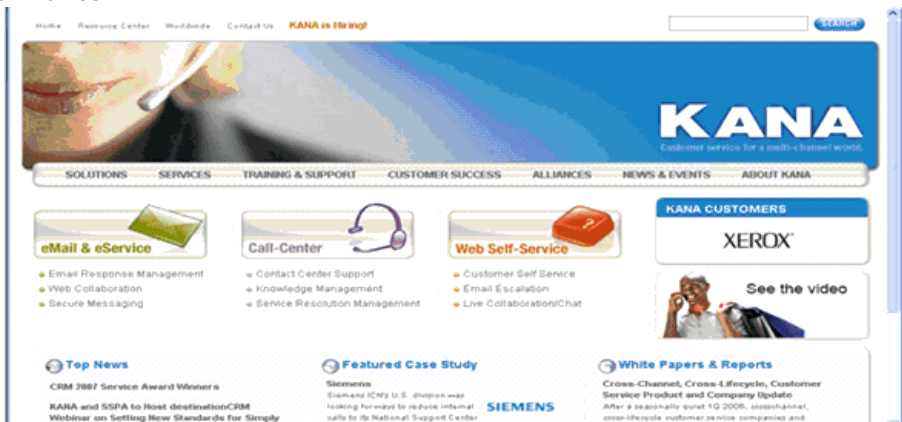
- c **Options:** Contains cobrowse settings that an agent or customer can change. Currently, you can change only the computer screen display character set.
 - 1 **Charset:** The character set for the shared browser. The **Charset auto-detect enabled** option defaults to enabled. When this option is enabled, the browser detects the character set in which to display text based on browser settings. KANA recommends that you leave this option enabled.

Figure 6 Character Set Option



- 6 **Shared Browser Page:** This large area in the lower, right corner shows the Web page that you and your customer are cobrowsing. See [Figure 7](#).

Figure 7 Shared Browser



- 7 Shared Browser Indicator:** In the browser status bar in the lower, left corner of the window, Shared KANA Page indicates that you and your customer are cobrowsing this page. If these words do not appear, then you are not cobrowsing with a customer.

Chapter

3

Connecting With Customers

This chapter describes instructions for connecting with customers using the following methods.

- Using a Web meet-me page when you are on the phone with the customer
- Helping the customer online when the customer clicks a **Online Help** button

In this chapter

This chapter covers the following sections:

Section	Page
Cobrowsing with Online Help	12
Cobrowsing With a Meet-Me Page	15
The Control Panel	17
Additional Features and Functionality	20

Cobrowsing with Online Help

Figure 1 Example of Online Help

CURRENT INTEREST RATES

Use the following calculator to determine our current interest rates. [Apply online](#) and save ¼% off the origination fee. On a \$200,000 loan that is a savings of \$10,100.¹

Loan purpose:

 Property type:

 Occupancy:

 Property state:

 Loan amount: \$

 Second loan amount: \$

 Property value: \$

 Show:

Current Interest Rates

APPLY NOW
[Mortgage Application](#)

Contact Us
Mortgage Loan Counselor
(800) 922-6267
 8:00am to 10:00pm ET
 Monday - Thursday
 8:00am to 6:00pm ET
 Friday
 9:00am to 6:00pm ET
 Saturday
[Email](#)

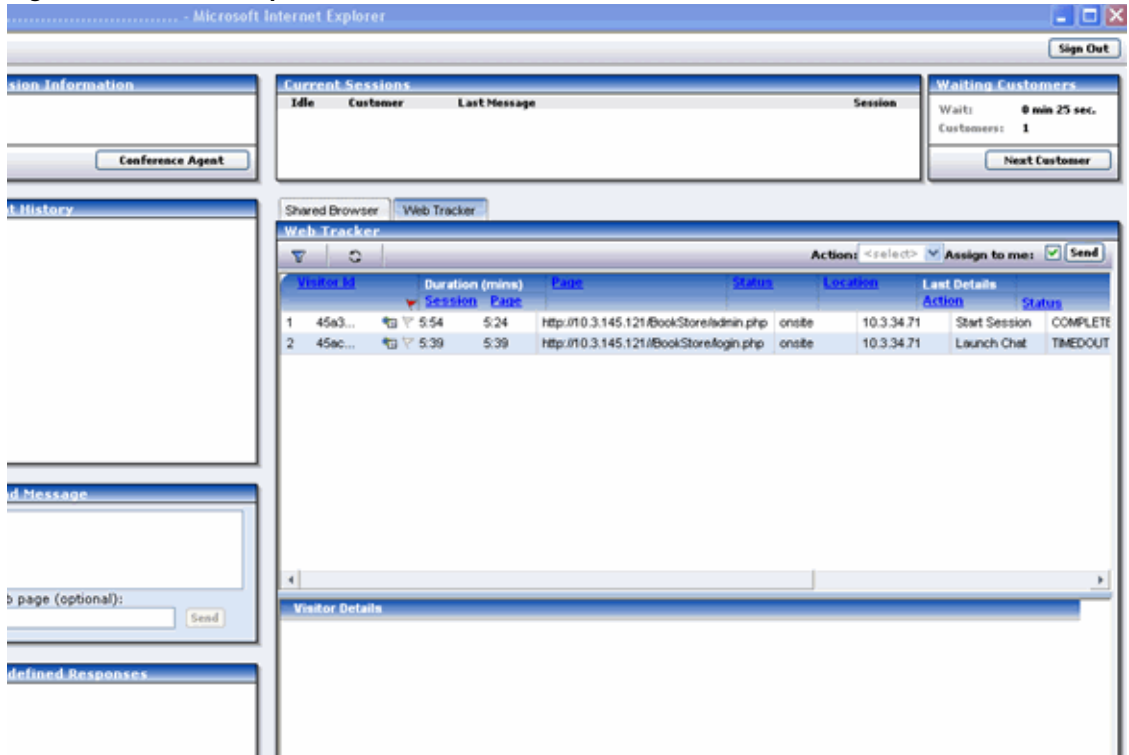


Product Information
[Fixed Rate Mortgages](#)
[Adjustable Rate Mortgages](#)

You can assist a customer using an online help connection.

The following steps describe the cobrowsing process with online help:

- 1 The customer browses a Web site that uses KANA Response Live.
- 2 The customer clicks an **Online Help** button.
- 3 After entering some personal information in an online form, the customer clicks a button, such as **Submit**. Customers enter the Response Live online queue from which agents pick up and service customer queries, by clicking the **Next Customer** button. See [Figure 2](#).

Figure 2 Online Help Queue

Refer to the Response Live Chat User Guide for more information on Online Help and Chat, and Cobrowse.

- 4 The agent can engage the customer in a cobrowse session while chatting, in the Shared Browser tab of the Agent console.
- 5 Cobrowse can be undertaken in:
 - cobrowse only mode or
 - cobrowse with escalation mode
 - cobrowse can also be engaged in Push Chat mode
- 6 The customer can continue to cobrowse even after the chat session with the agent has ended.

Signing Into Response Live

Once signed in, agents can cobrowse with customers that are having problems navigating Web sites or completing Web forms or other transactions.

- To sign into KANA Response Live, an agent should:
 - 1 Launch a Web browser.
 - 2 Go to the KANA Response Live launch page. If you do not know the URL for the launch page, contact your supervisor.
 - 3 Type your name and user ID.

A confirmation window appears.
 - 4 To sign in from a different machine, or sign in as another user, sign out, then sign in again.

Cobrowsing With a Meet-Me Page

A customer uses a simple Web meet-me page to type in your agent ID and click a button to establish a cobrowsing session with you. The customer communicates with you in advance to obtain your ID. See [Figure 3](#) for an example of a Web meet-me page that uses a button labeled **Go!** to establish a cobrowsing session with a KANA representative.

Figure 3 Example of a Web Meet-me Page



A customer is usually on the phone with you when using a Web meet-me page. You direct the customer to the meet-me page so that you can interact on the Web site.

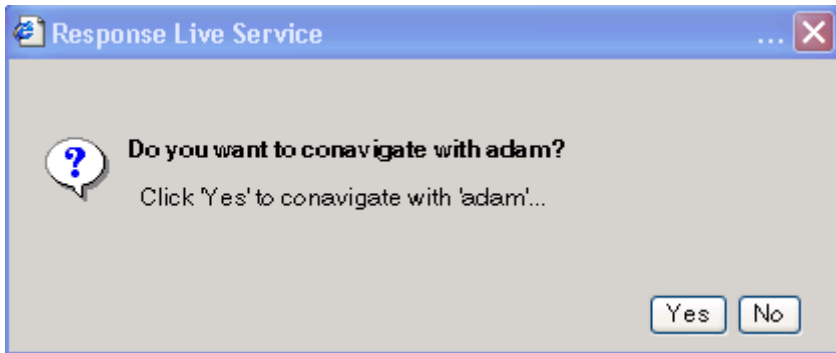
How a Web Meet-me Page Works

The following steps describe the process for cobrowsing with a meet-me page:

- 1 Sign into the KANA Response Live system. You receive a unique Agent ID.
- 2 Give the customer a meet-me page URL.
- 3 After the customer reaches the meet-me page, give the customer your agent ID.
- 4 The customer types this ID into the meet-me page.
- 5 The customer clicks a connect button to start cobrowsing.

A dialog box similar to the one in [Figure 4](#) appears on the customer's computer.

Figure 4 Example of Cobrowse Question



- 6 The customer clicks **Yes**.

A meet-me panel and a shared browser appears on the customer machine. You and the customer are now connected and you can securely navigate Web pages, fill out forms, point, and complete Web transactions.

Exiting a Cobrowsing Session

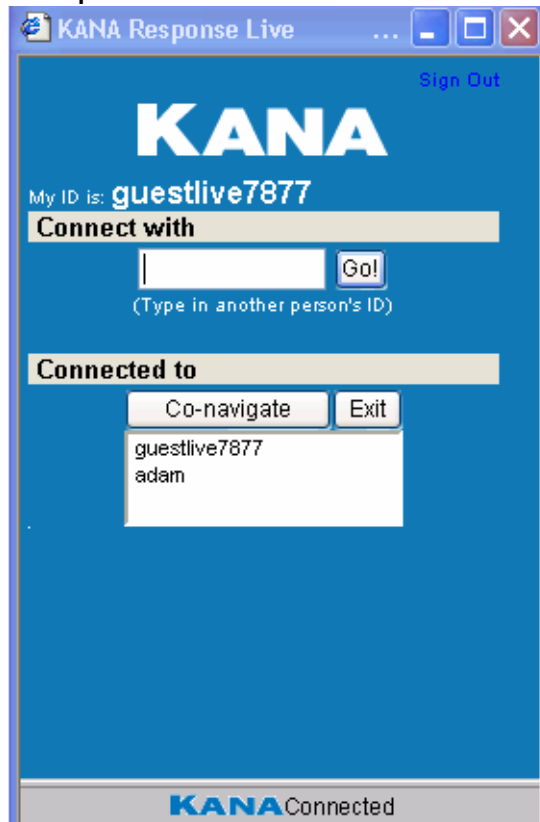
To exit a cobrowsing session either you or the customer can go to the control panel and click **EXIT**. The customer can continue browsing without being connected to you.

If you or the customer accidentally closes the shared browser, go to the control panel and click the **Cobrowse** button to open a new shared browser.

The Control Panel

The following explains how the control panel works. The control panel appears after you sign in. See [Figure 5](#) for an example of a KANA Response Live control panel. The control panel is often customized to fit the needs of each company, so the control panel you see may be different from what is shown in [Figure 5](#). The control panel appears prior to cobrowsing.

Figure 5 Example of Control Panel



Use the control panel to:

- Establish connections with customers
- Exit or manage cobrowsing sessions
- Re-open a closed cobrowse window

For example, if a customer clicks the **X** in the top right hand corner of the cobrowse window, the cobrowse window closes. Click the **Cobrowse** button to open a new shared browser and resume the session.

► To begin a cobrowse session:

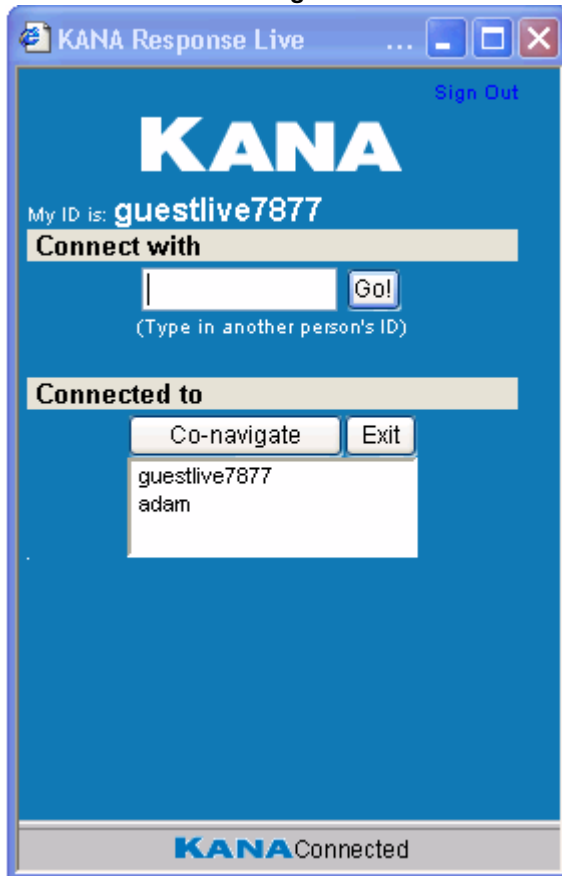
1 Type in the user name of the user with whom you want to connect.

Usually customers have user names that begin with guest followed by a number.

2 Click **Go!**.

Once you are connected to a user, the user's ID is shown in the **Connected to** box. Your user ID also appears in this box. See [Figure 6](#).

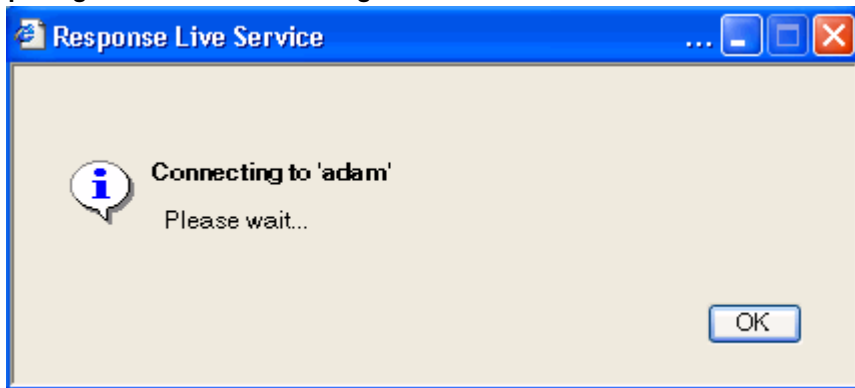
Figure 6 Control Panel Showing Connected Users



3 Click **Cobrowse** or **Conavigate** to open the shared browser.

After clicking **Cobrowse**, you may receive the message shown in [Figure 7](#) as the shared browser loads.

Figure 7 Opening Shared Browser Message



Additional Features and Functionality

This section provides additional information on cobrowse functionality.

- **Cobrowsing:** Either you or the customer can click a link or type a different URL that goes to a different Web page.
- **Coloading:** If either you or the customer clicks on a link that initiates a download or plug-in, the other user in the session is prompted to download the item.
- **Ending a cobrowsing session:** When a session is over, you can either close both browsers or you can close your browser only while the customer continues to browse.
- **Preparing for another session:** You must click **Exit** on the control panel to leave each session even if the customer exits first. When a session is over, no names should appear in the **Connected To** section of the control panel.
- **Home:** Clicking the **Home** icon, located between the **Refresh** and **Security** icons on the shared browser, sends the shared browsers to your home page.
- **Joint form filling:** You should press the **Tab** key after entering text into a Web form so that the customer can see what was typed. When selecting an option that automatically enters characters into a form field, such as a radio button, the **Tab** key does not have to be pressed.
- **No bookmark support:** Response Live cobrowse does not currently support bookmarks, but you can cut and paste URLs into the browser's **Address** or **Location** field and press **Enter**.

Chapter

4

Cobrowsing Restrictions for Agents & Customers

This chapter explains restrictions on agent and customer cobrowsing that can be enforced by the KANA Response Live system.

In this chapter

This chapter covers the following sections:

Section	Page
What Types of Restrictions Exist?	22

What Types of Restrictions Exist?

Restrictions imprint business and legal policies on the cobrowsing process. Restrictions are commands that place limits on cobrowsing participants' actions.

You, for example, might not be allowed to complete certain sections of a form or direct a session to locations outside a specified part of a web site. This happens because a restriction is enforced that prevents the agent from taking such actions.

The following types of restrictions are possible:

- Preventing form completion by you
See the [“Preventing You from Completing Customer Forms”](#) section for more information.
- Blocking you and customers from web sites
See the [“Blocking Web Sites from You and Customers”](#) section for more information.
- Obscuring secure information from you
See the [“Obscuring Secure Customer Form Data”](#) section for more information.
- Preventing form submissions by you
See the [“Preventing You from Submitting Customer Forms”](#) section for more information.

Restrictions are enforced because of policies and decisions made by your company, not by the Response Live cobrowse system.

Why are restrictions needed?

Restrictions can limit the capabilities of anyone within the cobrowsing session. They enforce these limits based on the name or type of user, or both.

In a typical scenario, however, most of the restrictions are placed upon agents.

By preventing you from performing sensitive actions or seeing sensitive data, such as passwords, companies can maintain an accurate and secure audit trail for client accounts.

**Scenario:
Cobrowsing
Restrictions**

The following usage scenario describes a typical cobrowsing session with interactions between you and your customer when cobrowsing restrictions can be enforced.

A customer is considering an online purchase and needs assistance about a particular product. The customer initiates a cobrowsing session with you as described in [Chapter 3: “Connecting With Customers”](#).

You and your customer cobrowse to a product page. The customer is not sure about some of the content on the page. You answer the customer's questions and use the pointer at times to highlight specific aspects of the product.

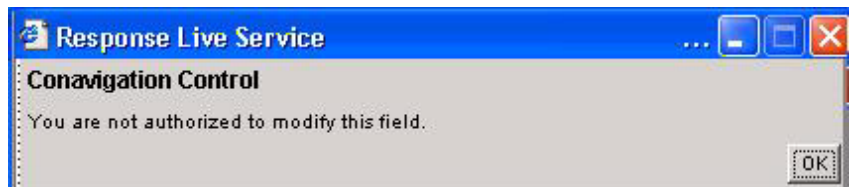
Once the customer decides which product to buy, the product purchase form can be completed.

At this point, cobrowsing restrictions can be enforced.

Preventing You from Completing Customer Forms

The restriction on form fills prevents you from changing the value of a form field. For example, there are many cases when you should not edit fields that may alter the amount of money that a customer can spend. If you try to complete the credit card information field, a restriction preventing form fills is enforced. A message similar to the one in [Figure 1](#) appears. Only customers are authorized to complete credit card information.

Figure 1 Example of a Prevent Form Fill Message



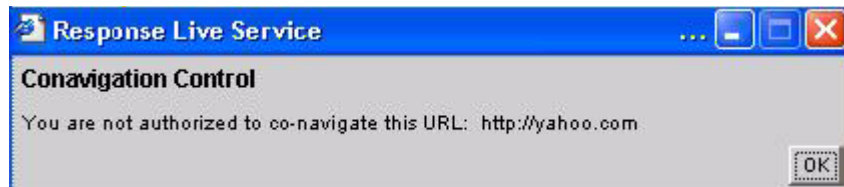
You may be able to fill out forms on some pages, but not others. Which forms you can fill out is controlled by your company.

Blocking Web Sites from You and Customers

The blocking Web sites restriction prevents you and customers from directing the cobrowse session to unacceptable Web sites. Examples include competitor Web sites or sites with inappropriate content. Usually, a company restricts the cobrowsing session to pages on the company's Web site and blocks all other Web sites.

If you try to direct the customer to an unauthorized Web page, a message similar to that in [Figure 2](#) appears.

Figure 2 Example of Blocking a Web Site Message



Obscuring Secure Customer Form Data

The secure form restriction obscures the customer's secure information from you. This restriction provides strong security for fields that involve authorization.

For example, when the customer is ready to enter credit card information, you might only see asterisks, which obscures the credit card number from you. See [Figure 3](#) for an example of obscuring secure customer form data.

Figure 3 Example of Obscuring Secure Customer Form Data

A screenshot of a web form titled "Credit Card Information". The form contains the following elements:

- A note: "This form is named 'cc_form'."
- Card Type: Three radio buttons labeled "Visa", "Mastercard", and "American Express".
- Credit Card Number: A text input field where the characters are replaced by asterisks.
- Expiration Date: Two dropdown menus, the first showing "01" and the second showing "2001".
- Buttons: "Submit", "Reset", and a "GO!" button with a circular icon.

Preventing You from Submitting Customer Forms

The form submission restriction prevents you from submitting a customer's form on the customer's behalf. Only customers are allowed to submit forms. You are not allowed to submit forms for customers.

If you try to submit the form for the customer or inadvertently click **Submit**, a message similar to the one in [Figure 4](#) appears.

Figure 4 Example of a Prevent Form Submission Message



You may be able to submit forms on some pages, but not others. Which forms you can submit is controlled by your company.

Software and System Requirements

Refer to the *KANA Response Live Release Notes* and the *KANA Response Live Server Installation Guide* for software and system requirements for agent and customer machines to run Response Live cobrowse. Users with noncompatible configurations receive an incompatible browser or operating system notification when they try to connect to the KANA Response Live system.

Glossary

A

Active Cluster / Active Clustering

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

Administrator

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

Administration Tools

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

Agent

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

Agent Console

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

Agent Group

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

API

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

Applet

See Java applet.

Authenticating a Request

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

B

Barge In

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

Business Data Model

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

Business Rules

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

C**Callback**

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

Canvass

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

Chat

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

Chat Transcript

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

Client / Client Application

Refer to the portion of the KANA Response Live application which are visible inside a Web browser. The differentiation is between the

server (interaction system) and the Web browser that the end users are using

Cluster

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

Cobrowse

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

Conavigate

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

Configuration Directory

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

Control Panel

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

Customer

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

D

Daemon

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

Data Center

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

Dynamic Start Page

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

E

End user

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

F

Failover

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

FileShare

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

Firewall

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

Funnel Images

See Image Funneling.

H

Harvey Balls

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

Hosted Service

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

Hot Backup

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

I

iChannel

Commonly used abbreviation for interaction channel.

Image Funneling

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

Interaction Channel

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

Interaction System

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

iSystem

Commonly used abbreviation for interaction system.

J

Java applet

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

K

KANA Directory

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

KANA Response Live Application server

The KANA Response Live software that manages a cobrowse session.

KANA Response Live Data Model

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

KANA Response Live Proxy architecture

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

KANA Response Live Router / Router

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

L

Live Help Button

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

Login server

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

M

Meet Me page

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

Monitoring System / Monitoring Tool

One of the most important characteristics of a live interaction system such as KANA Response Live's is that it must be available on a 24 by 7

basis. In order to provide this level of reliability, even in the face of hardware failures, KANA Response Live has a monitoring system. The monitoring system's sole role in a KANA Response Live deployment is to detect system failures and notify the appropriate people usually by e-mail.

O

On-premise Solution

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

Organization

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

Organization Administration Tool

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

Organization Administrator

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

Original Web Server

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

P

Panel

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

PDR

Acronym for predefined response.

Pointer

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

Predefined Response

An agent productivity feature of the Response Live chat product. A predefined responses (PDR) is a carefully worded statement that answers a commonly asked question with one click by an agent. PDR are entered into the business data model by either a supervisor or an

organization administrator and are then available to agents who are participating in a chat session.

Proactive Chat

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

Q

Queueing Server / Queue Serve

A specialized server that maintains the queues for a chat system.

R

Registered User

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

Relaxed Truster

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

Router

See KANA Response Live router.

S

Servlet engine

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

Session

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

Shared Browser

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

SSL

Acronym for Secure Sockets Layer.

SSL Certificate

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

Supervisor

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

Supervisor Console

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

Supervisor Mode

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

Systems Administration Tool

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

Systems Administrator

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

Systems Data Model

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

System

A KANA Response Live software implementation.

U**UI**

Commonly used abbreviation for user interface.

User key

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

W**Web Tracker**

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

Whisper / Whispering

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

