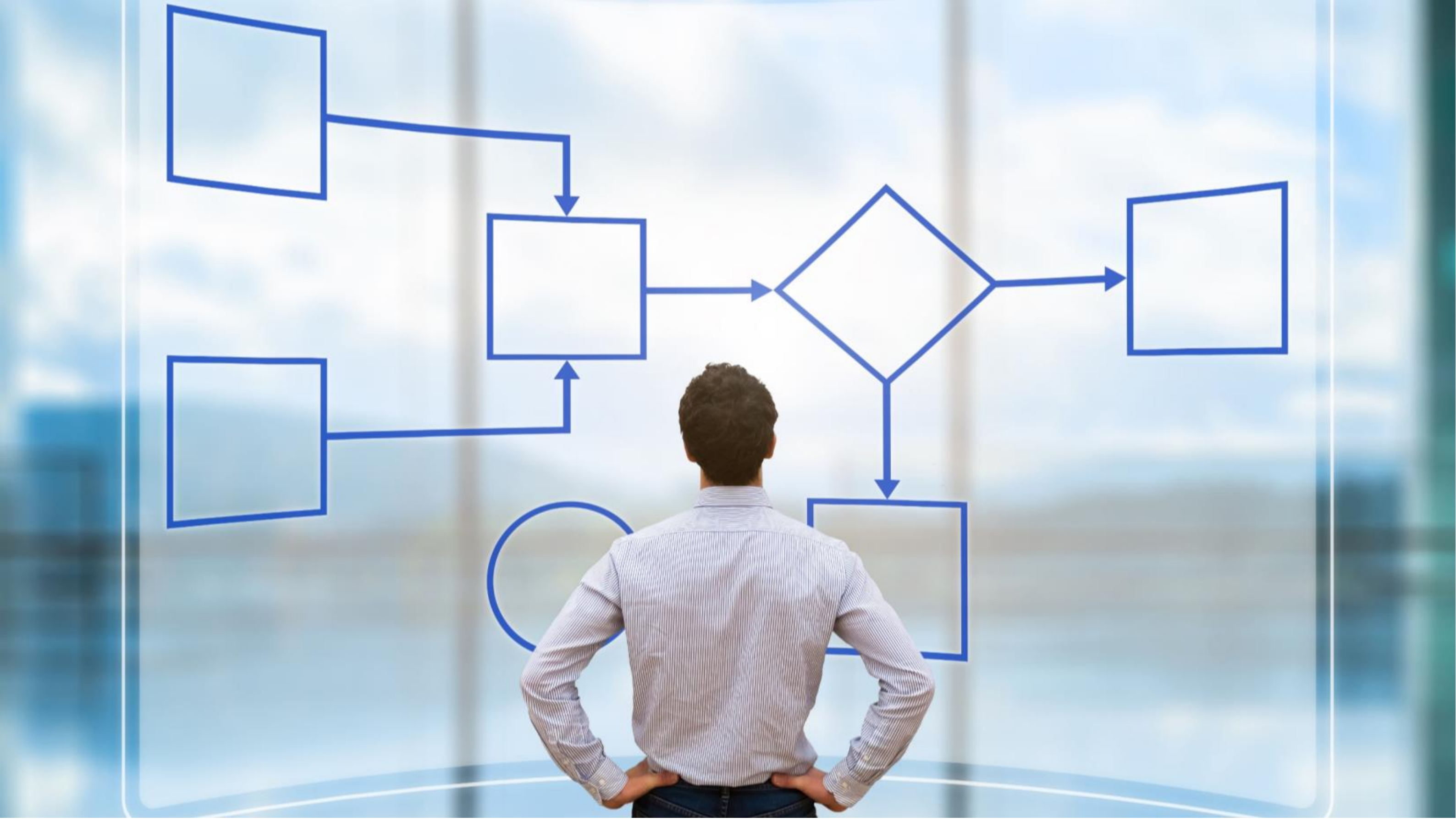

Alcatel-Lucent Enterprise Connect powered by AKIO Administration

User guide

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Alcatel·Lucent Enterprise

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History

Software version	Date	Author	Subject
7.19.3	02/09/2021	AKIO	

1 Welcome to ALE Connect

ALE Connect is an application for customer relationship management that unifies all interaction channels (telephone, email, web chat, social networks). It optimises their processing, both in terms of response quality and volume processed. This **documentation** presents the ALE Connect **administration features**, whatever the media managed by the platform. They will allow you to set up the software and use it according to the needs of the activity.

A single platform for all media

ALE Connect centralises exchanges from different media such as **phone**, **email**, **Facebook Messenger** conversations, or **chat** from a single interface. For each contact, ALE Connect generates a sheet that centralises collected information from existing folders and bring together the contact exchanges history.

Segment your activities

ALE Connect is built on a structure based on **business units**, each containing one or several interaction **queues** of a same media.

Agents are split into groups to which rights are assigned to these queues, according to their **skills**. All agents from the same group have therefore the same rights, the same access to the application functionalities, the same interface and the same folders to be processed. Assigning rights on queues and skills is the responsibility of the coordinator or supervisor. This setup is performed in the administration interface of the software.

It is therefore very easy to partition or not the activities according to operational or accounting needs, etc.

Realtime statistics versus reporting

ALE Connect provides dedicated functionalities for **supervisors**, as agent group managers. They can thus manage the activity, while helping the supervised agents in their daily tasks (please refer to the *Supervisor* documentation for further information).

For this purpose, the software offers a **dashboarding application** to monitor the realtime activity, as well as an integrated **reporting module**. This module provides standard reports, with the possibility to create your own reports, published in real time or sent off-line by email.

1.1 Minimum required configuration

Before using the application, ALE Connect must match with the following configuration criteria for an optimal use.

Compatible browsers

No matter the chosen browser, it must support the SSL protocol, use the Websocket API, run JavaScript execution and accept cookies. Any browser not listed below is not compatible with ALE Connect.

Mozilla Firefox 91 ESR
Recommended

Internet temporary file settings should be configured as follows: enter about:config in the browser address bar. The list of Firefox settings is displayed. Then check that the browser.cache.disk.enable option is set to "true".

Google Chrome

Current version

Microsoft Edge

Current version

Internet Explorer 11

Update 24 minimum

From the menu bar, click Tools > Internet options > General tab > Settings button > Temporary Internet Files tab. For the Check for newer version of stored pages option, check the Automatically value.

> **Warning**: even though IE 11 is compatible with ALE Connect, it shows penalizing technical limitations. Indeed, IE 11 does not support the Notification API. Therefore, the functionality allowing to notify incoming interactions (calls, emails, chat, etc.) is not available if you use this browser. In addition, when using the system features such as opening or saving an attachment, the user will be logged out if the pop-up remains opened for more than 30 seconds.

Screen resolution
• 1920 x 1080 – Recommended with a wide screen • 1280 x 1024 – Minimum resolution supported
Memory
• Recent desktop PCs with **2 GB** of RAM • Minimum prerequisite for an ALE Connect activity only and without third-party tools
Network
• For an optimal performance, **direct communication** between the browser and ALE Connect web services in the Cloud is recommended. Consequently, please make sure that no component can disturb this communication (example: antivirus, proxy, etc.). • Communication on **TCP 443** ports (by default) is required between the user's computer and the ALE Connect web services.
Recommendations
• Some constraints related to the **use of keyboard** or **browser** functions have been noticed. • It is strongly recommended not to use the following keys or functions when the agent is working on ALE Connect: the **Back** button from the browser, the **Backspace** key, **F5**, **Enter** or the **space bar** (excluding manual entry of a field content).

1.2 License and media

ALE Connect manages the following interaction channels below from a single unified interface.

Voice | **Email** | **Chat** | **Facebook Messenger** | **Twitter**

The use of the license is based on the two articles of the ALE Connect offer:

- The **accesses (Connected Agent)** represent the number of users simultaneously logged in to ALE Connect. They are divided into two pools: one reserved to V.I.P. users (coordinators or supervisors) and the other accessible to all. For each “Connected Agent” article purchased, a token will be systematically provisioned in the ALE Connect license. This token corresponds to the use of the voice media. An additional access is added free of charge to the ALE Connect license to allow a coordinator to be logged in to the web configuration interface.
- The **tokens (Interaction Channel)** represent the number of media to which a user have a write access. They are divided by business units, then for each of them into two pools, one reserved to V.I.P. users and the other accessible to all.
  Example: an agent with read/write rights to 1 or more Voice queues and 1 or more E-mail queues. At login, the agent will consume 1 access and 2 tokens. The number of tokens available in the ALE Connect license will be the sum of the “Connected Agent” and “Interaction Channel” articles.

Warning: depending on the offer acquired, some functionalities described in this documentation may not be available on your interface. This is particularly the case if the subscription is only for the “Connected Agent” article. In that case, only the voice media will be available.

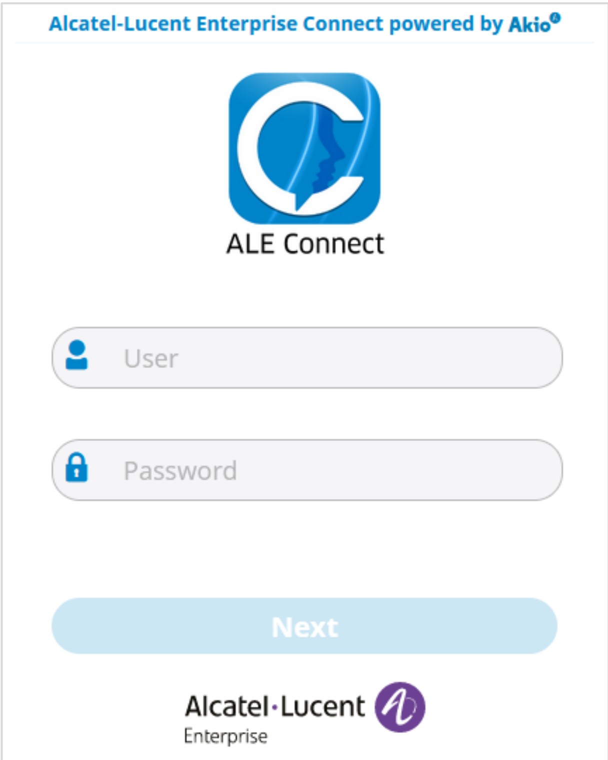
1.3 Logging in to ALE Connect

The login to the software is mandatory. It defines your access permissions based on your profile. The login errors are identified and a message informs you if the login and/or password is incorrect.

1.3.1 Login

1. Enter the **URL address** of the tenant that you wish to configure in the browser of your computer.

   The login page is displayed:



2. Enter the user **login** and the **password** assigned to you.

   Warning: these fields are case sensitive.

3. Click the **Next** button: the administration interface is displayed.

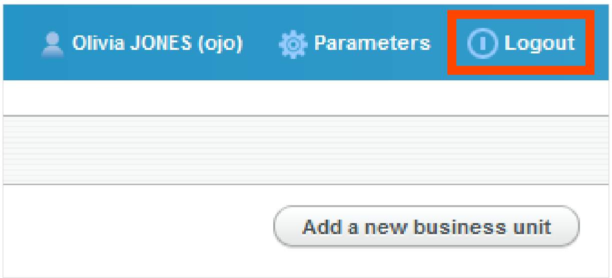
   The access to the different functionalities depends on your profile.

1.3.2 Logout

Warning: you must log out properly when your working session is over. Indeed, your login is the starting point to build the statistical data of the day. The logout corresponds to their closing. If you forgot to log out the day before, do it as soon as you arrive before opening a new session. Closing the web browser is not considered as a logout.

1.3.2.1 Manual

1. Click the **Logout** button in the upper right corner of the application.



2. You are now logged out.

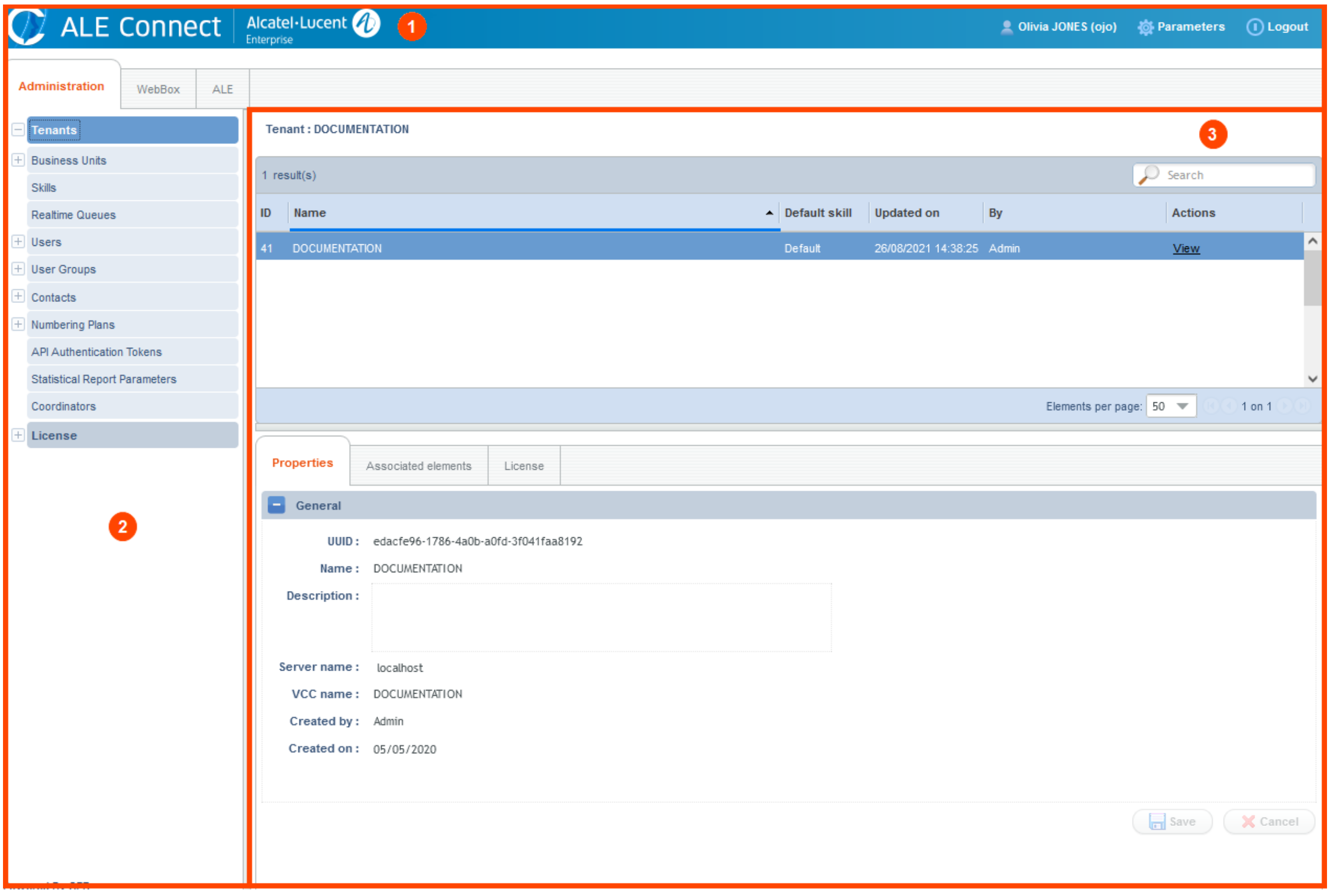
1.3.2.2 Automatic

ALE Connect can log you out automatically:

- after a certain **period of inactivity** defined by the administrator. Your session is then expired.
- when a user **logs in under your identity**. Indeed, only one simultaneous login by user is authorised.
- when you are **voluntarily logged out** by an administrator or another coordinator.
- when your **coordinator role is removed** by an administrator or another coordinator.
- when your **supervisor role is removed** by an administrator or another coordinator.

1.4 Introducing the interface

The administration interface presents a sober working environment, arranged to favour a clear display. Most of the screens are designed with the same template, to ensure consistency in ergonomics. It looks like this:

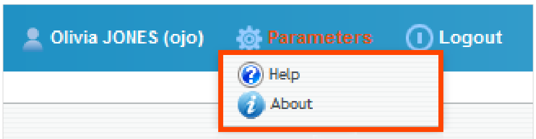


1. Banner
2. Main menus
3. Workspace

1.4.1 Banner

Located in upper part of the interface, the banner is displayed permanently:

To the right of the **interface name** (1), ALE Connect displays the first name, name (login) of the **user logged in** (2). By clicking it, you go directly to the user management of the platform. The **Parameters** scrolling menu (3) allows you to access the general parameters of the administration interface:



To read the online help, click **Help**. It is displayed in the default web browser of your computer (a display with 100% zoom is recommended, for optimal rendering).

To view the current version of ALE connect, click **About**. This information is particularly useful in the context of a maintenance procedure, version update, operation or if you contact the customer support.

In the right corner of the banner, the **Logout** menu (4) allows you to log out from the administration interface.

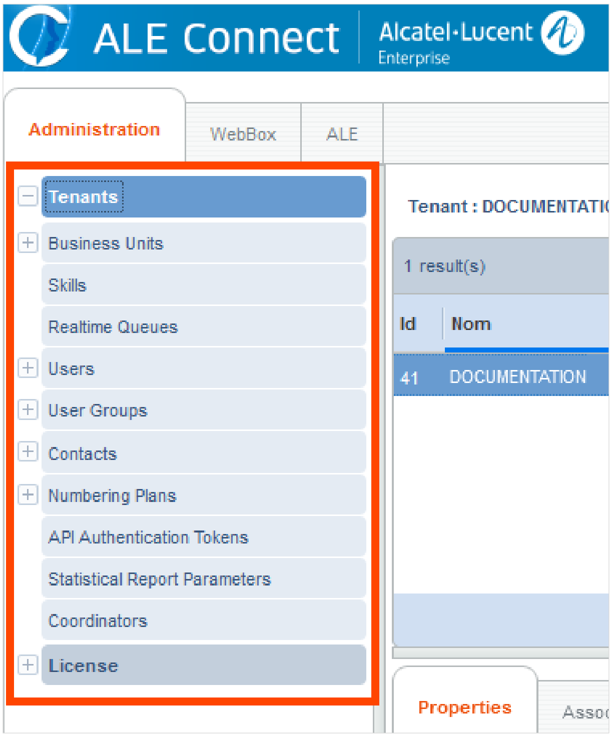
1.4.2 Main menus

Functionalities are divided into 3 main menus:

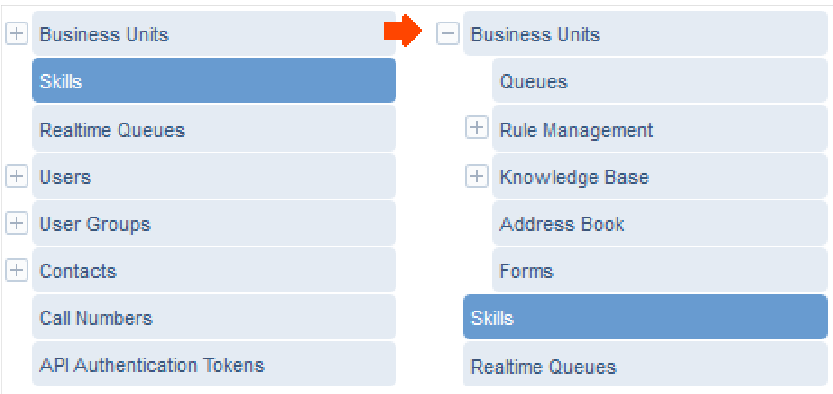
- Administration
- Webbox
- ALE

Each of them is accessible via a tab. By default, the **Administration** tab is displayed at your login.

The choice of a functionality is performed via the pane on the left of the screen. This pane cannot be hidden, moved or docked elsewhere on the screen. However, you can increase or decrease its width to adjust the size of the workspace: click the grey vertical bar, which separates the menus from the workspace, and move it to the right or left as needed.



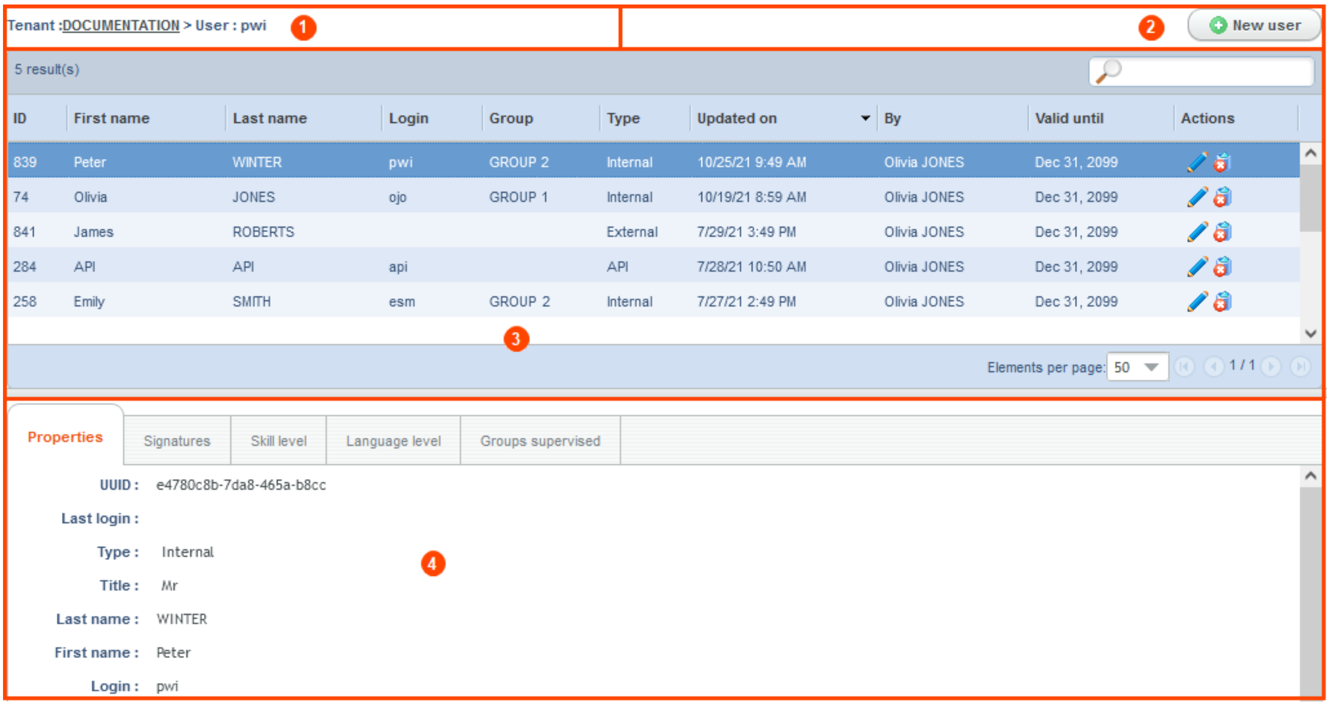
Each main menu presents a set of functionalities, sometimes grouped in a sub-menu (example: Business Units, Knowledge Base, etc.). You then need to click the **Expand [+]** button to view them. On the contrary, you can collapse a sub-menu by clicking the Collapse [-] icon. The selected functionality is coloured in dark blue.



The available functionalities depend on your business profile (coordinator or supervisor).

1.4.3 Workspace

Occupying most of the screen, this area allows you to set up the functionalities and administer the ALE Connect platform on a daily basis. The workspace is single-tasked: you can only open one functionality at a time. This ergonomic principle guarantees entry without fear of overwriting another parameter.



Each area of the workspace is dedicated to a specific task.

The **breadcrumb trail** (1) shows the path through the main menu to the current functionality. It is used as a reference point in the interface, to know your position. As it is dynamic, you can click the underlined element to display the corresponding functionality. The **single button** on the right of the screen (2) allows you to create an element and to add it to the existing list.

The **central table** (3) provides an overview of the functionality, by showing the list of all its elements. If the list contains several pages, it is possible to perform a search or to use the navigation bar. The table can be sorted according to the column of your choice: simply click the column header to sort in ascending (▲) or descending order (▼). The possible actions for each element are represented by icons displayed in the last column.

The selected element is highlighted in dark blue. Its **detailed characteristics** (4) are displayed under the list. They are grouped by theme (= tab). Each tab is independent: when you make changes in a particular tab, do not forget to save them before clicking elsewhere in the interface.

1.5 Basic actions

Most of the functionalities of the administration interface present a list of elements (tenants, business units, users, etc.). When you use any of these lists, you can always perform at least the following actions:

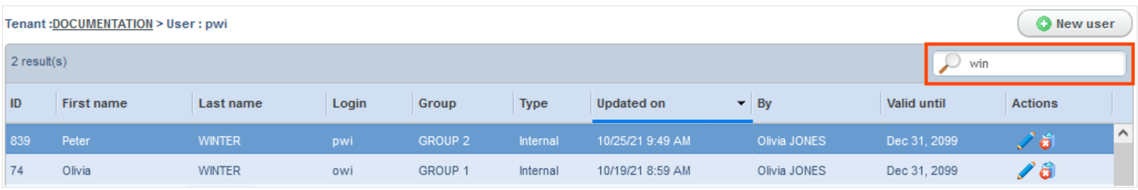
- Search
- Create
- View
- Modify
- Delete

1.5.1 Searching an element

You can search an element in a list by name, especially when the list is particularly long (for example, ALE Connect users).

The search works in **"contains" mode**, that is to say it extracts all the elements whose name contains the character string entered. In addition, it is not case sensitive: e.g. if you type "na", ALE Connect will search all the elements that contain this sequence such as "NAME", "Name", or "name".

1. Open the desired functionality from the menu tree structure on the left of the screen.
2. Click in the search area above the list of elements.
3. Type the character string (1 minimum) common to all elements to be searched.



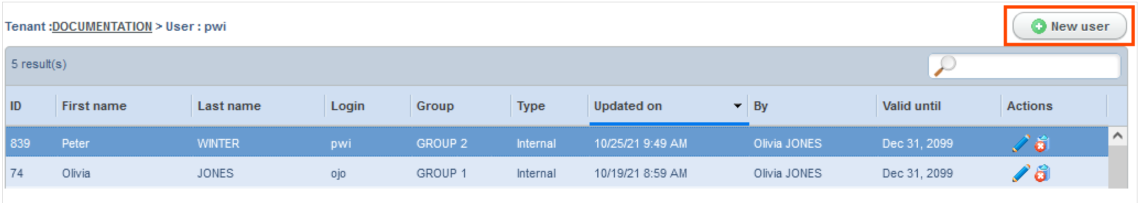
The matching results are immediately displayed in the list, without having to validate your entry.

To cancel the search, simply clear the character string entered: all the elements of the list are redisplayed.

1.5.2 Creating an element

This action adds a new element to the current functionality. Usually, it is represented by a button located above and to the right of the list of elements.

1. Open the desired functionality from the menu tree structure on the left of the screen.
2. Click the **Add** button ( ).



   A new tab is displayed in editing mode under the list of elements, in the lower part of the screen.

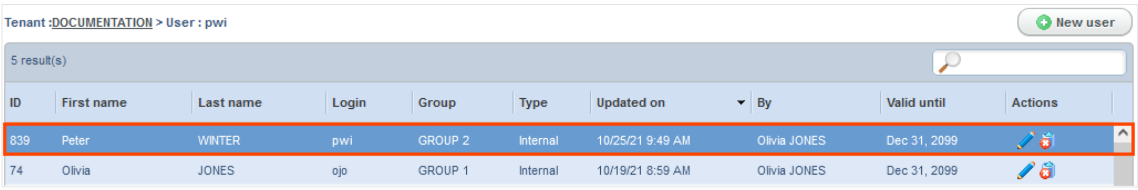
3. Fill in the characteristics of the element.
4. Click **Save** to save your entry.

   ALE Connect adds this new element to the list, displayed in the upper part of the page.

1.5.3 Viewing an element

Viewing is a basic action of the administration interface. The characteristics of the viewed element are displayed in read-only mode: this means that it is not possible to modify them.

1. Open the desired functionality from the menu tree structure on the left of the screen.
2. From the list, click the line of the element to be viewed:



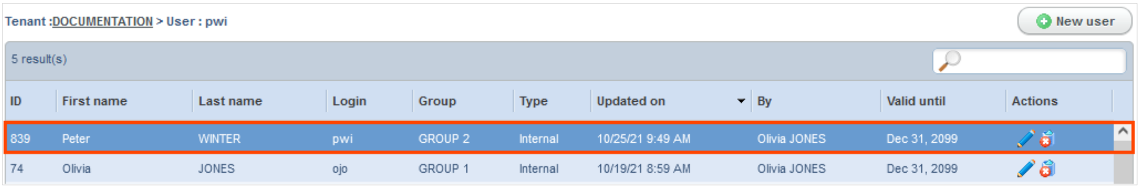
   Its detailed characteristics are automatically displayed in the lower part of the screen, as one or more tabs (example: Properties, Associated elements, etc.).

1.5.4 Modifying an element

This action allows you to modify one or more characteristics of an existing element. It is represented by an icon displayed in the **Actions** column of the list (in last position).

Warning, according to the functionalities, all the fields of an element are not necessarily changeable. Likewise, modifying an element may be subject to condition.

1. Open the desired functionality from the menu tree structure on the left of the screen.
2. Click the **Modify** button () located on the line of the affected element.



   Its detailed characteristics are automatically displayed in the lower part of the screen, as one or more opened tabs (example: Properties, Associated elements, etc.).

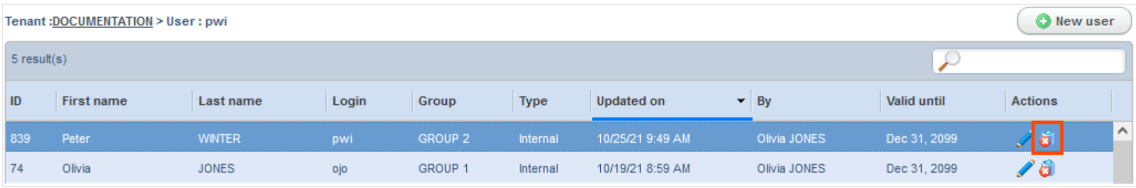
3. Modify the desired characteristics.
4. Click the **Save** button to validate your entry.

1.5.5 Deleting an element

This action consists in deleting an element permanently from the database. It is represented by an icon displayed in the **Actions** column of the list (in last position). It is useful in case of entry errors, or when the affected element has become obsolete. Before deleting an element, carefully evaluate the consequences of this action, as it could have a significant impact on the contact centre activity.

Some elements of ALE Connect cannot be deleted: in that case, the corresponding icon is not displayed. In other cases, some conditions must be respected beforehand. For example, this is the case for the deletion of tenants or business units: all their associated sub-elements must be deleted beforehand.

1. Open the desired functionality from the menu tree structure on the left of the screen.
2. Click the **Delete** button ( ) located on the line of the affected element:



   ALE Connect asks you to confirm the deletion.

3. Click **Yes** to permanently delete the element, or **No** to abandon this action.

   ALE Connect updates the list: the element is no longer displayed.

1.6 Entry rules

Screens of the interface frequently include fields to fill in or free comment areas, for which a value can/must be entered by the user. These must comply with certain principles, regarding the General Data Protection Regulations (GDPR), both in terms of content and form, when it comes to the private lives of individuals.

Therefore, the information provided must not damage the image of the person or prevent him from benefiting from a service to which he/she can claim.

1.6.1 Best practices

You must be vigilant about the content you enter.

- Save only the data strictly necessary for the processing that you must perform.
- Inform the person about the personal data you must keep about them and the purpose of this action.
- Remember that the data subject has a right of access to this information.
- Be objective, never excessive or insulting.
- Limit yourself to neutral and objective terms when it comes to sensitive data.
- Raise awareness of good practice among users.

CNIL website: Notepad and comment sections: the good reflexes to avoid getting out of hand

1.6.2 Format constraints

- The accepted format depends on the nature of the field: date, URL address, numerical value, etc.
- ALE Connect checks the value entered in most cases and warns you of an incorrect entry (for example, a case problem).
- The entry requirement is indicated by the * character located on the right of the field name.
- Any entry errors are indicated by an exclamation mark ! on the right of the field name.
- An error message is displayed when the screen is validated if a value entered does not respect the expected format.

Example in the user sheet:

2 Organisation of the contact centre

The **Administration** tab contains all the essential parameters for your activity with ALE Connect and more particularly:

- the structural organisation of the contact centre,
- the creation of the different queues and realtime queues where the interactions will be stored,
- the feeding of the shared knowledge base,
- the management of user accounts,
- the creation of user groups with assignment of access rights,
- the assignment of profiles to users.

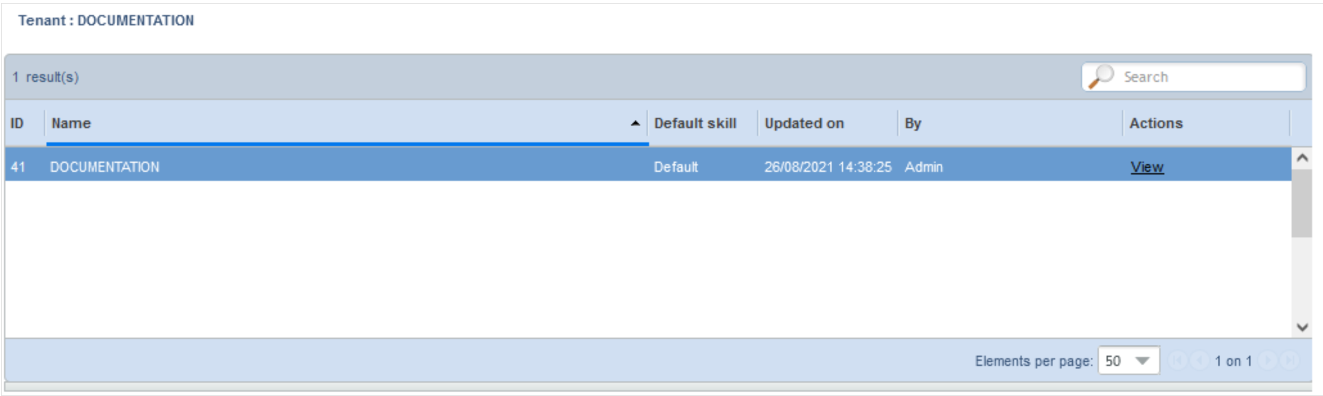
Note: this tab, displayed by default, is always accessible whatever the profile of the user logged in to the administration interface.

2.1 Tenants

A tenant is a functional or administrative organisation - usually a company - within which ALE connect is implemented. It includes at least one business unit and one skill.

2.1.1 Overview

This functionality is available from the **Administration** > **Tenants** menu. The upper part of the screen displays the existing tenant.

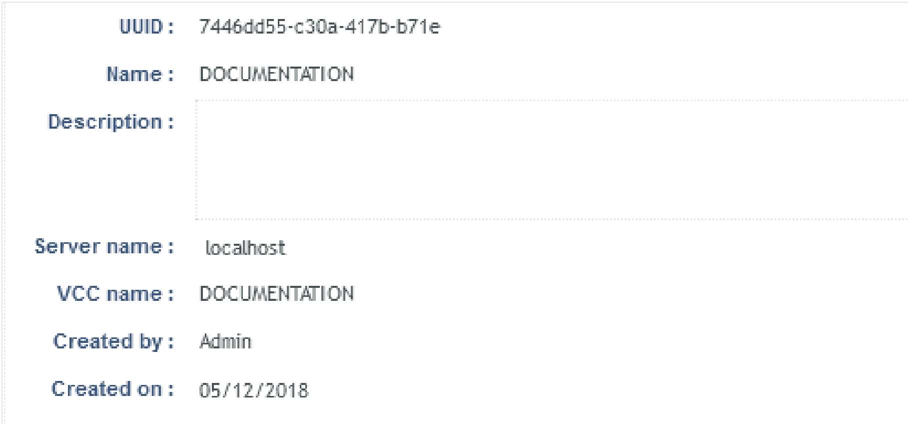


You can view:

- ID assigned by the system,
- name,
- name of the default skill,
- date and time of last update,
- user who performed the action,
- possible actions.

2.1.2 Viewing the properties of a tenant

1. From the **Administration** tab, click **Tenants**.
2. The **Properties** tab is displayed:



UUID
ID automatically assigned to the tenant by ALE connect. It cannot be changed.

Name
Name that clearly identifies the tenant.

Description
Optional text describing the information related to the tenant (objective, function, warning, etc.).

Server name
Location server ID of the tenant (always localhost).

VCC name
Creation name of the tenant. Even if the tenant is renamed, this field will still indicate the creation name.

Created by
Name of the user who created the tenant.

Created on
Creation date of the tenant.

2.1.3 Managing the license of a tenant

It is mandatory to allocate the accesses and tokens related to the ALE Connect license among the users of the tenant, whatever their profile. ALE Connect distinguishes VIP users (coordinators and supervisors) and agents. This operation can be performed either when the administrator creates the tenant, or later.

This allocation can evolve: it can be changed according to the needs of the contact centre and unexpected events.

2.1.3.1 Allocating accesses

You do not have to assign accesses to VIP users: by assigning zero to this pool, the accesses and tokens will be deducted from the pool accessible to everyone.

1. From the **Administration** tab, click **Tenants**.
2. Click the **License** tab.
3. In the first table, enter the number of accesses allocated to VIP users and agents:

UUID	Start	End	VIPs pool	Agents pool	Total
38d68cae-af4d-4e1e-a1df-01fb4a3aec	1/1/14 8:00 AM	1/1/25 6:00 PM	0	101	101 / 101

The license is identified by its unique ID and its validity period. The total number of accesses available is displayed as reminder.

5. Click **Save**.

2.1.3.2 Allocating tokens

ALE Connect allocates the tokens to computers that request them, until the number of available tokens is consumed. When a user logs out, the token is released on the server and becomes available for another computer.

1. From the **Administration** tab, click **Tenants**.
2. Click the **License** tab.
3. For each business unit, enter the number of tokens allocated to V.I.P. users and agents:

UUID	Start	End	Business unit	VIPs pool	Agents pool	Total
38d68cae-af4d-4e1e-a1df-01fb4a3ae	1/1/14 8:00 AM	1/1/25 6:00 PM				250 / 301
38d68cae-af4d-4e1e-a1df-01fb4a3ae			FRANCE	0	150	150
38d68cae-af4d-4e1e-a1df-01fb4a3ae			UNITED KINGDOM	0	100	100

The license is identified by its unique ID and its validity period. To facilitate reading, the list of business units of the tenant is sorted in alphabetical order and the total number of tokens available is displayed as a reminder.

5. Click **Save**.

2.2 Business units

A business unit is a subset of the tenant on which it depends. It usually corresponds to a company subsidiary or a brand within which the contact centre will be set up. The business unit has its own information system: a knowledge base, queues, etc. A tenant may therefore have one or several business units according to the structure of the company.

Warning: a DEFAULTCLIENTSPACE business unit is automatically created by the provisioning and cannot be deleted.

2.2.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** menu. The upper part of the screen displays the list of business units of the selected tenant:

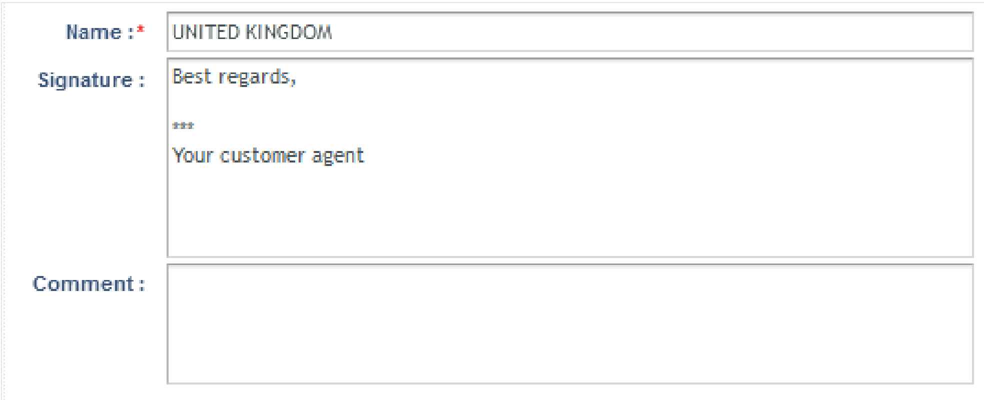
For each of them, you can view:

- unique ID assigned by the system,
- name,
- date and time of last update,
- user who performed the action,
- possible actions represented by an icon.

2.2.2 Creating a business unit

First check that the selected tenant is correct. Note that it is not possible to create a business unit if the active licenses do not allow it.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Click the **Add a new business unit** button.



3. You must enter a name that clearly identifies the business unit.
4. Enter the signature to be automatically inserted into all emails processed from the queue(s) linked to this business unit.
5. Enter a comment if necessary.

   Note: although the **Default queue for unitary outbound calls** field is displayed, it should not be filled in. This field will display the voice queue attached to this business unit later, which will be used by default for outbound calls.
6. Click **Save**.

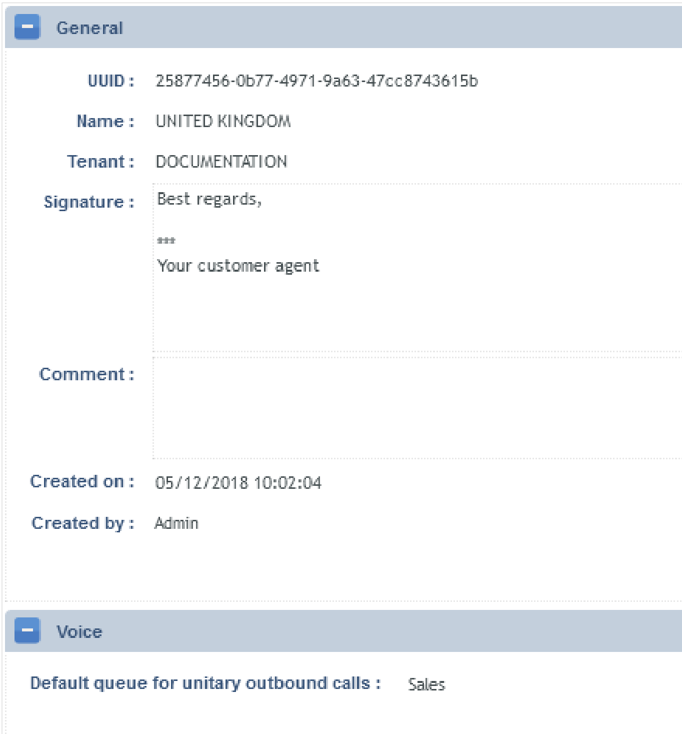
   ALE Connect suggests to immediately assign the ALE Connect license tokens to this business unit, so that its users can log in.
7. Click **OK, I do it now** to accept the suggestion.

   If you click **Later**, ALE Connect creates the business unit. In that case, the allocation of tokens will have to be performed later from the **License** tab of a tenant.
8. Distribute the ALE Connect license tokens of the business unit by user pool, according to the total number of users available.
9. Click **Save**.

   The allocation is saved and the business unit is now created.

2.2.3 Viewing the properties of a business unit

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select, from the list, the desired business unit.
3. Click the **Properties** tab.



General

UUID

Unique number automatically generated by the system to identify the business unit. This field is only displayed once the business unit has been created and cannot be changed.

Name

Long description that clearly identifies the business unit.

Tenant

This field is only displayed once the business unit has been created and cannot be changed: it reminds the tenant to which the business unit is attached.

Signature

Signature that will be automatically inserted into all emails processed from the queue(s) linked to this business unit. Three types of signatures are possible in emails sent by agents: the business unit signature, the queue signature (defined in the characteristics of the queue) and the agent signature.

Comment

Additional information related to the business unit.

Created on

Creation date and time of the business unit.

Created by

First name and name of the user who created the business unit.

Voice

Default queue for unitary outbound calls

When an agent performs a spontaneous call to another agent, or a consultation call during a conversation, this call is attached to the queue defined here.

2.2.4 Setting up the associated elements

Once the business unit has been created, you have to set up and customise some elements that are necessary for its daily use, such as parameters related to the processing of written interactions, equity rules for the distribution of interactions within the business unit, and alarm thresholds according to the priority level.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select, from the list, the business unit to set up.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the desired section:

   Alarm thresholds

   Qualification criteria

   Dissuasive message

   Waiting message

   Calendar

   HTML templates

   Introduction and conclusion messages

   Equity rules (Voice media excluded)

2.2.5 Modifying a business unit

It is possible to change the properties of a business unit after its creation, as the signature (example: change of address).

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Click the **Modify** button () located on the line of the affected business unit.
3. Change the desired properties.
4. Click **Save**.

2.2.6 Deleting a business unit

This action is only possible if all its attached elements have been previously deleted: folders, users, and user groups.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Click the **Delete** button () located on the line of the affected business unit.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes** to permanently delete the business unit, or **No** to abandon this action.

   ALE Connect updates the list: the business unit is no longer displayed.

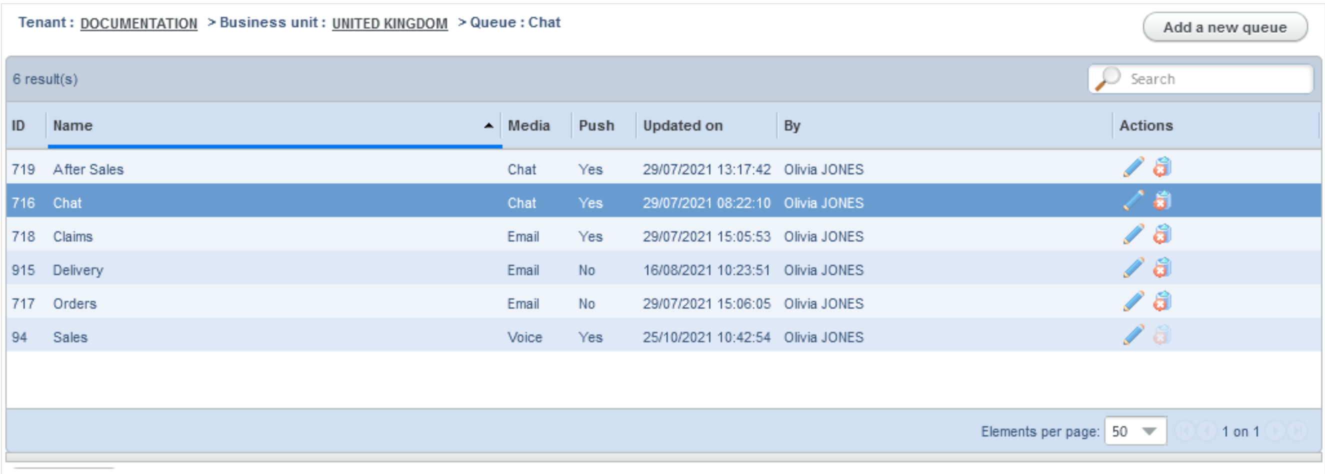
2.3 Queues

A queue is a set of folders from the same media. A queue depends on a business unit that is itself attached to a tenant. This functionality allows you to manage the queues of each business unit. The number of queues to create depends on various criteria: media, flows, contact centre organisation, etc. This preparatory study is performed when implementing ALE Connect.

Warning: queues of **voice media** are automatically created by the provisioning and cannot be deleted. They correspond to the pilots declared in OXE.

2.3.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Queues** menu. The upper part of the screen displays the list of all queues of the selected business unit:



For each of them, you can view:

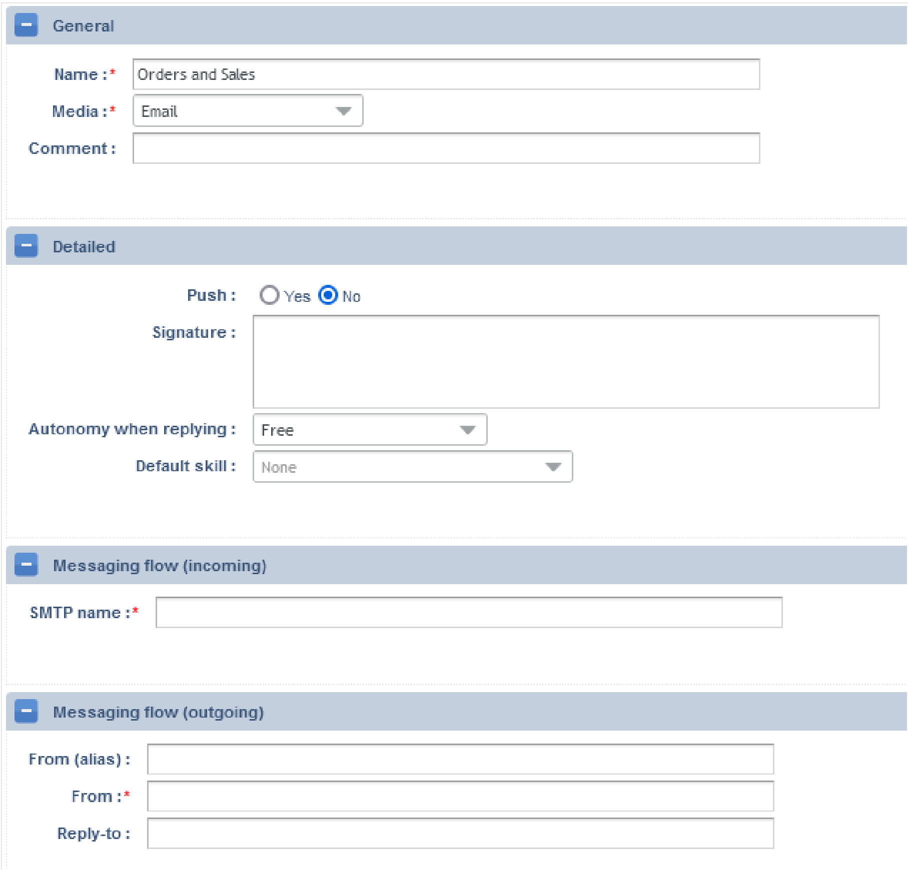
- ID assigned by the system,
- name,
- media associated,
- information indicating whether the access to the folders of this queue is in push mode,
- date and time of last update,
- user who performed the action,
- possible actions represented by icons.

2.3.2 Creating an email queue

Queues from this media allow to process the written interactions that arrive in ALE Connect as an email.

Warning: in addition to the setup, the AKIO administrator must configure the customer's mail server for the email queues that receives external flows.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Click the **Add a new queue** button.



3. Enter a **name** that clearly identifies the queue. The following characters are not authorised in the name:

```
& = ^ $ * , ; : ! § / . ? % £ ° ² < > + } \ ` # ~ {
```

4. Select the **Email** media (cannot be changed).
5. Fill in the properties of the queue:

   Comment
   If necessary, enter additional information related to the use of the queue.

   Push
   Choose the access mode to the folders of this queue.
   Push: the folder is pushed to the agent by the system (ACD).
   Pull: the agent must select the folder to be processed from the list.

This parameter can be modified: when you switch a queue from Push mode to Pull mode, or vice versa, the change is taken into account immediately on the agent interface, in a transparent way. Agents do not need to log out from their application and can continue to work.

SMTP name (Simple Mail Transfer Protocol)

Enter the name of the queue corresponding to its physical location on the server (not its email address).

Return alias

Enter the description that will be displayed in the Sender field of a message sent by the agent. It will be displayed instead of the email address of the mailbox.

Return address (From)

You must enter the email address that will be viewed by the contacts when an email is sent to them by an agent. If the contact wishes to reply to the agent, the address used is this one as long as no address is specified in the "Return address (reply-to)" field.

Technical note: to avoid outgoing emails from ALE Connect being considered as SPAM by the recipient's email system, the allocated subdomain must be declared in the SPF field of the DNS by the domain administrator.

Return address (Reply to)

Address used in the case of a response from the contact to the agent. If no address is defined here, the return address (From) will be used. Warning: the return addresses must match the email address of a queue from the ALE Connect platform, to allow the processing of folders by an external agent.

Default skill

Select, from the scrolling list, the skill associated by default with the queue. It will be automatically assigned to the folders redirected to this queue. Warning: this skill is only used in the case of a folder redirection. When the folder is created, the default skill of the tenant is assigned.

Declaring a default skill at the queue level has two consequences:
- It forces the skill of the folder, when it is redirected by an agent to another queue.
- It groups together all the folders with this default skill in the Folder/Queue component from the list of folders on the agent interface.

Autonomy when replying

Writing messages from this queue is handled by one of the following options:
Free: the agent can directly send his/her reply without validation.
Random validation: the messages sent by the agent are randomly submitted to the supervisor for validation. The random validation affects about 20% of the folders. Then enter the number of days for which the queue is in random validation.
Systematic validation: all the messages sent by the agent are submitted to the supervisor for validation.

Signature

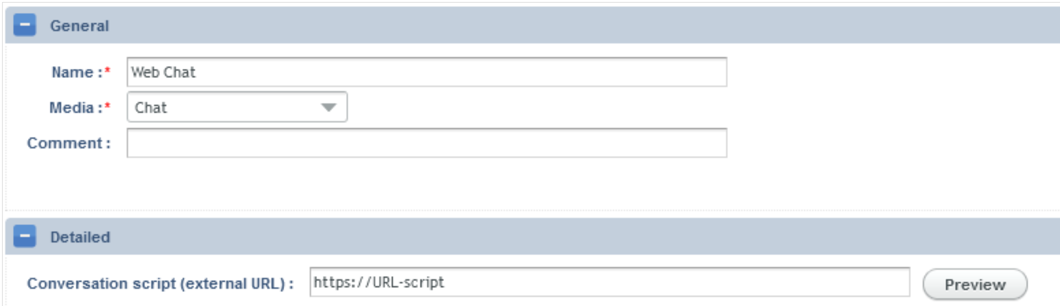
Enter the text of the signature that will be displayed at the bottom of the emails processed by agents.

6. Click **Save**.

2.3.3 Creating a chat queue

Queues from this media allow to process chats (instant messaging) with web users, via the Webbox provided by ALE Connect. It is strongly advised to create an introduction message and to associate it with this queue: it will allow the web user to start immediately the conversation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Click the **Add a new queue** button.



3. Enter a **name** that clearly identifies the queue.

   The following characters are not authorised in the name:

```
& = ^ $ * , ; : ! § / . ? % £ ° ² < > + } \ ` # ~ {
```

4. Select the **Chat** media (cannot be modified).
5. Fill in the properties of the queue:

   Comment
   If necessary, enter additional information related to the use of the queue.

   Conversation script (external URL)
   During a chat, the agents can lead the conversation with the web user relying on a predefined script. It will be displayed on their ALE Connect interface in the Script tab to the right of the folder.

   For this purpose, the script must be created beforehand with an external application, such as Google Forms (free application published by Google to create customised surveys and forms, with result management). Once set up, copy-paste its access URL address here starting with https://. You can preview the conversation script by clicking the Preview button.

   So that supervisors get substantiated statistics, it is possible to automatically feed some information of the script: its setup must anticipate the insertion of variables provided by ALE Connect.

   Once finalised, the URL address of the script will be generated by the external application by integrating these fields. However, if the script does not anticipate their automatic initialisation, the agent will be responsible for entering them manually when handling the chat. In all cases, all the replies can only be viewed from the application that owns the data.

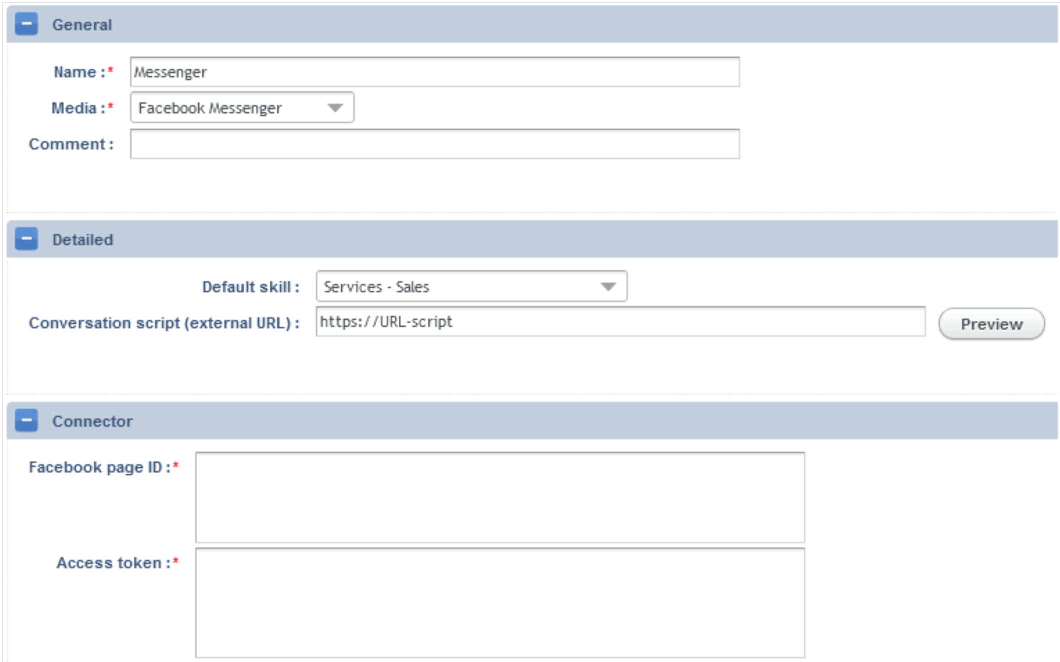
Note: the use of the Google Forms application requires to create a Gmail user account. For more information, we invite you to read the editor's documentation.
Example of URL address generated by Google Forms:
https://docs.google.com/forms/id_google_form/viewform?usp=pp_url&entry.1372425656=$%7BthreadId%7D

6. Click **Save**.

2.3.4 Creating a Facebook Messenger queue

Queues from this media allow to process the interactions with web users, that come from the social media Facebook Messenger.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Click the **Add a new queue** button.



3. Enter a **name** that clearly identifies the queue.

   The following characters are not authorised in the name:

```
& = ^ $ * , ; : ! § / . ? % £ ° ² < > + } \ ` # ~ {
```

4. Select the **Facebook Messenger** media (cannot be modified).
5. Fill in the properties of the queue:

   Comment
   If necessary, enter additional information related to the use of the queue.

   Default skill
   Select, from the scrolling list, the skill associated by default with the queue. It will be automatically assigned to the folders redirected to this queue. Warning: this skill is only used in the case of a folder redirection. When the folder is created, it is assigned to the default skill of the tenant.

   Declaring a default skill at the queue level has two consequences:
   - It forces the skill of the folder, when it is redirected by an agent to another queue.
   - It groups together all the folders with this default skill in the Folder/Queue component from the list of folders on the agent interface.

Conversation script (external URL)

Agents can lead a Facebook Messenger conversation with the web user relying on a predefined script, for which you have to copy-paste here the access URL address starting with https://.

Facebook page ID (mandatory)

Enter the official Facebook page ID, from which the Facebook Messenger interactions will be posted, and then stored in this queue. This alphanumeric code is provided by the Facebook application. In addition, it is unique for all tenants: two queues cannot use the same ID on the server.

> **Warning:** if you reassign the ID of a queue A to another queue B, messages from web users will continue to be sent to the folders in queue A until they have been closed by an agent.

Access token (mandatory)

Fill in the access token for the Facebook page, in alphanumeric format.

6. Click **Save**.

2.3.5 Creating a Twitter queue

Twitter is a social network that allows its users to send free short messages called tweets (280 characters maximum) by SMS or instant messaging. The instant messaging offers the possibility to send direct messages in private to third parties, whether they be persons or companies. For this purpose, ALE Connect allows agents to process direct messages from web users who contact the centre via Twitter.

Creating a queue for this media results in creating the webhook and subscribing to the Twitter account declared.

2.3.5.1 Procedure

Warning: during the configuration, you will need the access keys and tokens that have been generated from the Twitter application management dashboard. Please have these ID ready before you start typing.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Click the **Add a new queue** button.
3. Enter a **name** that clearly identifies the queue.

   The following characters are not authorised in the name:

   ```
   & = ^ $ * , ; : ! § / . ? % £ ° ² < > + } \ ` # ~ {
   ```

4. Select the **Twitter** media (cannot be modified).
5. Fill in the properties of the queue:

   Comment
   If necessary, enter additional information related to the use of the queue.

   Default skill
   Select, from the scrolling list, the skill associated by default with the queue. It will be automatically assigned to the folders redirected to this queue. Warning: this skill is only used in the case of a folder redirection. When the folder is created, it is assigned to the default skill of the tenant.

   Declaring a default skill at the queue level has two consequences:
   - It forces the skill of the folder, when it is redirected by an agent to another queue.
   - It groups together all the folders with this default skill in the Folder/Queue component from the list of folders on the agent interface.

   Conversation script (external URL)
   Agents can reply to direct messages from a web user by using a predefined script, for which you have to copy-paste here the access URL address starting with https://.

   Twitter account ID
   Enter the ID of the Twitter account from which the interactions will be posted, and then stored in this queue. This alphanumeric code is provided by the Twitter application. In addition, it is unique for all tenants: two queues cannot use the same ID on the server.

   Application key (APP API Key)
   Enter the application key provided by Twitter.

API check code (API Secret Key)

Enter the API check code provided by Twitter.

Access token

Enter the access token to the Twitter page, in alphanumeric format.

Check code of the access token (Access Token Secret)

Enter the check code of the access token to the Twitter page, in alphanumeric format.

6. Click **Save**.

2.3.5.2 Reconnecting a queue to Twitter

Technical problems with connecting to Twitter may occur (example: webhook subscription invalid). A warning message is then displayed in the upper part of the screen, in the properties of the affected queue. To solve this error, simply reconnect the queue to Twitter.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Select the Twitter queue in error.
3. In the **Properties** tab displayed by default, click the **Connect** button.

   The webhook is reactivated. ALE Connect informs you that the connection has been successfully established.

2.3.6 Setting up the associated elements

Once the queue has been created, you must complete its setup. By default, it inherits the values set up for the business unit on which it depends.

Warning: the available parameters depend on the media (chat, email, etc.) of the queue.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Select, from the list, the queue to configure.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) of the desired section:

   Alarm thresholds

   Qualification criteria

   Users

   Equity rules (Voice media excluded)

   Dissuasive messages

   Waiting messages

   Acknowledgement of receipt

   Introduction and conclusion messages

2.3.7 Modifying a queue

It is possible to modify some properties of a queue after its creation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Click the **Modify** button () located on the line of the affected Queue.
3. Change the desired properties.
4. Click **Save**.

2.3.8 Deleting a queue

This action is possible if:

- all the elements attached to it have been previously deleted (folders, users and user groups).
- the concerned queue is not associated with a real time queue.
- the affected queue is not a voice queue.

Note: if you delete a queue in which there are waiting emails, ALE Connect will use the queue of the folder instead of the original message queue so that these emails can be sent.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Click the **Delete** button () located on the line of the affected queue.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes** to delete the queue permanently.

   ALE Connect updates the list: the queue is no longer displayed.

2.4 Associated elements

It is possible to customise the parameters of a business unit or a queue. They are available in the **Associated elements** tab from the selected element.

By default, a queue inherits the values set up for the business unit on which it depends. However, it is possible to customise them at the queue level. Likewise, a realtime queue inherits default values of the queue on which it depends.

2.4.1 Alarm thresholds

An alarm threshold shows to agents the urgency of a folder to be processed. There are 5 thresholds; with level 5 being the lowest priority and level 1 the most urgent. Each threshold has its own colour: in the agent interface, it is displayed in the **Deadline** column from the list of folders. Alarm threshold colour charts are always created at the business unit level. They are then assigned either to a business unit or to a queue.

Note: ALE Connect provides a default chart of 5 colours, which cannot be changed.

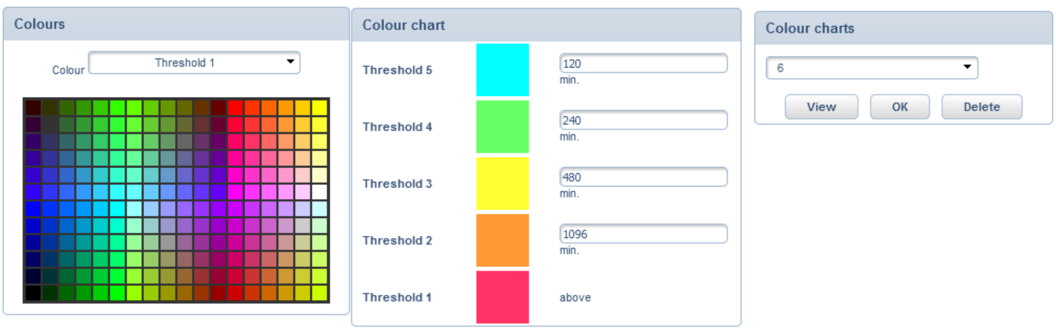
2.4.1.1 Creating a colour chart

If the default colour chart does not suit you, you can create another one, with the colours of your choice. It is then possible to customise the colour and duration of each alarm threshold.

A colour chart is always created at the business unit level: check beforehand that the selected business unit is correct.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the business unit for which you wish to create an alarm threshold chart.
3. Click the **Associated elements** tab.
4. Click the **Create a new colour chart** button ( ) from the **Alarm thresholds** section.

   The following screen is displayed:



5. In the **Colours** area on the left of the screen, select a threshold from the scrolling list.
6. From the grid, click the square of the colour to be assigned to the threshold.
7. Repeat these two steps for the 5 alarm thresholds.
8. In the **Colour chart** area, enter the number of minutes from which the folder deadline colour will change.

   For example, if you enter 120 minutes for the threshold 5, this means that any folder to be processed for which the deadline reaches or exceeds 120 minutes since its arrival will take the colour configured.

9. In the **Colour charts** area, select **New colour chart** in the scrolling list.
10. Click **Validate** to create the colour chart.

    ALE Connect automatically assigns a number to this new colour chart. It is now available from the scrolling list.

2.4.1.2 Assigning a colour chart to a business unit

Once created, the colour chart must be assigned to either a business unit or a queue. The default colour chart will be used if this step is not performed.

The colour chart is assigned to all queues of the affected business unit.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the **Alarm thresholds** section.

   ALE Connect displays the colour chart that is currently assigned to the business unit by default.
5. Select, from the list, the colour chart to be assigned to the business unit.
6. Click the **View** button to check that this is the colour chart you want to assign.
7. Click the **OK** button.

   The chosen colour chart is now the default one.

2.4.1.3 Assigning a colour chart to a queue

This assignment allows you to manage different alarm thresholds according to the queues within the same business unit.

Warning: if a colour chart is assigned to a business unit and another one to a queue of this business unit, the colour chart of the queue will be applied.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Select the affected queue.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the **Alarm thresholds** section.

   ALE Connect displays the colour chart that is currently assigned to the business unit by default.
5. Select, from the list, the colour chart to be assigned to the queue.
6. Click the **View** button to check that this is the colour chart you want to assign.
7. Click the **OK** button. The chosen colour chart is now assigned to the queue.

2.4.1.4 Modifying a colour chart

The default colour chart provided by ALE Connect, with the 0 code, cannot be changed. In addition, it is recommended not to change the thresholds of a colour chart being used.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Create a new colour chart** button (+) from the **Alarm thresholds** section.
5. In the **Colour charts** area on the right of the screen, select the **number** of the colour chart to modify.
6. Change the desired characteristics (colours and/or number of minutes).
7. Click **OK** to save your entry.

   The changes are immediately saved.

2.4.1.5 Deleting a colour chart

The default colour chart of the system, with the 0 code, cannot be deleted. Warning, the deletion is performed immediately without any confirmation message.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Create a new colour chart** button (+) from the **Alarm thresholds** section.
5. In the **Colour charts** area on the right of the screen, select the **number** of the chart you want to delete.
6. Click the **Delete** button.

   ALE Connect immediately deletes the colour chart and updates the existing list.

2.4.2 Qualification criteria

They allow contact centre agents to qualify the folders during their processing. Thanks to the information collected during the qualification, it is possible to get later qualitative statistics. These customised criteria are classified according to a hierarchical tree structure, with up to six levels maximum. You can thus adapt the classification of criteria to the needs of your business.

2.4.2.1 Overview

This functionality is available in the menu **Administration** > **Tenants** > **Business Units** > **Associated elements** > **Qualification criteria**. It allows you to create and manage the qualification criteria of a business unit.

The left part of the screen displays the tree structure of the criteria created (only the first three levels). The right part shows the level of the selection (breadcrumb trail), as well as the list of criteria or groups of criteria of the selected level.

The root directory is called **Qualification**.

2.4.2.2 Creating a qualification criterion

This action is always performed at the business unit level. Each criterion is unique within a business unit. In other words, two criteria cannot have the same name.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit by clicking the corresponding line.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the **Qualification criteria** section.
5. Click the affected directory (root or lower level) in the tree structure displayed on the left of the screen.
6. Click the **Add a new criteria** button.
7. Modify the name of the qualification criterion (255 alphanumeric characters maximum).
8. Click **Validate** to save your entry.

   The system adds this new criterion to the tree structure.

2.4.2.3 Modifying a qualification criterion

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit by clicking the corresponding line.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the **Qualification criteria** section.
5. Click the parent directory containing the criterion to modify, from the tree structure displayed on the left of the screen.
6. Click the **Modify** button.
7. Modify the name of the qualification criterion (255 alphanumeric characters maximum).
8. Click **Validate** to save your entry.

   The system updates immediately the tree structure.

2.4.2.4 Deleting a qualification criterion

The deletion is always performed criterion by criterion. It is not possible to delete a whole set. To delete a directory, all the criteria attached to it must first be deleted.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit by clicking the corresponding line.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the **Qualification criteria** section.
5. Click the parent directory containing the criterion to delete, from the tree structure displayed on the left of the screen.
6. In the list of criteria attached to this directory, click the **Delete** button.

   ALE Connect asks you to confirm the selected criterion.
7. Click **Validate** to confirm the deletion (or **Cancel** to abandon this action).

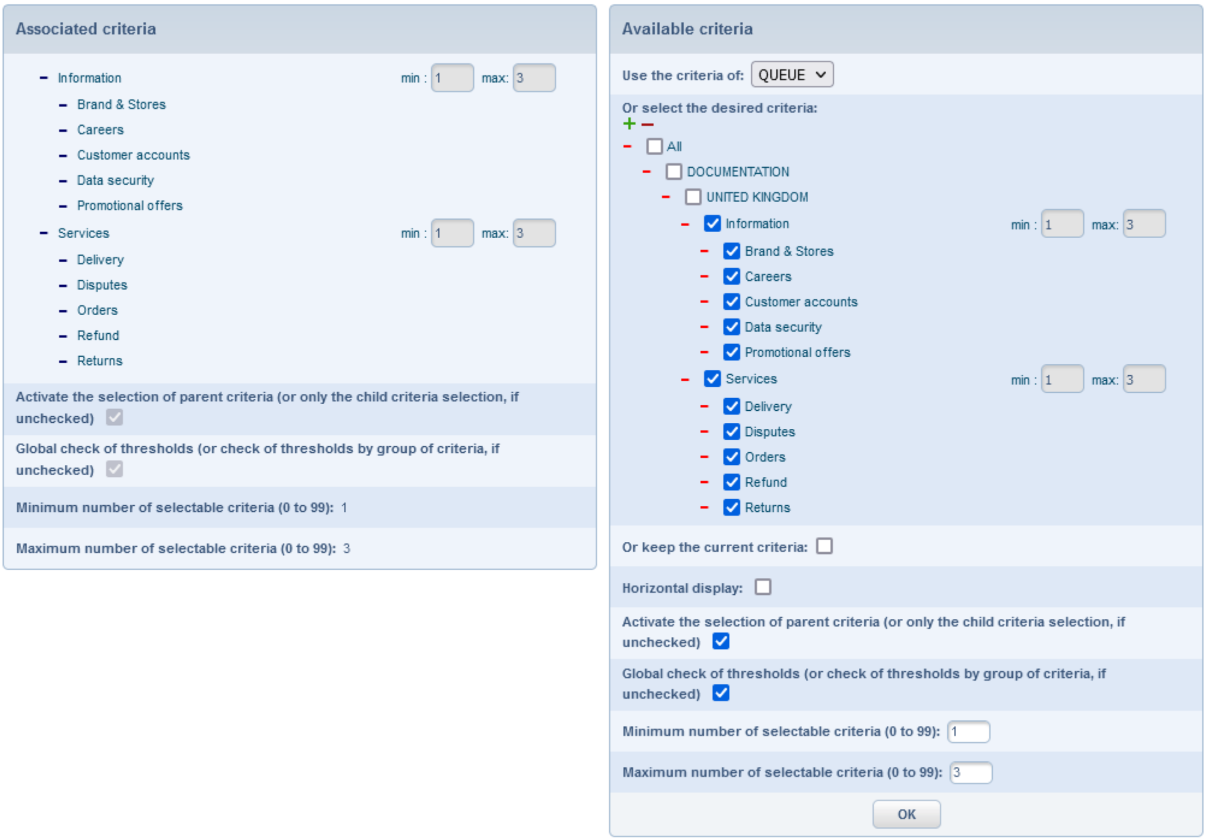
   The system updates immediately the tree structure.

2.4.2.5 Assigning qualification criteria to a queue

Once the qualification criteria have been created at the business unit level, you must assign them to each of its queues.

1. From the **Administration** tab, click **Tenants** > **Queues.**
2. Open the affected queue by clicking the corresponding line.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the **Qualification criteria** section.

ALE Connect displays the following screen:



The screen is divided into two vertical parts: on the left, you view the **criteria currently associated** with the queue. The minimum and maximum numbers of criteria to be selected when processing a folder from this queue are also indicated. The right part displays all the **available criteria** of the business unit that can be assigned to the queue.

5. Check/Uncheck the **available criteria** to assign to the current queue.

   To go faster, you can reuse the criteria of **another queue** as a template, by selecting it from the scrolling list at the top right of the screen.

6. According to the need, set up the following options:

   Or keep the current criteria
   If you just want to modify the minimum/maximum number of selectable criteria, and not the criteria themselves, check this option if you do not want to delete the existing assignments.

   Horizontal display
   By default, in the agent interface screens, the qualification criteria are displayed vertically. If you check this option, the criteria will be displayed horizontally, as lines.

   Warning: the horizontal display is not supported in the Qualification tab when processing a call, a chat or a Facebook Messenger/Twitter interaction.

Activate the selection of parent criteria (or only the child criteria selection, if unchecked)

This option is useful when the qualification criteria tree structure has several levels. If you check it, the parent criteria will be displayed as a checkbox and can therefore be checked by agents. In the example above, the Information and Services parent criteria can be checked as well as their child criteria. However, if you do not check this option, the parent criteria are displayed without a checkbox.

Global check of thresholds (or check of thresholds by group of criteria, if unchecked)

If this option is checked, ALE Connect will control the minimum and maximum numbers of qualification criteria that can be selected by an agent for all criteria of the tree structure. If the option is unchecked, ALE Connect controls these thresholds by group of criteria. Example: you have defined a maximum number of 3 selectable criteria. If this option is checked, the agents will therefore be able to select a maximum of 3 qualification criteria for any folder in this queue. However, if the option is unchecked, the agents will be able to select 3 criteria per existing group of criteria.

Minimum/Maximum number of selectable criteria (0 to 99)

Enter the minimum and maximum numbers of criteria that agents can select for each folder of the queue. These thresholds will be checked by ALE Connect, according to the previous option.

7. Click **Validate** to save your entry.

2.4.3 Users subscribed to a queue

For checking purposes, you can view the list of users who have read and/or write rights on each existing queue. This list is automatically updated according to the rights that have been defined by queue, at the internal user groups level. It is therefore not possible to perform changes here.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Select the affected queue.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **Users** section.

Agents	Rights on the queue
SMITH Emily (esm)	Read/Reply
JONES Olivia (ojo)	Read/Reply
WINTER Peter (pwi)	Read/Reply

For each user, his/her name, first name, login between brackets and his/her rights on the queue (read and/or write) are displayed.

2.4.4 Dissuasive messages

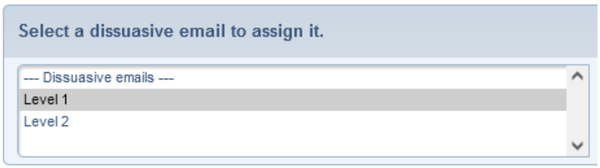
A dissuasive message is an automatic reply sent by email to any contact who performed a written request that needs to be dissuaded (or directed to another procedure). A "written request" is an incoming interaction classified in a written queue. For example, a web user sends an email regarding his/her folder that has been closed for six months: he/she automatically receives a message inviting him/her to contact the company via the "Customer Service" form.

You can set up here the dissuasive message(s) that the contact centre needs. According to the activity context, it is possible to create dissuasive messages as many as necessary, especially when you need to manage different trigger criteria (for example, a dissuasive message for folders that have been closed for more than 7 days, and another for archived folders).

Warning: the sending of dissuasive messages is performed by a scheduled task (operating process) that must be configured by a coordinator on your ALE Connect environment.

2.4.4.1 Overview

This functionality is available from the menu **Administration** > **Tenants** > **Business Units** > **Associated elements > Dissuasive message**. The upper part of the screen displays the list of existing dissuasive messages; the lower part indicates which one is currently assigned to the business unit:

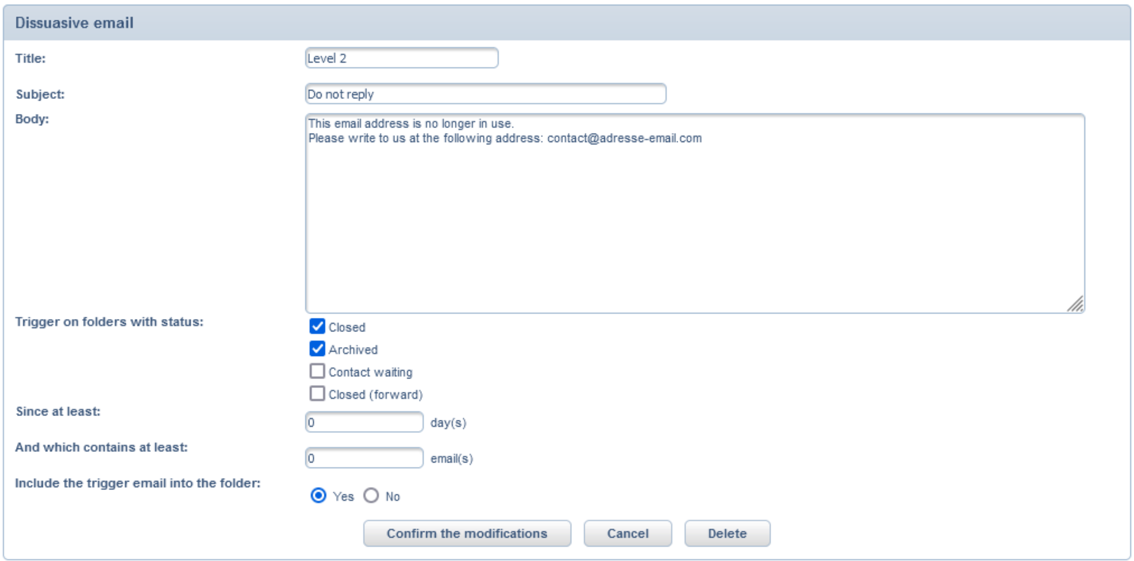


2.4.4.2 Creating a dissuasive message

Dissuasive messages must be created by a coordinator at the business unit level: first check that the one selected is correct.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the business unit for which you wish to create a dissuasive message.
3. Click the **Associated elements** tab.
4. Click the **Create a new message** button () from the **Dissuasive message** section.
5. Click the **Create** button.

   The following screen is displayed:



6. Fill in the characteristics of the message: title, subject, body, etc.
7. Click **Confirm the modifications** to save your entry.

   The new message is added to the existing list. You can modify or delete it later.

2.4.4.3 Assigning a dissuasive message to a business unit

Once created, the dissuasive message must be assigned to either a business unit, or a queue. If this step is not performed, the message will never be sent by the system. If necessary, it is possible to delete an assignment.

The dissuasive message is assigned to all queues belonging to the affected business unit.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) from the **Dissuasive message** section.
5. Select, from the list, the dissuasive message to be assigned to the business unit. Its detailed content is displayed under the list.
6. Click the **Assign** button.

   The dissuasive message is now assigned to the business unit.

2.4.4.4 Assigning a dissuasive message to a queue

This assignment allows you to manage different dissuasive messages for different queues within the same business unit. If necessary, it is possible to delete it.

Warning: if a message is assigned to a business unit and another one to a queue of this business unit, the message of the queue will be applied.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Select the affected queue.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) from the **Dissuasive message** section.
5. Select, from the list, the dissuasive message that must be assigned to the queue. Its detailed content is displayed under the list.
6. Click the **Assign** button.

   The dissuasive message is now assigned to the queue.

2.4.4.5 Modifying a dissuasive message

This action is useful when, for example, you need to change the text of the message or its trigger parameters.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Create a new message** button ( ) from the **Dissuasive message** section.
5. Select, from the list, the dissuasive message to modify.
6. Modify the desired characteristics.
7. Click **Confirm the modifications** to save your entry.

   The changes are immediately saved.

2.4.4.6 Deleting a dissuasive message

A dissuasive message can be deleted at any time, even if it has already been assigned to one or several queues.

Warning: this action cancels the sending of dissuasive messages already scheduled.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Create a new message** button ( ) from the **Dissuasive message** section.
5. Select, from the list, the dissuasive message to delete.
6. Click the **Delete** button.

   ALE Connect immediately deletes the dissuasive message and updates the existing list.

2.4.5 Waiting messages

A waiting message is an automatic email sent to a contact to keep him/her waiting while his/her folder is being processed. It is usually set up when the handling time announced in the first acknowledgement of receipt is exceeded, in order to avoid a reminder from the contact.

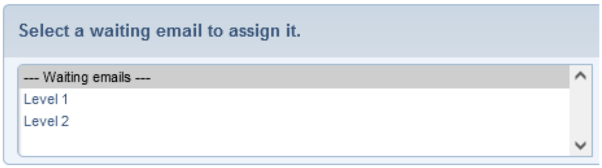
The sending of a waiting message is triggered by:

- the receipt of an email to be processed resulting in the opening of a folder,
- the sending of the folder to an expert for specific processing,
- the sending of the folder to an external agent.

Warning: the sending of waiting messages is performed by a scheduled task (operating process) which must be configured by a coordinator on your ALE Connect environment.

2.4.5.1 Overview

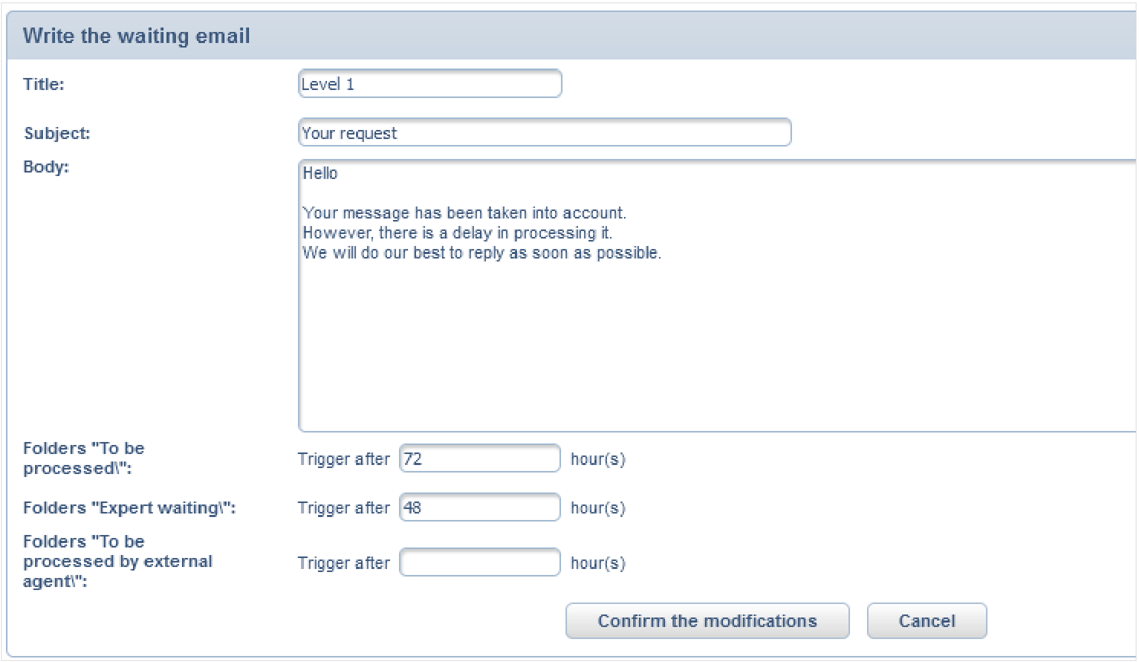
This functionality is available from the menu **Administration** > **Tenants** > **Business Units** > **Associated elements** > **Waiting message.** The upper part of the screen displays the list of existing waiting messages; the lower part indicates which one is currently assigned to the business unit:



2.4.5.2 Creating a waiting message

Waiting messages must be created by a coordinator at the business unit level: first check that the selected business unit is correct. It is possible to create dissuasive messages as many as necessary, especially when you need to manage different trigger criteria (for example, waiting message sent within 4 hours or 24 hours depending on the queues).

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the business unit for which you wish to create a waiting message.
3. Click the **Associated elements** tab.
4. Click the **Create a new message** button ( ) from the **Waiting message** section.
5. Click the **Create** button.



6. Configure the waiting message:

Title / Subject

Enter a title that clearly describes the purpose of the waiting message as well as its main subject.

Body

Enter the text of the waiting message. As acknowledgements of receipt, it is possible to customise it by inserting variables.

Folders "To be processed"

Indicate after how many hours ALE Connect should send the waiting message when an email is arrived in the desktop of folders to be processed. The 0 value is not allowed. If this field is blank, the waiting message is not handled in this case (not sent).

Folders "Expert waiting"

Indicate after how many hours ALE Connect should send the waiting message when an agent has transferred the folder to an expert. The 0 value is not allowed. If this field is blank, the waiting message is not handled in this case (not sent).

Folders "To be processed by external agent"

Indicate after how many hours ALE Connect should send the waiting message when an agent has transferred the folder to an external agent. The 0 value is not allowed. If this field is blank, the waiting message is not handled in this case (not sent).

Warning: it is not possible to validate the creation of the waiting message if these last 3 fields are blank.

7. Click the **Confirm the modifications** button.

   The new waiting message is added to the existing list. You can modify or delete it later.

2.4.5.3 Assigning a waiting message to a business unit

Once created, the waiting message must be assigned to either a business unit, or a queue. If this step is not performed, the message will never be sent by the system. If necessary, it is possible to delete an assignment.

The waiting message is assigned to all queues belonging to the affected business unit.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **Waiting messages** section.
5. Select, from the list, the waiting message to be assigned to the business unit. Its detailed content is displayed under the list.
6. Click the **Assign** button.

   The waiting message is now assigned to the business unit.

2.4.5.4 Assigning a waiting message to a queue

This assignment allows you to manage different waiting messages for different queues within the same business unit. If necessary, it is possible to delete it.

Warning: if a message is assigned to a business unit and another one to a queue of this business unit, the message of the queue will be applied.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Select the affected queue.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () of the **Waiting messages** section.
5. Select, from the list, the waiting message that must be assigned to the queue. Its detailed content is displayed under the list.
6. Click the **Assign** button.

   The waiting message is now assigned to the queue.

2.4.5.5 Sending rules

- If the folder is processed by an agent before the automatic sending of the waiting message, the waiting message is cancelled.
- If several messages are scheduled at the same time for the same contact, only one will be sent.
- No waiting messages are sent between 10:00 pm and 6:00 am. If a message is scheduled to be sent during this period, it is automatically delayed until 6:00 am.

2.4.5.6 Modifying a waiting message

This action can be useful when, for example, you need to change the text of the message, or its trigger parameters.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Create a new message** button () from the **Waiting message** section.
5. Select, from the list, the waiting message to modify.
6. Modify the desired characteristics.
7. Click **Confirm the modifications** to save your entry.

   The changes are immediately saved.

2.4.5.7 Deleting a waiting message

A waiting message can be deleted at any time, even if it has already been assigned to one or several queues.

Warning: this action cancels the sending of waiting messages already scheduled.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Create a new message** button () from the **Waiting message** section.
5. Select, from the list, the waiting message to delete.
6. Click the **Delete** button.

   ALE Connect immediately deletes the waiting message and updates the existing list.

2.4.6 Activity calendar

The activity calendar defines the days and times when the company is active for email processing. Each created business unit automatically benefits from a default calendar, for which the working hours are from Monday to Friday from 9:00 am to 6:00 pm. **Note that it is not possible to change the default calendar: however, you can customise it.**

2.4.6.1 A very specific use

The activity calendar is exclusively used to calculate the email quality of service. It measures the time elapsed, in working hours, between the receipt of the last incoming message of a folder and the reply: ALE Connect takes the calendar of the business unit associated with the queue of the folder at the time of the reply. The email quality of service can be viewed by supervisors on their ALE Connect interface, from the reports based on the Quality of Service (written) cube which allows to analyse the emails processed on D and D+.

Technically, the email quality of service is calculated for each processing action performed on a folder (for example: reply and close, close the folder, etc.). This calculation is performed only once, during the execution of the ETL job when the data is replicated from the USER database to the BI database of the ALE Connect server. The calculated email quality of service cannot be modified subsequently. If the default calendar is updated, the performed changes will be taken into account for the next emails, but will not affect the past data.

Warning: each business unit can only manage one calendar, the default one.

2.4.6.2 *Modifying the default calendar*

In order to adapt the calendar to your activity, you can customise the working hours for each day of the week. As a reminder, the default time range is from 09:00 am to 18:00 pm from Monday to Friday.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the business unit for which you want to modify the calendar.
3. Click the **Associated elements** tab.
4. Click the **Modify** button ( ) from the **Calendar** section.
5. Click the **name** of the calendar to display its characteristics.

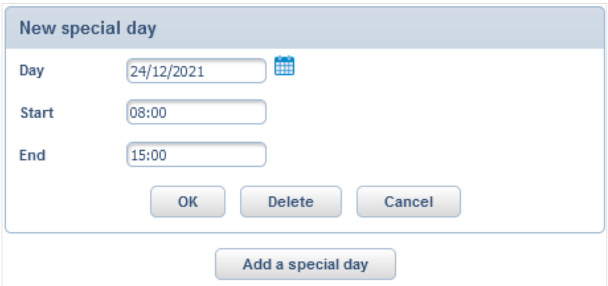
6. Enter the working hours for each day of the week, in HH:MM format.
7. If necessary, add special days: these days have different working hours from the standard days.
8. Click **OK** to save your entry.

2.4.6.3 *Scheduling special days*

Depending on the activity, certain days may have special working hours. So that ALE Connect takes them into account, you must add them to the calendar.

Adding a special day

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the <u>business unit</u> for which you want to modify the calendar.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **Calendar** section.
5. Click the **name** of the calendar to display its characteristics.
6. Click the **Add a special day** button.



7. Enter the date then the start and end times.
8. Click **OK.**

   ALE Connect adds the special day to the list.

Adding a special day

The deletion is immediate (no confirmation message).

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the <u>business unit</u> for which you want to modify the calendar.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **Calendar** section.
5. Click the **name** of the calendar to display its characteristics.
6. From the existing list, click the special day to delete.
7. Click the **Delete** button.

   The special day is immediately deleted from the calendar.

2.4.7 HTML templates

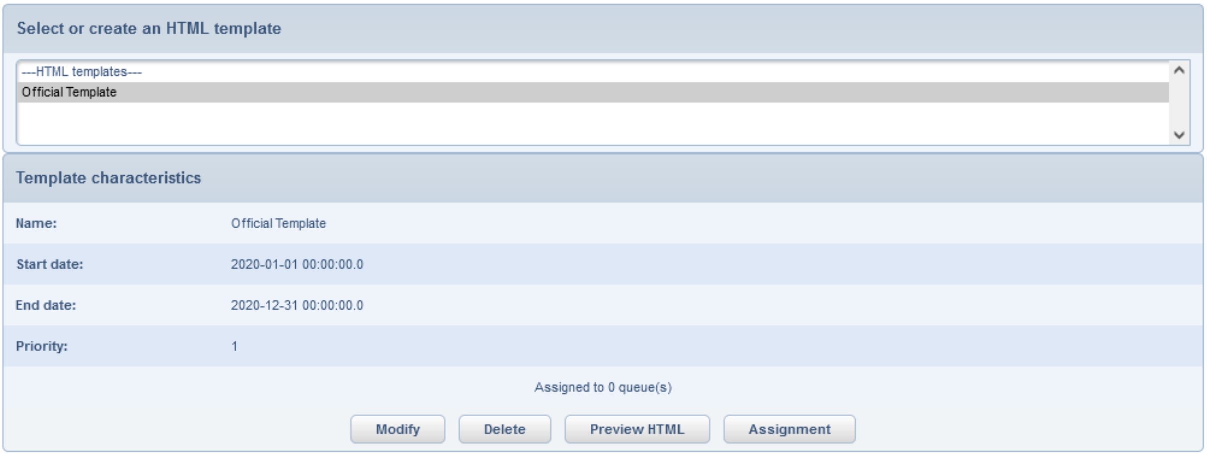
An HTML template defines the styles and presentation of the various elements constituting an email. It is generally customised according to the company's official graphic charter (logo insertion, colours, font, etc.). Once active, it is applied to all the emails sent by the agents and supervisors of the contact centre: spontaneous emails or sent as reply while processing a folder.

The final interpretation of the HTML code of the email received by the recipient depends on the settings and HTML code interpretation capacities of his/her mailbox The final display may therefore be different from one mailbox to another. The HTML template management is performed at the business unit level.

Warning: this functionality is intended for people with knowledge of HTML and CSS (e.g. web designers).

2.4.7.1 Overview

This functionality is available in the menu **Administration** > **Tenants** > **Business units**. The upper part of the screen displays the list of existing HTML templates; the lower part displays the characteristics of the template selected by default:



2.4.7.2 Structure to be respected

The HTML template has a predefined structure that must not be changed or deleted. It declares the classes of the different objects that constitute an email. The HTML page starts at the <**html**> tag and ends at the <**/html**> tag. The styles must be defined in the header of the HTML code between the <**head**> and <**/head**> tags because mailboxes do not allow access to an external .css file.

The template to be created must at least contain the following objects by inserting the corresponding code between the <**body**> and <**/body**> tags:
`answer` : body of the email written by the agent.
`sigOperator`: agent's signature (if set).
`sigMailBox`: queue signature (if set).
`sigCustomerSpace`: business unit signature (if set).
`urlSurvey`: Online survey URL (obsolete object that must be kept to validate the HTML template).
`quotedEmail`: message recieved from a contact to be included in the reply.

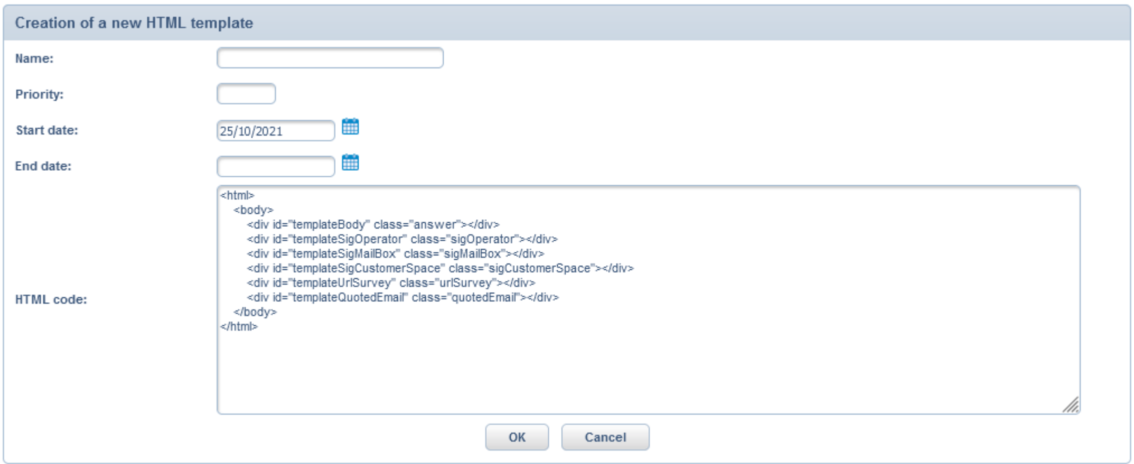
Here is an example:

```
<html>
   <head>
      <style>
         .answer{font-size:10pt;color:#18186b;font-family:Arial}
         .sigOperator{font-size:12pt;color:#993333;font-family:Verdana;font-weight:bold}
         .sigMailBox{font-size:12pt;color:#CC6699;font-family:Verdana;font-weight:bold}
         .sigCustomerSpace{font-size:12pt;color:#FFCC66;font-family:Verdana;font-weight:bold}
         .urlSurvey{font-size:10pt;color:blue;font-family:Verdaa}
         .quotedEmail{ font-size:10pt; color:#000000;font-family:Arial }
      </style>
   </head>
   <body bgcolor="#FFFFCC">
      <img src="http://www.akio-software.com/images/logo.gif" border=0>
      <div id="templateBody" class="answer"></div>
      <div id="templateSigOperator" class="sigOperator"></div>
      <div id="templateSigMailBox" class="sigMailBox"></div>
      <div id="templateSigCustomerSpace" class="sigCustomerSpace"></div>
      <div id="templateUrlSurvey" class="urlSurvey"></div>
      <div id="templateQuotedEmail" class="quotedEmail"></div>
   </body>
</html>
```

2.4.7.3 Creating an HTML template

HTML templates are created by a coordinator at the business unit level: first, check that the selected business unit is correct. It is possible to create HTML templates as many as necessary, especially when you need to manage different templates for different queues within a same business unit.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the business unit for which you wish to create an HTML template.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **HTML templates** section.
5. Click the **Select or create an HTML template** button.



6. Enter a **name** that clearly identifies the HTML template.
7. Enter a number, from 0 to N, representing the application priority of the current template.

   It defines which template should be used by ALE Connect, when there are several valid templates in the same time range and for the same queue. The 0 priority is the highest. Example: for a N queue, the A template is defined with priority 2 from 1 August 2021 to 30 September 2021. The B template is defined with priority 1 from 14 September 2021 to 20 September 2021 included.

   Results:

   - Between 01/08/2021 and 13/09/2021 included, the template used to send emails is A.
   - Between 14/09/2021 and 20/09/2021 included, the template used to send emails is B, as its priority is higher than the A template defined over the same time range.
   - Between 21/09/2021 and 30/09/2021 included, the template used to send emails is A.
8. Enter the **validity period** of the HTML template, with both dates required.
9. Enter the **HTML code** of the template.
10. Click **OK**.

2.4.7.4 Previewing an HTML template

This functionality is very useful to preview the final layout of the email, before assigning the template.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) from the **HTML templates** section.
5. Select, from the list, the HTML template you wish to preview.
6. Click the **Preview HTML** button.

   ALE Connect displays the template in a new browser window of your computer.

2.4.7.5 Modifying an HTML template

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) from the **HTML templates** section.
5. Select, from the list, the HTML template you wish to modify.
6. Click the **Modify** button.
7. Modify the characteristics of the template.
8. Click **OK**.

2.4.7.6 Assigning an HTML template

Once created, an HTML template must be assigned to one or several queues of the business unit, in order to be applied by the system. If necessary, it is possible to delete an assignment.

1. From the **Administration** tab, click **Tenants** > **Business Units**.
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) from the **HTML templates** section.
5. Select, from the list, the template to be assigned to the business unit.
6. Click the **Assignment** button: the system displays the characteristics of the template and the list of queues of the selected business unit.
7. Check the queues to which the template must be assigned.
8. Click **OK**.

2.4.7.7 Deleting an HTML template

A template can be deleted at any time, even if it has already been assigned to one or more queues.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **HTML templates** section.
5. Select, from the list, the HTML template to delete.
6. Click the **Delete** button.
7. Click **OK.**

2.4.8 Introduction and conclusion messages

An introduction/conclusion message is a predefined customised text that can be inserted at the beginning or end of a written response. It reduces the handling time of a folder, by avoiding the agent re-enter unnecessarily the same text for each message. These introduction/conclusion messages can be automatically inserted into all emails, or selected manually by the agent when processing a folder.

There are two types of messages:

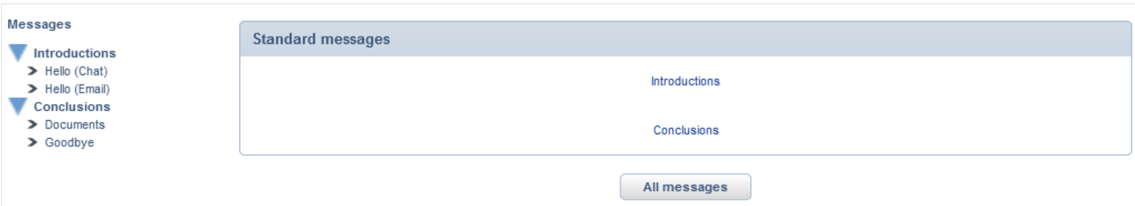
- The **introduction message** is inserted at the beginning of an email, or displayed by default within the Webbox during a chat conversation.
- The **conclusion message** is displayed at the end of an email. However, it cannot be used in chat conversations.

The agent can modify the content directly in his/her reply email or choose another message from a choice list.

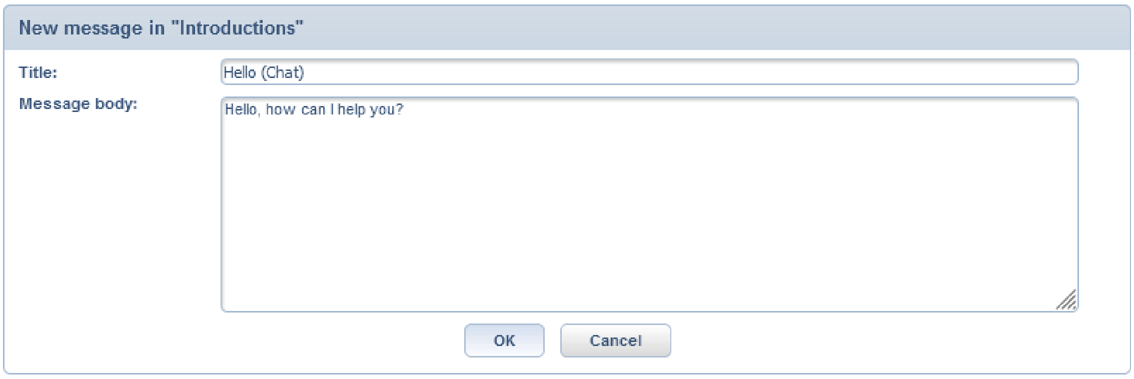
2.4.8.1 Creating an introduction/conclusion message

The creation of these messages is always performed at the business unit level. However, their assignment is performed at the queues level.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the desired business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **Introduction and conclusion messages** section.



5. Click the type of message to create: **Introductions** or **Conclusions**.
6. Click the **New message** button.



7. Enter a clear title.
8. Enter the text of the message. It is possible to insert variables to customise the text.
9. Click **OK**.

2.4.8.2 Inserting variables into a message

In the message body, it is possible to insert variables from a form (merge fields from response templates) to customise it. When the reply is read, they are automatically initialised with the matching actual values. A merge field corresponds to the name of the form field, preceded and followed by three hash characters (###).

Example: `Hello ###Title### ###First name### ###Last name###,`
Result: `Hello Mrs Mary Smith,`

2.4.8.3 Modifying a message

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the desired business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **Introduction and conclusion messages** section.
5. Click the type of message: **Introductions** or **Conclusions**.
6. Click the **Modify** button corresponding to the message.

   You can also directly click the desired message, from the tree structure:

7. Perform the changes you wish.
8. Click **OK**.

2.4.8.4 Deleting a message

As modification, you can delete the desired message directly from the displayed tree structure.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the desired business unit.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) from the **Introduction and conclusion messages** section.
5. Click the type of message: **Introductions** or **Conclusions**.
6. Click the **Delete** button corresponding to the message.

   ALE Connect asks you to confirm the deletion.
7. Click **Confirm.**

2.4.8.5 Assigning a message to a queue

Assignment of messages is always performed by queue. For each queue, it is possible to assign an introduction and conclusion message.

1. From the **Administration** tab, click **Tenants** > **Queues**.
2. Select the affected queue.
3. Click the **Associated elements** tab.
4. Click the **Modify** button (✏) from the **Introduction and conclusion messages** section.
5. Select the introduction message to assign to the queue: the message body is displayed on screen as a reminder.
6. Select the conclusion message to assign to the queue: the message body is displayed on screen as a reminder.
7. Click **OK.**

2.4.9 Equity rules (Voice media excluded)

For chat interactions, the equity rules allow to define how interactions are distributed to agents. Indeed, for a same tenant, several agents may have the same skills to process an interaction. These equity rules therefore determine the most appropriate agent, taking into account the weight of the activity:

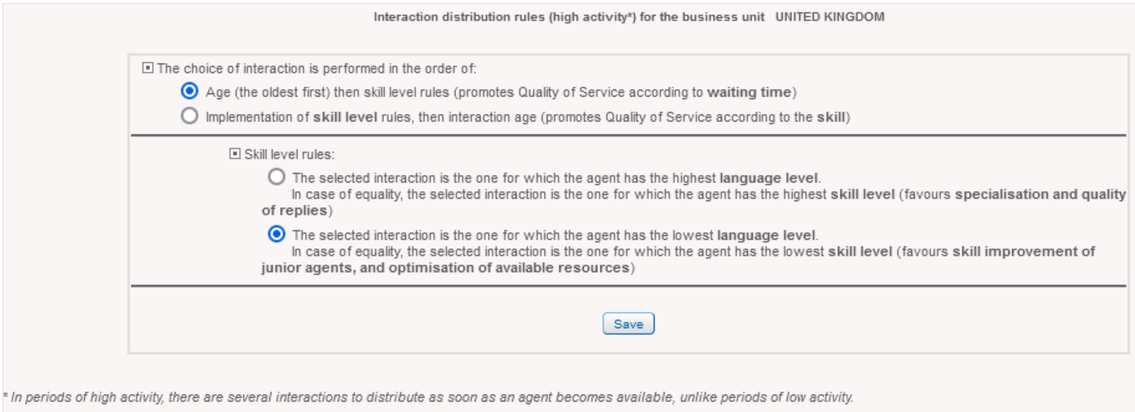
- **High activity**: all agents are busy and any new incoming interaction is distributed to the first agent that becomes available. Equity rules are configured at the business unit level.
- **Low activity**: several agents are available to process a new incoming interaction. Equity rules are configured at the queue level.

2.4.9.1 Defining rules in case of high activity

For each business unit, you must define how ALE Connect will fairly distribute interactions to agents in case of high activity. These rules are valid for all the queues of the selected business unit.

1. From the **Administration** tab, click **Tenants** > **Business Units.**
2. Select the affected business unit by clicking the corresponding line.
3. Click the **Associated elements** tab.
4. Click the **Modify** button () from the **Equity rules** section.

   The following screen is displayed:



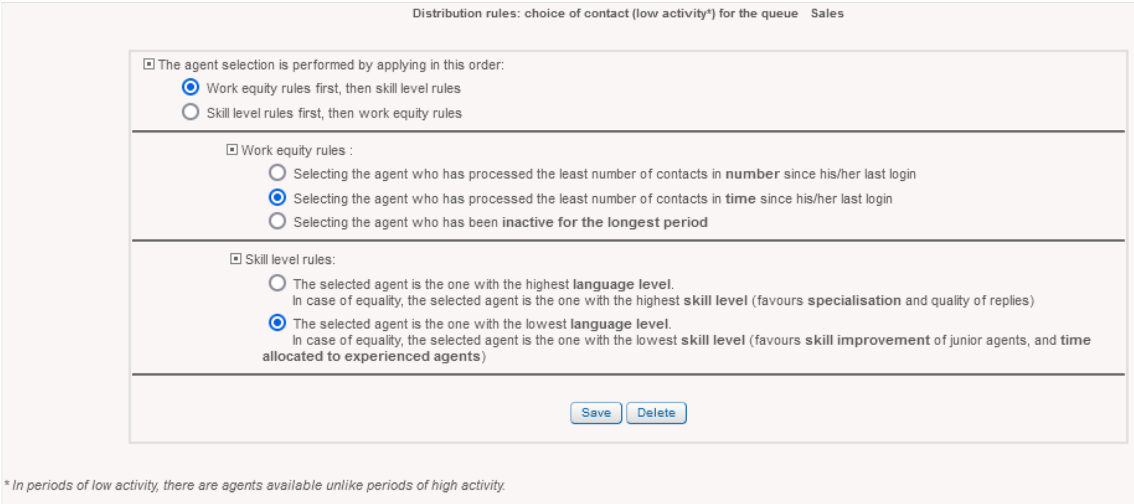
5. Indicate whether the system should distribute the interaction according to its age (regardless of agent skills) **OR** according to agent **skill levels** (then age) by checking the corresponding option.
6. If you have checked the second option, specify which behaviour ALE Connect should adopt in case of equality, i.e. when several agents have the same (highest) language level: ALE Connect gives priority to the interaction for which the agent has the highest skill level, or vice versa.
7. Click the **Save** button.

2.4.9.2 Defining rules in case of low activity

For each chat queue, you must define how ALE Connect will fairly distribute interactions to agents in case of low activity.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Queues**.
2. Select the affected queue by clicking the corresponding line.
3. Click the **Associated elements** tab.
4. Click the **Modify** button ( ) from the **Equity rules** section.

   The following screen is displayed:



5. Indicate whether ALE Connect should select an agent by giving priority to **work equity rules** first and then **skill level rules**, or vice versa, by checking the appropriate option.

   Work equity rules

   ALE Connect selects an agent according to his/her login time or the amount of work he/she has already performed. This is the one who:
   - has processed the least number of contacts since his/her login.
   - has processed the least number of contacts in time since his/her login, i.e. the one with the lowest cumulated handling time.
   - was inactive for the longest period (recommended).

   Skill level rules

   ALE Connect automatically selects the agent with the highest language level. However, in case of equality between several agents, the system can choose the most or the least skilled agent. As a reminder, the skill levels are defined by user groups (the agent inherits the level associated with his/her group).

6. Click the **Save** button.

2.4.10 Acknowledgements of receipt

In ALE Connect, an acknowledgement of receipt is an automatic email sent to the contact, confirming the receipt of his/her message and usually indicating an handling time. The content of the message can be completely customised.

The acknowledgement of receipt can be defined at the management rules, routing rules or queues level. The first two levels have priority over the acknowledgement of receipt linked to the queue, making it inactive.

2.4.10.1 Activating an acknowledgement of receipt

It is only possible to create one acknowledgement of receipt by queue.

1. From the **Administration** menu, click **Tenants** > **Business Units** > **Queues**.
2. Select, from the existing list, the affected queue.
3. Click the **Associated elements** tab.
4. Click the **Modify** button ( ) from the **Acknowledgement of receipt** section.
5. Enter the subject of the acknowledgement of receipt.
6. Enter the text of the acknowledgement of receipt by inserting variables if desired.
7. Activate the automatic sending of the acknowledgement of receipt by checking **Yes**.
8. Click **OK** to save your entry.

   Once the acknowledgement of receipt is defined, the Subject and Content fields can no longer be blank.

2.4.10.2 Deactivating an acknowledgement of receipt

1. From the **Administration** menu, click **Tenants** > **Business Units** > **Queues**.
2. Select, from the existing list, the affected queue.
3. Click the **Associated elements** tab.
4. Click the **Modify** button ( ) from the **Acknowledgement of receipt** section.
5. Deactivate the automatic sending of the acknowledgement of receipt by checking **No**.
6. Click **OK** to save your entry.

2.4.10.3 Inserting variables in an acknowledgement of receipt

It is possible to customise the acknowledgement of receipt by inserting variables from a form. When reading the response, they are automatically initialised with the matching actual values. A variable corresponds to the name of the form field, preceded and followed by three hash characters (###).

Example: `Hello ###Title### ###First name### ###Last name###,`
Result: `Hello Mrs Mary Smith,`

The available variables are:

Table	Column	Variable
Contact sheet	First name	CLI.PRENOM
Contact sheet	Name	CLI.NOM
Contact sheet	Title	CLI.CIVILITE
Contact sheet	Date of birth	CLI.DATE ANNIVERSAIRE
Contact sheet	Verbatim	CLI.VERBATIM
Contact sheet	Company	CLI.SOCIETE
Contact sheet	Street number	CLI.NUMERO DE RUE
Contact sheet	Street name	CLI.NOM RUE
Contact sheet	Building	CLI.IMMEUBLE
Contact sheet	Postcode	CLI.CODE POSTAL
Contact sheet	City	CLI.VILLE
Contact sheet	Comment	CLI.COMMENTAIRE CLIENT
Contact sheet	Phone number	CLI.TELEPHONE
Contact sheet	Mobile phone	CLI.MOBILE
Contact sheet	Reference	CLI.REFERENCE
Contact sheet	Country	CLI.PAYS
Contact sheet	Locality or residence	CLI.LIEU DIT
Agents	Title	OPE.CIVILITE
Agents	First name	OPE.PRENOM
Agents	Name	OPE.NOM
Agents	Phone number	OPE.TELEPHONE
Agents	Department	OPE.SERVICE
Agents	Address	OPE.ADRESSE
Agents	City	OPE.VILLE
Agents	Login	OPE.LOGIN

Table	Column	Variable
Agents	Language	OPE.LANGUE
Agents	Email	OPE.EMAIL
Agents	Site	OPE.SITE
Folder	Folder No.	thread_id
Folder	Creation date	date_creation
Folder	Subject	subject
Folder	Subject of incoming message	incoming_mail_subject
Folder	Date of incoming message	incoming_mail_date
Folder	Body of incoming message	incoming_mail_body

2.5 Skills

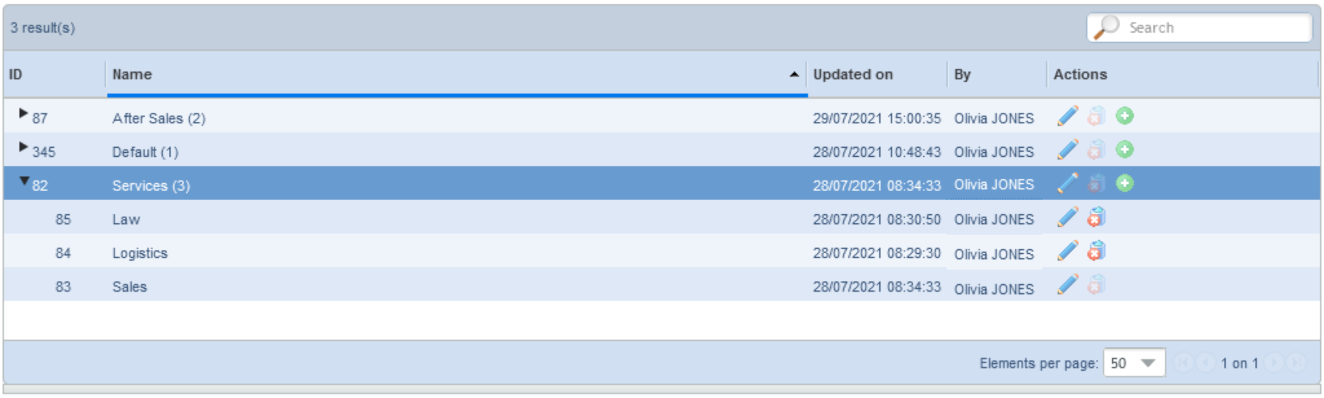
A skill is a business ability or know-how, which can be assigned to each new folder created (in the same way as a queue and a language). The coordinator of the tenant is responsible for their management. A skill can be assigned to a user group allowing them to process the folder. A skill group contains several skills.

Once created, it is possible to assign them to the collaborators of the contact centre, at the internal user groups level.

Warning: both skills and groups are managed from the same screen.

2.5.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Skills** menu. The upper part of the screen displays the list of existing skill groups. By default, they are sorted in descending chronological order (from the most recent to the oldest), allowing you to immediately view the last modified groups. Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column.



For each skill group, you can view:

- ID,
- name directly followed by the number of associated skills displayed in brackets,
- date and time of last update,
- user who created or modified it,
- possible actions represented by an icon.

2.5.2 Managing skill groups

You must first create the group, before creating its skills. Before starting, check that the selected tenant is the one for which you want to create groups.

Warning: a “default” skill group is automatically created by the provisioning and cannot be deleted.

2.5.2.1 Creating a skill group

1. From the **Administration** tab, click **Tenants** > **Skills**.
2. Click the **Add a new skill group** button above the list:
3. Fill in the name of the group.
4. Click **Save**.

2.5.2.2 Modifying a skill group

This functionality allows you to modify the group name if necessary.

1. From the **Administration** tab, click **Tenants** > **Skills**.
2. Click the **Modify** button () located on the line of the affected group.
3. Modify the group name.
4. Click **Save**.

2.5.2.3 Deleting a skill group

This action is only possible if no skills are associated with the group. Otherwise, the icon is greyed out. The skill group created by the provisioning cannot be deleted.

1. From the **Administration** tab, click **Tenants** > **Skills**.
2. Click the **Delete** () button located on the line of the affected group.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes**.

   ALE Connect returns to the list of skill groups: the deleted group is no longer displayed.

2.5.3 Creating a skill

Once the group is defined, you can create its skills.

Warning: click the ▸ icon in the ID column to view the skills that are associated with each group.

A default skill must be assigned to each tenant: it is necessary to process emails. When the corresponding folder is created, three characteristics are automatically assigned to it: the queue on which the flow was received, the default skill of the tenant and the language detected by the system (if not modified by a routing rule). Any new skill is taken into account on the agent interface within about 5 minutes after its creation.

Warning: a “default” skill, associated with the “default” skill group, is automatically created by the provisioning and cannot be deleted.

1. From the **Administration** tab, click **Tenants** > **Skills**.
2. Click the ▸ icon in the **ID** column of the group for which you wish to create a skill.
3. Click the **Add a skill** button (⊕) located on the line of the affected group.
4. Enter a name that clearly identifies the new skill.
5. Check the **Default skill of the tenant** option if it is indeed the default skill of the current tenant.
6. Click **Save**.

   ALE Connect adds automatically the skill to the group: its number is incremented by 1.

2.5.4 Modifying a skill

1. From the **Administration** tab, click **Tenants** > **Skills**.
2. Click the ▸ icon in the **ID** column of the group for which you wish to create a skill.
3. Click the **Modify** button () located on the line of the skill to modify.
4. Perform the changes you wish.
5. Click **Save**.

2.5.5 Deleting a skill

This action is possible if the skill is not associated with a realtime queue. The skill created by the provisioning cannot be deleted.

1. From the **Administration** tab, click **Tenants** > **Skills**.
2. Click the ▸ icon in the **ID** column of the group to which the skill to be deleted belongs.
3. Click the **Delete** button () located on the line of the skill to delete.

   ALE Connect asks you to confirm the action.
4. Click **Yes**.

   ALE Connect returns to the list of skill groups. Expand the list of skills from the group: the one that has been deleted is no longer displayed.

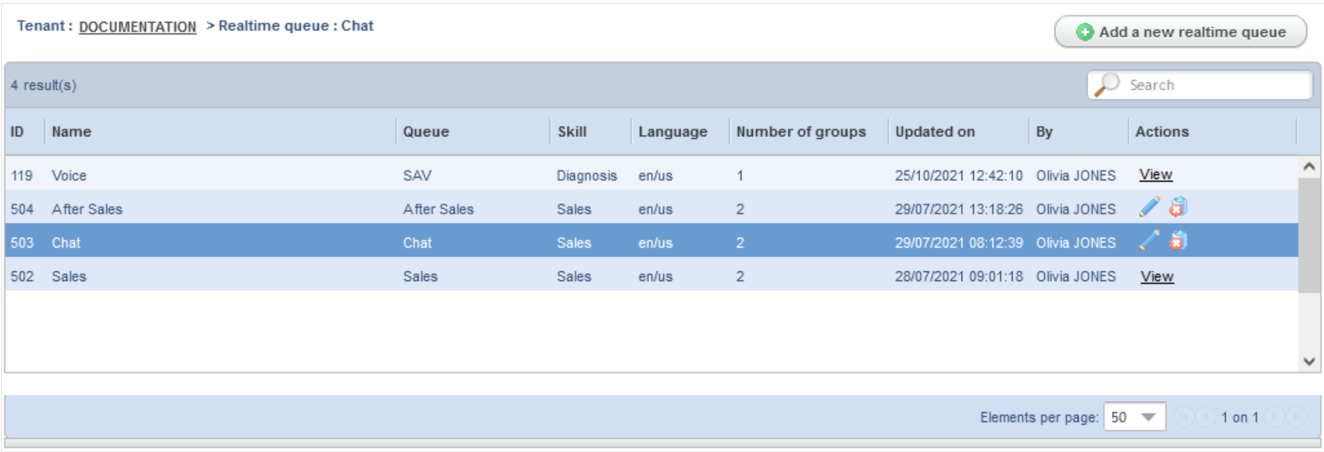
2.6 Realtime queues

A realtime queue is a queue to which a language and a skill have been assigned. It automatically inherits the media from the queue to which it is linked. It is possible to create realtime queues for chat media only.

Warning: voice realtime queues are automatically created by the provisioning and cannot be deleted. They correspond to pilots declared in OXE.

2.6.1 Overview

This functionality can be accessed from the **Administration** > **Tenants** > **Realtime Queues** menu. The upper part of the screen displays the list of all the realtime queues of the selected tenant:



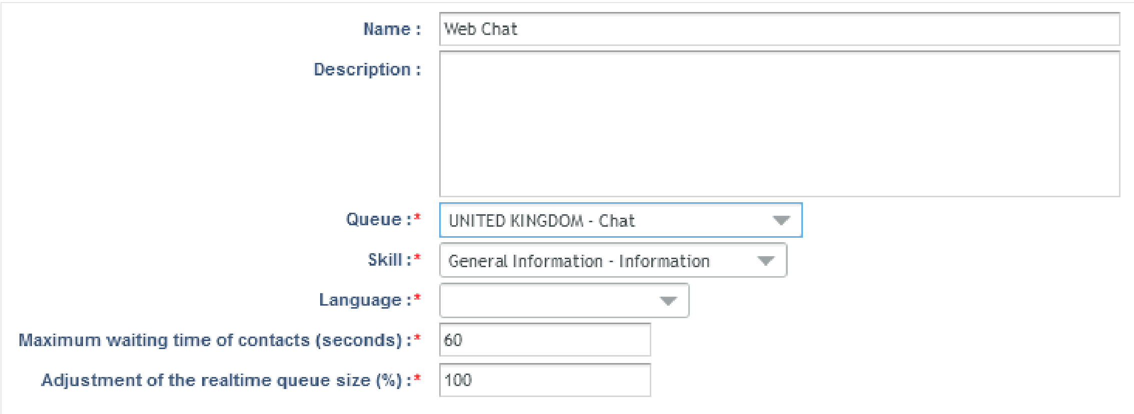
For each of them, you can view:

- ID assigned by the system,
- name,
- associated queue,
- skill,
- working language,
- number of subscribed user groups,
- date and time of last update,
- user who performed the action,
- context actions.

2.6.2 Creating a chat realtime queue

It allows the contact centre to handle chat conversations with web users. The realtime queue must be linked to a chat queue previously created. Also make sure that the tenant selected is correct.

1. From the **Administration** tab, click **Tenants** > **Realtime Queues**.
2. Click the **Add a new realtime queue** button.



3. Fill in the properties of the realtime queue:

Name
Enter a name to identify the realtime queue in the application. Two realtime queues cannot have the same name. If you forget to enter it, ALE Connect will automatically assign a name when saving.

The following characters are not authorised in the name:

```
& = ^ $ * , ; : ! § / . ? % £ ° ² < > + } \ ` # ~ {
```

Description
Long description allowing to type notes regarding the use of the realtime queue.

Queue (mandatory)
Select, from the list, the chat queue on which the realtime queue depends. Warning, this field cannot be modified after saving.

Skill (mandatory)
Select, from the list, the skill necessary to process the interactions of this realtime queue.

Language (mandatory)
Select, from the list, the working language of the realtime queue.

Maximum waiting time of contacts (seconds)
Indicate the maximum duration during which any web user, having performed a chat request, will wait for a connection with an agent. Beyond this duration, if no agent could accept the interaction, the web user is dissuaded. By default, this duration is set to 60 seconds.

Adjustment of the realtime queue size (% of number of agents logged in x number of maximum conversations)

This parameter allows to determine the size of the chat realtime queue, i.e. the number of web users that are placed in realtime queue when all agents allowed to process chat conversations have reached their maximum quota of authorised conversations. You must enter here a percentage from 0 to N. The size adjustment is then calculated as follows:
= (Total quota of chat conversations / 100) x Percentage value

When the result is a decimal number, ALE Connect rounds down to the nearest integer number.

Here is an example with 3 logged in agents who can process a maximum of 3, 2 and 1 conversations respectively. For this realtime queue, the contact centre can therefore process simultaneously a maximum of 6 chat conversations (3 + 2 + 1).

- 0%: no contacts in realtime queue.
- 20%: when the maximum quota is reached (i.e. 6), the system can place up to 1 contact in realtime queue.
- 50%: when the maximum quota is reached (i.e. 6), the system can place up to 3 contacts in realtime queue.
- 100%: when the maximum quota is reached (i.e. 6), the system can place up to 6 contacts in realtime queue.
- 150%: when the maximum quota is reached (i.e. 6), the system can place up to 9 contacts in realtime queue.

4. Click **Save**.

2.6.3 Viewing the subscribed user groups

You can view all internal user groups that are subscribed to the realtime queue: these are the groups with rights on the queue linked to the realtime queue. This association is automatically performed by ALE Connect as soon as an internal user group is attached to the same queue + skill + language as the realtime queue.

1. From the **Administration** tab, click **Tenants** > **Realtime Queues**.
2. Select a realtime queue by clicking the corresponding line.
3. Click the **User groups** tab.

   For each group, the screen displays its ID, name and the number of users it contains.

2.6.4 Modifying a realtime queue

It is possible to modify some properties of a chat realtime queue after its creation. However, voice realtime queues cannot be modified.

1. From the **Administration** tab, click **Tenants** > **Realtime Queues**.
2. Click the **Modify** button () located on the line of the realtime queue to modify.
3. Change the desired properties.
4. Click **Save**.

2.6.5 Deleting a realtime queue

This action is only possible for chat realtime queues, if all its attached elements have been previously deleted (folders, users, and user groups). However, voice realtime queues cannot be deleted.

1. From the **Administration** tab, click **Tenants** > **Realtime Queues**.
2. Click the **Delete** button () located on the line of the realtime queue to delete.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes**.

   ALE Connect updates the list: the realtime queue is no longer displayed.

2.7 Address book

The address book lists the contacts, internal or external to the company, with which agents can exchange while processing emails. In this context, it is used to copy the desired contacts, to transfer a folder to a third party or to redirect a folder to an expert.

The address book is defined by business unit. The queues attached to this business unit automatically inherit it.

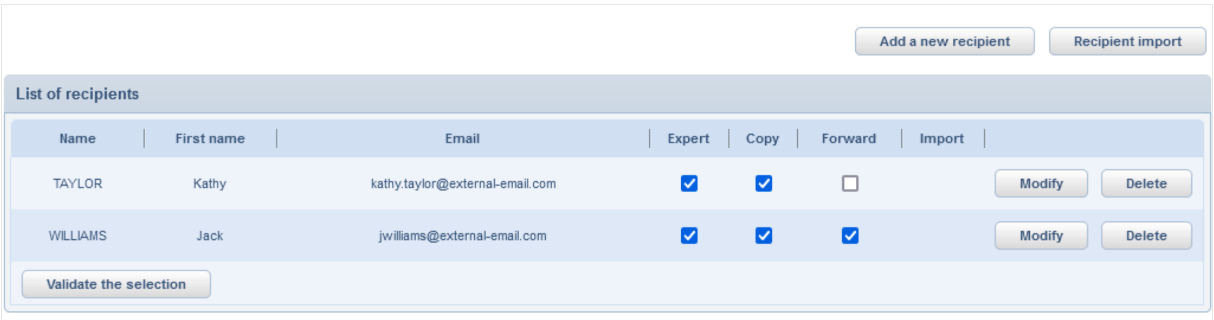
2.7.1 Display on the agent interface

When an agent (or a supervisor) uses the address book on his/her ALE Connect interface, the contact display rules are the following:

- When an agent processes an email folder from a queue of the A business unit, then the contacts stored in the A address book are displayed.
- If the agent processes an email folder from a queue of the B business unit, then the contacts stored in the B address book are displayed.

2.7.2 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Address Book** menu. The upper part of the screen displays the whole address book. The recipients are sorted in alphabetical order (A-Z) according to their last name.



For each recipient, you can view:

- last name,
- first name,
- email address,
- information indicating whether he/she is an expert or not,
- information indicating whether he/she can be copied on the emails,
- information indicating whether the emails can be forwarded to him/her,
- source of creation (recipient created following a file import or manual entry).

2.7.3 Creating a recipient

First, check that the selected business unit is correct. By default, any new recipient is considered as an expert and can be copied on the emails exchanged.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Address Book**.
2. Click the **Add a new recipient** button.
3. Fill in the following information:

   Title
   Select, from the list, the contact title. By default, the Mr value is selected (title: 10 characters). Titles are predefined in the system: it is not possible to add titles.

   Name (mandatory)
   Enter the last name of the recipient (50 alphanumeric characters maximum).

   First name (mandatory)
   Enter the first name of the recipient (50 alphanumeric characters maximum).

   Email (mandatory)
   Enter the email address of the recipient (255 alphanumeric characters maximum). It is its unique ID within the address book. That is why two recipients cannot have the same email address.

   Department
   If necessary, specify the company department to which the recipient belongs (50 alphanumeric characters maximum).

   Telephone
   Enter the phone number where the recipient can be reached (20 characters maximum). This should not contain any spaces or separators. In case of international number, it should not contain any separators, spaces or special characters.

   Address
   Enter the recipient’s postal address (100 alphanumeric characters maximum).

   City
   Enter the recipient's city (100 alphanumeric characters maximum).

4. Click the **OK** button.

   The recipient is added to the address book and can be used immediately.

2.7.4 Modifying a recipient

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Address Book**.
2. Click the **Modify** button located on the line of the affected recipient.
3. Perform the desired changes (see the creation of a recipient).
4. Click **OK**.

   ALE Connect saves the changes and updates the sheet.

2.7.5 Deleting a recipient

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Address Book**.
2. Click the **Delete** button located on the line of the affected recipient.

   ALE Connect displays the recipient's information.
3. Click **OK** to confirm the deletion.

   ALE Connect then deletes the recipient from the address book.

2.7.6 Importing recipients

This method is recommended if you have a large number of recipients to create in the system. It avoids time-consuming entry, by importing a text file containing all the recipients to be added to the address book.

2.7.6.1 Import file structure

So that the import succeeds, the file must respect the following constraints:

- It must be a **text** file.
- The characteristics of each recipient are displayed on a **single line** and are separated by a **comma** (delimiter).
- The file can contain up to **8 fields** strictly ordered as follows: Title, First name, Last name, Email, Department, Telephone, Address and City.
- The email is the only **mandatory** field.
- Each line must contain an **email address** different from the others. Otherwise, only the last line of the file will be imported.
- The phone number **must not** contain any **spaces**, **separators**, or **special characters** (e.g.: 0110203040 for a national number or 0033110203040 for an international number).

Correct examples:

```
Mr.,Alexander,Barnes,alexander.barnes@address.com,accounting,0102030405,221
Baker Street,NW1 6XE London
Mrs.,Jessie,Lee,jessie.lee@address.com,,,,
Mrs.,Georgia,Howey,georgia.howey@address.com,,,,
```

2.7.6.2 Performing an import

Each recipient is identified by his/her email single address. If the import file contains an email address that already exists, the system automatically updates the corresponding recipient, i.e. it overwrites the existing data of the address book and replaces them with data provided by the import file.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Address Book**.
2. Click the **Recipient import** button.
3. Enter the **name** of the import.
4. Click **Browse** and select the file to import.
5. Click **OK** to start the import.

   Once the import is complete and successful, the recipients are automatically added to the address book. In case of failure, a message will inform you.

2.7.7 Defining the recipient forwarding options

These options are used to process emails (license with Email media). You must specify which forwarding actions are allowed or forbidden for each recipient in the address book.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Address Book**.
2. For each recipient, check the forwarding option(s) allowed:

Name	First name	Email	Expert	Copy	Forward
TAYLOR	Kathy	kathy.taylor@external-email.com	☑	☑	☐
WILLIAMS	Jack	jwilliams@external-email.com	☑	☑	☑

Validate the selection

Expert
The expert is usually in charge of performing study or consulting missions, scientific reviews or evaluations in a technical domain. Agents/Supervisors have the possibility to send a folder to an expert, to get advice on the response. Once forwarded, the folder changes to the Expert waiting status and remains in the In progress desktop. The expert receives the folder as an email: the <InfoRef...> folder reference is indicated in the subject of the email. He/She prepares his/her reply and sends it via his/her mailbox. The expert never replies directly to the contact; he/she communicates exclusively with agents and supervisors. As soon as the expert reply is received, ALE Connect changes the status of the folder to Expert reply. The agent can then continue to process the folder, according to the follow-up.

Copy
The recipient can be copied on emails written by agents/supervisors. He/She is available in the address book whenever it is possible to copy recipients on an email.

Forward
Agents/supervisors can delegate the processing of an email folder to the recipients of their choice: another department in the company, external organisation, etc. The recipients will be responsible for resuming its follow-up with their own tools.
By checking this option, the agents/supervisors will be able to forward folders to this recipient. For example, a web user has sent an email due to a invoicing error on his/her order. This folder must be forwarded to the accounting department for adjustment.
Forwarding closes the folder permanently in ALE Connect. The folder is considered to be out of the system: it changes to the Closed (forward) status, then is stored in the Processed desktop. In other words, after forwarding, all events that will occur on the folder will not be visible in ALE Connect.

3. Click **Validate the selection** to save the setup.

2.8 Numbering plans

A numbering plan is a set of rules that determine how a phone number must be interpreted then transformed to be routed correctly to the correspondent. These rules will be applied to all phone numbers of incoming or outbound calls processed by agents.

To manage the telephone system with ALE Connect, you must configure two numbering plans that will allow to:

- store a single and homogeneous format of phone numbers (canonical format),
- manage contact sheets with a phone number correctly formatted,
- route correctly the calls to and from O2G.

2.8.1 What you need to configure

From the administration interface, you must create the **following 2 numbering plans**, strictly respecting the name indicated:

- **ale-incoming**: numbering plan which transforms the phone numbers of incoming calls (incoming flows in ALE Connect: OXE > O2G > ALE Connect).
- **ale-outgoing**: numbering plan which transforms the phone numbers of outbound calls (outgoing flows from ALE Connect: ALE Connect > O2G > OXE).

Warning: only these 2 numbering plans will be taken into account by the telephone system in ALE Connect. Furthermore, it is highly recommended to test them before the production.

2.8.2 Configuration steps

For each numbering plan to set up, you must perform the following steps:

1. Create a numbering plan
2. Create the rules of the numbering plan
3. Order the rules of the numbering plan
4. Activate the rules of the numbering plan
5. Test the numbering plan

2.8.3 Overview

This functionality is available from the **Administration** > **Tenants** > **Numbering Plans** menu. The upper part of the screen displays the list of all the configured numbering plans:

For each numbering plan, you can view:

- ID,
- name,
- date and time of last update,
- name and first name of the user who created or modified it,
- possible actions represented by an icon.

2.8.4 Creating a numbering plan

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Click the **New numbering plan** button.
3. You must fill in the name.

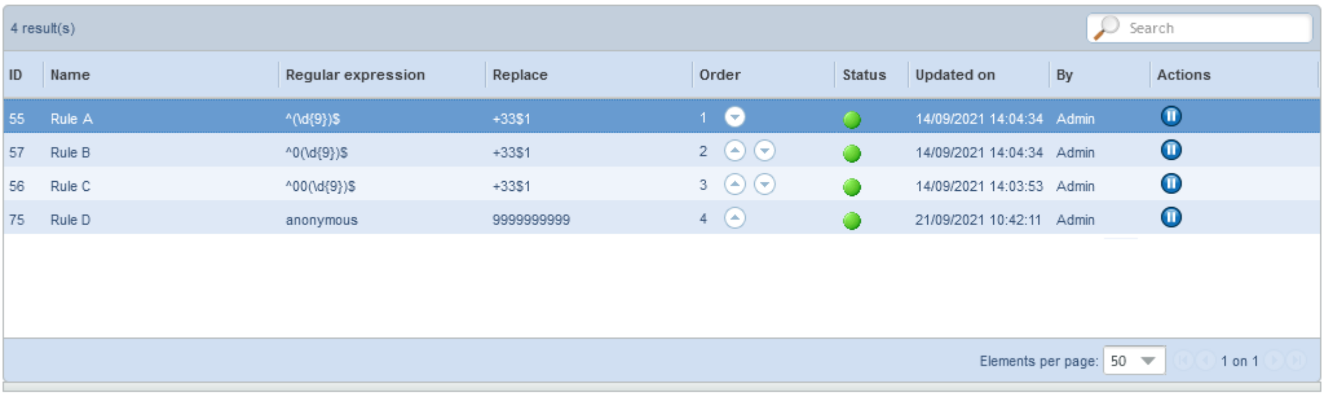
   This is either **ale-incoming** or **ale-outgoing** according to the numbering plan you want to create.
4. Enter a comment describing the use of this numbering plan, if desired.
5. Click **Save**.
6. Create the rules of the numbering plan.

2.8.5 Rules of a numbering plan

This functionality allows you to create the transformation rules of phone numbers, for a numbering plan.

2.8.5.1 Overview

The functionality is accessible from the **Tenants** > **Numbering Plans** > **Rules** menu. The upper part of the screen displays the list of rules set up for the numbering plan selected:



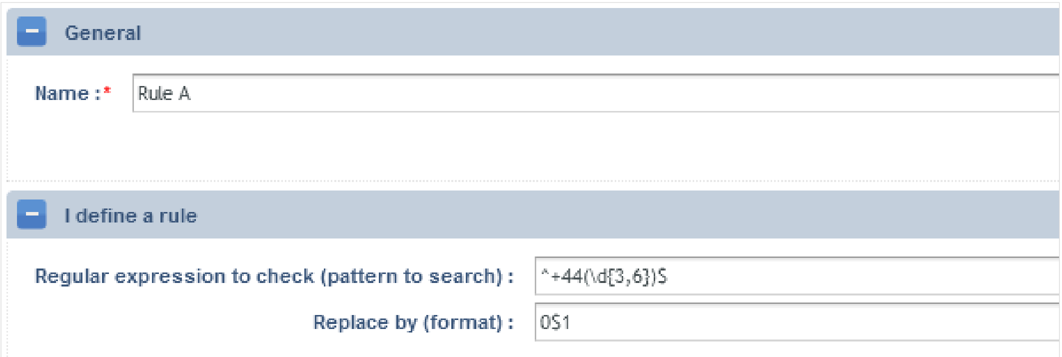
For each rule, you can view:

- ID,
- name,
- conversion regular expression,
- replacement value,
- order in which the rule is applied (can be modified by using the up and down arrows),
- current status illustrated by a colour indicator,
- date and time of last update,
- name and first name of the user who created or updated it,
- possible actions represented by an icon.

2.8.5.2 *Creating a rule*

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Select the numbering plan for which you want to create a rule.
3. Click the **Rules** sub-menu.
4. Click the **New rule** button.

   The following screen is displayed:



5. You must enter the **name** of the rule.
6. Fill in the **regular expression** that must be used to interpret phone numbers (refer to the JavaScript documentation related to regular expressions for any question).

   If the syntax of the regular expression is not correct, an error message is displayed when you try to save the rule.
7. In the **Replace by (format)** field, enter the value that should replace the phone number sequence interpreted by the regular expression.
8. Click **Save**.

2.8.5.3 Examples of rules

For the ale-incoming numbering plan

Example for an ACD call

Turn a number with 9 digits (123456789) sent by O2G into an international number to ALE Connect.

Regular expression:

`^(\d{9})$`

The rule replaces by:

`+33$1`

The resulting number is:

`+33123456789`

Example for an ACD call from the handset

Turn a number with 11 digits (00123465789) sent by O2G into an international number to ALE Connect.

Regular expression:

`^00(\d{9})$`

The rule replaces by:

`+33`

The resulting number is:

`+33123456789`

For the ale-outgoing numbering plan

Example for an outbound call from an ALE Connect contact sheet

Turn an international number (+33123465789) sent by ALE Connect into a number accepted by O2G.

Regular expression:

`^\+33(\d{9})$`

The rule replaces by:

`00$1`

The resulting number is:

`00123456789`

2.8.5.4 Modifying a rule

This action is only possible when the rule is deactivated. Otherwise, the button is hidden.

Warning: changes are taken into account after 60 seconds (cache).

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Select the numbering plan for which you want to modify a rule.
3. Click the **Rules** sub-menu.
4. Click the **Modify** button ( ) located on the line of the affected rule.
5. Perform the desired changes (refer to creation).
6. Click **Save** to save your entry.

2.8.5.5 Deleting a rule

This action is only possible when the rule is deactivated. Otherwise, the button is hidden.

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Select the numbering plan for which you want to delete a rule.
3. Click the **Rules** sub-menu.
4. Click the **Delete** button ( ) located on the line of the affected rule.

   ALE Connect asks you to confirm the deletion.
5. Click **Yes** to delete permanently the rule, or **No** to abandon this action.

   ALE Connect immediately deletes the rule and updates the list.

2.8.5.6 Activating a rule

Creating a rule is not enough: you must activate it in order to the numbering plan takes into account the rule.

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Select the affected numbering plan.
3. Click the **Rules** sub-menu.
4. Select the rule to activate.
5. Click the **Activate the rule** ( ) button located on the corresponding line.

   The rule is now activated.

2.8.5.7 *Deactivating a rule*

This action consists in temporarily suspending the application of the rule. After deactivation, the rule can be modified or deleted again.

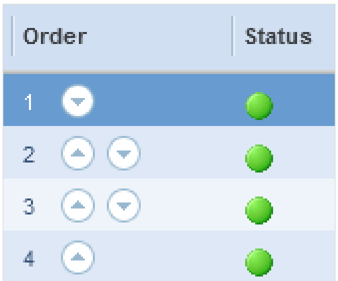
1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Select the affected numbering plan.
3. Click the **Rules** sub-menu.
4. Select the rule to deactivate.
5. Click the **Deactivate the rule** () button located on the corresponding line.

   The rule is now deactivated.

2.8.5.8 *Ordering the rules*

When several rules have been defined, they must be ordered to determine which one should be applied. Indeed, ALE Connect takes the rules in the order they appear in the list: **the first rule found and verified is applied.**

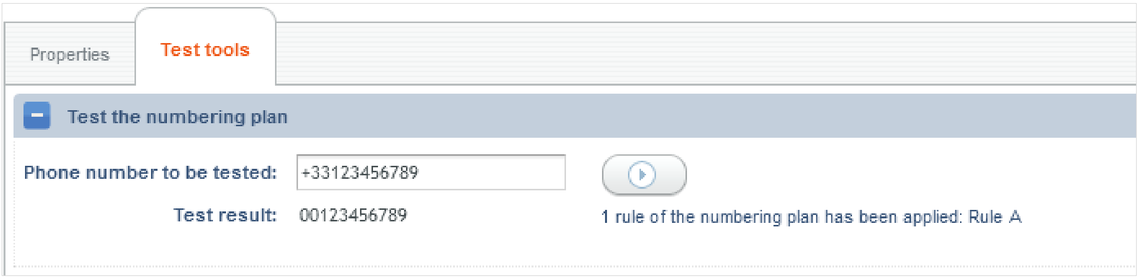
1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Select the numbering plan for which you want to order the rules.
3. Click the **Rules** sub-menu.
4. In the **Order** column, click the **Move up** and/or **Move down** buttons to order the rules in the list.



2.8.6 Testing a numbering plan

Warning: it is highly recommended to test each numbering plan, before the production.

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Select the numbering plan to be tested.
3. Click the **Test tools** tab.



4. Enter the **phone number to be tested** then click the button.

   ALE Connect displays the transformed phone number.

2.8.7 Modifying a numbering plan

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Click the **Modify** button () located on the line of the affected plan.
3. Perform the changes you wish.
4. Click **Save** to save your entry.

2.8.8 Deleting a numbering plan

This action is possible even if rules (active or inactive) are associated with the numbering plan to delete. Once the deletion is performed, the phone numbers of incoming calls will no longer be transformed according to the rules that were defined by the plan. These numbers will arrive in ALE Connect in their original format: the software may not find the contacts in the database, if the contact phone number has been saved in another format (duplicates of sheets possible).

1. From the **Administration** tab, click **Tenants** > **Numbering Plans**.
2. Click the **Modify** button () located on the line of the affected plan.

   ALE Connect asks you to confirm the deletion.

3. Click **Yes** to delete permanently the numbering plan, or **No** to abandon this action.

   ALE Connect immediately deletes the plan and updates the list.

2.9 Statistical report parameters

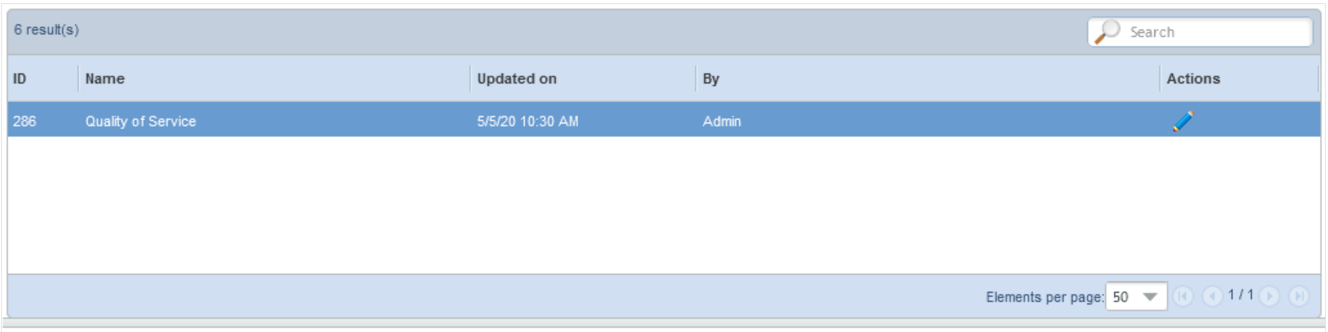
ALE Connect provides supervisors with a reporting and statistical tool, allowing to analyse the contact centre activity. In reports that report data over a period longer than one day (D+ aggregated), some dimensions present detailed results by time intervals.

This functionality allows you to define the desired intervals for the **quality of service calculated for emails**. It measures the elapsed time, in working hours, between the receipt of the last incoming message of a folder and the reply given (ALE Connect takes the calendar of the business unit associated with the queue of the folder, at the time of the reply). It is used in the **Quality of Service (written)** and **Quality of Service for incoming flows (written)** cubes.

This setup is performed at the tenant level and will then be applied to all its business units.

2.9.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Statistical Report Parameters** menu. The upper part of the screen displays the quality of service for which you can define the time intervals:



You can view:

- ID assigned by the system,
- name,
- date and time of last update,
- user who performed the action,
- context actions.

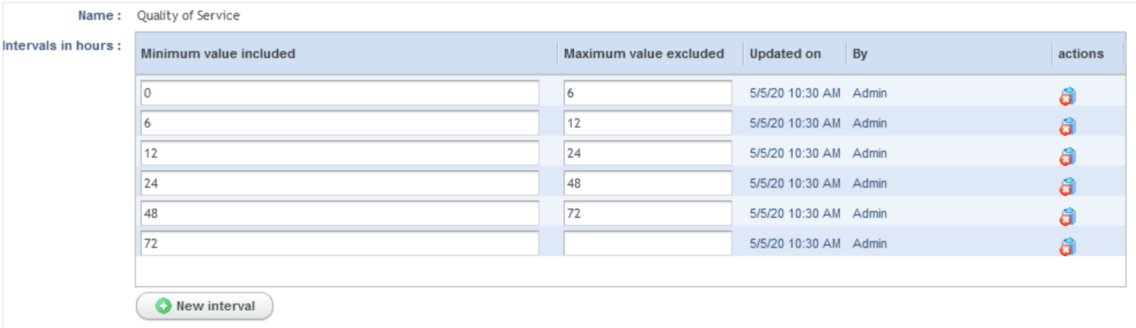
2.9.2 Modifying a parameter

The modification only affects the intervals; the other fields cannot be modified.

Warning: any modification of an interval has an immediate impact on reports that use the affected parameter. An inconsistency in the results generated may therefore occur in an impacted report. If the intervals are modified in the middle of the week and/or month, the aggregated data may be inconsistent: data that had a meaning at one time may have a different meaning at another time, due to this modification.

1. From the **Administration** tab, click **Tenants** > **Statistical Report Parameters**.
2. Click the **Modify** button (✏).

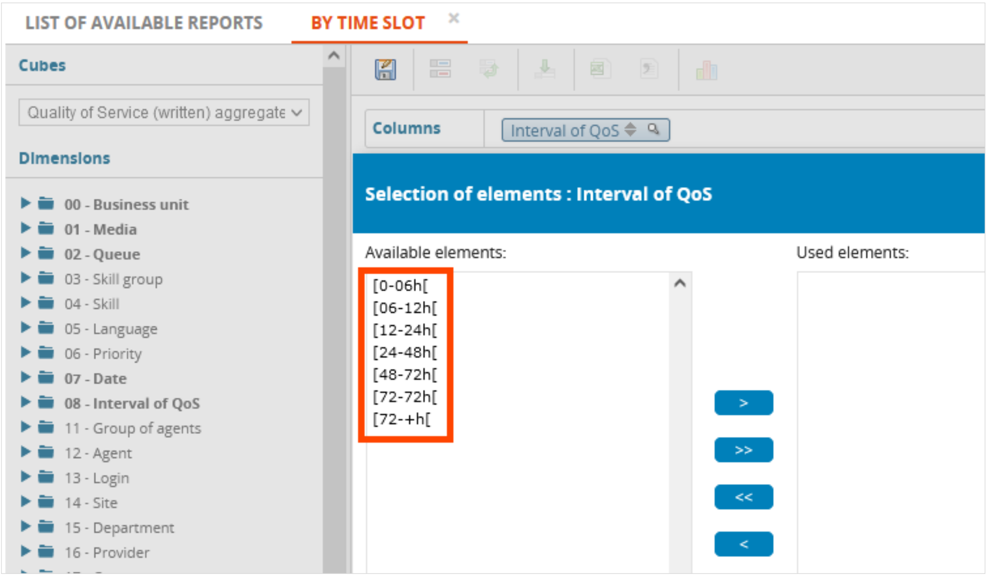
   The following screen is displayed:



3. Enter the **upper and lower limits** of the interval to be modified.
4. If necessary, it is possible to **add a new interval** by clicking the corresponding button: a new line is added to the table.
5. Click the **Save** button to validate your entry.

   ALE Connect informs you that the changes performed may generate an inconsistency in the results of reports using the affected parameter. The system asks you to confirm the modification.
6. Click **Yes**.

The time intervals set up are now available in the supervisor reporting module:



2.9.3 Example of modification

The intervals already set up are the following:

- 0 - 6
- 6 - 12
- 12 - 24
- 24 - 48
- 48 - 72
- 72 +

Aggregated statistical data already exists on my ALE Connect environment. I change the parameters as follows:

- 0 - 1
- 1 - 3
- 1 – 6
- Etc.

The next day, I can view in my aggregated D+ report that:

- the Quality of Service dimension displays the values corresponding to the former setup and the new one,
- the aggregated statistical data before my modification remain in the former intervals,
- those aggregated after my modification are in the new ones.

2.9.4 Viewing the properties of a parameter

1. From the **Administration** tab, click **Tenants** > **Statistical Report Parameters**.
2. The properties of the quality of service are displayed:

   UUID
   Unique number identifying the parameter in the system. This number cannot be modified.

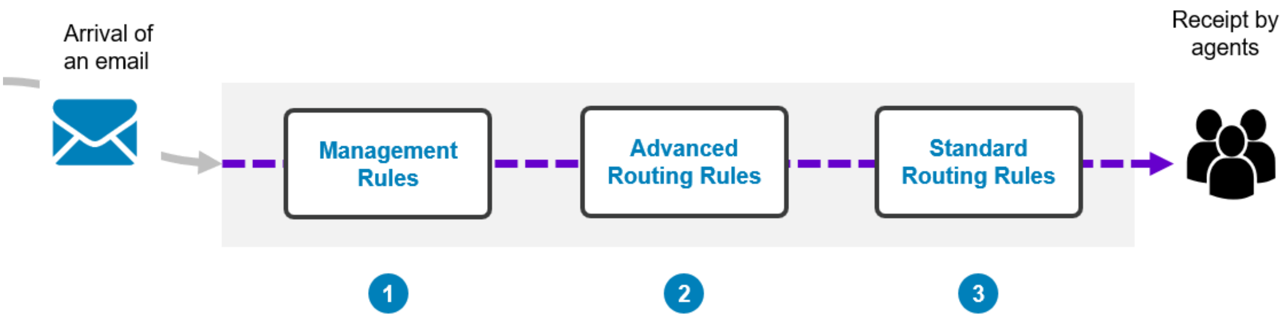
   Name
   Description of the parameter. It cannot be modified.

   Defined media
   Displays on the right the media to which this parameter is applied.

   Intervals in hours/seconds
   This table lists all the time intervals defined for the parameter. They must be consecutive and cover the time from 0 to infinity. The intervals of the quality of service are expressed in hours.

3 Routing of interactions

Every email that arrives in ALE Connect is routed through a native **routing engine**, which is based on rules to set up: their purpose is to automatically route incoming emails according to the needs of the activity. The routing is always deployed by business unit.



Its working order is the following: an email arrives in ALE Connect and passes through the routing engine. ALE Connect first applies the configured **management rules** (1). A specific management rule (last one in the list) automatically triggers the execution of all the **advanced routing rules,** if configured (2) in the defined order. Once the processing is complete, ALE Connect then executes the **standard routing rules** (3). This step is performed in all cases, whether advanced routing is implemented or not.

When the routing of the email is complete, it is then directed either to an internal desktop of the agent interface (no matter which one) or to an external desktop. This classification depends on the action performed by the routing rules. This path is traced in the **history of actions** of the corresponding folder: a **Routing by script** line is mentioned. It allows the agent or supervisor who views it to know whether the folder has been supported by a routing rule or not. If a rule was intended to route an email **outside of ALE Connect** (e.g. to a third party software), then the corresponding folder is stored in the **Processed** desktop, with the **Closed (forward)** status.

Warning: advanced routing is an optional extension of ALE Connect, dedicated to a technical audience. It completes the existing engine, allowing the coding of more complex and richer routing rules than those of the standard engine, oriented for functional use. It also gives access to new actions (not available as standard).

3.1 Management rules

This functionality allows you to set up the management rules that will be applied to incoming emails, before the routing rules. Before starting your entry, it is recommended to have created the forms and scripts that can be used during the setup. When this is done, you can start creating the rules.

3.1.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Rule Management > Management Rules** menu. When opening the menu, ALE Connect displays by default all the management rules:

They are sorted in an arbitrary order defined by the user. You can view for each them:

- available actions (represented by icons),
- date of last update,
- name of the user who performed the action,
- name of the management rule, in bold.

3.1.2 From the home screen

Creating a management rule

Duplicating a management rule

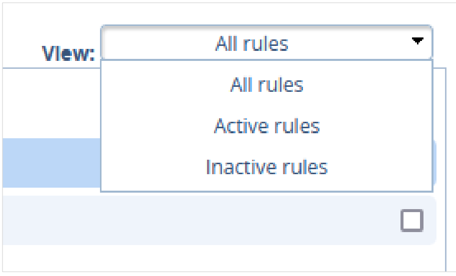
Deleting a management rule

Ordering the management rules

3.1.3 Filtering the management rules

By default, the home screen displays the list of all existing management rules. However, you can filter it to view only some of them.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.



2. In the **View** field above the list, select the type of rules to display:

   Active rules: only display the management rules currently in production for the business unit.

   Inactive rules: only display the management rules that are not in production (not applied).

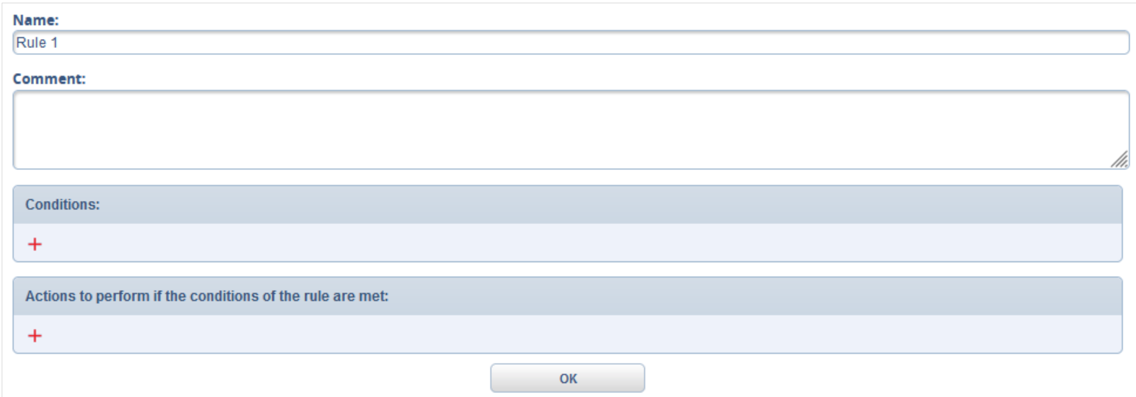
   The list is immediately filtered.

3.1.4 Creating a management rule

A management rule defines the conditions under which it is triggered and the actions to be executed in that case.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the **Add a rule** button (or the icon of an existing management rule).

   ALE Connect adds a new rule to the list, in last position. By default, its name is **Rule N**.
3. Click the rule just added.



4. Enter a **name** that clearly identifies the rule.

   By default, this is **Rule N**; N being a number that is automatically incremented with each addition.
5. Enter a **comment** to describe the purpose of the rule being created.

   It is recommended to fill in it to distinguish the rules in the menu. Indeed, this comment appears in a tooltip when you move the mouse cursor over the block.
6. Set up the triggering conditions of the management rule.
7. Define the actions to be performed when the conditions are met.
8. Click **OK** to create the rule.

3.1.5 Triggering conditions

They allow to trigger a management rule - or not - according to some criteria to be configured. To this end, a condition tests the value of a criterion. They are not mandatory: in that case, the management rule is systematically applied to all incoming emails for the affected business unit.

3.1.5.1 Available criteria

You will find below a list of all the criteria that the conditions can test. They are ordered as they appear on the screen in the scrolling list, when selected.

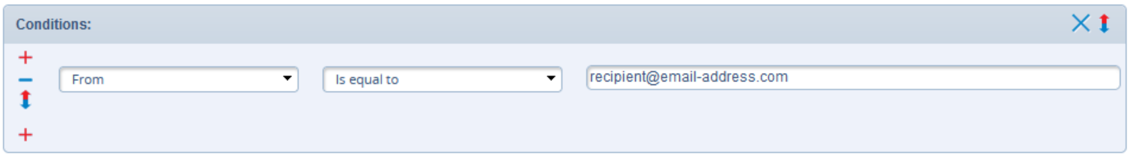
From	Address of the sender of the email.
To	Address of the recipient of the email.
CC	Address of the recipient copied in the email.
Subject	Content of the email subject. When an email arrives, the routing engine formats the Subject field by automatically removing all FW: and RE: prefixes for better reading. If the subject contains only one prefix, then the routing engine sets the default value to "----".
Body	Content of the email body.
Forms	Value of a form field to choose.

3.1.5.2 *Adding a condition*

This procedure explains you how to add a condition within a block, whether it is empty or not. The block then forms a set of conditions to be tested: **the management rule is only triggered if all the conditions of the block are met.** Indeed, when there are several conditions, they are automatically linked by AND (transparently). You can add a condition at any time, even if the management rule is already active. In that case, the modification will be taken into account as soon as you validate your changes.

Warning: if only one condition of the block is not met, the whole block is not checked. If it is the only condition block of the management rule, the rule is not triggered.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. In the affected block, click the **Add a condition** button (+).
4. Select a criterion from the scrolling list.



5. Select a logical operator:

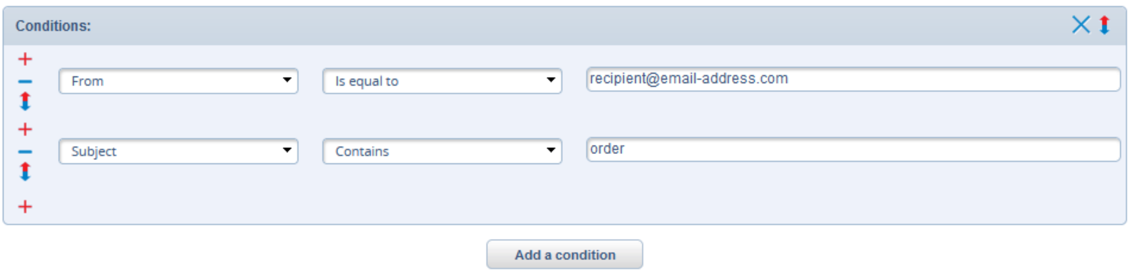
   Is equal to: the value of the criterion must be strictly identical to the value entered in the free field.

   Is different from: the value of the criterion must be strictly different (to the nearest character) from the value entered in the free field.

   Contains: the value of the criterion must be contained in the character string entered in the free field.

   Warning: ALE Connect is case sensitive when checking the value entered.

6. Enter the value of the criterion that the condition should check.
7. Repeat steps 3 to 6 to add another condition in the same block.



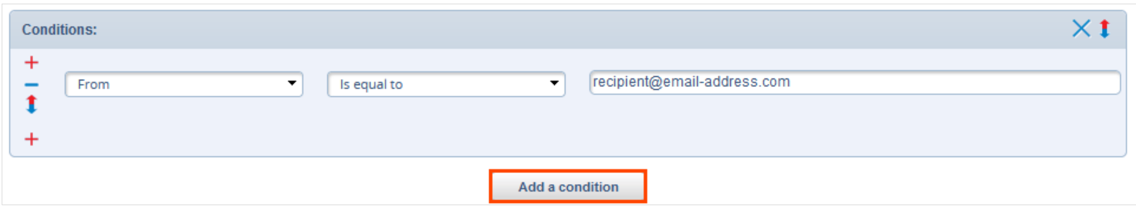
8. Click **OK** to save your entry.

   The management rule is successfully updated.

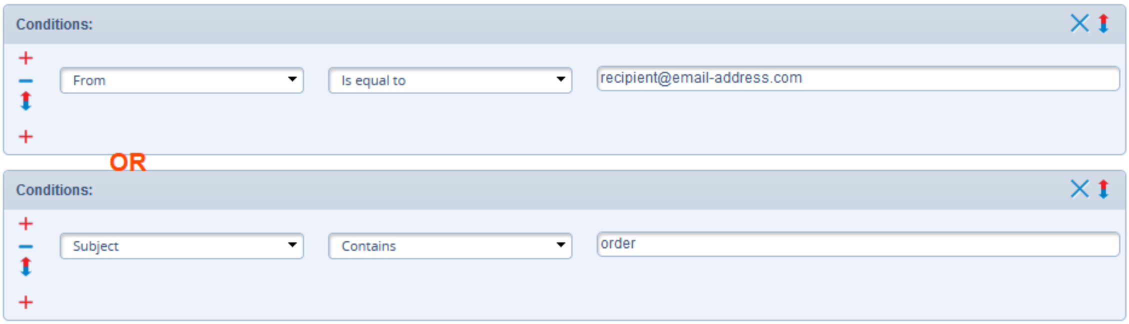
3.1.5.3 Adding a condition block

The advantage of managing several blocks is that **only one of them needs to be checked to execute the management rule**: indeed, the condition blocks are linked by OR (each block can contain one or several conditions). This setup is therefore very useful when you have to manage several cases resulting in the same action to be executed.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Click the **Add a condition** button.



4. In the new block, fill in a criterion, a logical operator and the value that the condition should check.



5. If necessary, add other desired conditions.
6. Click **OK** to save your entry.

   The management rule is successfully updated.

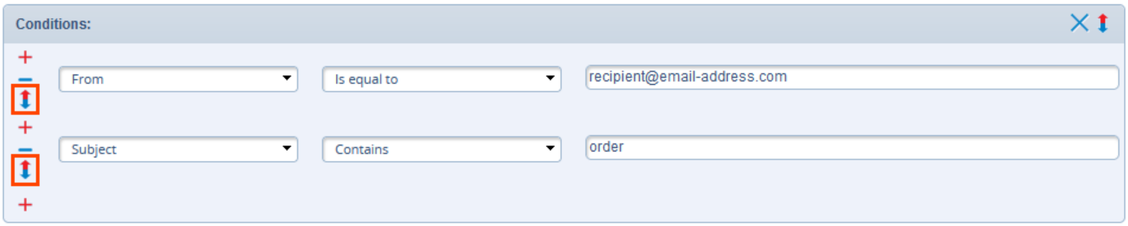
3.1.5.4 Ordering the conditions

By default, conditions and condition blocks are executed in the order in which they were added. If this does not suit you, you can reorder them.

Within a same block

A specific button allows you to move any condition in the block to the top of the list.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Click the **Switch this condition with another one** ( ) button for the condition to be moved to the top of the list.

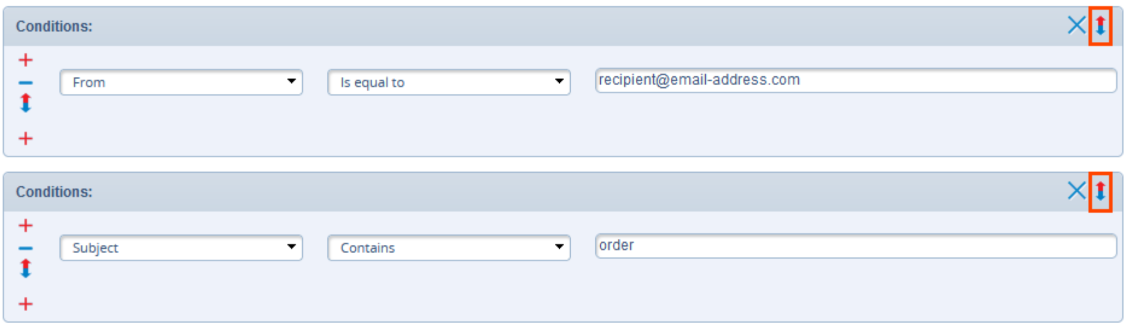


4. Click **OK** to save.

   The management rule is successfully updated.

Between blocks

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Click the **Switch this condition block with another one** button ( ) to move the block in the list.



4. Click **OK** to save.

   The management rule is successfully updated.

3.1.5.5 Deleting a condition

It is advised to anticipate the possible impact on a management rule when deleting a condition. It may be necessary to reorganise the conditions. The deletion is immediate and is not subject to confirmation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Click the corresponding **Delete this condition** button (−).
4. Click **OK** to save.

   The management rule is successfully updated.

3.1.5.6 Deleting a condition block

It is advised to anticipate the possible impact on a management rule when deleting a condition block. It may be necessary to reorganise the blocks. The deletion is immediate and is not subject to confirmation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Click the **Delete this condition block** button (✕) of the affected block.
4. Click **OK** to save.

   The management rule is successfully updated.

3.1.6 Executable actions

A management rule must contain at least one action to be executed. It is systematically triggered as soon as the triggering conditions are met. You can add as many actions as necessary.

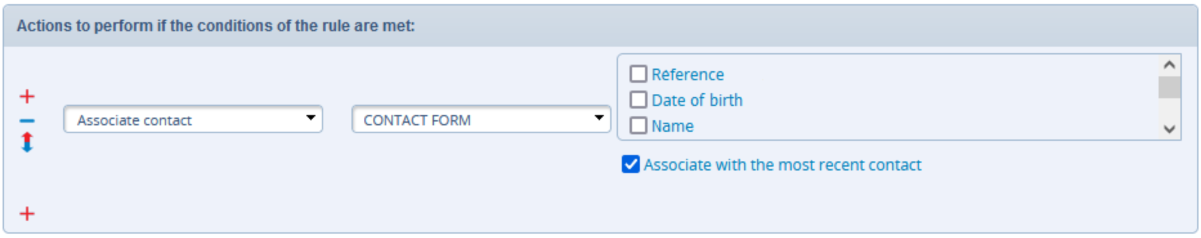
3.1.6.1 Available actions

They are ordered as they appear in the scrolling list when selected.

Check the form	Retrieves the values of a form to choose.
Associate contact	Automatically associates the incoming email with a contact sheet, using the structured data from the email. This action requires the information retrieved by the Check the form action to be used to search the existence of a matching contact sheet.
Qualification	Assigns the qualification criteria to be checked to the folder.
Send AOR	Generates an acknowledgement of receipt for which the subject and message body must be defined when the option is selected. **Warning:** the acknowledgement of receipt of a management rule has priority over those defined for a routing rule or a queue.
Invalid email	Declares the email as invalid (e.g. contains a special character). The email is then displayed in the agent’s list of folders in bold red type.
Script	Executes a previously created script to be selected when the option is selected.

3.1.6.2 Particularities of the "Associate contact" action

The **Associate Contact** action implies that the **Check the form** action is executed. Indeed, the purpose is to automatically create a contact sheet from the form data structuring the email received. When you select this action, you must choose a form to use. If none exists, it is not possible to automatically associate a contact with the email when routing.



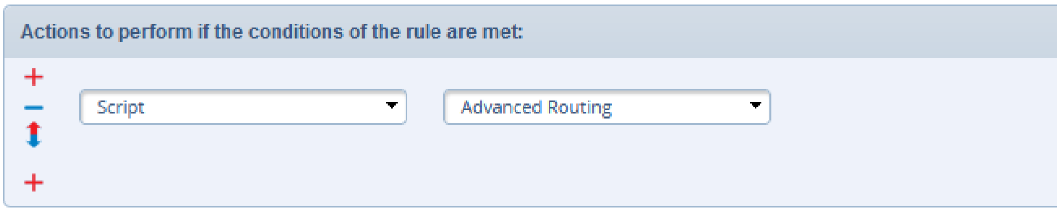
When ALE Connect processes the email, three cases can happen:

- **No matching contact sheets in the system**: the association is performed on the email address. If there is no matching email address, a new contact is automatically created.
- **There is only one contact sheet**: ID of the only contact found is used to associate the incoming email with the matching contact sheet.
- **There are several contact sheets that match**: the incoming email is associated by default with the most recent or the oldest contact, according to the option checked.

3.1.6.3 Adding an action

It is possible to add an action to a management rule at any time, even if it is already active. In that case, the modification is taken into account as soon as you validate the changes.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the <u>management rule</u> to modify.
3. Click the **Add** button (+) in the **Actions to perform if the conditions of the rule are met** block.
4. Select the <u>action to execute</u> from the scrolling list.
5. Enter the value to be checked (depends on the chosen action).



6. Repeat steps 3 to 5 to add another action to be performed.

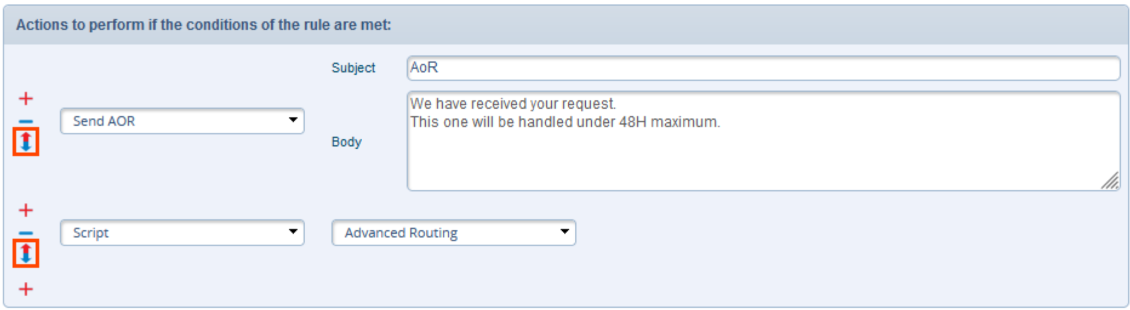
   You can click the **Add** button (+) **above** or **below** an existing action, according to the sorting order you want. In case of errors, it will always be possible to reorder the list later.
7. Click **OK** to save the entry.

   The management rule is successfully updated.

3.1.6.4 Ordering the actions

A management rule can contain several actions that are executed by default in the order in which they were added. If this does not suit you, you can reorder them. To this end, a specific button allows you to move any action to the top of the list.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Click the **Switch this aAction with another one** button ( ) to move the action in the list.



4. Click **OK** to save.

   The management rule is successfully updated.

3.1.6.5 Deleting an action

It is advised to anticipate the possible impact on a management rule when deleting an action. The deletion is immediate and is not subject to confirmation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Click the **Delete** button ( ) of the affected action.
4. Click **OK** to save.

   The management rule is successfully updated.

3.1.7 Activating a management rule

Creating a rule is not enough: it must be applied to the business unit to be taken into account by the routing engine. An active rule is displayed in the interface with a darker colour.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Check, from the list, the management rules to activate.
3. Click the **Apply the selected rules** button located at the bottom of the screen.

   ALE Connect confirms the success of the action.

3.1.8 Modifying a management rule

It is possible to view or modify a management rule at any time, even if it is already active.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the management rule to modify.
3. Perform the changes you wish.
4. Click the **OK** button to save your entry.

   ALE Connect confirms the success of the action.

3.1.9 Duplicating a management rule

This action is possible at any time, even if the management rule is already active. This procedure is useful since it allows you to quickly create a rule by copying an existing one. ALE Connect then adds the new rule to the list by naming it **(Copy)...**

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the **Copy** icon () of the management rule to be duplicated.

   ALE Connect immediately adds the new rule to the list, in last position.

3.1.10 Deactivating a management rule

Any deactivated rule is no longer applied to the business unit affected.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Check, from the list, the management rule to deactivate.
3. Click the **Deactivate the selected rules** button located at the bottom of the screen.

   ALE Connect confirms the success of the action.

3.1.11 Deleting a management rule

When you delete a rule, ALE Connect automatically reorders the remaining rules. Note that the deletion can be performed for one or several rules of your choice.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Check, from the list, the management rules to delete.
3. Click the **Delete** button ( ) or the one located at the bottom of the screen.

   ALE Connect asks you to confirm this action.
4. Click **Yes**.

   The rule is permanently deleted and the list is automatically reordered.

3.1.12 Ordering the management rules

When several rules have been defined, they must be ordered to determine their execution order. By default, any new rule is added in last position of the list.

Warning: if the order of the management rules is changed, it is necessary to reapply at least one of the rules by clicking the **Apply the selected rules** button in order to take the modification into account. Otherwise, the previous order will continue to be used.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Click the **Move this rule** button ( ) while holding down the left mouse button and drag it to the desired rank in the list.
3. Click the **Apply the selected rules** button.

3.1.13 Exporting the management rules

It is possible to export the content of the management rules of your choice, in a **GestionRulesExport.csv** file. Exported data are the type of rule (management or routing), its name, its comment and its status.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Management Rules**.
2. Check, from the list, the management rules to export.
3. Click the **Export rules** button.

   A window suggests you to open the folder with a spreadsheet program (Microsoft Excel™ for example) or to save it on your computer.
4. Check the desired option, then click **OK**: ALE Connect generates the export file.

   You can now retrieve it and use the data it contains.

3.2 Routing rules

This functionality allows you to create and manage the routing rules of incoming emails, for the selected business unit. This setup is performed in the same way as the management rules: the screens are therefore very similar. However, there are some functional differences:

- The routing rules are always applied after the management rules.
- The conditions and actions available for a routing rule are different from those of the management rules.

3.2.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Rule Management > Routing Rules** menu. When opening the menu, ALE Connect displays by default all the routing rules:

They are classified in an arbitrary order defined by the user. You can view for each of them:

- available actions (represented by icons),
- date of last update,
- name of the user who performed the action,
- name of the routing rule, in bold.

3.2.2 From the home screen

Create a routing rule

Duplicate an existing routing rule

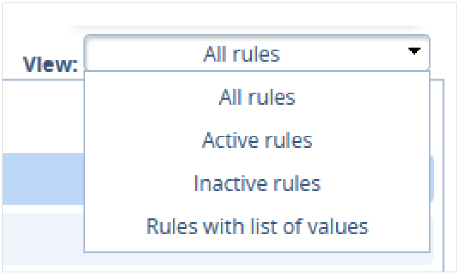
Delete an existing routing rule

Order the routing rules

3.2.3 Filtering the routing rules

By default, the home screen displays the list of all existing routing rules. However, you can filter the list to view only some of them.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.



2. In the **View** field above the list, select the type of rules to display:

   Active rules: only display the routing rules currently in production for the business unit.

   Inactive rules: only display the routing rules that are not in production (not applied).

   Rules with lists of values: only display the routing rules that use lists of values.

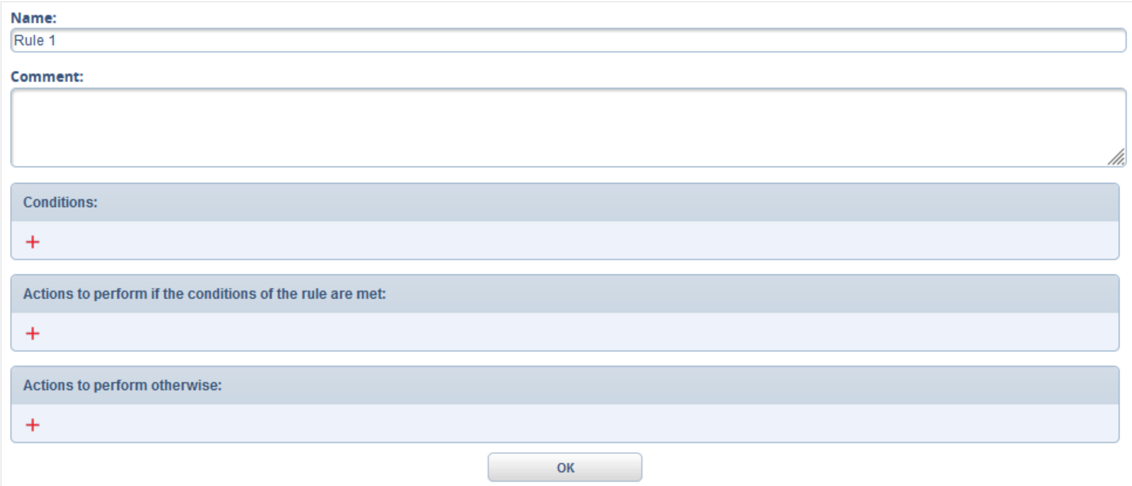
   The list is immediately filtered.

3.2.4 Creating a routing rule

A routing rule defines the conditions under which it is triggered and the actions to be performed, whether the conditions are met or not. Before starting, it is recommended to have created the forms and scripts that can be used during the setup.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click **Add a rule** button (or the icon of an existing routing rule).

   ALE Connect adds a new rule to the list, in last position. By default, the name is **Rule N**.
3. Click the rule just added.



4. Enter a **name** that clearly identifies the routing rule.

   By default, this is **Rule N**; N being a number that is automatically incremented with each addition.
5. Enter a **comment** to describe the purpose of the rule being created.

   It is recommended to fill in it to distinguish the rules in the menu. Indeed, this comment appears in a tooltip when you move the mouse cursor over the block.
6. Set up the triggering conditions of the routing rule.
7. Define the actions to be performed (whether the conditions are met or not).
8. Click **OK** to create the rule.

3.2.5 Triggering conditions

They allow to trigger a routing rule - or not - according to some criteria to be configured. To this end, a condition tests the value of a criterion. They are not mandatory: in that case, the routing rule is systematically applied to all incoming emails for the affected business unit.

The setup of conditions can be more or less complex according to the need: one block with one single condition, one block with several conditions, or several condition blocks.

3.2.5.1 Available criteria

You will find below a list of all the criteria that the conditions can test. They are ordered as they appear on the screen in the scrolling list, when selected.

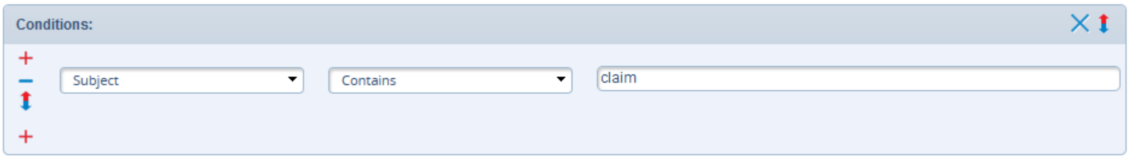
From	Address of the sender of the email.
To	Address of the recipient of the email.
CC	Address of the recipient copied in the email.
Subject	Content of the email subject. When an email arrives, the routing engine formats the Subject field by automatically removing all FW: and RE: prefixes for better reading. If the subject contains only one prefix, then the routing engine sets the default value to "----".
Body	Content of the email body.
Language	Language of the email.
Skill	Skill identified when the email arrives in the system.
Spam level	Level of spam determined by the spam filter when the email arrives.
Forms	Value of a form field to choose.

3.2.5.2 Adding a condition

This procedure explains you how to add a condition within a block, whether it is empty or not. The block then forms a set of conditions to be tested: **the routing rule is only triggered if all the conditions of the block are checked.** Indeed, when there are several conditions, they are automatically linked by AND (transparently). You can add a condition at any time, even if the routing rule is already active. In that case, the modification will be taken into account as soon as you validate your changes.

Warning: if only one condition of the block is not met, the whole block is not checked. If it is the only condition block of the routing rule, the rule is not triggered.

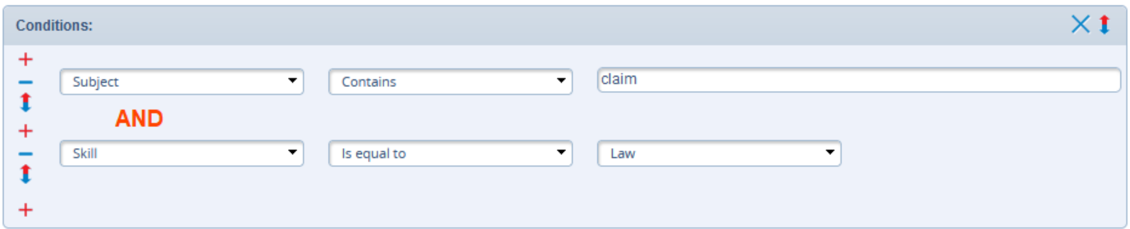
1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. In the affected block, click the **Add a condition** button (+).
4. Select a criterion from the scrolling list.



5. Select a logical operator:

   Is equal to: the value of the criterion must be strictly identical to the value entered in the free field.
   Is different from: the value of the criterion must be strictly different (to the nearest character) from the value entered in the free field.
   Contains: the value of the criterion must be contained in the character string entered in the free field.
   List element: the value of the criterion must be included in the selected list of values.
6. Enter the value of the criterion that the condition should check.

   Examples: Skill is equal to Troubleshooting, Subject contains Claim, etc.
7. Repeat steps 3 to 6 to add another condition in the same block.

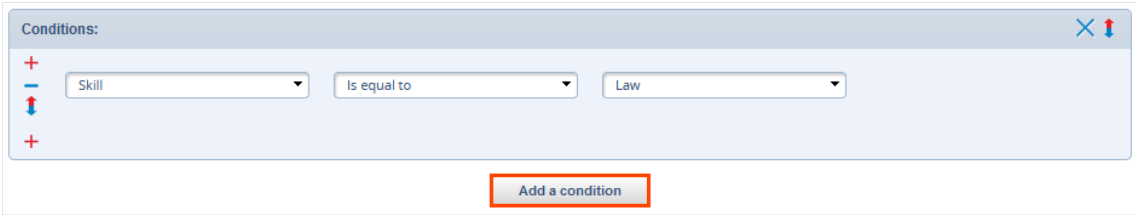


8. Click the **OK** button to save your entry. The routing rule is successfully updated.

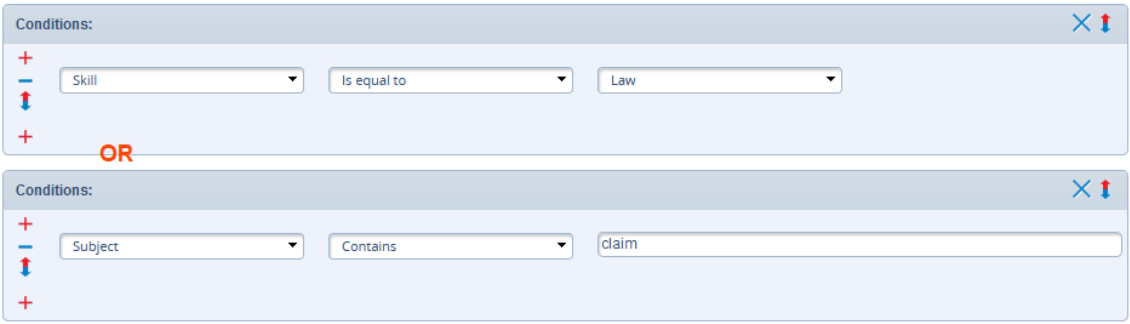
3.2.5.3 Adding a condition block

The advantage of managing several blocks is that **only one of them needs to be checked to execute the routing rule**: indeed, the condition blocks are linked by OR (each block can contain one or several conditions). This setup is therefore very useful when you have to manage several cases resulting in the same action to be executed.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the **Add a condition** button.



4. In the new block, fill in a criterion, a logical operator and the value that the condition should check.



5. If necessary, add other desired conditions.
6. Click **OK** to save your entry.

   The routing rule is successfully updated.

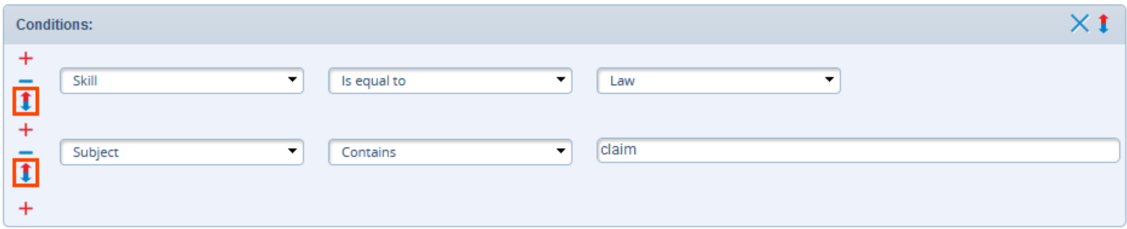
3.2.5.4 Ordering the conditions

By default, conditions and condition blocks are executed in the order in which they were added. If it does not suit you, you can reorder them.

Within a same block

A specific button allows you to move any condition in the block to the top of the list.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the **Switch this condition with another one** button ( ) for the condition to be moved to the top of the list.

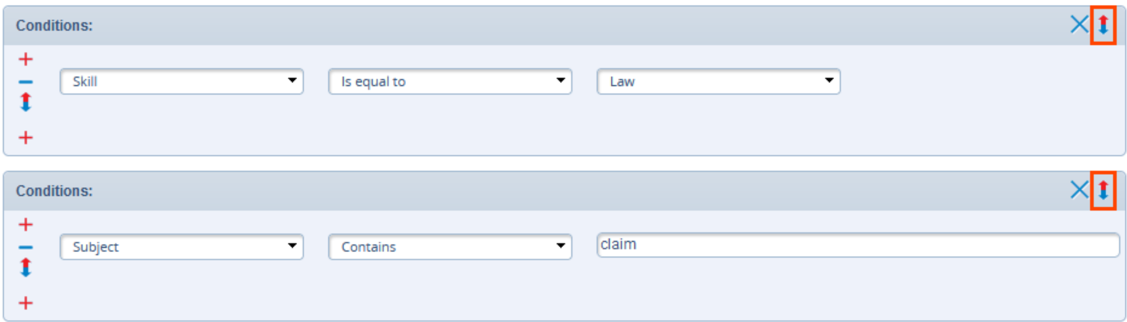


4. Click **OK** to save.

   The routing rule is successfully updated.

Between blocks

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the **Switch this condition block with another one** button ( ) to move the block in the list.



4. Click **OK** to save.

   The routing rule is successfully updated.

3.2.5.5 Deleting a condition

It is advised to anticipate the possible impact on a routing rule when deleting a condition. It may be necessary to reorganise the conditions. The deletion is immediate and is not subject to confirmation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the corresponding **Delete this condition** button (−).
4. Click **OK** to save.

   The routing rule is successfully updated.

3.2.5.6 Deleting a condition block

It is advised to anticipate the possible impact on a routing rule when deleting a condition block. It may be necessary to reorganise the blocks. The deletion is immediate and is not subject to confirmation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the **Delete this condition block** button (×) of the affected block.
4. Click **OK** to save. The routing rule is successfully updated.

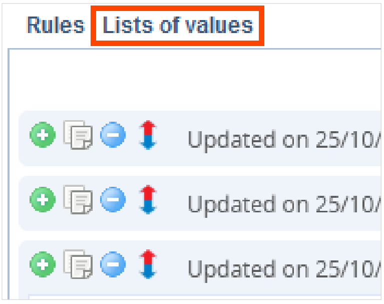
3.2.6 Lists of values

This functionality allows you to manage customised lists of values, which can be used by the conditions of routing rules. Usually, the list groups together a set of values of the same nature (e.g. type of customer, postcodes, etc.). It must be previously created in a text file (.txt) where each value is delimited by a carriage return. The file will then be imported into the software.

3.2.6.1 Viewing the lists of values

All lists of values that are (or have been) used in the conditions of a routing rule are accessible from the routing rules home screen by clicking the affected tab.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the **Lists of values** tab.



3. ALE Connect displays the lists of available values:

You can view for each of them its ID, its name, the number of times it is used and the number of routing rules using it.

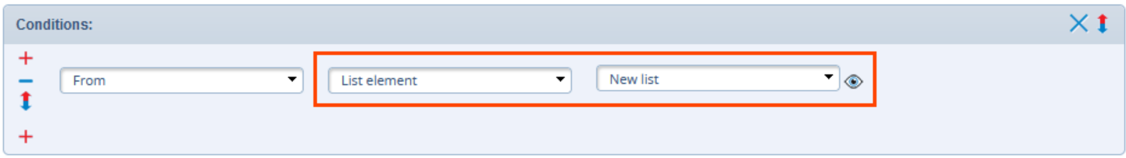
3.2.6.2 Creating a list of values

The creation consists in importing a text file containing the values. It must therefore be ready to use and correctly structured: it is advised to check beforehand that each value is followed by a carriage return.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to set up.
3. In the conditions, select a triggering criterion.

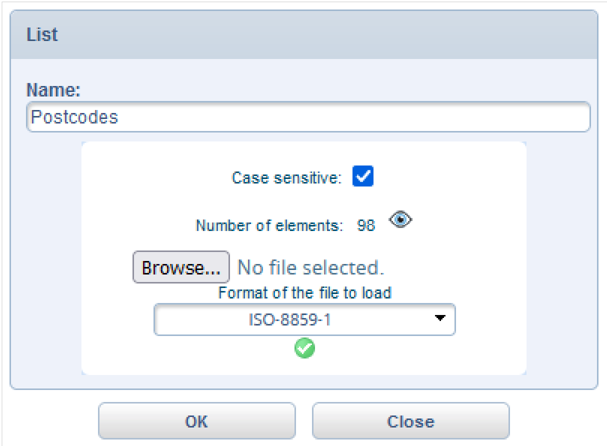
   You can either add a new condition, or change the criterion of an existing condition (depending on what you wish to set up).
4. Select the **List element** operator.

   Warning: this operator is not available for all triggering criteria.



5. Select the **New List** option.
6. Click the **View** button ( ) located on the right of the field.
7. Enter a name without spaces, that clearly identifies the list of values (the default name is List).
8. Check the **Case sensitive** option so that the values are case sensitive when the rule is executed.
9. Click the **OK** button.
10. Click **Browse** and select the corresponding text file.
11. Select the file format to be loaded: ISO-8859-1 or UTF-8.
12. Click **OK** ( ).

The file is imported and the number of values in the list is indicated in the window:



You can click to view the values of the list.

13. Click the **Close** button.

3.2.6.3 Modifying a list of values

The modification involves re-importing a new file: all the former values in the list will be deleted and replaced by the new values.

Warning: the new import deletes and replaces all existing values.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the **Lists of values** tab.
3. Click the **name** of the list to modify.
4. If necessary, check the **Case sensitive** option so that the values are case sensitive when the rule is executed.
5. Click **Browse** and select the corresponding text file.
6. Select the file format to be loaded: ISO-8859-1 or UTF-8.
7. Click **OK** ( ).

   The import is performed: the number of elements in the list is updated.

8. Click the **Close** button.

3.2.6.4 Deleting a list of values

This action is only available if the list of values is not used by a routing rule. Otherwise, the Delete button is hidden.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules.**
2. Click the **Lists of values** tab.
3. Click the **Delete** button ().

   ALE Connect deletes the list of values: it is removed from the list.

3.2.7 Executable actions

When setting up a routing rule, you must choose at least one action to execute. This action is systematically triggered unless conditions have been set up: in that case, the action is executed only when these conditions are met. You can add as many actions as necessary.

Warning: regarding the routing of incoming emails in ALE Connect, if a sender's email address (From field) is not correctly formatted, the action will not be executed.

3.2.7.1 Available actions

They are ordered as they appear in the scrolling list when selected.

Recycle bin	Moves directly the message to the recycle bin, without assigning an agent.
Close	Closes the message. The folder changes to the Closed status.
Archive	Archives the message. The folder changes to the Archived status.
Invalid email	Declares the email as invalid (e.g. contains a special character). The email is then displayed in the list of folders in bold red type.
Set the priority to	Sets the priority of incoming messages to the value selected in the scrolling list.
Freeze the priority	Obsolete functionality (do not use).
Assign to the queue	Routes the message to a queue to be selected. If a skill is assigned by default to the queue in question, it will be automatically assigned to the message when routing.
Qualification	Assigns to the folder the qualification criteria to be checked.
Assign to the agent	Routes the message to a specific agent to be chosen.
Set the skill to	Assigns to the message a skill to be selected.
Assign to the external agent	Routes the message to an external agent to be selected.
Warn	Notifies a third party by sending a message to be defined in the To, From, Subject and Body fields, which are displayed when the option is selected. The person warned does not receive the initial message. **Warning:** the To, From, Subject and Body fields are mandatory and must be filled in.
Activate automatic replies	Sends an automatic reply to the sender of the message.
Routing outwards	Forwards the message to addresses to be set up in the To, Cc, Bcc fields. The folder changes to the Closed (forward) status.

Send AOR	Generates an acknowledgement of receipt for which subject and message body need to be defined. **Warning:** the acknowledgement of receipt of a management rule has priority over those defined for a routing rule or a queue.
Filter attachments	Presents the email to the agent without its attachments.
Script	Starts the execution of a previously created script to be selected.
Black list	Deletes incoming messages as if they had never existed.

3.2.7.2 Adding an action

It is possible to add an action to a routing rule at any time, even if it is already active. In that case, the modification is taken into account as soon as you validate the changes.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the **Add** button (+) in the **Actions to perform if the conditions of the rule are met** block.

   The actions that will be listed will be executed only if the set up conditions are met.
4. Select the action to execute from the scrolling list.
5. Enter the value to be checked (depends on the chosen action).

6. Repeat steps 3 to 5 to add another action to be performed.

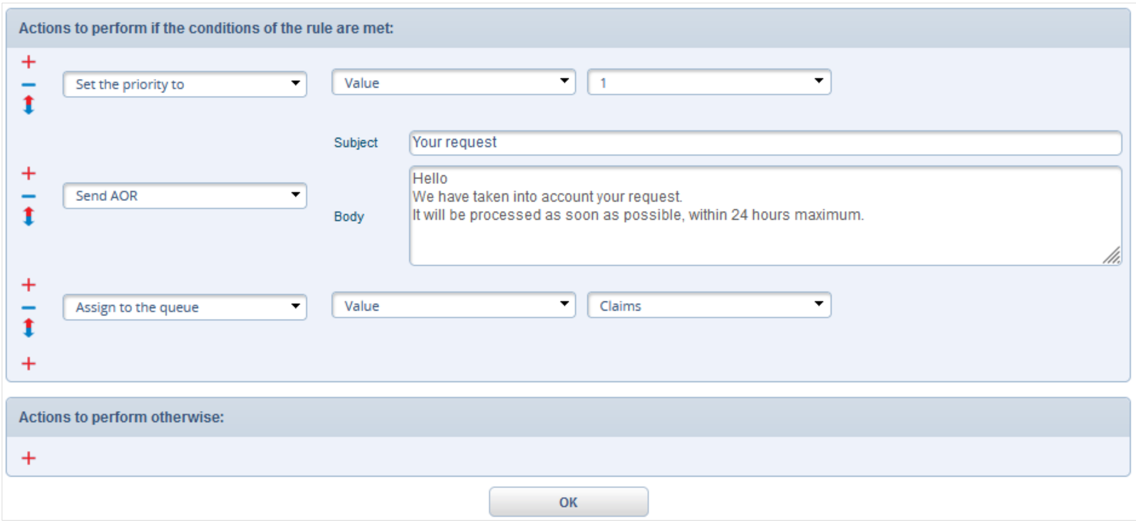
   You can click the **Add** button (+) **above** or **below** an existing action, according to the sorting order you want. In case of errors, it will always be possible to reorder the list later.
7. Click **OK** to save.

   The routing rule is successfully updated.

3.2.7.3 Ordering the actions

A routing rule can contain several actions that are executed by default in the order in which they were added. If it does not suit you, you can reorder them. To this end, a specific button allows you to move any action to the top of the list.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the **Switch this action with another one** button ( ) to move the action in the list.



4. Click **OK** to save.

   The routing rule is successfully updated.

3.2.7.4 Deleting an action

It is advised to anticipate the possible impact on a routing rule when deleting an action. The deletion is immediate and is not subject to confirmation.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Click the **Delete** button ( ) in the block of the affected action.
4. Click **OK** to save.

   The routing rule is successfully updated.

3.2.8 Activating a routing rule

Creating a rule is not enough: it must be applied to the business unit to be taken into account by the routing engine. An active rule is displayed in the interface with a darker colour.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Check, from the list, the routing rule to activate.
3. Click the **Apply the selected rules** button located at the bottom of the screen.

   ALE Connect confirms the success of the action.

3.2.9 Modifying a routing rule

It is possible to view or modify a routing rule at any time, even if it is already active.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the routing rule to modify.
3. Perform the changes you wish.
4. Click the **OK** button to save your entry.

   ALE Connect confirms the success of the action.

3.2.10 Duplicating a routing rule

This action is possible at any time, even if the routing rule is already active. This procedure is useful since it allows you to quickly create a rule by copying an existing one. ALE Connect then adds the new rule to the list, by naming it **(Copy)...**

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the **Copy** icon ( ) from the routing rule to be duplicated.

   ALE Connect immediately adds the new rule to the list, in last position.

3.2.11 Deactivating a routing rule

Any deactivated rule is no longer applied to the business unit affected.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Check, from the list, the routing rule to deactivate.
3. Click the **Deactivate the selected rules** button located at the bottom of the screen.

   ALE Connect confirms the success of the action.

3.2.12 Deleting a routing rule

When you delete a rule, ALE Connect automatically reorders the remaining rules. Note that the deletion can be performed for one or several rules of your choice.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Check, from the list, the routing rule to delete.
3. Click the **Delete** button ( ) or the button at the bottom of the screen.

   ALE Connect asks you to confirm this action.
4. Click **Yes**.

   The rule is permanently deleted and the list is automatically reordered.

3.2.13 Ordering the routing rules

When several rules have been defined, they must be ordered to determine their execution order. By default, any new rule is added in last position of the list.

Warning: if the order of the routing rules is changed, it is necessary to re-apply at least one of the rules by clicking the **Apply the selected rules** button in order to take into account the modification. Otherwise, the former order will continue to be used.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Click the **Move this rule** button ( ) while holding down the left mouse button, and then drag it to the desired rank in the list.
3. Click the **Apply the selected rules** button.

3.2.14 Exporting the routing rules

You can export the content of rules of your choice in a **GestionRulesExport.csv** file. The exported data are: type of rule (management or routing), name, comment and status.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Routing Rules**.
2. Check, from the list, the routing rule to export.
3. Click the **Export rules** button.

   A window suggests you to open the file with a spreadsheet program (Microsoft Excel™ for example) or to save it on your computer.
4. Check the desired option and click **OK**: ALE Connect generates the export file.

   You can now retrieve it and use the data it contains.

3.3 Scripts

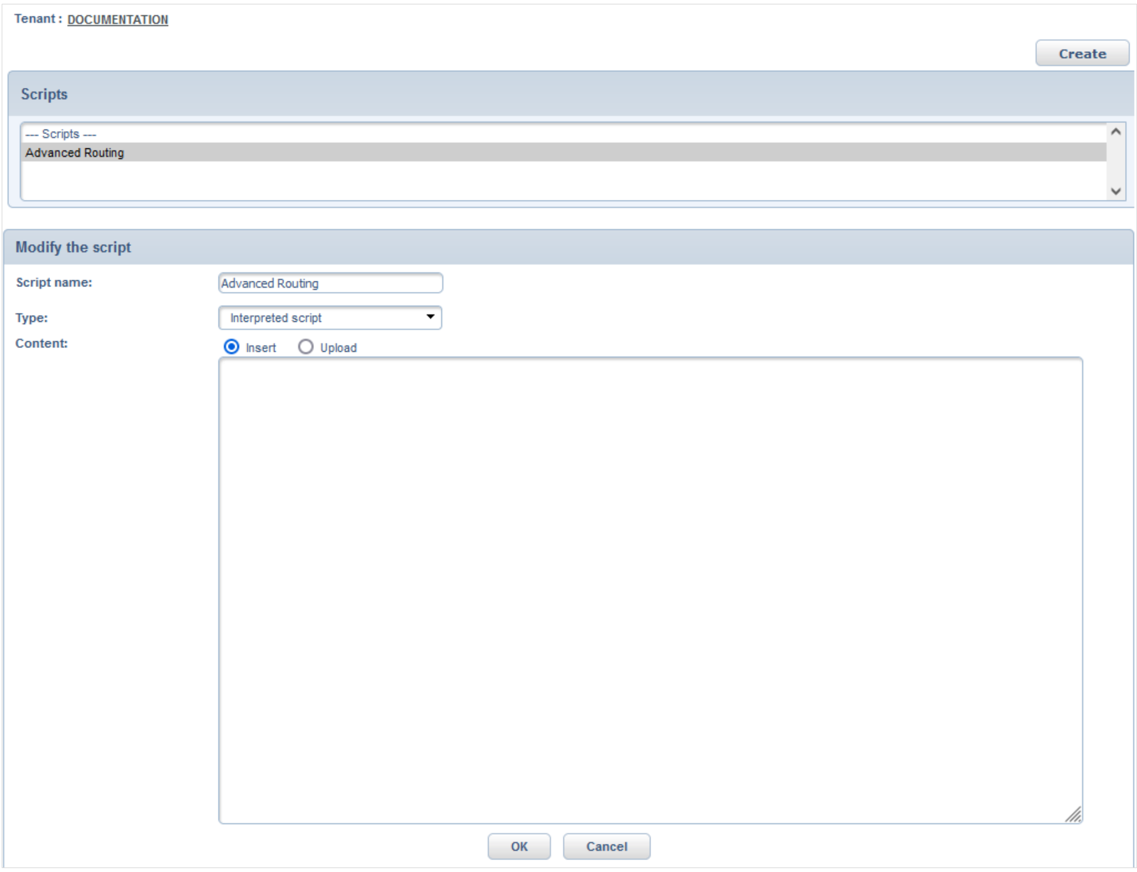
A script is a computer program that describes a sequence of commands or instructions to automate a task. In ALE Connect, you can write scripts that will be used by the management rules and routing rules to route interactions.

This functionality is dedicated to a technical audience with development skills.

3.3.1 Creating a script

Scripts are always defined at the tenant level: check first that the selected tenant is correct.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Scripts**.
2. Click the **Create** button. The following screen is displayed:



3. Enter a **name** that clearly identifies the script. It will appear in the scrolling lists of the corresponding field when creating a management or routing rule.
4. Select, from the suggested list, the **type** of script to create:

   Interpreted script: script programmed in Java language. Specify how you want to enter the Groovy code: typed directly in the content (Insert), or extracted from a text file to be selected (Upload)

   Execute type class: file to execute. Enter the name of the affected class.
5. Click **OK**.

3.3.2 Modifying a script

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Scripts**.
2. From the existing list, select the script to be modified: its content is displayed.
3. Click the **Modify** button.
4. Perform the changes you wish.
5. Click **OK**.

3.3.3 Deleting a script

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Rule Management** > **Scripts**.
2. From the existing list, select the script to delete: its content is displayed.
3. Click the **Move to the Recycle Bin** button.

   The system asks you to confirm the deletion of the script, and displays its characteristics as a reminder.
4. Click **OK**.

4 Knowledge base

The knowledge base is a library of shared elements facilitating the processing of folders by contact centre agents. It is specific to each business unit. Any agent can thus use the database and integrate the documents that are necessary to the daily processing of interactions.

It includes:

- response templates,
- automatic replies,
- attachments,
- keywords,
- suggestions,
- management of the artificial intelligence engine.

4.1 Response templates

A response template is a pre-formatted written message that agents and supervisors can use during the processing of a folder. Its insertion avoids data entry errors, reduces handling time, and allows frequently asked questions to be answered. Response templates are particularly useful to process e-mails and chats with web users. You can define as many as you need.

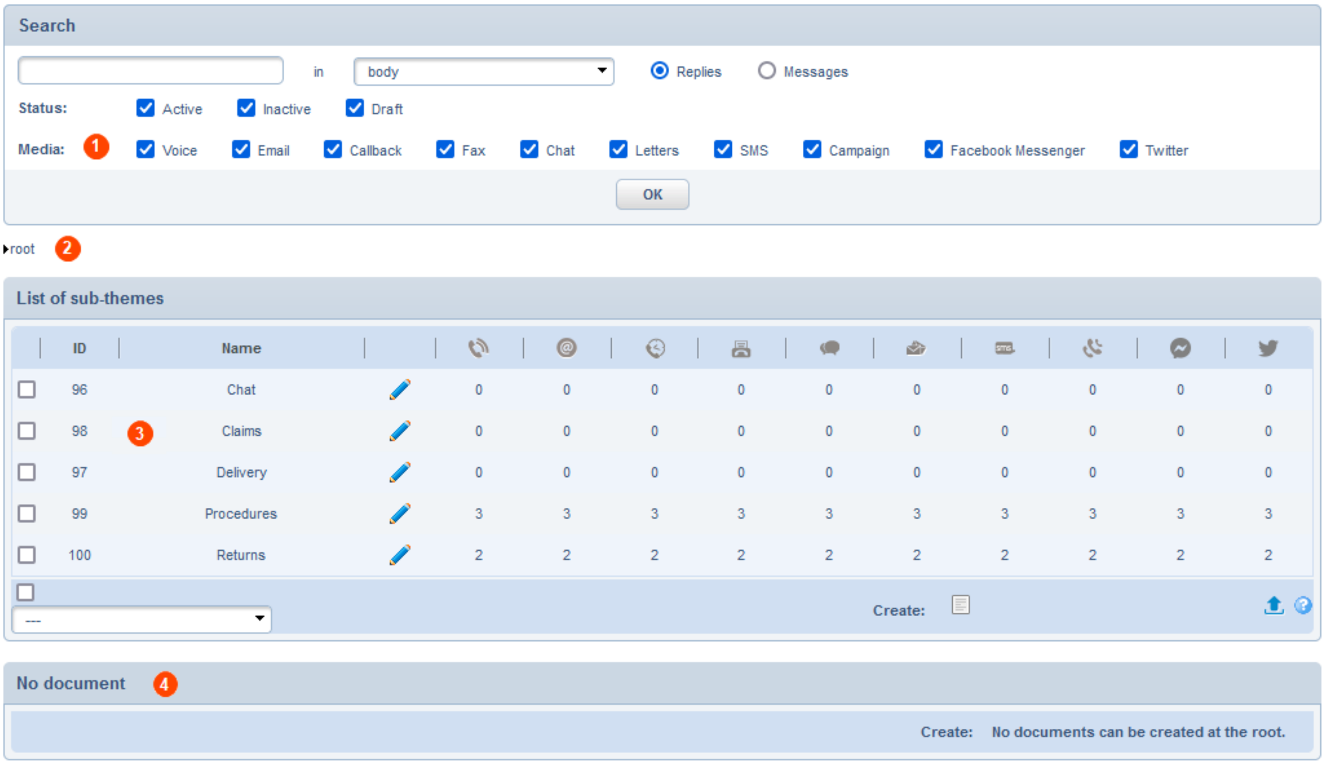
There are two categories of response templates:

- **Reply**: standard text automatically integrated into the processing of a folder when requested by an agent/supervisor.
- **Message**: compatible with Chat and Facebook Messenger media, this type of responses is used to formulate autocompletion sentences.

As with all elements of the knowledge base, response templates are defined by business unit: do not forget to select the desired business unit.

4.1.1 Overview

This functionality is available from the menu **Administration** > **Tenants** > **Business Units** > **Knowledge Base > Response Templates.** It allows you to create and manage the response templates of a business unit.



1. Search engine of response templates
2. Tree structure of themes
3. List of themes
4. List of response templates belonging to the selected theme

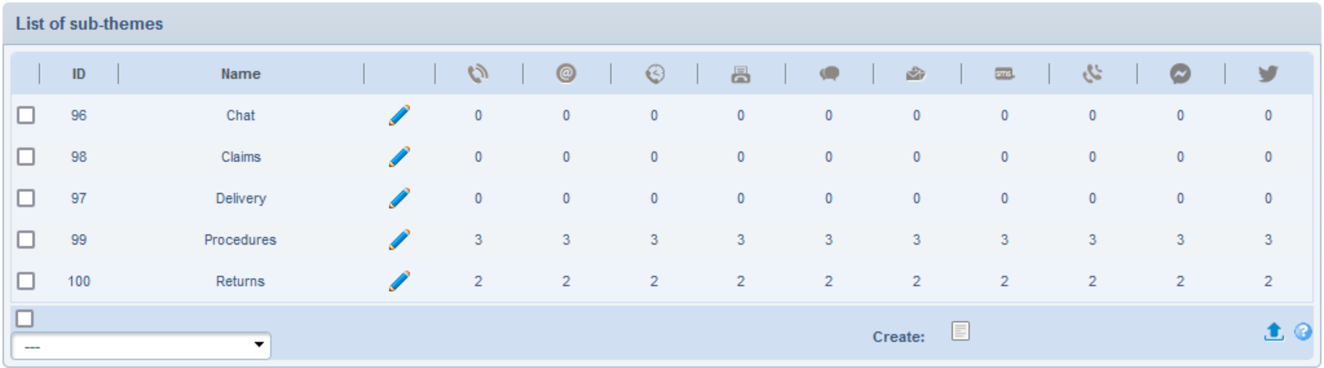
4.1.2 Organising the classification of response templates

Response templates can be many and varied. That is why it is mandatory to classify them by **theme** (directory) in order to find them more easily. These themes are organised according to a tree structure of N levels which must be defined. The first level is the **root**, in which no response template can be stored. The tree structure is represented by a **breadcrumb trail**. This path is dynamic: you can click the desired theme to display its response templates.

From the root, you start to create the different themes you need. Each theme may contain one or more sub-themes. A sub-theme automatically inherits the media allowed to its parent theme (i.e. it is not possible to create a response template for the media not allowed by a theme).

4.1.2.1 List of themes

By default, when arriving at the home screen of the functionality, the list shows all the themes that have been created at the root:



List of sub-themes

ID	Name										
96	Chat	0	0	0	0	0	0	0	0	0	0
98	Claims	0	0	0	0	0	0	0	0	0	0
97	Delivery	0	0	0	0	0	0	0	0	0	0
99	Procedures	3	3	3	3	3	3	3	3	3	3
100	Returns	2	2	2	2	2	2	2	2	2	2

Create:

They are sorted in ascending alphabetical order by name. Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column. For each theme, you can view: its ID, its name, a button allowing you to modify it, the number of response templates it contains for each media.

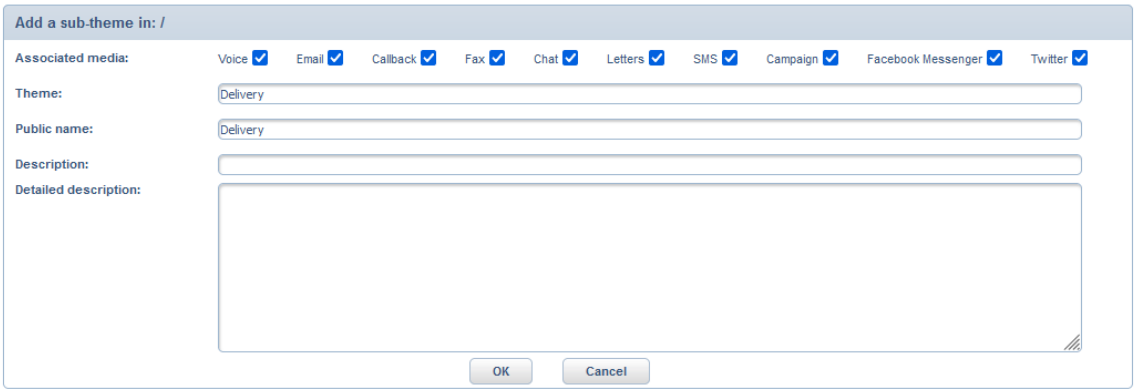
At the bottom of the screen, a line allows you to perform the following actions:

- Create a theme
- Modify a theme
- Copy and paste a theme
- Cut and paste a theme
- Delete a theme

4.1.2.2 *Creating a theme*

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.

2. Click the **Create** button () in the list of sub-themes.



The title of the window recalls the **parent theme**. In the example above, this is the root.

3. Fill in the following parameters:

Associated media
Check the media associated with the theme being created (all checked by default).

> **Warning:** only the media associated with the parent theme are displayed here. Example: if the theme being created depends on a parent theme that only allows the Voice and Email media, only these two media will be visible.

Theme
Enter a name that clearly identifies the theme. It must be unique in the entire tree structure; two themes cannot have the same name.

Public name
Enter the public name of the theme if it is intended for public use.

Description / Detailed description
Describe the use of the response templates that will be associated with this theme.

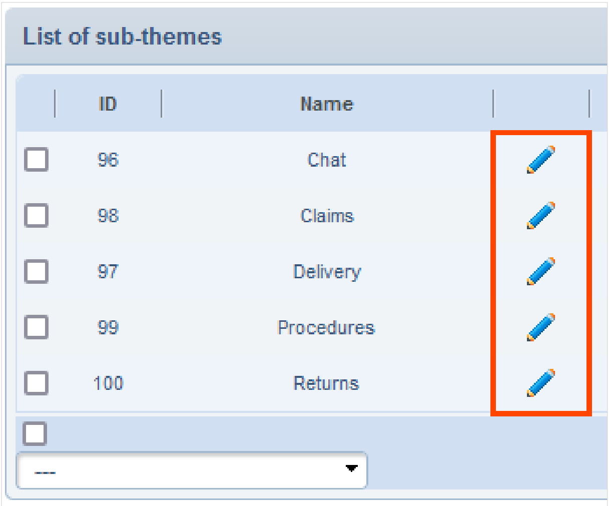
4. Click **OK**.

The new theme is now available.

4.1.2.3 Modifying a theme

This action is possible even if response templates have already been classified in the theme. All the fields can be modified. Please note that if you change the media associated with the theme (e.g. you uncheck the Twitter media), its sub-themes and all corresponding response templates will be automatically updated.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Navigate through the tree structure until you find the theme you want to change.
3. Click the **Modify** button ( ) of the affected theme.



4. Modify the desired characteristics.
5. Click **OK**.

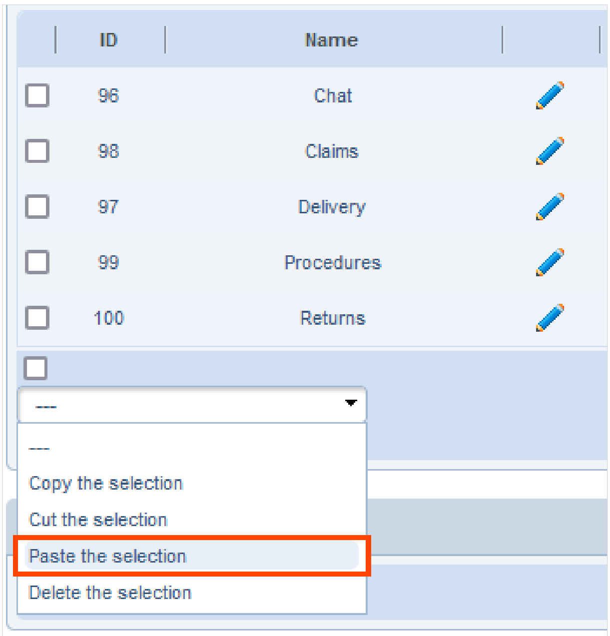
4.1.2.4 Copying and pasting a theme

To go faster, you can create one (or more) theme by copying one (or more) existing theme. All the response templates from the copied theme will also be pasted into the new theme. This convenient method actually allows you to quickly duplicate response templates, to adapt them to another working context.

Copy-paste can be performed at any level of the tree structure.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Navigate through the tree structure until you find the affected theme.
3. Check the theme to copy.
4. Select the **Copy the selection** action from the scrolling list.

   The screen is changed:

   The **Preview the clipboard** button () allows you to check the selected theme(s).

   The **Empty the clipboard** button () clears your selection and cancels the copy.

5. Navigate through the tree structure and click the name of the recipient theme.
6. Select the **Paste the selection** action.

   ALE Connect asks you to confirm the copy.

7. Click **OK** ().

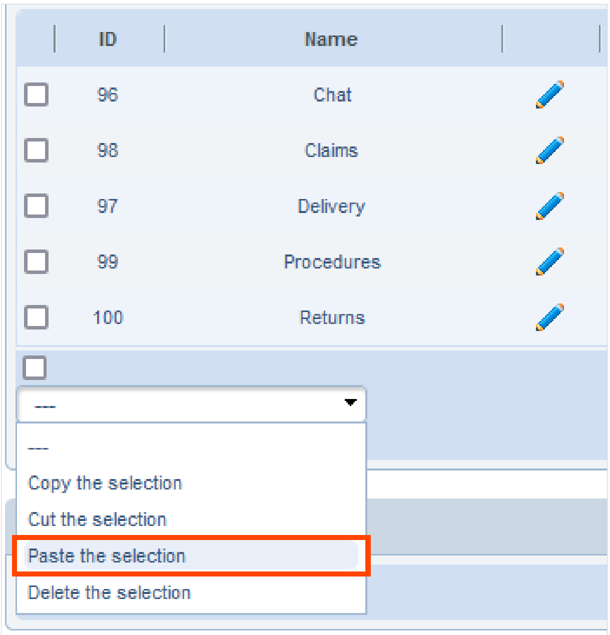
   The new theme is added to the list.

4.1.2.5 *Cutting and pasting a theme*

Unlike copy and paste, this action allows you to move a theme and all its elements, without duplicating it, to another level of the tree structure. It will therefore no longer be stored at its original location, but only at its destination. Cut and paste can be performed at any level of the tree structure.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Navigate through the tree structure until you find the affected theme.
3. Check the theme to be moved.
4. Select the **Cut the selection** action from the scrolling list.

   The screen is changed:

   The **Preview the clipboard** button ( ) allows you to check the selected theme(s).

   The **Empty the clipboard** button ( ) clears your selection and cancels the move.
5. Navigate through the tree structure and click the name of the recipient theme.
6. Select the **Paste the selection** action.

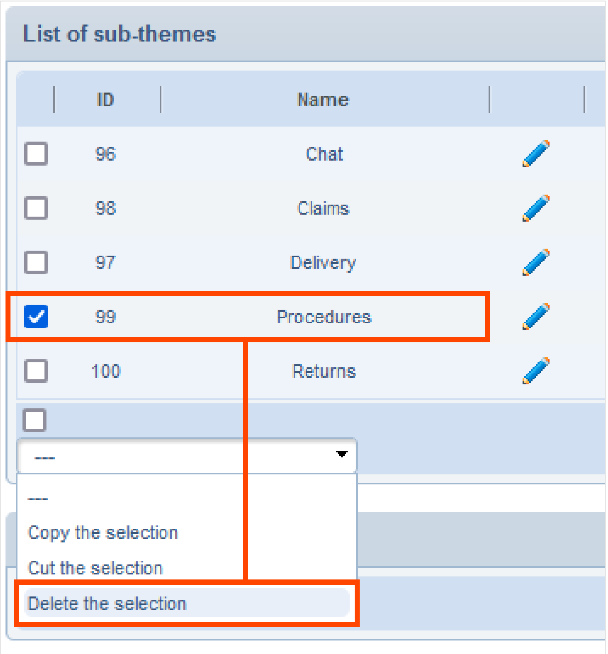
   ALE Connect asks you to confirm the move to the chosen theme.
7. Click **OK** ( ).

   The theme is moved.

4.1.2.6 Deleting a theme

It is possible to delete one or several existing themes, even if they contain response templates. All the elements of the theme will be permanently deleted.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Navigate through the tree structure until you find the affected theme.
3. Check the theme to delete.
4. Select the **Delete the selection** action from the scrolling list.



ALE Connect asks you to confirm the deletion of the selected themes.

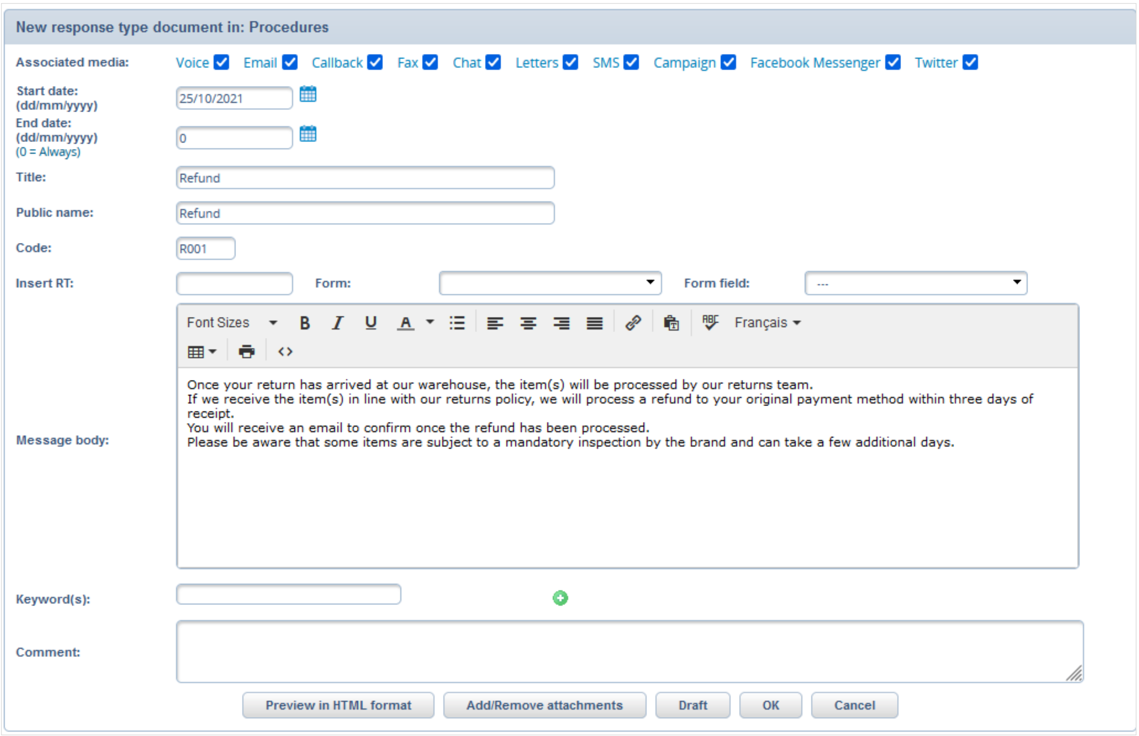
5. Click **OK** ( ).

The theme and all the elements it contained are permanently deleted.

4.1.3 Creating a “Reply” response template

This is a standard pre-formatted text that agents and supervisors can use when processing a folder (e.g. reply to an email, comment, etc.). The text is intended to answer a question frequently asked to the contact centre. The insertion of the response template is triggered by entering a call code.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Click the **name of the theme** affected.
3. Click the **Response** button ( ) in the list of documents.



4. Fill in the following parameters:

Associated media
Check the media for which the response template can be used (all by default).

Start date
Enter the start date of the response template in dd/mm/yyyy format. By default, this is the current date.

End date
Enter the end date of the response template in dd/mm/yyyy format. The 0 value, set by default, means that the response template is valid indefinitely.

> **Warning:** beyond the validity period, the response template is inactive and does not appear in the agent interface.

Title
Enter the title of the response template, as it will be displayed on the agent interface.

Public name

Parameter obsolete.

Code

It allows agents to call the response template. Enter a unique code of 6 alphanumeric characters maximum, identifying the response template. If this field is not filled in, a code will be automatically assigned by ALE Connect (can be changed). If the entered code already exists, ALE Connect will assign another code.

Insert RT

This field helps you to create a response template more quickly by retrieving the text of an existing one: enter the code of the response template, so that its content is automatically inserted into the body of the message. All you have to do is adapt the text.

Form / Form field

A merge field is information from a form. You can insert them into the body of the response template: they will be replaced when processing a folder by the actual values entered by the contact from the form. Select the form, and then the affected field. The field is added immediately at the cursor position in the message body. A merge field corresponds to the name of the form field, preceded and followed by three hash characters (###).
Example: the form contains the Title, Last name and First name fields.
The response template contains the phrase Hello ###Title### ###Lastname### ###Firstname###,

The result is Hello Mr Barnes Alexander,

See the available merge fields

Message body

Define the text of the response template, using the formatting options. You can customise it by inserting fields regarding the contact, agent or the folder being processed. To this end, select a merge field from the previously selected form: it will be inserted into the body of the message. The merge fields will automatically be replaced by the actual values from the form. If an error occurs, it is possible to delete the entire message body by clicking the corresponding button.

Keyword(s)

Add keywords that will allow the agent to quickly search this response template. Enter the corresponding character string. At the 5th character entered, the keyword is automatically suggested. Click **Add** ( ) to associate it with the response template.

Comment

This field allows you to provide additional information.

5. Click the button:

   OK to save the response template.

   Draft to save the response template as a draft (you can modify it later).

   Add/Remove attachments to attach documents to the response template (e.g. registration form). Attachments must be imported into the ALE Connect platform beforehand.

4.1.4 Creating a "Message" response template

It can only be used to process Chat or Facebook
Messenger folders. This type of reply is used to formulate the autocompletion sentences.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Click the **name of the theme** for which you want to create a response template.
3. Click the **Message** button () in the list of documents.
4. Fill in the parameters of the response template.
5. Click the button:

   OK to save the response template.

   Draft to save the response template as a draft (you can modify it later).

   Add/Remove attachments to attach documents to the response template (e.g. registration form). Attachments must be imported into the ALE Connect platform beforehand.

4.1.5 Using merge fields

The available fields are:

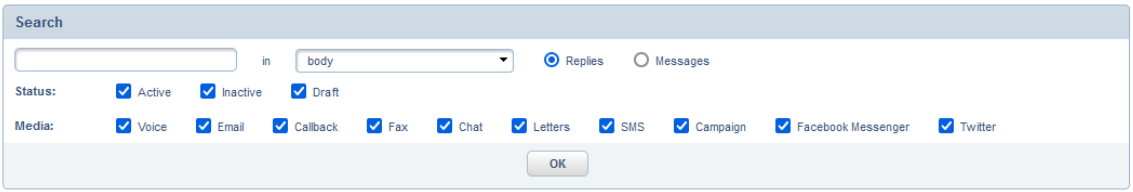
Table	Column	Variable
Contact sheet	First name	CLI.PRENOM
Contact sheet	Name	CLI.NOM
Contact sheet	Title	CLI.CIVILITE
Contact sheet	Date of birth	CLI.DATE ANNIVERSAIRE
Contact sheet	Verbatim	CLI.VERBATIM
Contact sheet	Company	CLI.SOCIETE
Contact sheet	Street number	CLI.NUMERO DE RUE
Contact sheet	Street name	CLI.NOM RUE
Contact sheet	Building	CLI.IMMEUBLE
Contact sheet	Postcode	CLI.CODE POSTAL
Contact sheet	City	CLI.VILLE
Contact sheet	Comment	CLI.COMMENTAIRE CLIENT
Contact sheet	Phone number	CLI.TELEPHONE
Contact sheet	Mobile phone	CLI.MOBILE
Contact sheet	Reference	CLI.REFERENCE
Contact sheet	Country	CLI.PAYS
Contact sheet	Locality or residence	CLI.LIEU DIT
Agents	Title	OPE.CIVILITE
Agents	First name	OPE.PRENOM
Agents	Last name	OPE.NOM
Agents	Phone number	OPE.TELEPHONE
Agents	Department	OPE.SERVICE
Agents	Address	OPE.ADRESSE

Table	Column	Variable
Agents	City	OPE.VILLE
Agents	Login	OPE.LOGIN
Agents	Language	OPE.LANGUE
Agents	Email	OPE.EMAIL
Agents	Site	OPE.SITE
Folder	Folder No.	thread_id
Folder	Creation date	date_creation
Folder	Subject	subject
Folder	Subject of incoming message	incoming_mail_subject
Folder	Date of incoming message	incoming_mail_date
Folder	Body of incoming message	incoming_mail_body

4.1.6 Searching response templates

The search engine allows you to find the response templates you need, without having to navigate through the tree structure of themes.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.



2. In the **Search** area, enter the following criteria:

   Entry area / in

   Enter a character string to search. You can use the **AND** and **OR** logical operators between words to refine your search. Then select the field in which the string should be searched: body of response templates, title or comment.

   Replies / Messages

   Check the type of response templates to search.

   Status

   Check the statuses of the response templates to search: active, inactive and/or draft. At least one status must be checked.

   Media

   Check the media associated with the response templates to search. At least one media must be checked.

3. Click **OK**.

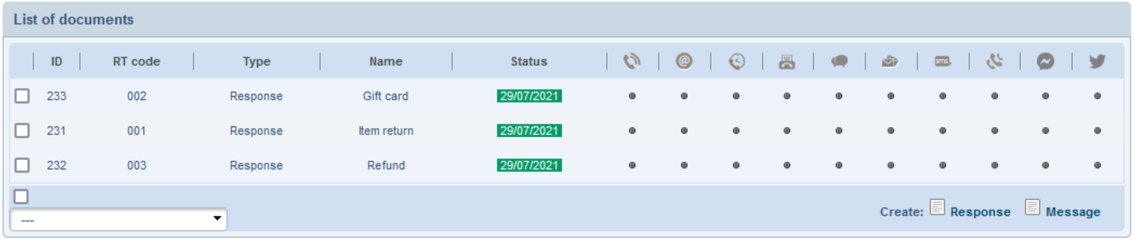
   ALE Connect displays the response templates that match the search in the **list of documents** at the bottom of the screen.

4.1.7 Displaying the list of response templates

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.

2. Perform a search or click the desired theme.

   ALE Connect displays the response templates that match the search in the **list of documents** at the bottom of the screen.



For each one, you can view its unique **ID**, **RT code**, **type** of response template, **name** (clickable), **status**, **creation date**, and the associated **media**.

4.1.8 Modifying a response template

Any modification of the response templates is taken into account immediately and transparently. Agents and supervisors do not need to log out from their ALE Connect interface.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.

2. Search or click the theme in which the response template to modify is stored.

3. Click the **name** of the response template.

4. Modify the desired parameters.

5. Click **OK**.

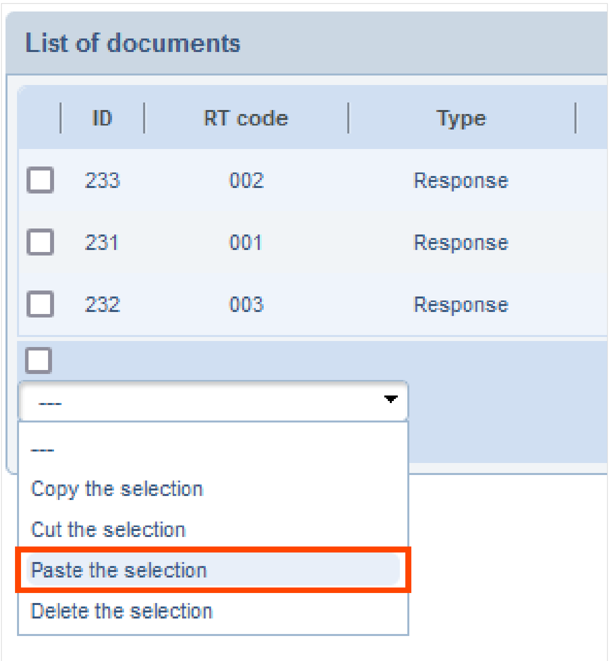
4.1.9 Copying and pasting a response template

To go faster, you can create one (or more) response template by copying one (or more) existing response template into the recipient theme of your choice. This convenient method actually allows you to quickly duplicate response templates, to adapt them to another working context.

Copy-paste can be performed at any level of the tree structure.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Perform a search or click the theme in which the response template to copy is stored.
3. Check the response template to be copied.
4. Select the **Copy the selection** action from the scrolling list.

   The screen is changed:

   The **Preview the clipboard** button () allows you to check the selected reply(ies).

   The **Empty the clipboard** button () clears your selection and cancels the copy.
5. Navigate the tree structure and click the name of the recipient theme.
6. Select the **Paste the selection** action.

   ALE Connect asks you to confirm the copy.
7. Click **OK** ().

   The response template is added to the list.

4.1.10 Cutting and pasting a response template

Unlike copy and paste, this action moves a response template without duplicating it into the recipient theme of your choice. Cut and paste can be performed at any level of the tree structure.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Perform a search or click the theme in which the response template to move is stored.
3. Check the response template to be moved.
4. Select the **Cut the selection** action from the scrolling list.

   The **Preview the clipboard** button () allows you to check the selected reply(ies).

   The **Empty the clipboard** button () clears your selection and cancels the move.
5. Navigate the tree structure and click the name of the recipient theme.
6. Select the **Paste the selection** action.

   ALE Connect asks you to confirm the move to the chosen theme.
7. Click **OK** ().

   The response template is moved.

4.1.11 Deleting a response template

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. Perform a search or click the theme in which the response template to delete is stored.
3. Check the corresponding box.
4. From the scrolling list of actions, select **Delete the selection**.

   ALE Connect asks you to confirm the deletion.
5. Click **OK** ().

   ALE Connect updates the list: the response template is no longer displayed.

4.1.12 Exporting response templates

This action generates a .csv file containing all response templates of the knowledge base. This view is very useful to re-read or correct the different texts, in order to keep a consistent structure (e.g. change of the brand name). You do not need to open the different themes and search manually the response template to be modified.

For each response template (file line), the following columns are available: ID, themes, name, public name, associated media, file, keywords, body, validation date, comment, RT code, status, validity start and end dates, creation date, creator, user who made the last update, last update date and attachments.

Note: it is recommended to download the file to your desktop and open it using the UTF-8 character set.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Response Templates**.
2. In the list of themes, click **Export** ().

   A window is displayed: it suggests you to open the file with the application of your choice (Microsoft Excel™ for example) or to save it on your computer.
3. Check the desired option, and then click **OK**.

   ALE Connect generates the export file: you can now download it and use it.

4.2 Automatic replies

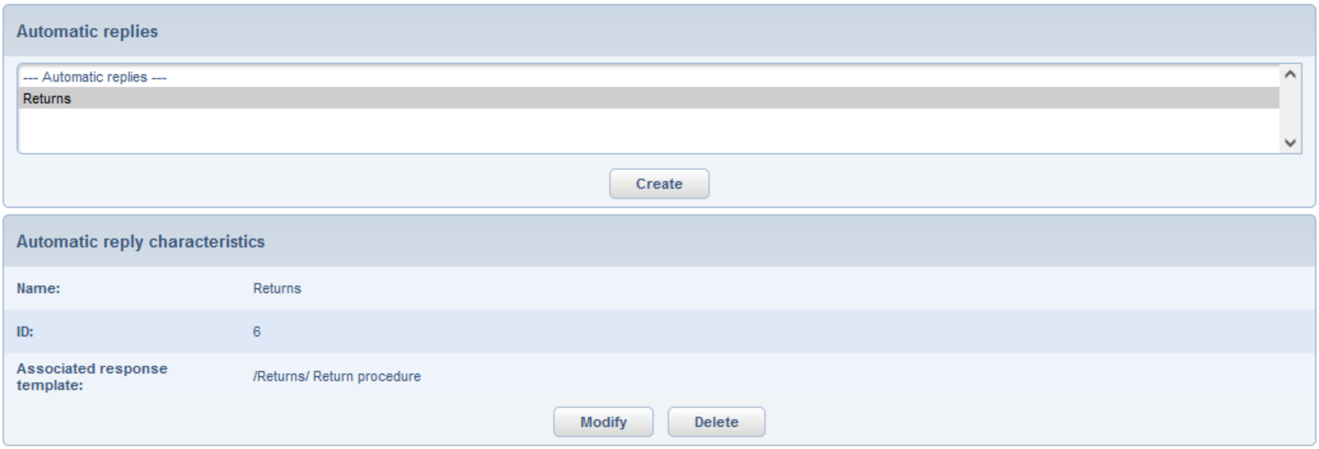
An automatic reply is a response template that is automatically sent, after receiving an email from a contact (e.g. a request for a brochure from a web form). This automation saves agents from dealing with repetitive and targeted requests.

There are two types of automatic replies:

- those generated by the artificial intelligence engine,
- those generated by the routing engine as described below.

4.2.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Knowledge Base** > **Automatic Replies** menu. The upper part of the screen displays the list of existing automatic replies; the lower part displays the characteristics of the reply selected by default.



4.2.2 Creating an automatic reply

Before starting, at least one response template must exist, otherwise it will be impossible to create the corresponding automatic reply. Also, make sure that the selected business unit is correct.

When it is created, an ID (which cannot be changed) is assigned by the system to the automatic reply: it is used to trigger the sending of the automatic reply.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Automatic Replies**.
2. Click the **Create** button.
3. Enter a name that clearly identifies the subject of the automatic reply.
4. Check, from the suggested list, the response template associated.
5. Click **OK**.

4.2.3 Modifying an automatic reply

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Automatic Replies**.
2. Select, from the list, the automatic reply to be modified: its detailed characteristics are displayed.
3. Click the **Modify** button.
4. Perform the changes you wish.
5. Click **OK**.

4.2.4 Deleting an automatic reply

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Automatic Replies**.
2. Select, from the list, the automatic reply to delete.
3. Click the **Delete** button.

   ALE Connect displays the characteristics of the automatic reply for verification.
4. Click **OK** to confirm the deletion.

4.2.5 Sending an automatic reply to an email

You must first:

1. set up the configuration file to send automatic replies (operation strictly reserved to the technical support of the ALE Connect platform),
2. create an automatic reply (as described above),
3. create a routing rule to declare the sending criteria.

Once this setup performed, the automatic replies are sent when emails from forms are received. The sending of the automatic reply is triggered if, after analysis of the content of the incoming email, the key corresponding to the sending of an automatic reply and its linked value are found in the body of the email. The key of the automatic reply must be previously declared in the configuration file of the application. The value corresponds to the automatic reply ID.

Example:

The presence of “Auto_rep=10" in the body of an incoming email triggers the sending of the automatic reply whose ID is 10, if:

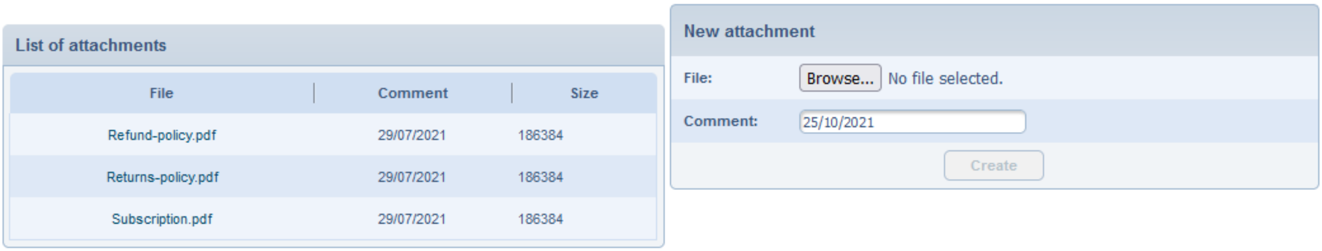
- Auto_rep is the key declared in the configuration file to send automatic replies,
- This incoming email has been processed by a routing rule activating the sending of automatic replies.

4.3 Attachments

The ALE Connect knowledge base allows you to store the documents that are the most frequently used by the contact centre agents during their work. It is useful especially when the documents are inserted as attachments within a response template sent by email (e.g. a registration form in response to a request). The attachment is viewed when opening the email.

4.3.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Knowledge Base** > **Attachments** menu. It allows you to upload all the documents necessary to the contact centre's activity. The left part of the screen displays the list of attachments saved in ALE Connect. The right part allows you to add an attachment.



For each attachment you can view the filename, a comment and the file size.

4.3.2 Limitations on the agent interface

Agents and supervisors will have to respect the following limitations when adding attachments:

- Maximum size of an attachment: **20 MB**
- Maximum total size of attachments: **30 MB**
- Maximum number of attachments: **100**

4.3.3 Adding an attachment

It is not possible to add two files with identical names and extensions (duplicate).

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Attachments**.
2. Click the **Browse** button to open the file explorer on your computer.
3. Select the file to be attached, and then click **Open**.
4. If necessary, enter a free comment (default current date).
5. Click **Create** to confirm the addition. ALE Connect adds the attachment to the knowledge base.

4.3.4 Modifying an attachment

It is possible to change the name of an attachment and its comment. These changes are then automatically taken into account in all response templates to which the attachment is attached.

However, any changes on the attachment itself must be performed in the source file. This file must then be re-imported into the application as a new attachment.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Attachments**.
2. From the list of the attachments, click the name of the file to modify.
3. Modify the desired elements.
4. Click **OK**.

4.3.5 Deleting an attachment

When an attachment is deleted from the knowledge base, it is also deleted from all response templates to which it was attached.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Attachments**.
2. From the list of the attachments, click the name of the file to delete.
3. Click the **Delete** button.

   ALE Connect asks you to confirm the deletion.
4. Click **OK**.

4.4 Keywords

This functionality allows you to define keywords that will be used by contact centre agents and supervisors to perform a quick search of response templates. The search is performed by completion when creating (or modifying) a response template. The keywords must be created before the response templates that use them.

4.4.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Knowledge Base** > **Keywords** menu. The left part of the screen displays the list of keywords saved in ALE Connect and sorted in alphabetical order. The right part allows you to add new keywords.

4.4.2 Creating a keyword

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Keywords**.
2. Enter the keyword in the corresponding field.
3. Click **Create**.

   ALE Connect adds the keyword to the existing list.

4.4.3 Modifying a keyword

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Keywords**.
2. From the list on the left of the screen, click the keyword to be modified.
3. Modify it in the **Edition** area on the right of the screen.
4. Click **Confirm**.

   ALE Connect updates the list of keywords.

4.4.4 Deleting a keyword

This action is always possible even if the keyword has already been associated with response templates. In that case, it will also result in its deletion in the affected response templates.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Keywords**.
2. From the list on the left of the screen, click the keyword to delete.
3. Click the **Delete** button.
4. Click the **Confirm** button to validate the deletion.

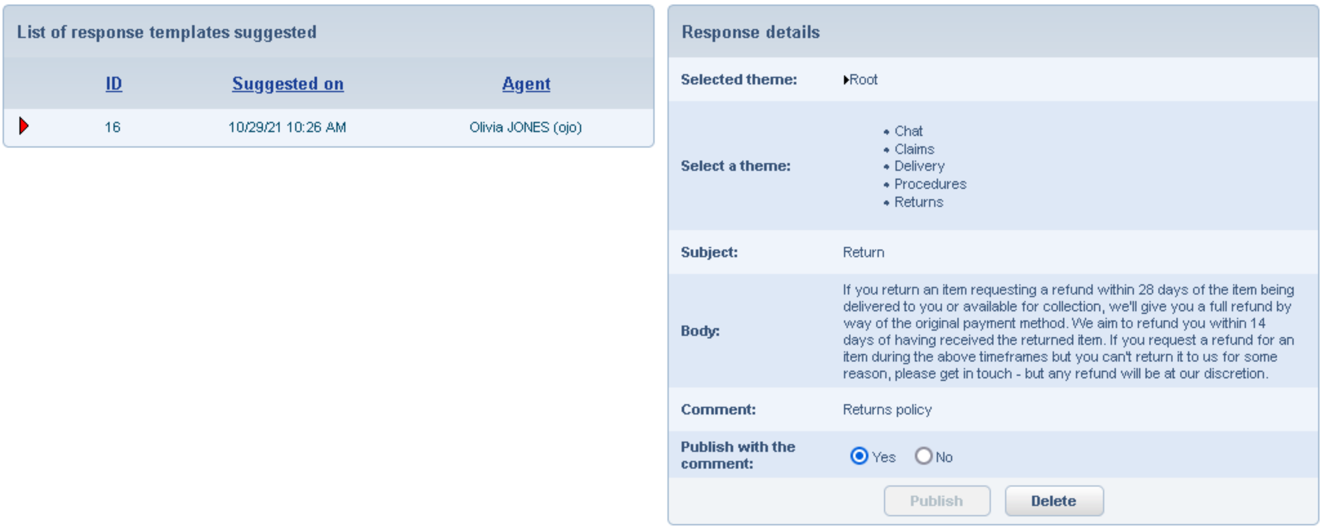
   ALE Connect updates the list: the deleted keyword is no longer displayed.

4.5 Suggestions

Any agent who frequently writes the same reply can submit it to his/her supervisor so that it can be integrated as a response template into the knowledge base. This functionality displays all suggestions that have been performed by all contact centre agents. You can then choose to accept or refuse to publish it in the knowledge base.

4.5.1 Overview

This functionality is accessible from the **Administration** > **Tenants** > **Business Units** > **Knowledge Base** > **Suggestions** menu. The left part of the screen displays the different response templates suggested; the right part displays the details of the default selected response template:



For each suggestion, you can view:

- ID,
- suggestion date and time,
- name and login of the agent who performed it (optional).

Note: it may happen that a suggestion is anonymous. This means that the agent has been deleted from the user file in the meantime (e.g. employee who has left the company). In addition, if the logged in user has a supervisor profile, the anonymous suggestions are not displayed.

4.5.2 Publishing a suggestion

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Suggestions**.
2. From the list of response templates suggested, select the suggestion to be published by clicking one of the values in the **ID**, **Suggested on** or **Agent** column: a red arrow indicates the selected suggestion. The detail of the response template is displayed.
3. Select the **theme** to which the response template should be added.
4. Click **Publish** to confirm the action.

   The response template creation form **New response type document in: [selected theme]** is displayed: the title and body of the suggested response are automatically inserted.
5. If necessary, modify the response template before validating it.

   It is still possible, at this step, to cancel the publication of the response template without deleting the suggestion. To this end, click the **Cancel** button.
6. Click **OK** to permanently publish the response template suggested.

4.5.3 Refusing a suggestion

If a suggestion is not appropriate or relevant, you can delete it. Warning: the deletion is immediate and cannot be reversed.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **Suggestions**.
2. From the list of response templates suggested, select the suggestion to be deleted by clicking one of the values in the **ID**, **Suggested on** or **Agent** column: a red arrow indicates the selected suggestion. The detail of the response template is displayed.
3. Click the **Delete** button.

   The suggestion is immediately removed from the existing list.

4.6 Managing the artificial intelligence engine (AI)

The objective of the artificial intelligence (or AI) engine is to analyse all incoming emails and to search the most appropriate response templates from the knowledge base. This functionality allows you to view the setup of the engine and the results obtained.

4.6.1 Viewing the indexing parameters

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **AI Engine Management**.
2. Click **Database management**.

Parameters		Current databases	
Maximum number of emails by response template:	1000	Average number of emails by response template:	0
Maximum number of emails for response templates:	100000	Total number of emails in response templates:	0
Maximum email age for response templates:	90 day(s)	Age of the oldest email from response templates:	0 day(s)
Maximum number of emails in QA:	20000	Total number of emails in QA:	0
Maximum email age of QA:	90 day(s)	Age of the oldest email from QA:	0 day(s)

The **Parameters** area shows the indexing parameters of the artificial intelligence engine.

The **Current databases** area shows the actual data of the environment, as reference point, so that you can compare it with the parameters defined. You can thus know the limits already reached.

Maximum number of emails by response template
Maximum number of emails to be taken into account for the indexing, among those that have recently used the response template.

Maximum number of emails for response templates
Maximum number of emails to be taken into account for the total indexing for all response templates used. Indeed, since this number is not necessarily reached for all the response templates, the parameter allows you to limit the total number of emails to be indexed during the night, in order not to exceed the time allocated.

Maximum email age for response templates
Maximum number of days of life of an email to be indexed.

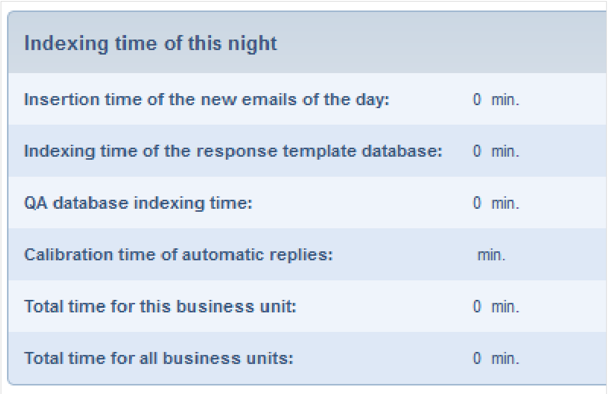
Maximum number of emails in QA
Maximum number of emails in the questions/answers to be taken into account for the indexing.

Maximum email age of QA
Maximum number of days of life of the questions/answers emails.

4.6.2 Checking the indexing times of the previous night

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **AI Engine Management**.
2. Click **Database management**.

   In the **Indexing time of this night** area, ALE Connect shows the durations that the engine has selected to index data during the previous night.



Indexing time of this night	
Insertion time of the new emails of the day:	0 min.
Indexing time of the response template database:	0 min.
QA database indexing time:	0 min.
Calibration time of automatic replies:	min.
Total time for this business unit:	0 min.
Total time for all business units:	0 min.

   You can thus view:
   - the insertion time of the day’s new emails into the database tables,
   - the indexing time of the response template database,
   - the indexing time of the question/answer database,
   - the calibration time of automatic replies,
   - the total indexing time for this business unit,
   - the total indexing time for all business units.

4.6.3 Analysing response templates

You can view the list of response templates used over the last 15 days.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Knowledge Base** > **AI Engine Management**.
2. Click **Analysis of response templates**.

   The list indicates, for each response template, the theme to which it belongs, its frequency of use during the period and the percentage of relevance.

   The **relevance** is the percentage of the number of times the response template determined by the artificial intelligence engine was actually used compared to the number of times it was suggested by the engine.

   The **frequency of use** of a response template is the number of times the response template has been sent when processing an email over the last seven days.

   The list of response templates can be ordered by theme, frequency of use or relevance: use the scrolling list to change the way the list is displayed. Each response template in the list can be viewed in a pop-up window by clicking its name.

5 Users

This chapter is dedicated to the management of ALE Connect users. A user is any person who may use ALE Connect, regardless of the interface (administration and/or agent).

From the administration interface, you will be able to:

- create and manage the user accounts on a daily basis,
- assign them a business profile (agent, supervisor or coordinator),
- create the user groups,
- create and manage the different profiles (realtime, chat, etc.),
- view the operational statuses of agents.

5.1 Users

This functionality allows you to create and manage all the users of the ALE Connect platform. This management is performed by the coordinator, at the tenant level.

5.1.1 Users created by the provisioning

All the ALE Connect users have a profile (agent, supervisor or coordinator) that determines their access rights to the different functionalities.

The agents and supervisors are automatically created by the provisioning:

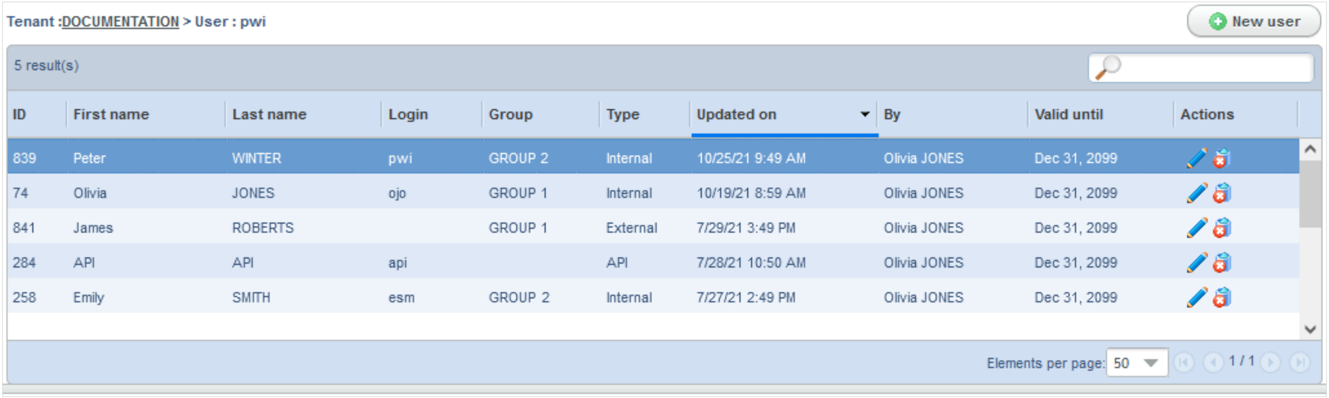
- The name, first name and language are those configured for OXE users.
- The login, email and time zone are those configured in Rainbow.

Agents and **supervisors** are attached when creating the DEFAULTUSERGROUP group. Supervisors have a supervision profile on the DEFAULTUSERGROUP group.

Coordinators, if they are not agent or supervisor, must be created manually as users, by another coordinator. Their login must be the Rainbow email address.

5.1.2 Overview

This functionality is available from the **Administration** > **Tenants** > **Users** menu. The upper part of the screen displays the list of all existing users. By default, they are ordered alphabetically by name. Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column.



Tenant :DOCUMENTATION > User : pwi

New user

5 result(s)

ID	First name	Last name	Login	Group	Type	Updated on	By	Valid until	Actions
839	Peter	WINTER	pwi	GROUP 2	Internal	10/25/21 9:49 AM	Olivia JONES	Dec 31, 2099	
74	Olivia	JONES	ojo	GROUP 1	Internal	10/19/21 8:59 AM	Olivia JONES	Dec 31, 2099	
841	James	ROBERTS		GROUP 1	External	7/29/21 3:49 PM	Olivia JONES	Dec 31, 2099	
284	API	API	api		API	7/28/21 10:50 AM	Olivia JONES	Dec 31, 2099	
258	Emily	SMITH	esm	GROUP 2	Internal	7/27/21 2:49 PM	Olivia JONES	Dec 31, 2099	

Elements per page: 50 1 / 1

For each of them, you can view:

- unique ID,
- first name,
- last name,
- ALE Connect login,
- group to which he/she belongs,
- type of group (internal or external),
- last update date and time of the sheet,
- user who performed the action,
- validity end date of the user’s account,
- available actions.

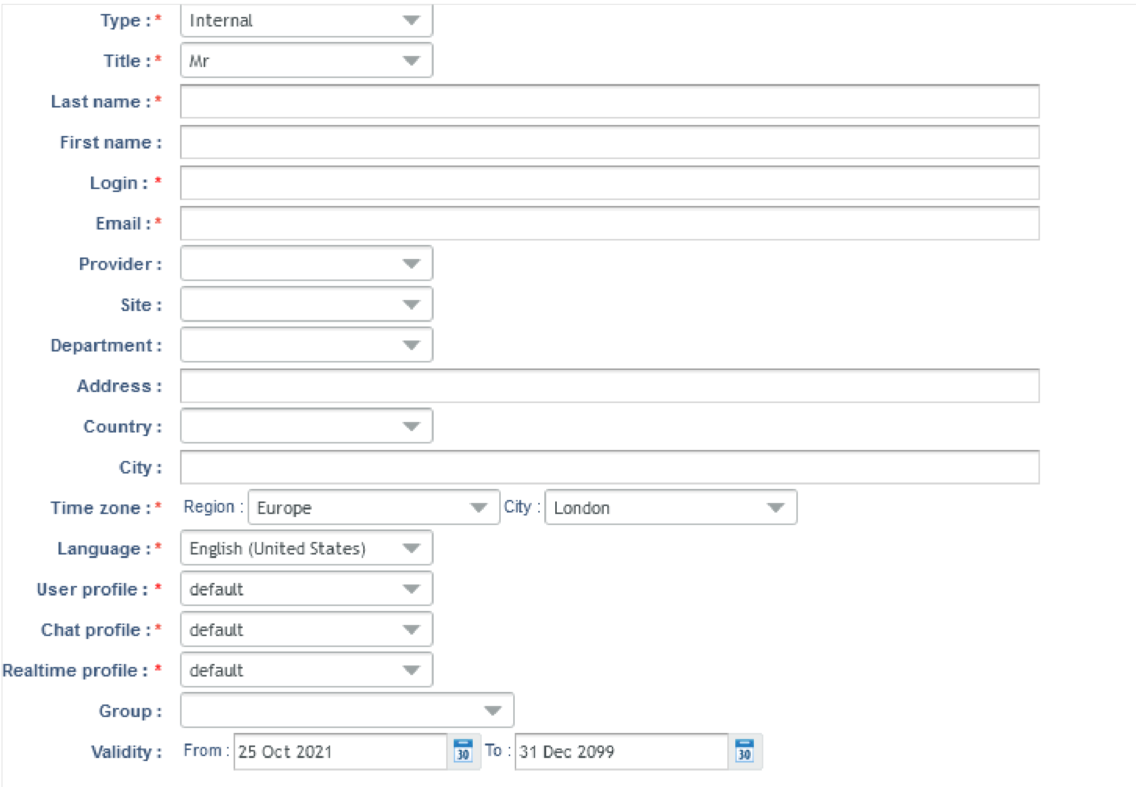
5.1.3 Internal or external user?

ALE Connect distinguishes two types of user:

- **Internal user**: he/she is declared in ALE Connect through a detailed sheet. He/She is agent, supervisor or coordinator. Each internal user must be assigned to a user group for which he/she inherits the rights on the queues and skills, in order to log in to the interface. The assignment of the internal user to his/her group is performed either when creating his/her sheet (if the user group already exists) or from the user group.
- **External user**: he/she is in charge of processing emails without being logged in to ALE Connect. He/She then decides what action to perform on each folder: process it (from the received email), archive it, suggest it for deletion, or refuse it. The folders are sent to external agents either automatically by a routing rule (the message meets specific criteria), or manually by forwarding from an internal agent. Like internal users, an external user must be declared in the application and assigned to a group of external users.

5.1.4 Creating an internal user

1. From the **Administration** tab, click **Tenants** > **Users**.
2. Click the **New user** button.
3. You must select the **Internal** type.



4. Fill in the properties of the user.
5. Click **Save**: the user account is now created.
6. Customise the user's signatures used to send replies.
7. Define the user's skills and his/her levels of expertise.
8. Fill in his/her language levels.
9. If the user is a supervisor, indicate the groups he/she supervises.

5.1.4.1 Properties tab

This tab allows you to identify the user and to fill in his/her personal information. When the user is created following a provisioning processing, some fields are already filled in by default.

Warning: the fields to fill in may vary according to the user sheet set up. The explanations below only describe the standard user sheet provided by ALE Connect by default.

1. From the **Administration** tab, click **Tenants** > **Users**.
2. Select the affected user by clicking the corresponding line.
3. Click the **Properties** tab.
4. Fill in the following information:

   Title (mandatory)

   Select, from the suggested list, the user's title (Mr. by default). Titles are hard-coded in the system. It is not possible to create one.

   Last name (mandatory) / First name

   Fill in the user's last name and first name. By default, when the user is created following to a provisioning processing, the first and last names are those declared in OXE.

   Login (mandatory)

   Enter an ID of 50 characters maximum. The user will have to fill it in when logging in to ALE Connect. Each login must be unique. By default, when the user is created following a provisioning processing, the login is the one declared in Rainbow.

   Email (mandatory)

   Fill in the user's email address. By default, when the user is created following a provisioning processing, the email address is initialised with the Rainbow login.

   Address

   Enter the user's postal address.

   Country

   Select, from the suggested list, the country where the user lives.

   City

   Enter the city where the user lives.

   Time zone (mandatory)

   Select, from the suggested list, the region and city of the time zone that ALE Connect must use. By default, when the user is created following a provisioning processing, the time zone is the one declared in Rainbow.

   Language (mandatory)

   Select, from the suggested list, the display language of the ALE Connect interfaces for this user. By default, when the user is created following a provisioning processing, the language is the one declared in OXE.

User profile (mandatory)

Assign a user profile to the user. It defines his/her rights on the agent interface, especially for the processing of emails. It must be previously created, in the Administration > Tenants > Users > User Profiles menu.

Chat profile (mandatory)

If the user needs to process chats with web users, assign a chat profileto him/her. This chat profile defines the conditions under which the chats can be distributed. Chat profiles must be previously created, in the Administration > Tenants > Users > Chat Profiles menu.

Realtime profile (mandatory)

Select the realtime profile that must be assigned to the user. The realtime profiles must be previously created, in the Administration > Tenants > Users > Realtime Profiles and Agent Statuses menu.

Group

Select, from the suggested list, the internal group to which the user belongs. The groups must be previously created, in the Administration > Tenants > Users > User Groups menu. The user then inherits the rights to the queues, processing parameters, languages and skills of the group. If no group has been created or if the user is not an agent, let the field blank.

Validity from/to

Fill in the validity period of the user account. The start date is, by default, the current date. You can either enter the dates in the corresponding fields, in DD/MM/YYYY format, or select them from the calendar.

5. Click **Save**.

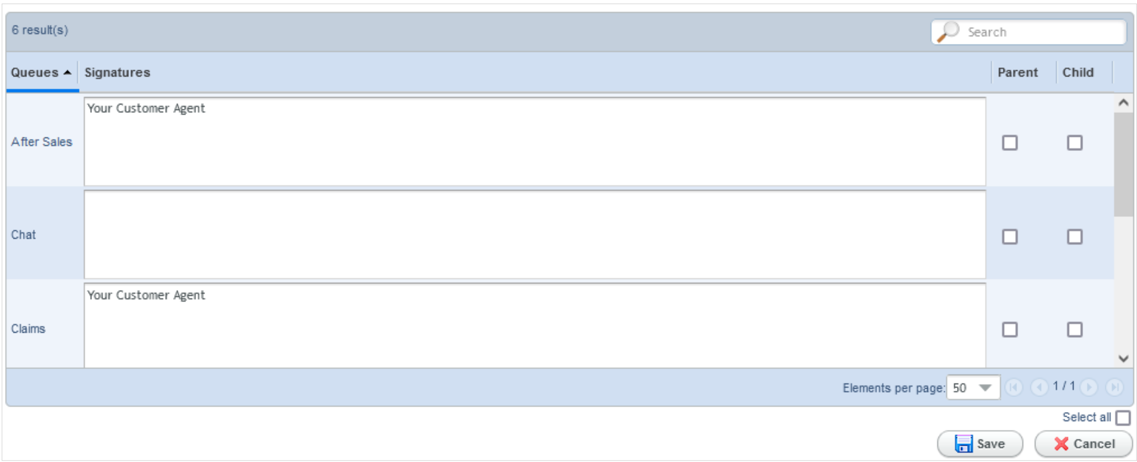
5.1.4.2 Signatures tab

The emails processed by the user can be customised by a signature automatically inserted. To display it at the bottom of his/her emails, it must be activated when setting up the internal group to which the agent belongs: Queues tab, Signature parameter.

If the user needs to process chats, it is possible to set up a signature by chat queue. It will then be used as a **nickname** to identify the user during a conversation with the web user. If no signature has been defined for the queue, the user's **login** will be used.

In all cases, the user can have several signatures, but only one by queue to which he has access.

1. From the **Administration** tab, click **Tenants** > **Users**.
2. Select the affected user by clicking the corresponding line.
3. Click the **Signatures** tab.



4. For each queue on which the user has rights, enter the text of his/her signature.
5. To go faster, you can duplicate an existing signature by checking the **Parent** box for it (it is therefore the template to copy). Then, check the **Child** box for each queue that must inherits this signature.
6. Click **Save** to validate the entry.

5.1.4.3 Skill level tab

A skill is an ability, a professional know-how allowing the agent to perform various tasks (e.g. a mechanical skill to process the after-sales service repair folders). ALE Connect relies on these skills to distribute the folders to be processed to the most appropriate agents.

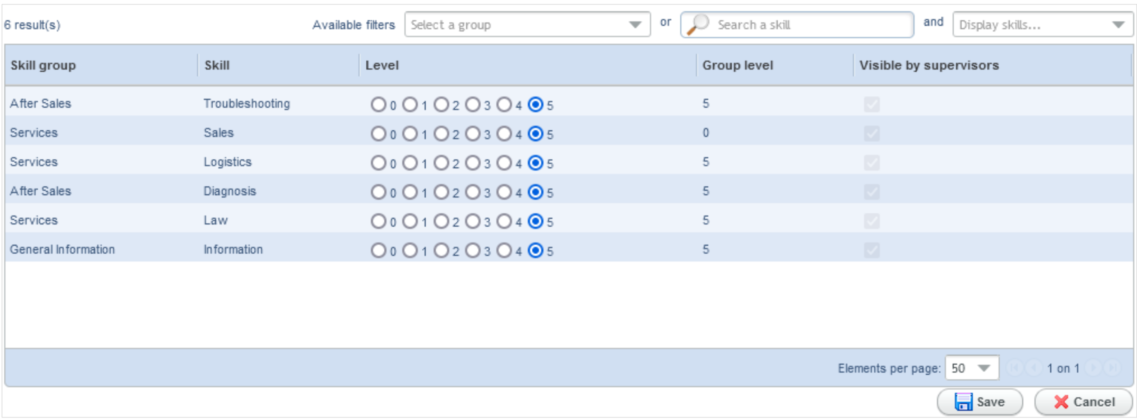
For each skill, you must rate the user's level here between 0 and 5; 5 being the highest level of expertise. On the contrary, 0 means that the agent does not have the skill: he/she is therefore not eligible to process interactions that require it. By default, the user inherits the skill levels of the internal group to which he/she belongs.

You can view and modify the skill levels of users (individually or by group) when you need to:

- regulate high or low activity,
- handle temporary or unexpected peaks (e.g. critical 6-7 pm time slot),
- favour the processing of a media (e.g. additional assignment of agents to chat realtime queues).

Warning: the skill levels only impact the distribution of chat conversations. Other media are not affected.

1. From the **Administration** tab, click **Tenants** > **Users**.
2. Select the affected user by clicking the corresponding line.
3. Click the **Skill level** tab.



ALE Connect displays the skills of the internal group to which the user belongs. If no group has been assigned to him/her, the tab is empty.

It is possible to limit the list by searching:
- the skill group to select,
- OR the skill name to enter in the area provided,
- AND by active skills (level higher or equal to 1), inactive skills (level equal to 0) or both.

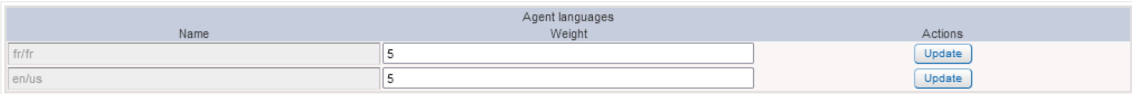
4. Check the user's level for each skill (from 1 to 5).
5. Click **Save**.

5.1.4.4 Language level tab

Like skills, you must rate here the user's level for each language by giving a score between 0 and 5; 5 being the highest level of expertise. On the contrary, 0 means that the agent does not speak the language: he/she is therefore not eligible to process interactions that require it.

Warning: by default, the user inherits all the language levels of the internal group to which he/she belongs.

1. From the **Administration** tab, click **Tenants** > **Users**.
2. Select the affected user by clicking the corresponding line.
3. Click the **Language level** tab.

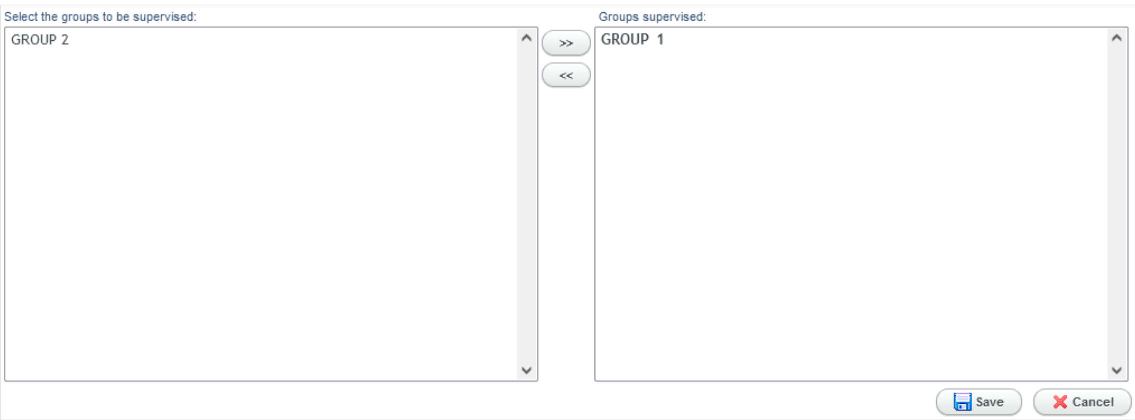


4. Fill in the user's level for each language (from 0 to 5).
5. Click **Update** to save your entry.

5.1.4.5 Groups supervised tab

This tab allows to assign the supervisor profile to the user by declaring the internal user group(s) he/she has to supervise. Following this assignment, the user has access to all supervision functionalities on his/her ALE Connect interface (dashboards, reporting, etc.).

1. From the **Administration** tab, click **Tenants** > **Users**.
2. Select the affected user by clicking the corresponding line.
3. Click the **Groups supervised** tab.



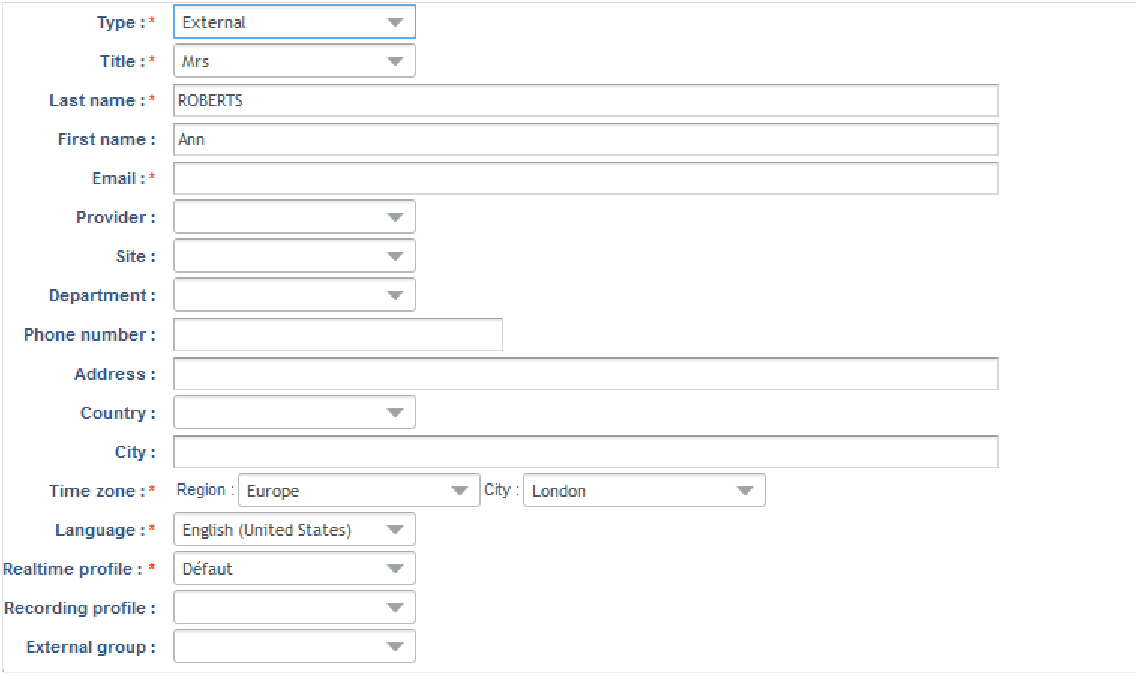
4. Select the internal groups that the user needs to supervise.

   To perform the selection, **double-click** the affected group or select it and then click the **[>>] button** to assign it. The groups for which the user is the supervisor are then displayed on the right side. On the contrary, it is possible to delete an assignment if necessary.

5. Click **Save** to save your entry.

5.1.5 Creating an external user

1. From the **Administration** tab, click **Tenants** > **Users**.
2. Click the **New user** button.
3. You must select the **External** type.



4. Fill in the following information:

Title (mandatory)

Select, from the suggested list, the external user's title (Mr. by default). Titles are hard-coded in the system. It is not possible to create one.

Last name (mandatory) / First name

Fill in the external user's last name and first name.

Email (mandatory)

Enter the external user's email address.

Phone number

Enter the phone number where the external user can be reached.

Address

Enter the external user's postal address.

Country

Select, from the suggested list, the country where the external user lives.

City

Enter the city where the external user lives.

Time zone (mandatory)

Select, from the suggested list, the region and city of the time zone that ALE Connect must use.

Language (mandatory)

Select, from the suggested list, the working language of the external user.

Realtime profile (mandatory)

Select the realtime profile to be assigned to the user. It must be previously created, in the Administration > Tenants > Users > Realtime Profiles and Agent Statuses menu.

External group

Select, from the suggested list, the external group to which the user belongs. The groups must be previously created, in the Administration > Tenants > Users > User Groups menu. This field is optional.

5. Click **Save**.

5.1.6 Creating an API user

Warning: functionality reserved exclusively for the use of the External CRM extension only. Please refer to the *Integration* guide for further information.

One of the functionalities of the External CRM extension allows users with no access to ALE Connect to access the ALE Connect history of folders for a given contact. This access is performed from the company's information system, by calling a URL address pointing to the ALE Connect server. So that ALE Connect allows the access to this history, it is mandatory to create an API user, and then to generate an authentication token giving access rights. This token is used in the called URL.

Note: only a few fields of the **Properties** tab of the user sheet are useful. The other tabs do not require to be filled in.

1. From the **Administration** tab, click the **Tenants** > **Users** menu.
2. Click the **New user** button.
3. You must select the **API** type.
4. Fill in the following information:

Title (mandatory)
Select, from the suggested list, the API user's title (Mr. by default). Titles are hard-coded in the system. It is not possible to create one.

Last name (mandatory) / First name
Fill in the API user's last name and first name.

Login (mandatory)
Enter an ID of 50 characters maximum. The user will have to fill it in when logging in to ALE Connect. Each login must be unique.

Token
This field displays the authentication token of the API user account, once it has been generated by simply clicking the corresponding button (accessible only when editing the sheet).

Password / Confirm password
Not applicable.

Email (mandatory)
Fill in the email address of the API user account.

Phone number
Not applicable.

Address
Not applicable.

City
Not applicable.

Time zone (mandatory)
Select, from the suggested list, the region and city of the time zone that ALE Connect must use.

Language (mandatory)

Select, from the suggested list, the display language of the ALE Connect interfaces for this user.

User profile (mandatory)

Not applicable. Let the default value selected.

Chat profile (mandatory)

Not applicable. Let the default value selected.

Realtime profile (mandatory)

Not applicable. Let the default value selected.

Group

Since this user will not process interactions, let the field blank.

Validity from/to

Fill in the validity period of the user account. The start date is, by default, the current date. You can either enter the dates in the corresponding fields, in DD/MM/YYYY format, or select them from the calendar.

5. Click **Save**.
6. Click the **Modify** button () located on the line of the newly created API user.
7. Click the **Generate a new token** button.

   The authentication token of the API user is automatically generated.

5.1.7 Assigning a business profile to a user

Once the user has been created, you must associate a profile with it:

- Coordinator
- Supervisor

Warning: any user who is not coordinator or supervisor is considered as an agent.

5.1.8 Modifying a user

1. From the **Administration** tab, click the **Tenants** > **Users** menu.
2. Click the **Modify** button ( ) located on the line of the affected user.
3. Modify the desired properties, whether it is an internal user or an external user.
4. Click **Save**.

5.1.9 Deleting a user

Warning: when a user is deleted, he/she no longer appears in the database but is not deleted from the statistics database (BI).

If you wish to delete a user but retain a view on his/her past activity, you must let the user is his/her group, and then only then delete his/her account. On the contrary, any reference to the user group will also be deleted from the BI database and therefore no more statistics will be available.

1. From the **Administration** tab, click the **Tenants** > **Users** menu.
2. Click the **Delete** button ( ) located on the line of the concerned user.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes**.

5.2 User form

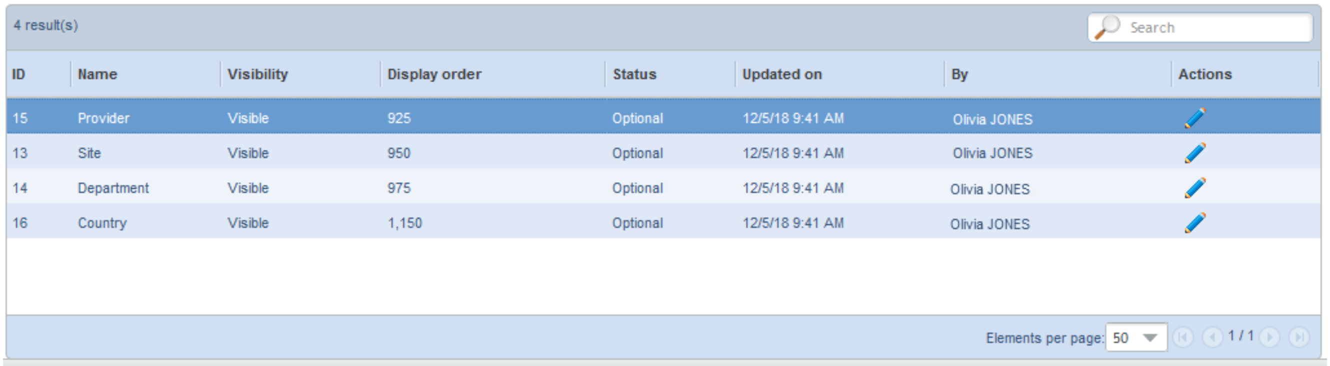
The standard user sheet offers a number of fields. However, you can add your own fields to adapt it to your needs. They can then be used in the D or D+ reports as dimensions.

Warning: the fields created here are applied to all users of the tenant.

5.2.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Users** > **User Form** menu. The upper part of the screen displays the list of all user fields. By default, they are sorted by display order. Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column.

ALE Connect natively provides 4 predefined and undeletable user fields: Provider, Site, Department and Country.



4 result(s)

Search

ID	Name	Visibility	Display order	Status	Updated on	By	Actions
15	Provider	Visible	925	Optional	12/5/18 9:41 AM	Olivia JONES	
13	Site	Visible	950	Optional	12/5/18 9:41 AM	Olivia JONES	
14	Department	Visible	975	Optional	12/5/18 9:41 AM	Olivia JONES	
16	Country	Visible	1,150	Optional	12/5/18 9:41 AM	Olivia JONES	

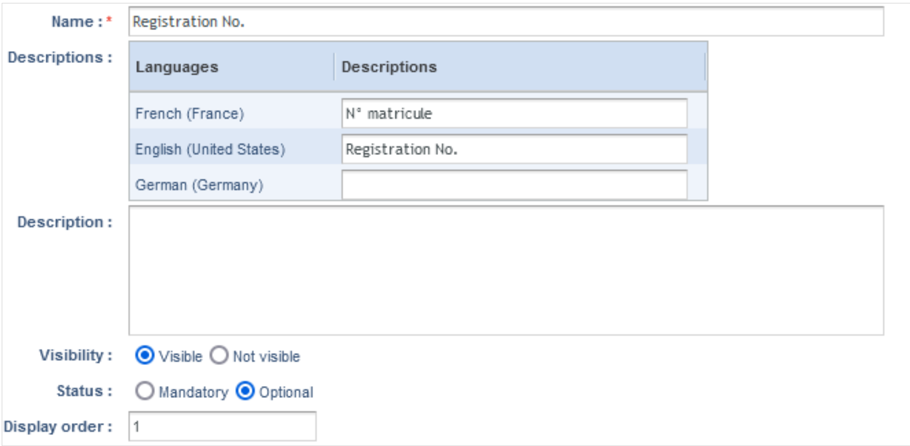
Elements per page: 50 1 / 1

For each of them, you can view:

- unique ID assigned by the system,
- name,
- information of whether or not the field is displayed in the user sheet,
- display position in the user sheet,
- information of whether or not this field is mandatory in the user sheet,
- date and time of last update,
- user who performed the action,
- possible actions represented by an icon.

5.2.2 Creating a user field

1. From the **Administration** tab, click **Tenants** > **Users** > **User Form**.
2. Click the **New field** button. The following screen is displayed:



3. You must enter the **name** of the field.
4. Enter its **description** in the different languages of the application.
5. Add an additional **description** if you wish to give details on its use.
6. Indicate, by checking the corresponding option, whether the field must be visible in the user sheet or not. By default, a field is visible.
7. Indicate if the field is **mandatory** or **optional** (default choice) when entering the user sheet, by checking the corresponding option.
8. Enter the **display order** of the field i.e. its position in the user sheet. Each static field in the form has an order from 100 to 100. The new fields are inserted between these values.
9. If the field has several possible values, add them. These values will be presented as a scrolling list of choices in the user sheet. Then choose the default value (optional).
10. Click **Save** to save your entry.

5.2.3 Adding values to a field

Depending on the information to be filled in, you can predefine a list of values from which you will only have to select the desired one. It is possible to add values at any time.

Warning: for the Country field, the list of values is defined by default in the system and cannot be modified.

1. From the **Administration** tab, click **Tenants** > **Users** > **User Form**.
2. Click the **Modify** button () located on the line of the affected field.
3. Click the **New value** button.

   The following screen is displayed:

Name	Display order	Descriptions in French	Descriptions in English	Descriptions in German	actions
Value 1	1	Valeur 1			
Value 2	2	Valeur 2			
Value 3	3	Valeur 3			

4. Enter its name, display order, and descriptions in the various languages.
5. Repeat the last two steps for each value to add.
6. Select the default value if you wish. If no value is selected, the field will be blank by default.
7. Click **Save** to save your entry.

5.2.4 Modifying a user field

1. From the **Administration** tab, click **Tenants** > **Users** > **User Form**.
2. Click the **Modify** button () located on the line of the affected field.
3. Modify the desired characteristics (refer to the creation).
4. Click **Save** to save your entry.

5.2.5 Deleting a user field

Only hard-coded fields in the system (provider, site, department and country) cannot be deleted.

1. From the **Administration** tab, click **Tenants** > **Users** > **User Form**.
2. Click the **Delete** button () located on the line of the affected field.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes**.

   ALE Connect updates the list: the field is no longer displayed.

5.3 User statuses

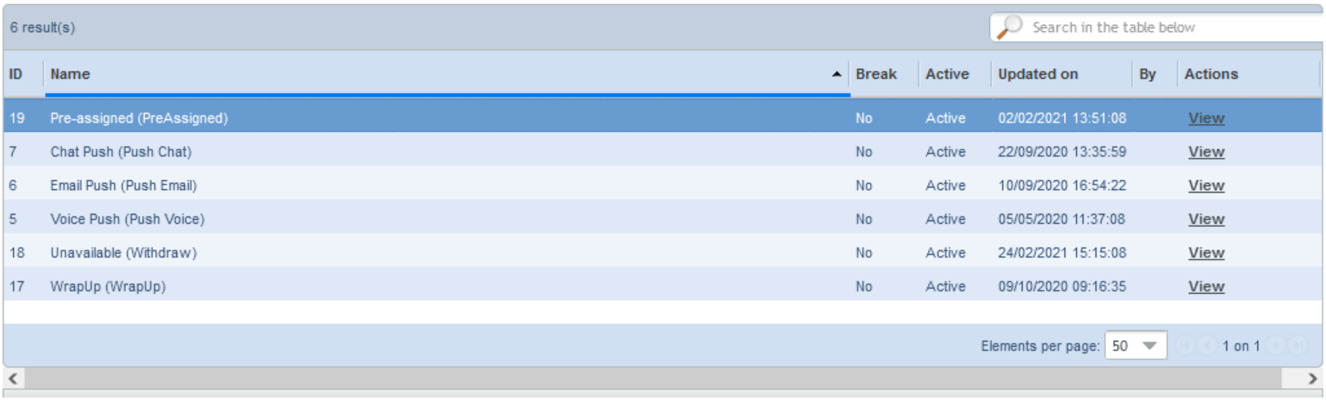
On their ALE Connect interface, the agents can choose their operational status: it indicates, in real time, what the agent is doing while communicating his/her availability to other users logged in. It is represented by a round icon (cannot be customised) and a name specifying the task performed.

This functionality allows you to view all the operational statuses available in ALE Connect. **They are created by default: you cannot add, modify or delete them.** However, you must assign them to the realtime profiles of the users affected, so that they are available on the agent interface.

Note: ALE Connect memorises the time spent in each status, over different periods. It can be viewed by the supervisors through detailed analysis reports.

5.3.1 Overview

This functionality is accessible from the **Administration** > **Tenants > Users > User Statuses** menu. The upper part of the screen displays the list of all existing statuses.



6 result(s)

Search in the table below

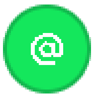
ID	Name	Break	Active	Updated on	By	Actions
19	Pre-assigned (PreAssigned)	No	Active	02/02/2021 13:51:08		View
7	Chat Push (Push Chat)	No	Active	22/09/2020 13:35:59		View
6	Email Push (Push Email)	No	Active	10/09/2020 16:54:22		View
5	Voice Push (Push Voice)	No	Active	05/05/2020 11:37:08		View
18	Unavailable (Withdraw)	No	Active	24/02/2021 15:15:08		View
17	WrapUp (WrapUp)	No	Active	09/10/2020 09:16:35		View

Elements per page: 50 1 on 1

For each status, you can view:

- unique ID,
- name,
- information specifying whether or not the user is on break with this status,
- information specifying whether or not the status is active,
- date and time of last update,
- last user who modified it,
- link to view its properties.

5.3.2 Available statuses

Status name	Icon	What the agent can do
Pre-assigned		Particular status in which the agent may find himself/herself temporarily, when his/her supervisor changes his/her processing group. This status displays a greyed out circle to indicate that the agent should wait until the operation is complete.
Push Chat		The agent can only process chats pushed by ALE Connect. Nevertheless, with this status, the agent remains free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions).
Push Email		The agent can only process emails pushed by ALE Connect. Nevertheless, with this status, the agent remains free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions).
Push Voice		The agent can only process calls pushed by ALE Connect. Nevertheless, with this status, the agent remains free to process other folders at the same time in pull mode (emails, Facebook Messenger or Twitter interactions).
Withdraw		The agent is temporarily on break. The interaction distribution in push mode stops. It restarts when the agent changes his/her operational status.
WrapUp		This temporary status allows the agent to momentarily interrupt the distribution of interactions in push mode, to allow the agent to finish an additional task. The duration of the wrap-up status is limited: when the time is up, the agent automatically returns to the operational status he/she had before being in wrap-up.

5.4 Business profiles

Each user declared in ALE Connect must have a profile that determines his/her role and access to functionalities, on the administration and agent/supervisor interfaces.

There are 3 profiles:

- Coordinator
- Supervisor
- Agent

5.4.1 The coordinator

This user profile has full rights to set up a tenant. He/She can thus use all the functionalities related to its business units. On the other hand, he/she has access to certain technical extensions (such as advanced routing).

Warning: the first coordinator is created manually by AKIO when creating the tenant.

5.4.1.1 His/Her functions

From the administration interface, he/she can act on each business unit of his/her tenant:

- He/She manages all the options of the queues, except for their creation.
- He/She manages all the lists of the business units (address book, qualification criteria, redirection profile, etc.).
- He/She creates the management and routing rules.
- He/She defines the activity calendar.
- He/She manages the entire knowledge base.
- He/She creates and assigns the waiting emails, HTML templates and alarm thresholds.
- He/She creates the signature of each business unit.
- He/She creates the users, then defines the profile of each one, on their respective business unit.
- He/She creates and defines the user groups.
- He/She assigns the agents to the user groups.

5.4.1.2 Assigning the coordinator profile

1. From the **Administration** tab, click **Tenants** > **Coordinators**.
2. Click the **Add** button to display the list of the existing users.
3. Select, from the list, the desired user by checking the corresponding box (multiple selection allowed).
4. Click **Add** to validate the assignment.

   ALE Connect updates the list of coordinators of the system.

5.4.1.3 Removing the coordinator profile

1. From the **Administration** tab, click **Tenants** > **Coordinators**.
2. Select, from the list, the coordinator to whom you wish to remove the rights by checking the corresponding box (multiple selection allowed).
3. Click **Remove** to validate the action.
4. ALE Connect asks you to confirm the deletion of the element.
5. Click **Yes** to permanently delete the element (or **No** to abandon this action).

   ALE Connect updates the list of coordinators of the system.

5.4.2 The supervisor

In a contact centre, the supervisor is in charge of one or several groups of agents. He/She often combines the roles of agent and supervisor. As operational, he/she manages the activity and supports the agents he/she supervises in their daily tasks. A user can be supervisor on one tenant only. If the same person has to supervise groups of users on several tenants, he/she must own several logins.

5.4.2.1 His/Her functions

From the **administration interface**, he/she can:

- access the Administration tab only,
- view the business units on which the user groups supervised have rights,
- view the queues associated with these business units,
- create or modify the waiting messages of the business units,
- modify the calendar of the business units,
- create or modify the HTML templates of the business units,
- create or modify the introduction and conclusion messages of the business units,
- manage the knowledge base,
- manage the address book of the business units,
- create users only for the supervised groups,
- modify the user sheets of supervised groups.
- assign user profiles to the supervised users,
- assign chat profiles to the supervised users,
- view and modify the rights of supervised user groups,
- change the group of supervised users,
- view the list of supervised users logged in to ALE Connect.

On the **agent interface**, he/she can access functionalities not visible to the agents:

- dashboarding application to ensure realtime follow-up of the activity,
- statistics and reporting module to analyse the results,
- picking to check the responses from agents by random sampling,
- desktop to permanently delete the folders moved to the recycle bin by the agents or to reactivate them,
- desktop to validate or refuse the replies written by the agents before sending them,
- export of contacts to a file.

5.4.2.2 Assigning the supervisor profile

There are two ways to perform the assignment: either via the sheet of an internal user group, or via a user sheet. The result is the same in both cases.

Method #1

It consists in declaring a specific user as the supervisor of a group.

1. From the **Administration** tab, click **User Groups** > **Internal**.
2. Select, from the list, the user group to supervise.
3. Click the **Supervisors** tab.
4. Click the **Add supervisors** button: ALE Connect displays the list of internal users who do not have this profile.
5. Check the users to whom you wish to assign the supervisor profile (multiple selection allowed).
6. Click the **Add selected supervisors** button to validate the assignment.

   ALE Connect updates the list of supervisors.

Method #2

It consists in declaring the user groups that the user must supervise.

1. From the **Administration** tab, click **Users**.
2. Select, from the list, the user affected.
3. Click the **Groups supervised** tab.
4. Select the group(s) that the user needs to supervise.
5. Click **Save** to save your entry.

5.4.2.3 Removing the supervisor profile

Method #1

This functionality is only accessible to a coordinator.

1. From the **Administration** tab, click **User Groups** > **Internal**.
2. Select, from the list, the affected user group.
3. Click the **Supervisors** tab. ALE Connect displays the list of supervisors for the group.
4. Check the supervisors from whom you wish to remove the profile (multiple selection allowed).
5. Click the **Remove selected supervisors** button.

   ALE Connect updates the list of supervisors.

Method #2

1. From the **Administration** tab, click **Users**.
2. Select, from the list, the user affected.
3. Click the **Groups supervised** tab.
4. Deselect the group(s) supervised.
5. Click **Save** to save your entry.

5.4.3 The agent

The agent is an advisor who processes interactions with contacts (calls, emails, etc.). He has skills on which the system relies to distribute the interactions. Unlike the other profiles, the agent profile is not assigned to an internal user. He/She gets the agent profile as soon as he/she is attached to a user group for which the access rights to at least one queue have been set up. In other words, any user who is not coordinator or supervisor is considered as an agent.

With ALE Connect, the agent processes interactions according to its read and write rights on the corresponding queues. However, he/she does not have access to the administration interface. An agent is associated with a tenant: he/she can therefore have rights on queues of different business units of this tenant.

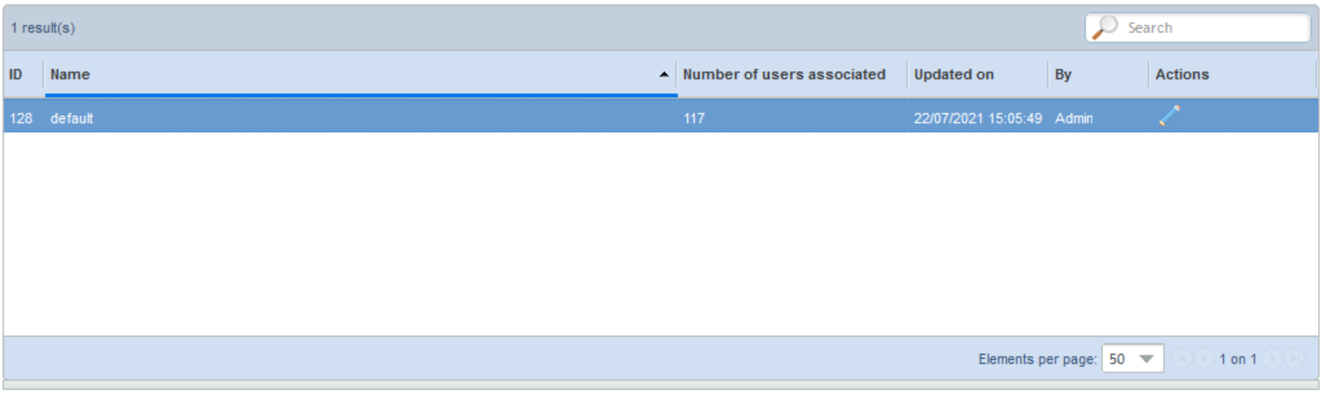
5.5 User profiles

A user profile defines the functionalities allowed to the agents and supervisors on their ALE Connect interface. They mainly concern the processing of emails. Each user can only have one user profile, visible in his/her sheet.

Warning: a default user profile is provided by ALE Connect.

5.5.1 Overview

This functionality is accessible from the **Administration** > **Tenants > Users > User Profiles** menu. The upper part of the screen displays the list of all existing user profiles. By default, they are sorted by name in ascending alphabetical order (A-Z). Nevertheless, it is possible to sort the list according to the criterion of your choice, by clicking the desired column header.



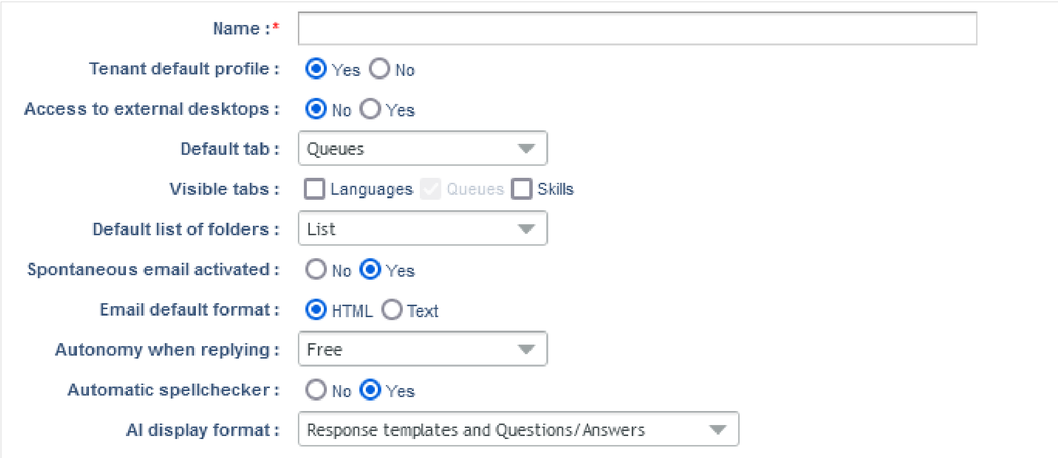
For each profile, you can view:

- unique ID,
- name,
- total number of users with this profile,
- date and time of last update,
- user who created or modified it,
- possible actions represented by an icon.

5.5.2 Creating a user profile

1. From the **Administration** tab, click **Tenants** > **Users** > **User Profiles**.
2. Click the **Add a new profile** button.

   The following screen is displayed:



3. Fill in the following parameters:

   Name (mandatory)
   Fill in a name that clearly identifies the nature of the profile and its users.

   Tenant default profile
   Indicate, by checking the corresponding option, whether or not this user profile must be assigned by default to any new user of the tenant. There can only be one default user profile for a tenant. It cannot be deleted directly: you must first define a new default profile in order to delete the current profile.

   Note: modifying this option does not impact the user profiles already assigned to agents.

   Access to external desktops
   The contact centre may have to delegate the processing of certain specific folders, on an episodic basis, to people external to the company: in ALE Connect, they are called external agents. The external agent works with the contact centre, but is not part of the company's workforce. As a result, he/she does not have access to ALE Connect and therefore does not need a license. His/Her role is to process the emails sent to him/her by the agents. Each folder is sent to him/her as an email; his/her mailbox is used as a working tool. Unlike experts, the external agent is responsible for responding directly to the contact without any intermediary for validation. As this is a special circuit, these folders are stored separately in external desktops of the agent interface. You must therefore indicate here whether or not the agents with this profile have access to external desktops. If not (default choice), they will be hidden in their ALE Connect interface.

   Default tab
   On his/her ALE Connect interface, the agent can display the list of folders sorted by queues, skills or languages (regardless of the desktop). Among these three proposals, select the tab that must be displayed by default.

Visible tabs

In addition of the previous option, check the tabs that will allow the agent to view the list of folders sorted by queues, skills and/or languages in his/her ALE Connect interface. The default tab is checked and greyed out. However, a deactivated tab is displayed on the agent interface, but is not accessible.

Default list of folders

It is possible to limit the display of the list of folders, no matter the desktop, by applying a default filter:
List: no filter is applied on the list (default option). All the folders are displayed.
Filtered: only the folders assigned to the logged in agent and those without assignment are displayed. Folders assigned to other agents are hidden.
My list: same as the Filtered option but the number of unassigned folders is reduced according to the Number of new folders (My list) (0 - 255) parameter. This option is only available for the internal desktop of folders in progress.

Number of new folders (My list) (0 - 255)

This parameter is only displayed when the My list option has been selected as default filter of the list of folders. Indicate the maximum number of folders without assignment (from 0 to 255) that must be displayed in the list of folders in progress. Example: if you enter 3, only 3 unassigned folders with the most urgent priority will be displayed in the desktop (in addition to the folders assigned to the agent).

Deferred action activated (My list)

Parameter obsolete.

Spontaneous email activated

This option allows the agent (or a supervisor) to send emails to a recipient outside of the scope of a folder. If it is forbidden, he/she will not be able to send spontaneous emails to a queue, even if he/she is allowed to access this queue to process folders (Read/Reply parameter at the setup of queues level).

Email default format

Choose the format of incoming emails in the agent interface, by checking the desired option: Text or HTML.

Autonomy when replying

Choose the degree of autonomy for agents in this profile, when sending an email response to a contact. This parameter affects both emails sent as part of a folder and spontaneous emails.
Systematic validation: all the messages sent by the agent are submitted to the supervisor for validation.
Random validation: messages sent by the agent are randomly submitted to the supervisor for validation (about 1 in 10 responses are sent).
Free: the agent can reply without validation from the supervisor, unless the queue associated with the message sent is configured with a reply autonomy in systematic or random validation.

During N day(s) (0 = Always)

This parameter is displayed when the systematic or random validation has been selected in the previous option. Enter the number of days during which the agent replies will be systematically submitted to their supervisor for validation. After this deadline, ALE Connect will automatically switch agents back to free validation. The 0 value (default choice) indicates that this duration is unlimited and therefore makes this setup permanent.

Validation percentage

This parameter is displayed when the random validation has been chosen for the reply autonomy. Enter the global percentage of replies that will be submitted to the supervisor for validation, all agents included.

Automatic spellchecker

When the agent clicks one of the sending buttons of the email, ALE Connect automatically launches the spellchecker to analyse its content. If no error is detected, the email is sent. Otherwise, it is reported. If the agent clicks one of sending buttons a second time, the email is sent even if there are still errors.

AI display mode

When writing a reply to a contact, the agent has the option to be assisted by the ALE Connect artificial intelligence engine. It analyses the contact's request and suggests the most appropriate answers to the agent, so that he/she uses them as a basis for his/her response. Select the elements that the engine should suggest after querying:
Response templates and Questions/Answers: response templates and Q/A that are the most relevant to the request of the incoming message are displayed.
Response templates: only the most relevant response templates are displayed.
Questions/Answers: only the most relevant questions/answers are displayed.

4. Click **Save**.

   The system immediately updates the list of the existing user profiles: the new profile is displayed.

5.5.3 Assigning a profile to users

This procedure allows you to assign a user profile to several users in a single action. For internal users only, the profile assigned is visible in the user sheet (Administration > Tenants > Users > Properties tab menu).

5.5.3.1 Associating users with the profile

This procedure allows the mass assignment of a user profile to several users. However, you can also perform this association in the user sheet.

1. From the **Administration** tab, click **Tenants > Users > User Profiles**.
2. Select the profile to modify.
3. Click the **Users** tab.

   ALE Connect displays the list of all users who already have this user profile.
4. Click the **Add users** button.

   ALE Connect automatically displays the list of all users, internal and external, who do not yet have a user profile. For each of them, you can view his/her first name, last name, login, validity end date, group and future user profile.

   If the list is too long, you can search by using the available filters: by selecting a user profile from the list, OR a user group, OR by entering his/her name, first name or login. The entry area operates in “Contains" mode.
5. Select, from the obtained list, the users to be added.

   For a unitary selection, manually check each user to be added to the profile. To perform a multiple selection, you can select all the elements of the current page or select all (all pages).
6. When the selection is complete, click the **Add selected users** button.

   ALE Connect returns to the list of users in the profile: it has been updated.

5.5.3.2 Deleting an association

Any internal user must have a user profile: that is why this field is mandatory in the user sheet. It is therefore not possible to delete the assignment of a profile without replacing it by another.

There are two ways to change the user profile of an internal user:

- **Solution #1**: you change the sheet of the internal user affected directly, by selecting another user profile. The list of users of the new selected user profile is automatically updated. This procedure is to be preferred when it is punctual.
- **Solution #2**: you add users to the new user profile that you wish to assign to them. This action removes them from the former profile to which they were assigned. At the same time, ALE Connect updates the corresponding field in the user sheets affected.

For external users, only the second solution is available.

5.5.4 Modifying a user profile

Warning: agents and supervisors with this profile must log out from their ALE Connect interface and relog in, so that the changes are taken into account.

1. From the **Administration** tab, click **Tenants** > **Users** > **User Profiles**.
2. Click the **Modify** button () located on the line of the affected profile.
3. Modify, as needed, the properties of the user profile.
4. Click **Save** to save your entry.

   The system immediately updates the list of existing user profiles.

5.5.5 Deleting a user profile

It is not possible to delete a default user profile of the tenant.

1. From the **Administration** tab, click **Tenants** > **Users** > **User Profiles**.
2. Click the **Delete** button () located on the line of the affected profile. The system asks you to confirm the deletion.
3. Click **Yes** to permanently delete the profile, or **No** to abandon this action.

   ALE Connect updates the existing list: the deleted profile is no longer listed.

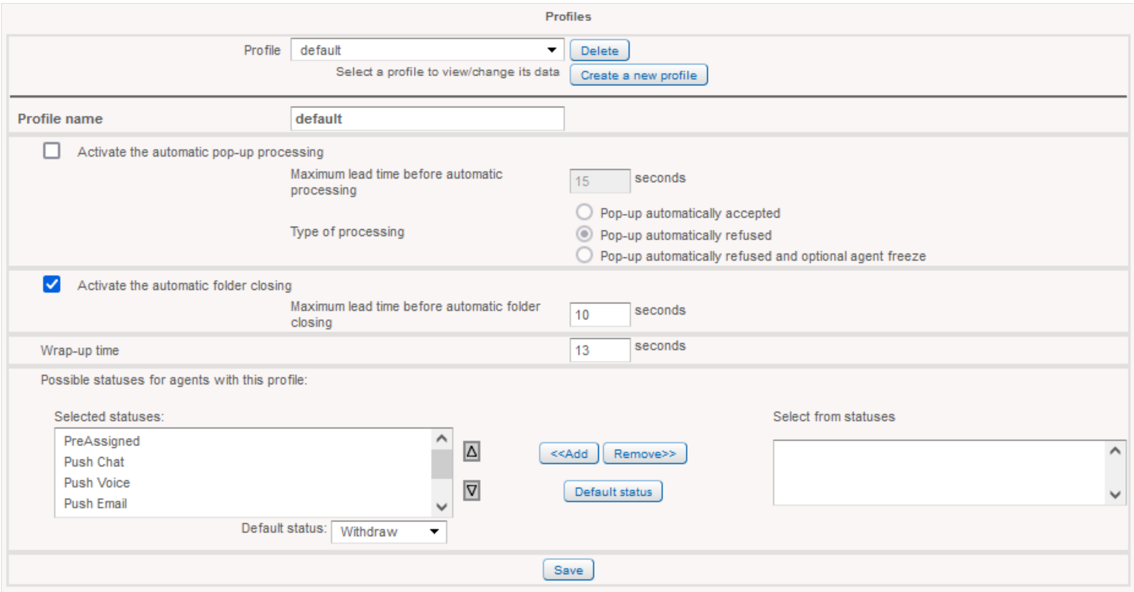
5.6 Realtime profiles and agent statuses

A realtime profile is a set of parameters that determine how incoming interactions (calls, chats and emails in push mode) are distributed to agents. It also allows to choose the user statuses that agents can select on their ALE Connect interface.

This parameter is common to all agents and supervisors to whom the profile is assigned, in their internal user sheet.

5.6.1 Creating a realtime profile

1. From the **Administration** tab, click **Tenants** > **Users** > **Realtime Profiles and Agent Statuses**.



2. Click the **Create a new profile** button.
3. Enter a **name** that clearly identifies the profile.
4. Fill in the following parameters:

Activate the automatic pop-up processing

Parameters unavailable.

Activate the automatic folder closing

If this option is checked, each folder is automatically closed after a certain time limit to be set up. Specify the **maximum lead time** in seconds that the agent has to finish processing the current folder before ALE Connect automatically closes it (between 1 and 600 seconds, 0 value forbidden).

Wrap-up time

Enter, in seconds, the amount of time an agent has between two interactions, i.e. the time between the closing of a folder and the presentation of a new interaction (call, chat, etc.). The value must be comprised between 1 and 30 seconds maximum. The 0 value is forbidden.

Possible statuses for agents with this profile

Selected statuses / Select from statuses

ALE Connect displays a list of available user statuses on the right of the screen. Select those to assign to the profile by using the **Add** and **Remove** buttons. You can then order the statuses in the desired order by clicking the Up and Down arrows. The list of statuses will be presented strictly in this order on the ALE Connect interface for agents and supervisors.

Note: the default realtime profile of the tenant already suggests the active statuses of the tenant.

Default status

Select, from the list, the default status of the agent, immediately after his/her login to the ALE Connect platform. Only active statuses are listed. The default status selected is Withdraw.

5. Click the **Save** button to validate your entry.

5.6.2 Modifying a realtime profile

You can adapt the setup if necessary, by modifying the realtime profile desired.

Warning: agents and supervisors with this profile must log out from their ALE Connect interface and relog in, so that the changes are taken into account.

1. From the **Administration** tab, click **Tenants** > **Users** > **Realtime Profiles and Agent Statuses**.
2. Select the profile to modify.
3. Perform the changes you wish.
4. Click the **Save** button to validate your entry.

5.6.3 Deleting a realtime profile

This action is possible at any time. It is not possible to delete the default realtime profile of the tenant.

1. From the **Administration** tab, click **Tenants** > **Users** > **Realtime Profiles and Agent Statuses**.
2. Select the profile to delete.
3. Click the **Delete** button.

   ALE Connect asks you to confirm the deletion.
4. Click **Yes** to permanently delete the profile.

   ALE Connect updates the existing list: the deleted profile is no longer listed.

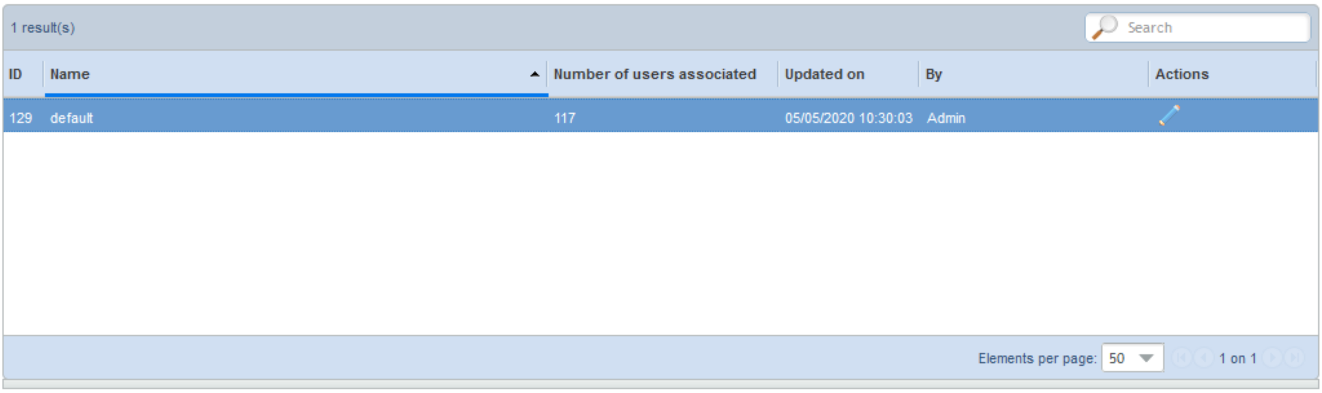
5.7 Chat profiles

A chat profile is a set of parameters related to the processing of chat conversations (instant messaging), such as the maximum number of simultaneous chats that an agent can process.

Warning: this functionality is only available if the license includes the Chat media.

5.7.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Users** > **Chat Profiles** menu. The upper part of the screen displays the list of all existing chat profiles: By default, they are sorted by name in ascending alphabetical order (A-Z). Nevertheless, it is possible to sort the list according to the criterion of your choice, by clicking the desired column header.



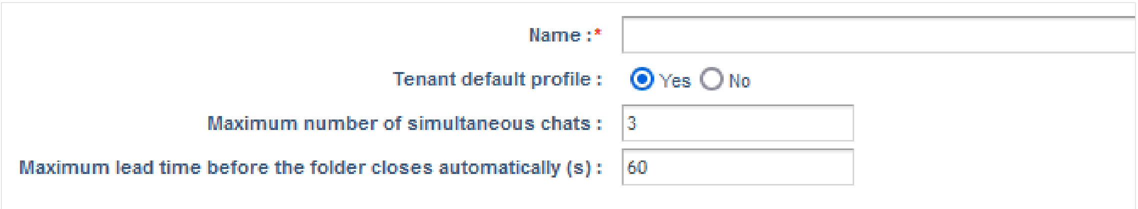
For each profile, you can view:

- unique ID,
- name,
- total number of users with this profile,
- date and time of last update,
- user who created or modified it,
- possible actions represented by an icon.

5.7.2 Creating a chat profile

Note that a chat profile named **Default** is natively provided by ALE Connect when the tenant is created.

1. From the **Administration** tab, click **Tenants** > **Users** > **Chat Profiles**.
2. Click the **Add a new profile** button.



3. Fill in the properties of the profile:

   Name (mandatory)
   Fill in a name that clearly identifies the nature of the profile and its users.

   Tenant default profile
   Indicate, by checking the corresponding option, whether or not this chat profile should be assigned by default to all new users of the tenant. The chat profile of a user can be changed via the Users tab, or from the user sheet. There can only be one default chat profile for a tenant. It cannot be deleted. A new default profile will first need to be defined in order to delete the current profile.

   Maximum number of simultaneous chats
   Define the maximum number of chat interactions that an agent can receive simultaneously (3 by default).

   Maximum lead time before the folder closes automatically (s)
   Enter, in seconds, the time left to the agent after closing the conversation, whether the conversation is initiated by the agent or the web user (60 seconds by default). This handling time, also called “wrap-up”, allows to finalise the folder and to qualify it. During this time, the agent is considered as being in conversation by the system. ALE Connect may submit a new chat interaction only if the agent has not reached yet his/her maximum number of simultaneous chats (see above).

   After this end of this period, the folder is automatically closed, even if the agent has not finished. He/She is then considered as available for a new chat interaction.

4. Click **Save** to save your entry.

   The system updates the list of existing chat profiles: the new profile is displayed.

5.7.3 Assigning a profile to users

This procedure allows you to assign a profile to several users in a single action. For internal users only, the chat profile assigned is visible from the user sheet (Administration > Tenants > Users > Properties tab).

5.7.3.1 Associating users with the profile

This procedure massively assigns a chat profile to N users. However, you can also perform this association in the user sheet.

1. From the **Administration** tab, click **Tenants** > **Users** > **Chat Profiles**.
2. Select the profile to modify.
3. Click the **Users** tab.

   ALE Connect displays the list of users who already have this profile.
4. Click the **Add users** button.

   ALE Connect automatically displays the list of all users, internal and external, who do not have a chat profile yet. For each of them, you can view his/her first name, last name, login, validity end date, group and future chat profile.

   If the list is too long, you can search by using the available filters: by selecting a user group, OR by entering his/her name, first name or login. The entry area operates in “Contains" mode.
5. Select, from the obtained list, the users to be added.

   For a unitary selection, manually check each user to be added to the profile. To perform a multiple selection, you can select all the elements of the current page or select all (all pages).
6. When the selection is complete, click the **Add selected users** button.

   ALE Connect returns to the list of users of the profile: it has been updated.

5.7.3.2 Deleting an association

Any internal user must have a chat profile: that is why this field is mandatory in the user sheet. It is therefore not possible to delete the assignment of a profile without replacing it by another.

There are two ways to change the chat profile of an internal user:

- **Solution #1**: you change the sheet of the internal user affected directly, by selecting another chat profile. The list of users of the newly selected chat profile is automatically updated. This procedure is to be preferred when it is punctual.
- **Solution #2**: you add users to the new chat profile that you wish to assign to them. This action removes them from the former profile to which they were assigned. At the same time, ALE Connect updates the corresponding field in the user sheets affected.

For external users, only the second solution is available.

5.7.4 Modifying a chat profile

Warning: agents and supervisors with this profile must log out from their ALE Connect interface and relog in, so that the changes are taken into account.

1. From the **Administration** tab, click **Tenants** > **Users** > **Chat Profiles**.
2. Click the **Modify** button () located on the line of the affected profile.
3. Modify, as needed, the properties of the chat profile.
4. Click **Save** to save your entry.

   The system updates the list of existing chat profiles.

5.7.5 Deleting a chat profile

It is not possible to delete the default chat profile of the tenant.

1. From the **Administration** tab, click **Tenants** > **Users** > **Chat Profiles**.
2. Click the **Delete** button () located on the line of the affected profile.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes**.

   ALE Connect updates the existing list: the deleted profile is no longer listed.

5.8 Internal groups

A user group allows to apply a set of parameters common to all users assigned to it. Any change of setup is therefore applied to all users in the group.

Warning: a user cannot belong to several groups.

In ALE Connect, there are two types of groups:

- Internal groups
- External groups

An internal group includes internal users with rights on queues, processing parameters, languages and skills. Any user assigned to an internal group automatically inherits the agent profile for the queues assigned to this group.

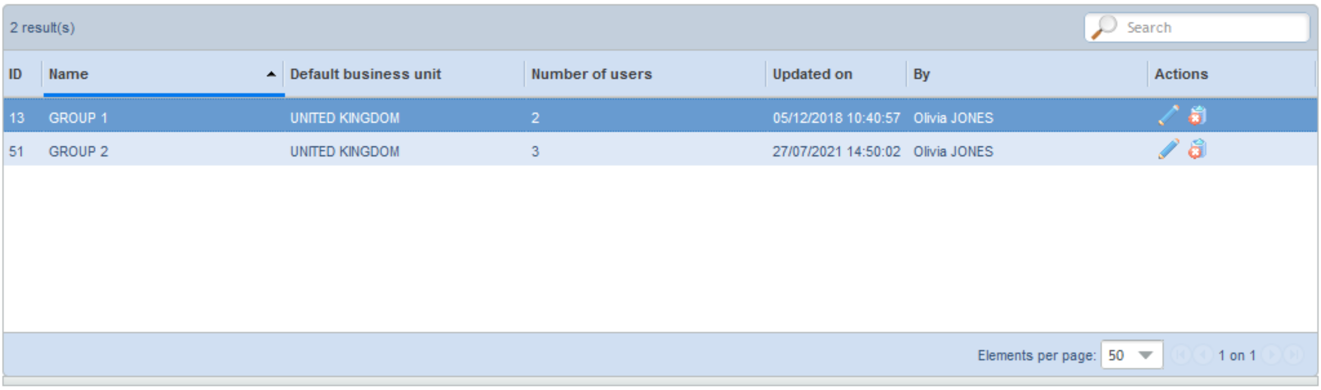
5.8.1 The DEFAULTUSERGROUP group

A DEFAULTUSERGROUP group is automatically created by the provisioning. It has the following characteristics:

- **Business unit:** DEFAULTCLIENTSPACE
- **Queues:** all voice queues (pilots) are created with a Read/Reply and outbound calls access.
- **Skill:** default
- **Users:** all OXE agents and supervisors are assigned to this group by the provisioning.
- **Supervisors**: all OXE supervisors are assigned to this group by the provisioning.

5.8.2 Overview

This functionality is available from the **Administration** > **Tenants** > **User Groups** > **Internal** menu. The upper part of the screen displays the list of all existing internal groups. By default, they are sorted by name in ascending alphabetical order (A-Z). Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column.



For each group, you can view:

- unique ID,
- name,
- default business unit on which users will consume accesses and tokens at login,
- total number of users,
- date and time of last update,
- name of the user who performed the action,
- available actions.

5.8.3 Creating an internal group

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Click the **New internal group** button above the list.
3. Fill in the properties of the internal group.
4. Click **Save**: the internal group is now created.
5. Set up the access rights to the different queues.
6. Define the skills of the group and their level of expertise.
7. Indicate the working languages of the group.
8. Select the internal users who belong to the group.
9. Select the supervisors of the group.
10. Set up the redirection profile of the group.
11. Check the summary of your setup.

    The setup of the internal group is complete.

5.8.3.1 Properties tab

This tab allows you to identify the group.

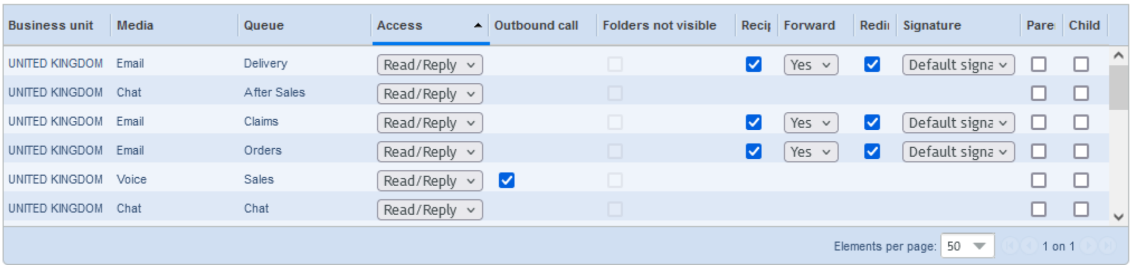
1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the business unit affected by clicking the corresponding line.
3. The **Properties** tab is displayed by default:

4. Enter a unique **name** that clearly identifies the internal group.
5. Select the business unit on which this group is allowed to work.
6. Enter a comment related to the internal group (objective, working order, warning, etc.).
7. Click **Save** to validate your entry.

5.8.3.2 *Queues tab*

This tab displays all the queues of the selected tenant. For each of them, you must set up the access rights of the users who belong to the group.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the business unit affected by clicking the corresponding line.
3. Click the **Queues** tab.



4. For each queue, fill in the following parameters:

   Access

   Select the access right to the queue for all users of the group.
   No: users cannot access the folders of the queue (default choice).
   Read: users of the group can only view the folders of the queue.
   Read/Reply: users of the group have the right to process incoming folders. If the media of the queue is Email, users can read and reply to the messages. However, they will only be able to send spontaneous emails if the corresponding right has been activated in their user profile. If the media of the queue is Voice, users can process incoming calls. The ability to perform spontaneous outbound calls in the context of this queue is described below.
   When the group has no rights on a queue or has read-only rights, the Recipients, Forward, Redirection and Signature parameters are useless.

   > **Warning:** if you change the access, the agents and supervisors of this group must log out from their ALE Connect interface and relog in so that the changes are taken into account.

   Outbound call

   This option is only active when the Read/Reply access right (previous parameter) has been selected and the media of the queue is Voice. If it is checked, the users of the group are allowed to perform outbound calls. Any change of this parameter is taken into account immediately and transparently: agents and supervisors do not need to log out from their ALE Connect interface.

   > **Warning:** if no voice queue in the group has this option activated, the agents of this group will not be able to perform spontaneous outbound calls.

   Folders not visible

   When the access right allowed on the queue is Read, check this option so that users of the group only have access to histories of folders for this queue. Any change of this parameter is taken into account immediately and transparently: agents and supervisors do not need to log out from their ALE Connect interface.

Recipients

This option only affects the queues of Email media. When it is checked, the agents of the group have the right to freely enter the email address of the main (A field), copied (Cc field) and/or blind (Cci field) recipients. This rule is also valid for email addresses of the experts to whom the files are sent for expertise. If this option is not checked, the agents have no choice but to select the email recipients from the address book.

Note: spontaneous emails are not affected by this option.

Forward

Check this option so that the agents in the group have the right to forward a folder (option not available for a voice queue). Otherwise, the Forward option will be inactive. Any change of this parameter is taken into account immediately and transparently: agents and supervisors do not need to log out from their ALE Connect interface.

Redirection

Check this option so that the agents in the group have the right to redirect a folder to this queue. Any change of this parameter is taken into account immediately and transparently: agents and supervisors do not need to log out from their ALE Connect interface.

Signature

This option allows to systematically add a signature to the replies sent by the agents of the group.
No user signature: outbound emails from the queue do not contain the agent's signature.
Default signature: outbound emails contain a default signature including the agent's first and last names saved in his/her user sheet.
Nickname: outbound emails contain the customised agent's signature, defined in the Signatures tab of his/her user sheet.
The signature of messages sent by an agent can be consists of three parts: the signature of the business unit, the signature of the queue and the agent's signature (if they have been set up). Any change of this parameter is taken into account immediately and transparently: agents and supervisors do not need to log out from their ALE Connect interface.

Parent/Child

To facilitate your entry, these options allow you to duplicate the setup of a queue (Parent) and copy it to one or more other queues (Child).

5. Click **Save** to save your entry.

5.8.3.3 Skills tab

You must specify the skills of the users in the group, and then rate the level of expertise for each of them between 0 and 5; 5 being the highest level. On the contrary, 0 means that the users do not have the skill: they will therefore not be eligible to process interactions that require it.

This common setup is applied by default to all users in the group. However, you can customise it by agent in the Skill level tab of the user sheet.

Warning: the agents and supervisors of this group must log out from their ALE Connect interface and relog in, so that the changes are taken into account.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the business unit affected by clicking the corresponding line.
3. Click the **Skills** tab.

All the skills associated with the tenant to which the group belongs are displayed.

4. Set up for each skill:

Rights
Check this option to assign the current skill to the group. By default, the group has no skill assigned.

Visible by supervisors
If you check this option, the supervisors will be able to view the skill and change the level of expertise of the agents they supervise, via their ALE Connect interface. This operation allows them to impact the distribution of chats. It is necessary when the supervisors need to regulate high or low activity, handle temporary or unexpected peaks of activity, or favour the processing of this media. In order to make this functionality as effective as possible, it is recommended (but not mandatory) to set up ALE Connect so that the software distributes interactions fairly, according to agent skill levels first, then interaction age. These equity rules are set up at the business unit level.

A supervisor may also decide whether his/her changes are:
- temporary. The changes performed are only valid for the current session of logged in agents. The agents will return to their usual skill levels, at their next ALE Connect login.
- persistent. The skill levels changed by a supervisor become the new default values and are updated in the sheet of each user affected.

Warning: if the option is not checked, the skill is hidden from the supervisors. None of them will be able to change the level of expertise of the users in the group, for this skill.

Levels

Check the level of expertise of the group for the current skill (from 0 to 5).

Update the user level

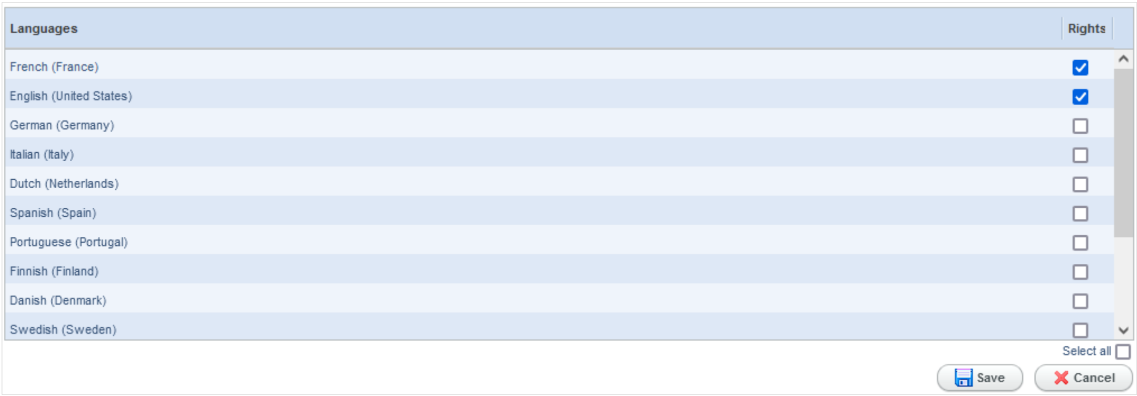
Check this option to apply the setup of the current skill to the sheet of all users in the group. The other skills keep their specific setup. If this option is not checked, the level of expertise is only defined for the group.

5. Click **Save** to save your entry.

5.8.3.4 Languages tab

It consists in defining the working languages of the group's users. Any change of rights on a language is taken into account immediately and transparently: agents and supervisors do not need to log out from their ALE Connect interface.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the business unit affected by clicking the corresponding line.
3. Click the **Languages** tab.



4. Check the working **language** of the group's users.
5. Click **Save** to save your entry.

5.8.3.5 Users tab

This tab allows to add or remove, at any time, the users within a group.

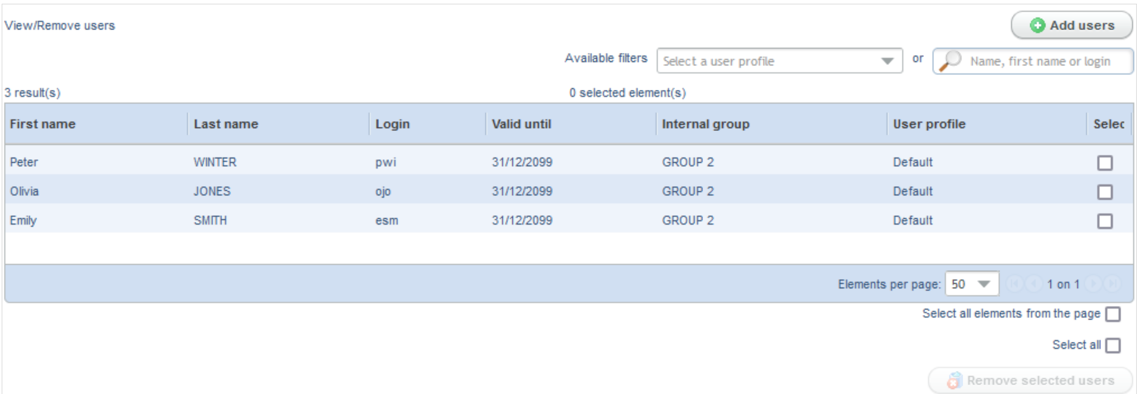
Adding a user

Warning: an internal user can only belong to one group. If you associate a user who is already assigned to another group, ALE Connect adds him/her to the current group and automatically removes the previous association.

When you move a user from a group to another, only the statistics are affected. For example: an agent belongs to the A group with rights on the A queue. He/She is moved to the B group. As a result of this change, the supervisor of the A group no longer views the agent's statistics. However, the supervisor of the B group can view not only these statistics, but also those from before the change of group if he/she also supervises the A group, or if the B has rights on the A queue.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the group to modify.
3. Click the **Users** tab.

   ALE Connect displays the list of all internal users who already belong to the group:



   For each of them, you can view his/her first name, name, login, validity end date, group and future user profile.

4. Click the **Add users** button.

   ALE Connect displays the list of all internal users, whether or not they already are assigned to a group.

5. Search the users to be assigned to the group by using the available filters: either by selecting a user profile from the list, OR by entering his/her name, first name or login. The entry area operates in “Contains" mode.
6. Add the desired users from the obtained list.

   For a unitary selection, check manually each user to be added to the group. To perform a multiple selection, you can select all the elements of the page or select all (all pages).

7. Click the **Add selected users** button.

   ALE Connect returns to the list of internal group users: it has been updated.

Removing a user

Warning: if a user is deleted from the database, he/she is not deleted from the group; so that statistics can continue to be carried out. To permanently delete a user, you should remove him/her from the group BEFORE deleting him/her from the database.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the affected group.
3. Click the **Users** tab. ALE Connect displays the list of users who belong to the group.
4. Select, from the list, the users to remove.
5. Click the **Remove selected users** button.

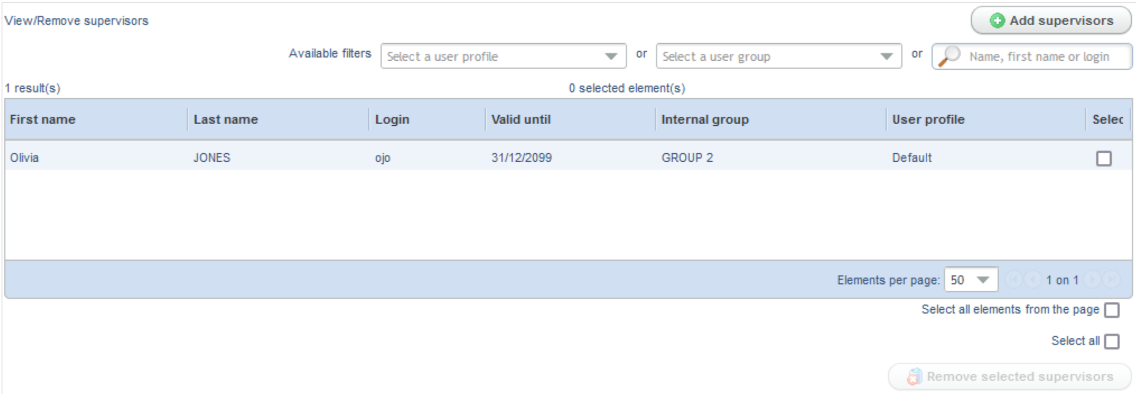
   ALE Connect asks you to confirm this action.
6. Click **Yes** to confirm the deletion, or **No** to cancel this action.

   ALE Connect updates the list: the removed users are no longer displayed.

5.8.3.6 Supervisors tab

It consists in declaring the supervisor(s) of the internal group. The selection principle is the same as for group users. This tab is read-only if the user logged in to the administration interface has a supervisor profile.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the business unit affected by clicking the corresponding line.
3. Click the **Supervisors** tab.



4. Click the **Add supervisors** button.
5. Search the users to be assigned to the group by using the available filters: either by selecting a user profile from the list, OR by selecting a user group, OR by entering his/her name, first name or login. The entry area operates in “Contains" mode.
6. Select the users who are supervisors of this group, from the obtained list.

   For a unitary selection, check manually each user. To perform a multiple selection, you can select all the elements of the page or select all (all pages).
7. Click the **Add selected supervisors** button.

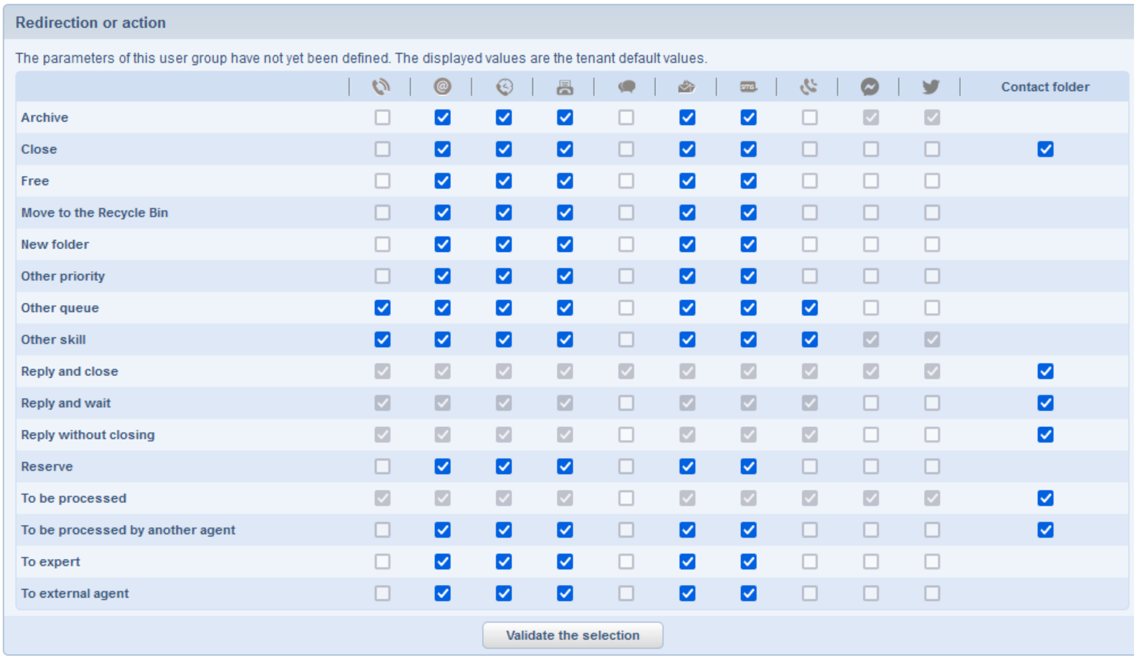
   ALE Connect returns to the list of group supervisors: it has been updated.

5.8.3.7 Redirection profile tab

You must define the rights of the internal group users, by specifying which actions are allowed or forbidden by media. A default redirection profile is already applied to all users of a tenant, regardless of their belonging group. However, it is possible to customise here the group profile. Any change of the profile is taken into account immediately and transparently: agents and supervisors do not need to log out from their ALE Connect interface.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the group to modify.
3. Click the **Redirection profile** tab.

   The following screen is displayed:



4. For each action and media, check the actions allowed or uncheck the actions forbidden.

   Refer to the detail of actions in the Default redirection profile section.
5. Click the **Validate the selection** button to save the entry.

5.8.3.8 *Summary tab*

It summarises all the elements associated with this user group, that is to say queues, skills, languages and realtime queues.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Select the affected group.
3. Click the **Summary** tab.

   The summary of the rights allowed to this group is displayed in details.

5.8.4 Modifying an internal group

If the change consists in renaming the group, make sure to update the lists of values filtered on the user group names, which are used within customised reports (reporting module of the ALE Connect supervision interface).

Warning: it is not possible to modify an internal group created by a provisioning operation.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Click the **Modify** button ( ) located on the line of the affected group.
3. Change the desired properties.
4. Click **Save**.

5.8.5 Deleting an internal group

This action is possible even if the group is not empty. The internal users affected will no longer be assigned to any group.

Warning: it is not possible to delete an internal group created by a provisioning operation.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal**.
2. Click the **Delete** button ( ) located on the line of the affected group.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes** to permanently delete the group, or **No** to abandon this action.

   ALE Connect updates the list: the group is no longer displayed.

5.9 Default redirection profile

This functionality allows you to choose which actions that agents (and supervisors) can and cannot perform when processing a folder, on their ALE Connect interface. The setup can be customised by action and by media. The default redirection media is applied to all the internal user groups of the selected tenant. However, you can define a specific redirection profile by group, if you need to differentiate the permissions. In that case, this is the setup at the group level which is applied by the system.

1. From the **Administration** tab, click **Tenants** > **User Groups** > **Internal** > **Default Redirection Profile**.

The screen displays a table of options to check or uncheck: each row corresponds to an action and each column to a media. As reminder, the available media depend on the license acquired. Some options are voluntarily greyed out since they are managed by the system.

2. For each media, check the actions allowed or uncheck those that should be forbidden to users.

To be processed

The agent has the right to manually create a folder with the To be processed status for a new contact, on the agent interface.

To be processed by another agent

The agent has the right to redirect a folder to another agent whom he/she considers more qualified to process it.

Archive

The agent has the right to directly archive a folder without providing a response. It is then sorted in the Processed desktop.

Other priority

The agent has the right to change the priority assigned to a folder.

Close

The agent has the right to close a folder.

Free

The agent has the right to delete the assignment of the folder to the current agent. No agent is any longer assigned to the folder. If agents work in push mode, this action returns the folder to the list of folders to be processed, without changing its status.

Move to the Recycle Bin

The agent has the right to move the folder to the recycle bin, whether or not it was processed, without changing its status. Only supervisors have access to the recycle bin: they can then permanently delete the folder or reactivate it as the case may be.

New folder

The agent has the right to create an email folder from an existing folder that already contains several exchanges. This new folder contains the information from the last exchange. The status of the source folder remains identical.

Other skill

The agent has the right to modify the skill associated with the folder. The folder status is not affected by this change. If this option is checked, the skills associated with the group will be suggested when requesting a redirection.

Other queue

The agent has the right to redirect the folder to a more appropriate queue for its contents. The folder status remains the same. If this option is checked, the queues associated with the group will be suggested when requesting a redirection.

Reply and wait

The agent has the right to reply to the folder and to put it on hold. The reply is sent to the contact waiting for further information. The folder is stored in the desktop of processed folder. When the contact replies, the folder returns to the desktop of folders in progress and changes its status to Contact reply.

Reply and close

The agent has the right to reply to the folder and close it. The reply is then sent to the contact. The folder changes to the Closed status and is stored in the desktop of processed folders. If the contact sends a new message related to this folder, its status changes to the To be processed status in the In progress desktop.

Reply without closing

The agent has the right to reply to the folder, but not to close it. This action is available only if the folder depends on a queue in pull mode. It allows you to send a non-final reply to the contact (to keep him/her waiting, for example). The folder remains at the To be processed status.

Reserve

The agent has the right to assign to himself/herself one or more folders to be processed later.

To external agent

The agent has the right to forward and assign the folder to an external agent. The folder is then forwarded to him/her and sorted in the In progress external desktop. The folder changes to the To be processed by external agent status.

To expert

The agent has the right to redirect the folder to an expert, in order to get his/her advice on its processing or the reply to be given. Once forwarded, the folder changes to the Expert waiting status. The experts are either recipients created in the address book, or third parties for which the email address is freely entered by the agent when sending the folder (if the agent's rights allow it).

Contact folder

Sometimes, an agent may need to manually create a new folder (following the receipt of a letter, for example). Once the folder filled in, and to validate it, the agent must choose from a scrolling list the action to perform: reply and wait, reply and close, etc.

This checkbox allows you to show or hide the current action in the list of actions suggested to the agent.

Note: if no action is checked in the Contact folder column, the agent is blocked when validating the folder, as the Send button is greyed out.

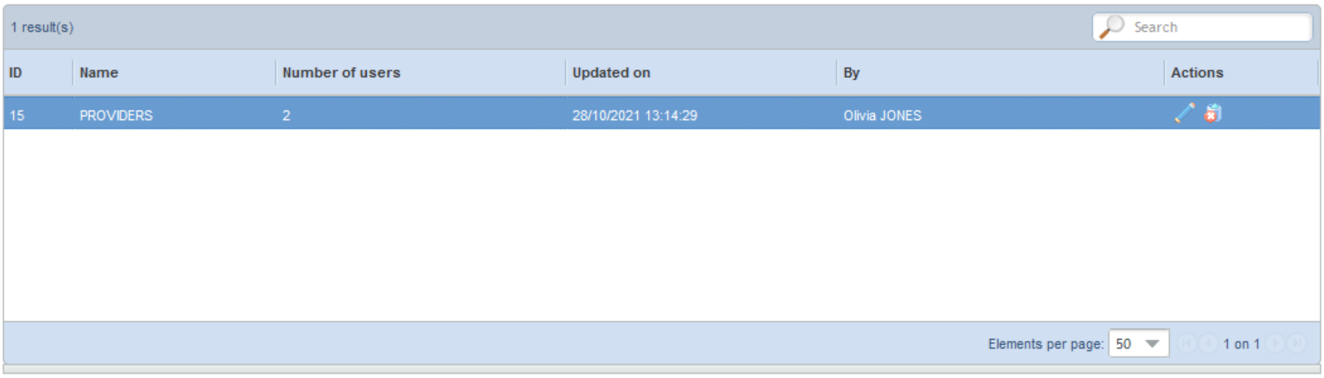
3. Click **Validate the selection** to save your entry.

5.10 External groups

This functionality allows you to create groups that include external users only.

5.10.1 Overview

This functionality is available from the **Administration** > **Tenants** > **User Groups** > **External** menu. The upper part of the screen displays the list of all existing external groups. By default, they are sorted by name in ascending alphabetical order (A-Z). Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column.



For each group, you can view:

- unique ID,
- name,
- total number of users,
- date and time of last update,
- name of the user who performed the action,
- available actions.

5.10.2 Creating an external group

1. From the **Administration** tab, click **Tenants** > **User Groups > External**.
2. Click the **Add a new external group** button above the list.
3. Fill in the properties of the external group.
4. Click **Save**: the group is now created.
5. Define the business units to which the users of the group have access.
6. Select the external users who belong to the group.

   The setup of the external group is complete.

5.10.2.1 Properties tab

This tab allows you to identify the external group.

1. From the **Administration** tab, click **Tenants** > **User Groups > External**.
2. Select the affected external group by clicking the corresponding line.
3. The **Properties** tab is displayed by default:

4. Enter a **name** that clearly identifies the external group.
5. Enter a comment related to the external group (objective, working order, warning, etc.).
6. Click **Save** to validate your entry.

5.10.2.2 Business units tab

It is mandatory to select the business units to which the external users of the group have access rights. ALE Connect only suggests those of the selected tenant: check beforehand that this one is correct.

1. From the **Administration** tab, click **Tenants** > **User Groups > External**.
2. Select the affected external group by clicking the corresponding line.
3. Click the **Business units** tab.

4. Check the business units to which the users of this group have access.
5. Click **Save**.

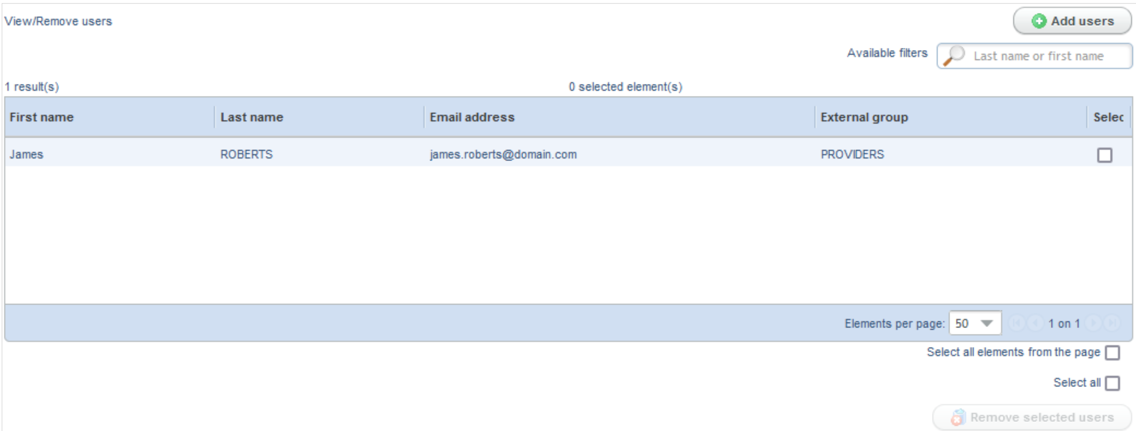
5.10.2.3 Users tab

You need to select the external users who belong to the group. It is possible to add or remove users at any time. In other words, this action can be performed regardless of the creation of the group.

Adding a user

1. From the **Administration** tab, click **Tenants** > **User Groups > External**.
2. Select the affected external group by clicking the corresponding line.
3. Click the **Users** tab.

   ALE Connect displays the list of external users who already belong to the group:

   For each of them, you can view his/her first name, last name and email address.
4. Click the **Add users** button.

   ALE Connect displays all the external users who are not assigned yet to a group.
5. Search the users to be assigned to the group by using the available filters: either by selecting a user group from the list, OR by entering his/her name or first name. The entry area operates in “Contains" mode.
6. Add the desired users from the obtained list.

   For a unitary selection, check manually each user to be added to the group. To perform a multiple selection, you can select all the elements of the page or select all (all pages).
7. When the selection is complete, click the **Add selected users** button.

   ALE Connect returns to the list of external users in the group: it has been updated.

Removing a user

1. From the **Administration** tab, click **Tenants** > **User Groups > External**.
2. Select the affected external group by clicking the corresponding line.
3. Click the **Users** tab. ALE Connect displays the list of users who belong to the group.
4. Select, from the list, the users to remove.
5. Click the **Remove selected users** button.

   ALE Connect asks you to confirm this action.
6. Click **Yes** to confirm the deletion, or **No** to cancel this action.

   ALE Connect updates the list: the removed users are no longer displayed.

5.10.3 Modifying an external group

1. From the **Administration** tab, click **Tenants** > **User Groups > External.**
2. Click the **Modify** button () located on the line of the affected group.
3. Modify the desired elements.
4. Click **Save**.

5.10.4 Deleting an external group

This action is possible at any time, even if the group contains users.

1. From the **Administration** tab, click **Tenants** > **User Groups > External**.
2. Click the **Delete** button ( ) located on the line of the affected group.

   ALE Connect reminds you that the group contains users and asks you to confirm the deletion.
3. Click **Yes** to permanently delete the group, or **No** to abandon this action.

   ALE Connect updates the list: the group is no longer displayed. The affected external users are no longer assigned to any group.

6 Contacts

A contact is a person or an entity (such as a company for example) with whom/which an agent can interact in ALE Connect by using the various media available.

Any interaction managed by ALE Connect is mandatorily associated with a contact, already identified or anonymous.

To this end, ALE Connect provides you with a contact database that you can use and enrich as your activity grows, to link them to the processed interactions. It can be fed in two ways: either by creating a sheet (new folder for example), or by importing a contact file. This second operation can only be performed by the coordinator of the ALE Connect tenant.

6.1 Contact sheet form

A contact sheet identifies the person with whom the agent is in contact, according to his/her personal information (name, first name, etc.), and centralises all his/her folders. It is only accessible from the agent interface.

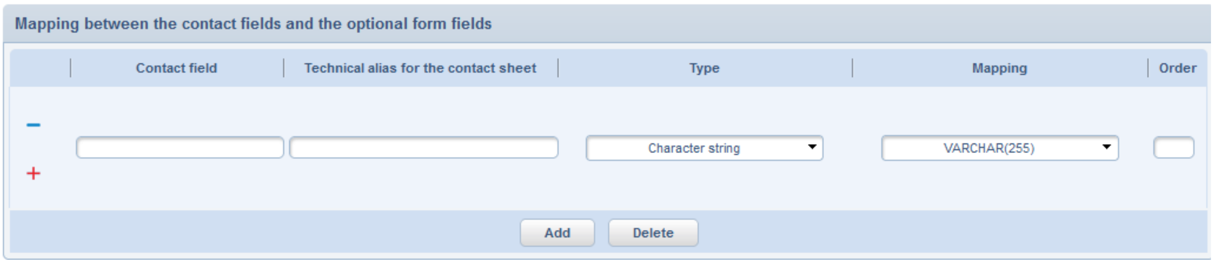
ALE Connect provides a default contact sheet form. It includes, among other things, the following 12 predefined fields that cannot be modified: title, name, first name, date of birth, verbatim, company, street number, street, building, postcode, city and comment. However, you can customise this form by adding additional fields. This is particularly the case when the sheet has to be multi-contact (it represents a company for example with several contacts).

6.1.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Contacts** > **Contact Sheet Form** menu. The upper part of the screen displays the list of all fields that are currently used by the default form. The lower part allows to add new fields.


Mapping between the contact fields and the mandatory form fields

Contact field	Type	Mapping	Order
Title	Character string	VARCHAR(255)	1
Name	Character string	VARCHAR(50)	2
First name	Character string	VARCHAR(50)	3
Date of birth	Date	DATE	4
Contact ID	Character string	VARCHAR(255)	5
Company	Character string	VARCHAR(255)	6
No.	Character string	VARCHAR(255)	7
Street	Character string	VARCHAR(255)	8
Locality / Residence	Character string	VARCHAR(255)	9
Building	Character string	VARCHAR(255)	10
Postcode	Character string	VARCHAR(255)	11
City	Character string	VARCHAR(255)	12
Country	Character string	VARCHAR(255)	13
Home phone	Character string	VARCHAR(255)	14
Mobile phone	Character string	VARCHAR(255)	15
Email address	Character string	VARCHAR(255)	16
Verbatim	Character string	VARCHAR(4000)	17
Comment	Character string	VARCHAR(1000)	18


Mapping between the contact fields and the optional form fields

	Contact field	Technical alias for the contact sheet	Type	Mapping	Order
− +			Character string	VARCHAR(255)	

Add Delete

The screen displays:

- name of the field in the contact sheet,
- format (integer, character string or date),
- format of the selected type of field allowing its mapping,
- display order in the form.

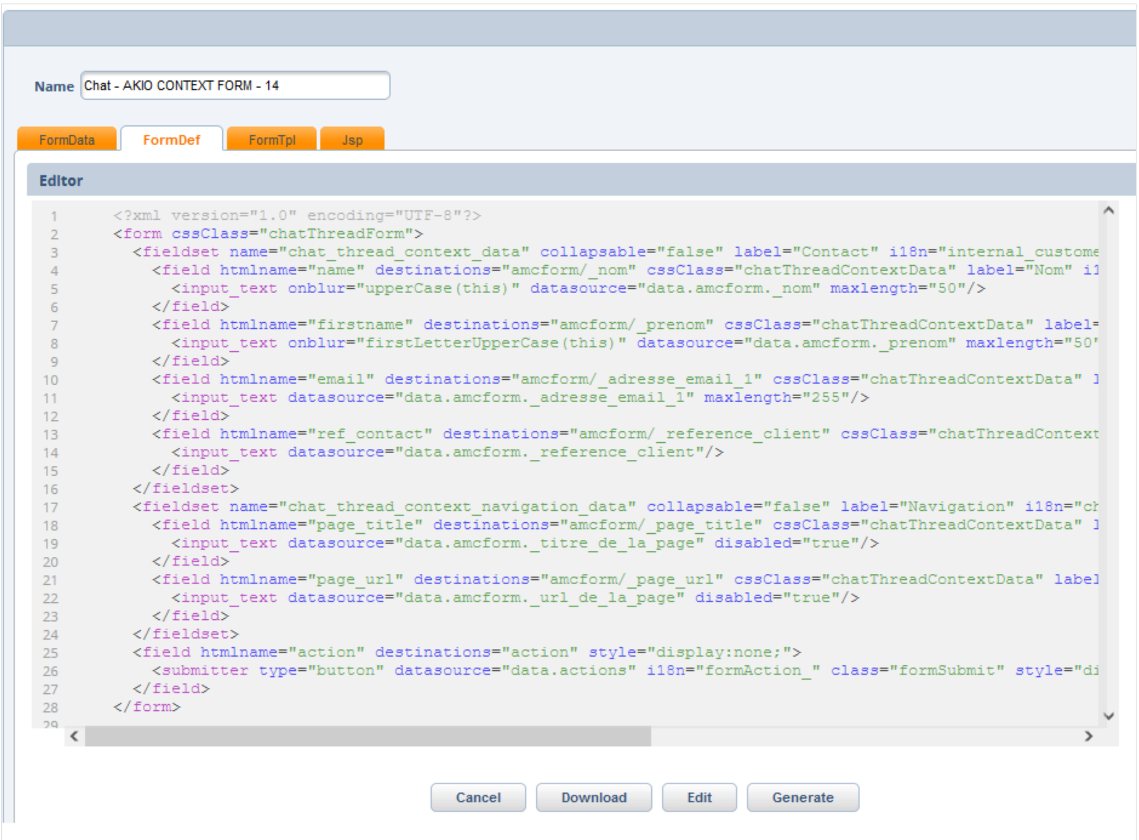
6.1.2 Adding a field to the contact sheet

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Contact Sheet Form**.
2. At the bottom of the screen, in the **Mapping between the contact fields and the optional form fields** area, enter the name of the field to be added.
3. Fill in the information related to the new field.
4. Click the **Add** button to save the new field.

6.1.3 Setting up a field added in the form

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Form Editor**.
2. Select the type of form, the business unit and the AMC formula desired.

   The list of matching forms is displayed:
3. Click the **Edit** button ( ) located on the line of the form in which the field must be added.
4. Click the **FormDef** tab. The following screen is displayed:



5. Click the **Edit** button in order to modify the tab content.
6. Enter the code declaring the addition of the field, previously created.

Example of content to add a field named **Class**.

```
<field htmlname="Class" label='${r"${data.customer.Class.label}"}'
destinations="customer/Class">
    <input_text datasource="data.customer.Class.value"
disabled="data.customer.Class.readOnly"/>
</field>
```

7. Click **Validate the syntax** to check whether the code entry rules are compliant: the “The content is valid” message should be displayed.
8. Click **OK** to save your entry.
9. Click **Generate**: the **FormTpl** tab is displayed.
10. Validate and generate the **FormTpl** tab: the **Jsp** tab is displayed.
11. Switch to edit mode then validate the **Jsp** tab.
12. The form must be published to be visible in the agent interface.

6.1.4 Embedding data from a structured email in a contact sheet

It consists in extracting data from a structured email (name, first name, age, etc.) to a contact sheet. This procedure is implemented in two steps: by setting up the structured form, then by setting up a management rule to apply to the structured e-mail.

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Form Editor**.
2. Select the type of form, the business unit and the AMC formula desired.

   The list of matching forms is displayed:
3. Click the **Edit** button ( ) located on the line of the affected form.
4. Specify the types of data to be extracted by setting up the structured form.

   The types of data to be extracted should be displayed in the **Contact sheet mapping** column.

6.2 Forms

ALE Connect allows you to create forms to store metadata linked to an interaction. Each of them allows to store data in tables, extracted from emails from forms, or from the context of Internet browsing (chat). Once stored, this data is used to enrich and customise emails, or can be used as variables when integrating other customer relationship tools. ALE Connect adds only the new information of the form, to each contact sheet. The other fields are not updated (their values are kept).

It is possible to export them in a .txt file for operation.

6.2.1 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Forms** menu. The upper part of the screen displays the list of all existing forms. Each row of the table corresponds to a form.

For each form, you can view:

- name,
- unique ID assigned by the system,
- possible actions represented by an icon.

Click the following icon to:

Change a form

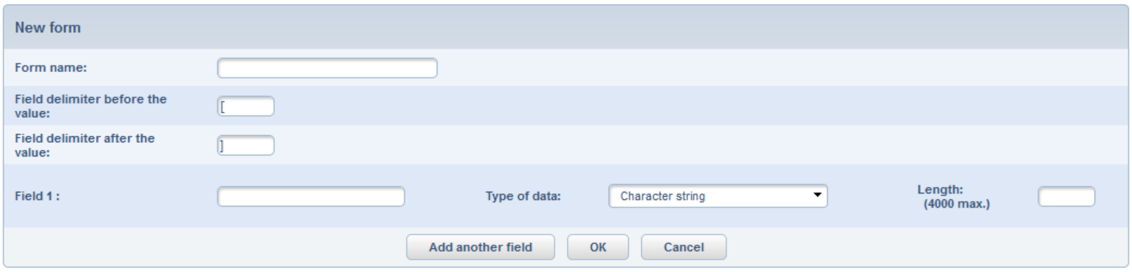
Delete a form

Preview the form

Export the received data

6.2.2 Creating a form

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Forms**.
2. Click the **New form** button. The following screen is displayed:



3. Fill in the following information:

   Form name
   Enter a name that clearly identifies the nature of the form.

   Field delimiter before/after the value
   Enter the characters delimiting the values to be extracted from the form. The system only extracts values between these two characters. By default, the [and] square brackets will be used. To define a carriage return as a delimiter, type \n.

   Field 1 to N
   Enter the name of the first field in the form (e.g. Customer). Two fields cannot have the same name.

   Type of data
   Select, from the list, the format of values that will be stored in this field: character string, integer or date and time in the format defined by the AMCFORM_DATETIME_FORM variable in the application configuration file (default format DD/MM/YYYY).

   Length (4000 max.)
   If the field is a string, specify the maximum number of characters possible. When the field is finished being entered, click the **Add another field** button. This action adds the field 1 to the form and suggests the entry of the field 2. Add to the form as many fields as needed.

   Status
   Specify whether the field is:
   Mandatory: the field must be present so that the email is considered as from the form and the form valid. The management engine extracts the data only if all the mandatory fields are present in the received email.
   Optional: the field may not be present. The data extraction is therefore not impacted.

4. Click **OK** to save your entry.

6.2.3 Modifying a form

This action is important because it allows to complete the working order of the form. New setup fields are indeed available. The characteristics of the form can be changed, except for the length of the field. To modify this one, you must delete the field and create it again with a different length.

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Forms**.
2. Click the **Modify** button () located on the line of the form to modify.
3. Perform the changes you wish.
4. Modify the display order of the fields in the form if necessary.
5. Perform the **mapping with the contact sheet**: for each field in the form, select the corresponding field in the contact form to automatically feed the contact form from the structured information contained in the incoming folders.
6. Click **OK** to save your entry (or **Back** to abandon this action).

   ALE Connect saves the changes and updates the form information.

6.2.4 Deleting a form

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Forms**.
2. Click the **Delete** () button located on the line of the affected form.

   ALE Connect informs you that the form table contains data and asks you to confirm the deletion.
3. Click **OK** to confirm the deletion (or **Cancel** to abandon this action).

6.2.5 Previewing a form

You can preview the structure of the email expected by the management engine, to consider the form as valid and to be able to extract the data. Additional information specifies the number of mandatory fields and the maximum length of each field.

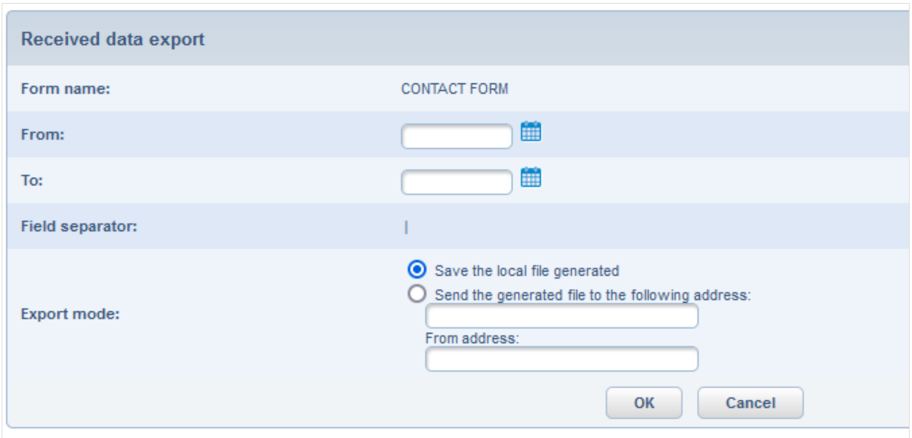
1. From the **Administration** tab, click **Tenants** > **Business Units** > **Forms**.
2. Click the **View** button () located on the line of the form to preview.
3. ALE Connect displays a preview of expected data i.e. the different fields of the form in the desired format within an email.

6.2.6 Exporting the extracted data

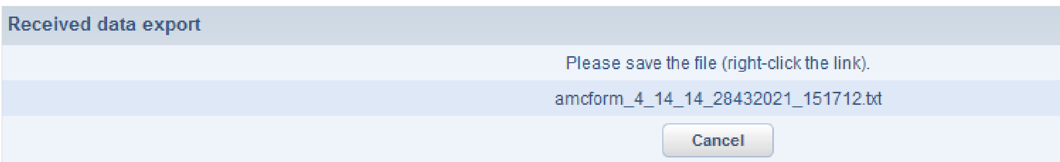
This functionality exports all data from the selected form to a text file, for the desired period. The separator character between the fields is |. The export process is automatically cancelled if its execution time exceeds 120 seconds (unchangeable timeout).

1. From the **Administration** tab, click **Tenants** > **Business Units** > **Forms**.
2. Click the **Export** button () located on the line of the affected form.

   ALE Connect displays the characteristics of the export:



3. You must fill in the period to be exported.
4. Indicate the desired export mode: save the .txt file generated locally, or send it to an email address to be specified.
5. In the **Address "From"** field, enter the shipping email address. It is used if the recipient uses the **Reply** action of his/her mailbox.
6. Click **OK** to confirm the data export.



7. Save the text file generated.
8. Click **Back** () to return to the list of forms.

6.3 Form editor

In ALE Connect, a form is a web page designed to collect information entered by a user (an agent, a web user) or filled in automatically by a system (from a structured email for example). The form is generally made of fields to be filled in, presented in different formats: entry areas, scrolling lists or checkboxes. Its formatting is structured to delimit its areas.

ALE Connect natively provides a number of forms that are an integral part of the agent/supervisor interface functionalities: contact sheet, processing of an incoming call, etc. The editor allows to customise them, or to create new ones. Their content can be adapted to the context of activity: fields, descriptions (internationalised or not), properties, order and classification, or even content according to the data source. The appearance of each form can also be customised to match the company's graphic charter, by inserting various objects: images, buttons or links.

Warning: the design, creation and customisation of forms is strictly reserved to ALE Connect coordinators.

6.3.1 Types of form

The types of form supported by ALE Connect are not stored in the database in the same way. Indeed, there are two different data structures to initialise the field values and save their new values:

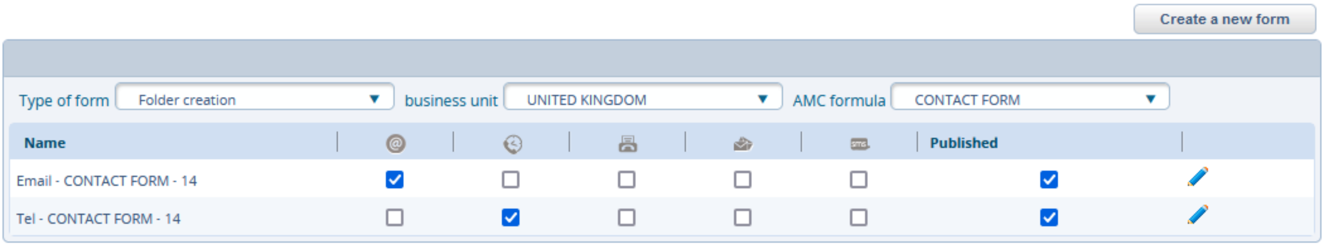
- **Contact sheet**
  This structure allows to store the **data of a contact** in database. It is used in read and/or write access by the forms. There is only one contact sheet structure by tenant. The contact sheet is by default single contact (only one interlocutor) but can be multi-contact subject to a specific setup.
- **AmcForm**
  This structure allows to store the **data of a folder** from a structured e-mail in database. It is used in read and/or write access by the forms. There is by default an AmcForm for each business unit. The AmcForm should contain the fields that you wish to display and keep.

6.3.2 Forms provided by ALE Connect.

Type	Structure in database	Media	Use	Customisable elements
Folder creation	AmcFormula	All	Creating manually a folder, for a contact already existing or not	Full form
Creation/Edition of contact sheet	Contact sheet	All	Creating, viewing or modifying a contact sheet	Full form
Incoming call	AmcFormula	Voice	Processing an incoming call	Content of the Subject area displaying the call context
Incoming chat	AmcFormula	Chat	Processing a chat conversation	Content of the Subject area in the Info tab of the folder
Chat context	AmcFormula	Chat	Processing a chat conversation	Context information in the corresponding tab of the folder.
Facebook Messenger context	AmcFormula	Facebook Messenger	Processing a Facebook Messenger folder	Context information in the corresponding tab of the folder.
Facebook Messenger form	AmcFormula	Facebook Messenger	Processing a Facebook Messenger folder	Content of the Subject area in the Info tab of the folder
Twitter context	AmcFormula	Twitter	Processing a Twitter folder	Context information in the corresponding tab of the folder.
Twitter form	AmcFormula	Twitter	Processing a Twitter media	Content of the Subject area in the Info tab of the folder

6.3.3 Overview

This functionality is available from the **Administration** > **Tenants** > **Business Units** > **Form Editor** menu. The upper part of the screen displays criteria allowing to search the existing forms. The lower part displays the corresponding results:



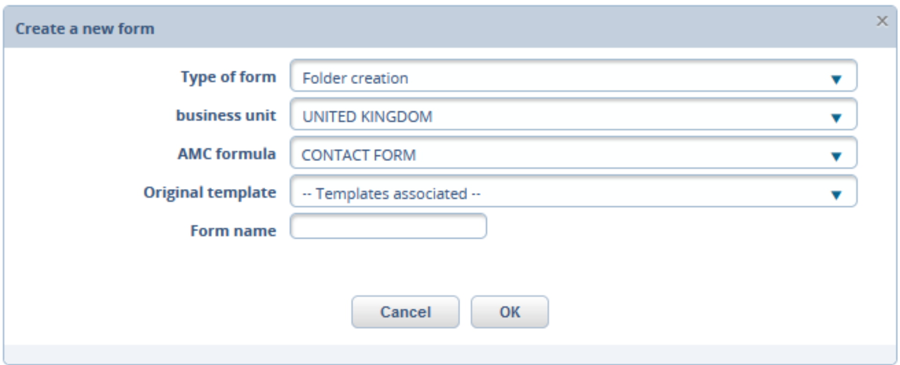
For each form, you can view:

- name,
- media for which it is used,
- information specifying whether or not the form has been published,
- available actions.

6.3.4 Creating a form

You wish to declare the use of a new form for a business unit. This action is always performed from one of the templates provided by ALE Connect.

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Form Editor**.
2. Click the **Create a new form** button.



3. Fill in the following parameters:

   Type of form
   Select the type of form to be created. Warning, the fields to be filled in may vary according to the type chosen. It is possible to modify the selection as long as you have not validated this screen.

   Business unit
   Select the business units for which you wish to create the form.

AMC formula

Select, from the list, the data structure template to be used.

Original template

Select, from the list, the template from which you wish to create the form.

Form name

Enter the description of the form being created.

4. Click **OK**.

   The new form is displayed in the list: you can now change it in order to customise it.

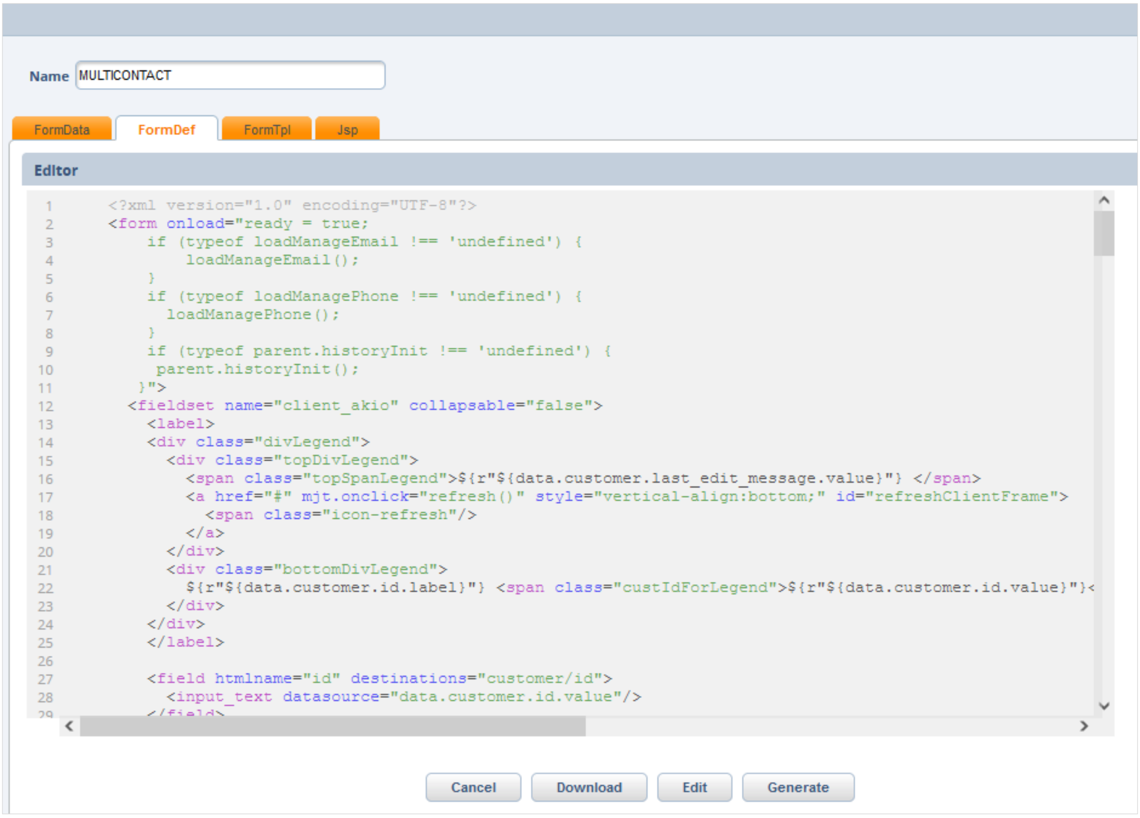
6.3.5 Modifying a form

This action allows you to modify and customise a form after its creation.

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Form Editor**.
2. You must select a type of form.
3. Select a business unit and an AMC formula.

   These criteria are not mandatory: they are only displayed according to the type of form previously chosen.

4. Click the **Modify** button () located on the line of the affected form.



The form is divided into 4 tabs:

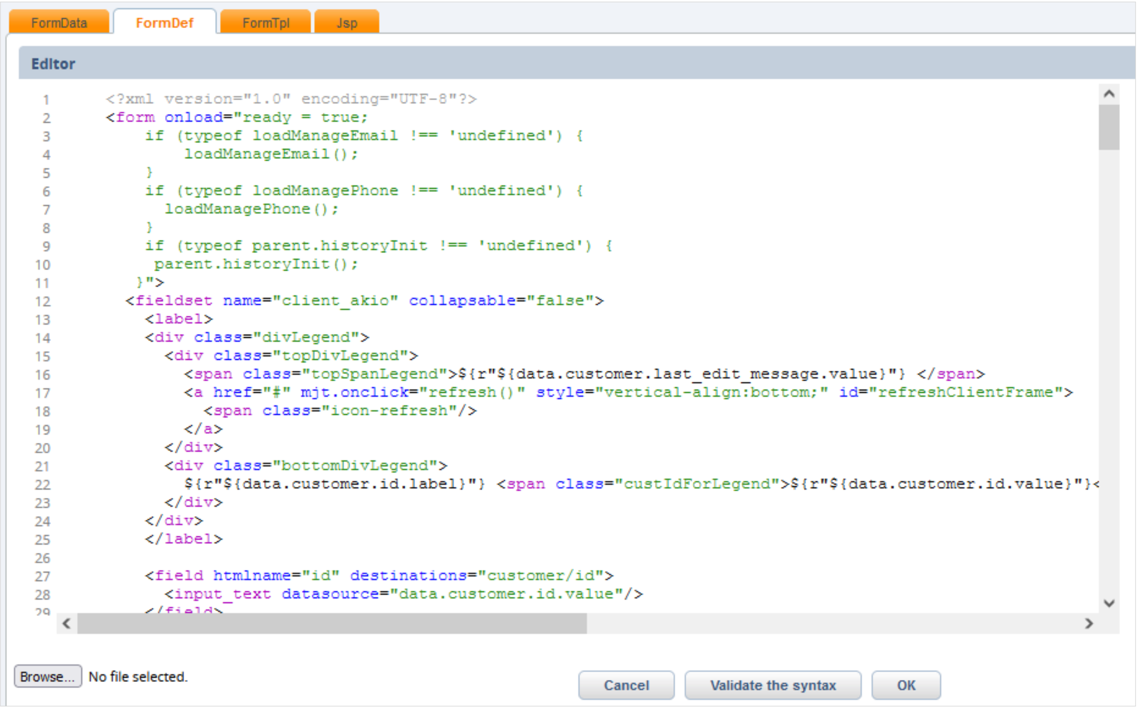
FormData: references source and recipient data that can be used.

FormDef: displays the form fields in read or write access. You set up the form here.

FormTpl: displays the JavaScript code of the form.

Generated: displays the JSP code generated from the FormTpl tab.

5. Click the **FormDef** tab.
6. Click the **Edit** button and change the content of the form.



7. Click **OK** to generate the JavaScript code that can viewed in the **FormTpl** tab.
8. Click the **FormTpl** tab, then the **Generate** button.

   This action generates the JSP code that can be viewed in the FormJsp. The folder is now generated.

6.3.6 Publishing a form

For a form to be used by agents and supervisors, you must publish it so that it is taken into account on the affected business unit. Please note that once the form is published, it cannot be deleted.

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Form Editor**.
2. You must select a type of form.
3. Select a business unit and an AMC formula.

   The list of existing forms is displayed.
4. Check the **Published** option.

6.3.7 Deleting a form

Only unpublished forms can be deleted.

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Form Editor**.
2. You must select a type of form.
3. Select a business unit and an AMC formula.

   The list of existing forms is displayed.
4. Click the **Delete** ( ) button located on the line of the affected recipient.

   ALE Connect asks you to confirm the deletion.
5. Click **OK**.

6.4 Importing contacts

You can import into ALE Connect a list of contacts from a .csv file. This operation is very useful to automatically feed the contact database, without having to create them one by one manually. The import process is performed in two successive steps: selection of the source file, then definition of import parameters. Once the import is executed, all contacts that did not exist in ALE Connect will be created and will have their own sheet. The existing contact sheets are updated (according to the import mode chosen).

6.4.1 Preparing the file to be imported

Before importing contacts, make sure that **the file to be imported is clean**: the data it contains must be correctly formatted according to the rules defined by ALE Connect. It is also important that it is relevant and of high quality. This will prevent the file from being rejected for download by ALE Connect, or having errors when executing the import (especially if the file is large).

You can only import files in .csv format with no limitation on the maximum number of rows.

6.4.1.1 Rules to be followed

✓	Any empty file or file with a **size of 0 KB** is rejected by ALE Connect.
✓	Data of each contact are displayed on **one single row**.
✓	Values are **separated by the same character** in the file (column separator defined when saving the file): comma, semicolon, pipe, tab or space.
✓	If the .csv file was generated from a spreadsheet program, the values are stored in **columns**.
✓	If the .csv file was generated from a text file, the contacts are separated by the **same delimiter** in the file: single quote (‘) or double quote (“).
✓	If **a value is missing**, two separators must follow each other (without spaces between them) so that the following values can be assigned in the correct fields.
✓	The **email** address is in local@domain format and it is valid.
✓	The **date of birth** is in DD/MM/YYYY format and its length is strictly less than 35 characters.
✓	The **postcode** does not exceed 5 characters.
✓	The **country** is 2-letter ISO 3166-1 code, or left blank so as not to prevent import.
✓	**Character strings** are strictly less than 50 characters long.
✓	Any **decimal number** uses a point as a decimal separator, and is comprised between 1.40239846E-45 and 3.40282347E38.
✓	The ID of the **assigned agent** corresponds to an internal or external user of the tenant for which the import is performed.
✓	The ID of the **assigned agent** is an integer comprised between -2147483648 and +2147483647.

6.4.1.2 Example of valid file

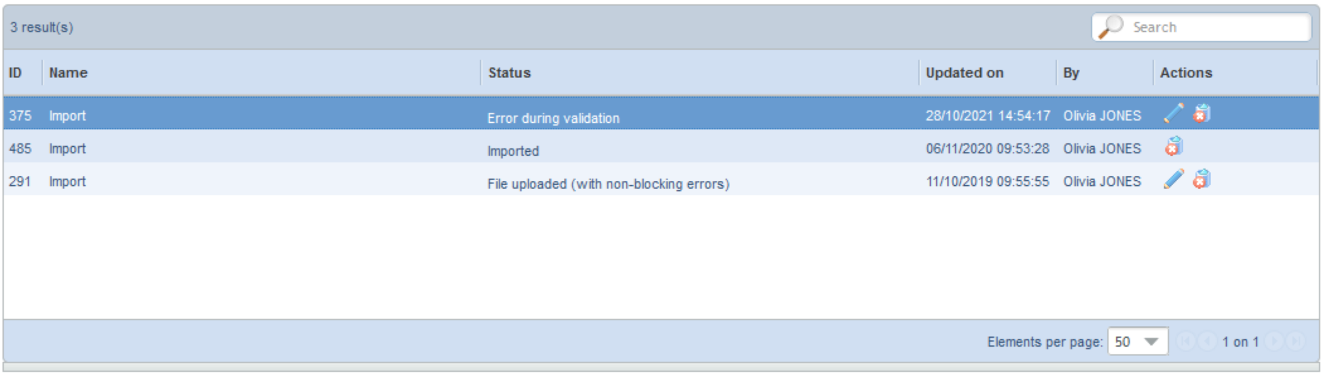
Here is an example of .csv file correctly structured:

```
Mr.,Firstname1,Name1,0102030405,Street,,London,namefirstname1@email-address.com
Mrs,Firstname2,Name2,0102030406,,,,name2firstname2@email-address.com
Mr.,Firstname3,Name3,0102030407,Street,Poscode,London,name3firstname3@email-address.com
```

It contains 8 fields: title, first name, last name, phone number, street, postcode, city and email address. The file was encoded in UTF-8 and the separator character used is the comma.

6.4.2 Overview

This functionality is available from the **Administration** > **Contacts** > **Import** menu. The upper part of the screen displays the list of all imports performed. By default, they are sorted in descending chronological order (from the most recent to the oldest), allowing you to immediately view the last imports performed. Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column.



For each import, you can view:

- unique ID,
- name,
- status,
- date and time of last update,
- user who created or modified it,
- possible actions represented by an icon.

6.4.3 Importing a new file

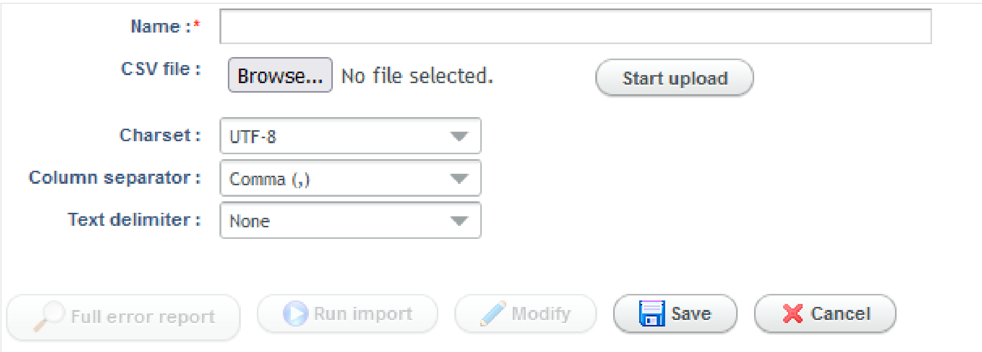
Before starting, make sure that the file to be imported was correctly prepared: refer to the preparation rules.

6.4.3.1 Step 1: selecting the source file

It consists in defining the nomenclature of the file, so that ALE Connect can read it and interpret its data correctly.

1. From the **Administration** tab, click **Tenants** > **Contacts** > **Import**.
2. Click the **Import a new file** button.

   The following screen is displayed:



3. You must enter a name that clearly identifies the import.
4. Click **Browse**.
5. Select the **CSV file** to be imported, then click **Open**.
6. Click **Start upload**.
7. Select the encoding method of data in the file: UTF-8 or ISO-8859-1.
8. Select the column separator character used in the file: comma, semicolon, pipe, tab or space.
9. Select, if applicable, the text delimiter used in the file: single quote (‘) or double quote (“).

   The delimiter is used to isolate each field in the .csv file, when a value occupies several rows or contains the column separator as a character.
10. Click **Save**.

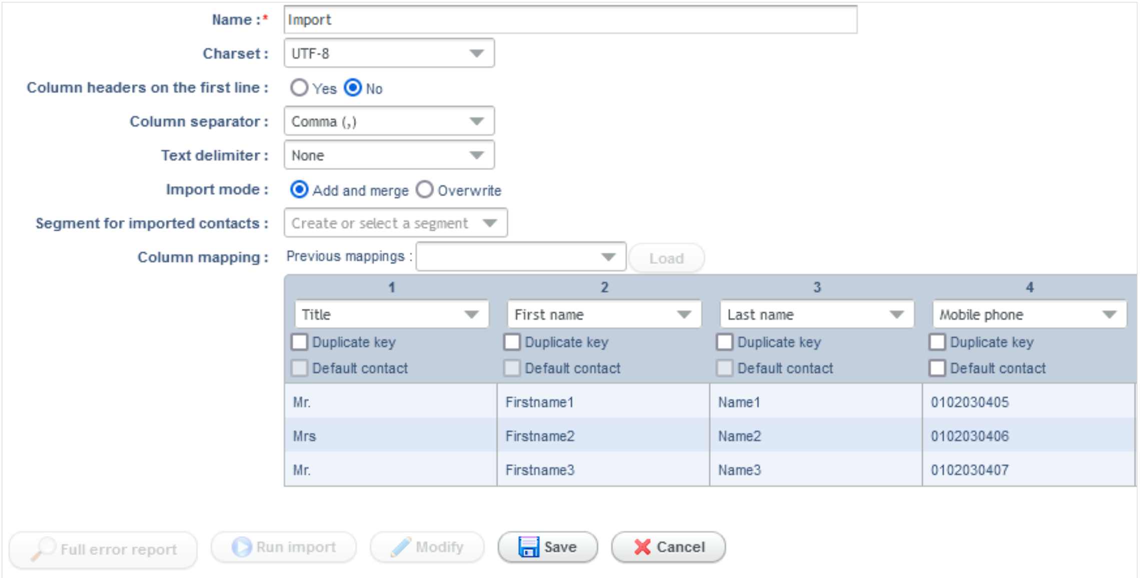
    ALE Connect checks the data format of the file. When everything is correct, the file changes to the **Ready to import** status. An overview of the imported contacts is generated: you proceed to step 2.

> **Warning:** as soon as ALE Connect founds an invalid data (except for the country code), the file is rejected.

6.4.3.2 Step 2: defining the import parameters

You are now viewing an extract of the imported contact file, displayed in a table. Each column corresponds to a field of the file. You should associate each of them with the corresponding field in the ALE Connect database ("mapping").

1. Click the **Modify** button.



2. Fill in the following parameters:

Name (mandatory)
Name identifying the current import. It can be modified.

Charset
Encoding method of data in the file: UTF-8 or ISO-8859-1. You can change it if you notice that the table is not displayed correctly: this means that the file has not been interpreted correctly (probably because the file characteristics chosen in step 1 were not as expected).

Column headers on the first row
Indicate whether or not the first row of the file is a header row with column names. If not, the first row of the table is interpreted as the following ones (in other words, as a contact).

Column separator
Column separator character used in the file: comma, semicolon, pipe, tab or space. As for charset, you can change it if you notice that the table is not displayed correctly.

Text delimiter
Character (optional) used in the file to isolate each value: single quote (') or double quote ("). As for charset and column separator, you can change it if you notice that the table is not displayed correctly.

Import mode

Check the import mode desired:
Add and merge: ALE Connect adds, in each contact sheet, only the new information from the imported file that did not exist before. The other fields are not updated (their values are kept).
Overwrite: the information of a contact, already existing in the ALE Connect database, is replaced by the information of the import file except for the information used as duplicate keys. The other fields of the contact sheet that are not part of the imported data are deleted.

Warning: if an email address is found in the imported file, it is added to the existing email address(es) of the contact, then defined as his/her main email address, regardless of the import mode chosen.

Segment for imported contacts

Parameter unavailable.

Column mapping

Select, from the header of each column in the table, the field of the ALE Connect database that matches the content of the column. To go faster (especially if the number of columns is large), you can reuse an existing configuration if it is identical to the association you are defining.

Warning: it is not possible to import several email addresses or phone numbers for a same contact.

Duplicate key

You must check at least one column to eliminate the duplicate contacts during the import (otherwise, when validating, the following error message will be displayed “Error during validation” and you will not be able to run the import). For example, if you check this option for the Name column, ALE Connect will eliminate the contacts who have the same last name. The deduplication works differently depending on the import mode chosen:
Add and merge: when the contact sheet already exists in the ALE Connect database, its blank fields are updated from the values found in the import file. The other fields of the contact sheet and those that are checked as duplicate keys are not updated.
Overwrite: when the contact sheet already exists in the ALE Connect database, its fields are updated from the values found in the import file (except for duplicate keys). However, the other fields are deleted.
If the imported file itself contains duplicates, the rows are processed successively: as soon as ALE Connect finds a contact that does not exist in the database (for the fields checked as duplicate keys), a new sheet is created. As soon as it finds a duplicate in the following rows, the contact sheet is updated depending on the import mode. Finally, if there are already duplicates in the database, ALE Connect updates the contact sheet with the smallest ID (i.e. the oldest).

Warning: a technical error is displayed when ALE Connect finds more than 1000 duplicate contacts. Error rows of the imported file are reported in the error report. The correct rows are imported.

Default contact

Parameter unavailable.

3. Click **Save** to save your entry.
4. Click the **Run import** button.

   ALE Connect checks and imports the file, by using the defined parameters. The error rows are not imported, so as not to block the processing (especially if the file is large).

   When the import is complete, the contact sheets are created or updated depending on the case. A report shows you which rows, if any, are in error and need to be corrected.

6.4.4 Running an import

This action allows you to trigger immediately the import of a contact file, ready for use. It is not possible to stop the process when it is in progress. Once complete, the contacts are created in the ALE Connect database. To be sure, you can perform a quick check by searching some imported contacts on the agent interface.

1. From the **Administration** tab, click **Contacts** > **Import**.
2. Click the **Run import** button ( ) located on the line of the affected import.

   ALE Connect asks you to confirm this action.
3. Click **Yes** to launch the processing, or **No** to abandon this action.

   ALE Connect triggers the import: when it is complete, its status changes to “Imported”.

6.4.5 Modifying an import

Warning: it is not possible to modify a completed import. Access to its tabs is read-only.

1. From the **Administration** tab, click **Contacts** > **Import**.
2. Click the **Modify** button ( ) located on the line of the affected import.
3. Modify the desired parameters.
4. Click **Save**.

6.4.6 Deleting an import

You can delete an import at any time, no matter its status. This function is particularly useful to clean the list of obsolete imports.

1. From the **Administration** tab, click **Contacts** > **Import**.
2. Click the **Delete** button ( ) located on the line of the affected import.

   ALE Connect asks you to confirm this action.
3. Click **Yes** to permanently delete the import, or **No** to abandon this action.

   ALE Connect deletes the import: it is removed from the list.

6.4.7 Downloading the full error report

It may happen that errors, blocking or not, are generated following the import of the file: invalid email address, incorrect date format, etc. In that case, you can download the full error report in a text file.

1. From the **Administration** tab, click **Contacts** > **Import**.
2. Perform an import of contacts (steps 1 and 2).
3. Click the **Full error report** button.

   A window is displayed: it suggests you to open the text file with the application of your choice or to save it on your computer.
4. Check the desired option, and then click **OK**.

   The text file is now available: you can view it to correct the errors that occurred.

7 License

ALE Connect is protected by a technical license which reflects the subscribed offer in terms of **Connected Agent** (number of people who can simultaneously connect to the tenant at a given time) and **Interaction Channel** (number of media to which a user has a write access). Within ALE Connect, this protection mechanism is intended to control access to the application.

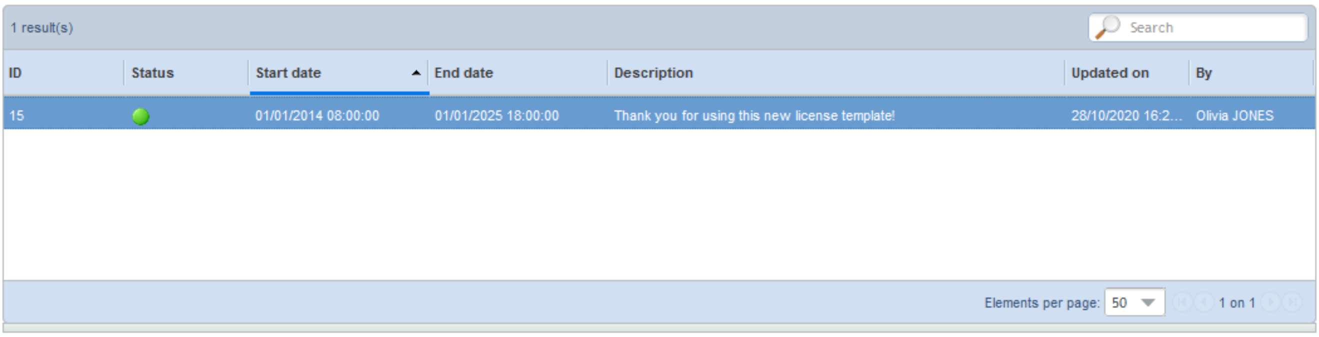
Note: if you change the subscribed offer from ALE, the technical license will be updated.

7.1 ALE Connect license

This functionality allows to view the subscribed quantities of **Connected Agent** (accesses) and **Interaction Channel** (tokens).

7.1.1 Overview

This functionality is available from the **Administration** > **License** menu. The upper part of the screen displays the list of existing licenses. By default, they are sorted in chronological order according to their validity start date. Nevertheless, it is possible to order the list according to the criterion of your choice, by clicking the header of the corresponding column.



For each of them, you can view:

- unique ID assigned by the system,
- status,
- validity start date and time,
- validity end date and time,
- description,
- date and time of last update,
- administrator who performed the action.

7.1.2 Viewing the properties of a license

1. From the **Administration** tab, click **License**.
2. Select the license to be viewed by clicking the corresponding line.

   ALE Connect displays the properties of the license:

   UUID
   Unique ID generated automatically by the system to identify the license.

   Description
   Describes the nature of the current license.

   Start/End date
   Validity period during which the license is active. It expires when it is not or no longer active. Accesses and tokens included in the license can then no longer be used. However, the existing business units remain accessible for reading, modifying and deleting, as well as all elements attached to them (modules and media excluded).

   Number of accesses
   Total number of users that can be simultaneously connected to ALE Connect. The accesses are split into two pools: one reserved to V.I.P. users (coordinators and supervisors); the other accessible to all. By assigning zero to the V.I.P. pool, the accesses and tokens are sent back to the pool accessible to everyone.

   Number of tokens
   Total number of accesses to media to which users have write access. The tokens are split by business units into two pools: one reserved to V.I.P. users (coordinators and supervisors); the other accessible to all.

   Example 1: you belong to a user group with read and write rights on 2 email, 2 chat and 2 voice queues. When you log in, you consume 3 tokens.

   Example 2: you belong to a user group with read and write rights on 1 chat queue and read rights on 1 email queue. When you log in, you consume 1 token.

   Number of business units
   Maximum number of business units allowed to the tenant, with this license.

   Media authorised
   List of media allowed with this license: voice, e-mail, etc.

   Servers authorised
   List of servers allowed to use the license.

   Current server (for information)
   MAC and IP addresses of the server using the current license.

7.2 Consumption follow-up

You can follow up the consumption of license accesses and tokens in real time, detailed by business unit. This functionality is available from the **Administration** > **License** > **Consumption Follow-up** menu.

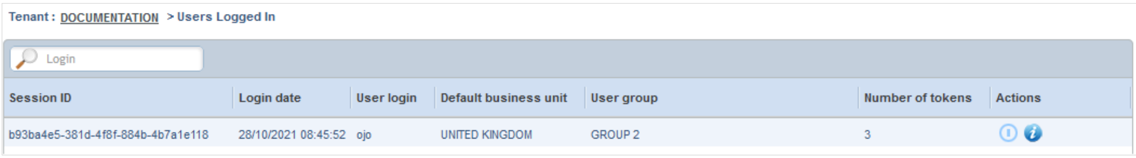
To facilitate reading, the list of business units is sorted in alphabetical order.

7.3 Users logged in

This functionality allows you to view all users who are currently logged in to ALE Connect, on the administration or agent interface.

7.3.1 Who is logged in to ALE Connect?

1. From the **Administration** tab, click the **License** > **Consumption Follow-up** > **Users Logged In** menu.



For each user, you can view:

- session ID,

- login date and time to ALE Connect,

- user's login,

- default business unit,

- user group to which he/she belongs,

- number of tokens he/she consumes,

- icon to log out the user,

- icon allowing to view the details of his/her accesses and tokens consumption.

7.3.2 Logging out a user

From this screen, you can log out any user from the list.

1. From the **Administration** tab, click the **License** > **Consumption Follow-up** > **Users Logged In** menu.
2. Click the **Log out the user** button ( ).

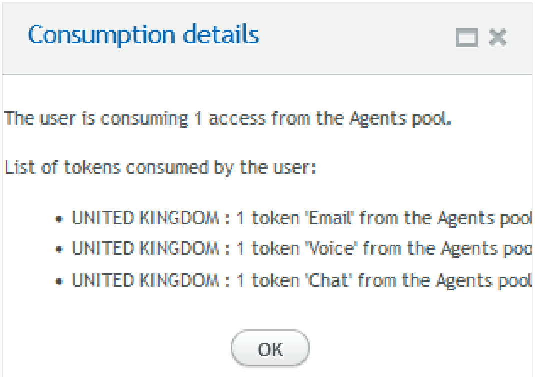
   ALE Connect asks you to confirm the logout.
3. Click **Yes**. The user is logged out from his/her ALE Connect interface.

7.3.3 Following up the consumption of a user

You can view the detail of the tokens consumed in the license for any user in the list.

1. From the **Administration** tab, click the **License** > **Consumption Follow-up** > **Users Logged In** menu.
2. Click the **Consumption details** button ( ).

   The following window is displayed:



7.4 API authentication tokens

Authentication tokens secure the access:

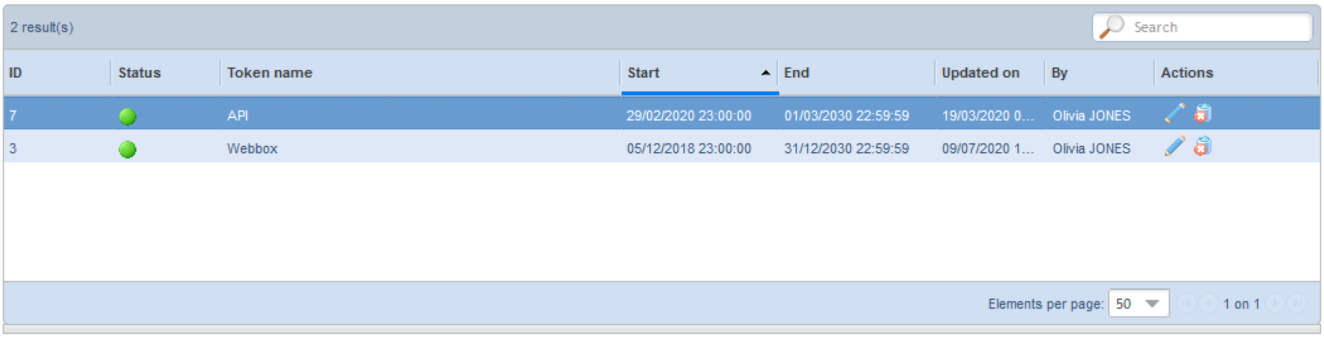
- to the Webbox when the contact centre manages a chat activity,
- to the REST APIs exposed by ALE Connect.

Each token is submitted to a validity period: after expiry, it no longer allows you to access the requested resources.

Warning: these tokens must remain confidential as much as possible.

7.4.1 Overview

This functionality is available from the **Administration** > **Tenants** > **API Authentication Tokens** menu. The upper part of the screen displays the list of all existing API authentication tokens. Each row of the table corresponds to a token:



For each of them, you can view:

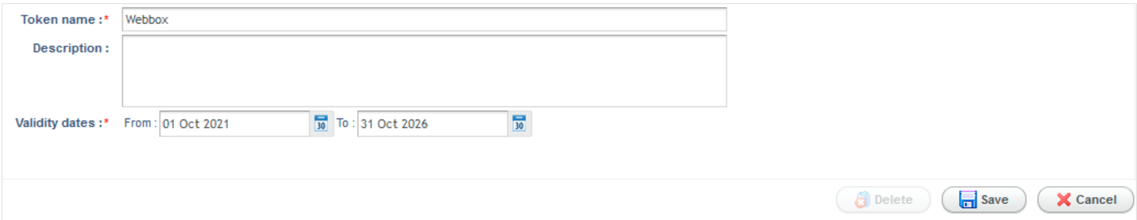
- unique ID assigned by the system,
- status illustrated by a colour indicator,
- name,
- validity start date,
- validity end date,
- date and time of last update,
- name of the user who created or updated it,
- possible actions represented by an icon.

7.4.2 Creating a token for the Webbox

This procedure should only be followed if the contact centre manages a **chat activity** with the ALE Connect Webbox. In that case, it is mandatory to generate an authentication token that allows the Webbox to communicate with AIP, the service exposing the ALE Connect public APIs. This token will be required to perform the minimal configuration of the Webbox. By default, it accesses to all the APIs needed to operate the Webbox. Associated with one or more domains, the request using the token must come from an authorised domain.

Warning: this token is strictly for the use of the Webbox. It must not be used for any other type of integration.

1. From the **Administration** tab, click **Tenants** > **API Authentication Tokens**.
2. Click the **Create a token** button.
3. You must enter the name of the token.
4. If necessary, enter a description related to its use.



5. You must enter the validity period of the token (start and end dates).
6. Click **Save** to validate your entry.

   ALE Connect assigns a **unique ID** to the token: this code is used by the request to allow access to the ALE Connect public REST API. It must remain confidential. The token is immediately added to the existing list.

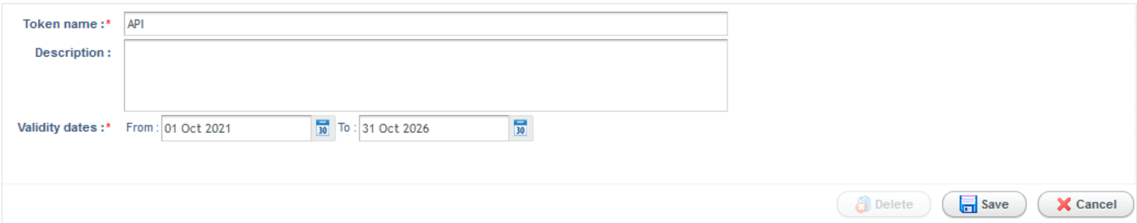
7.4.3 Creating a token for APIs

ALE Connect exposes public REST APIs allowing it to communicate and exchange with any application. They will allow you to perform various actions without using the ALE Connect graphic interface. These APIs can be used in any integration project with another software.

Access to these APIs is secured by using an authentication token that you have to set up here. This token has a unique ID (UUID) generated by the system when it is created. It is sent in the request header for each request from the customer to the resource server.

Note: please refer to the *Integration* technical guide for more information on APIs exposed by ALE Connect.

1. From the **Administration** tab, click **Tenants** > **API Authentication Tokens**.
2. Click the **Create a token** button.
3. You must enter the name of the token.
4. If necessary, enter a description related to its use.



5. You must enter the validity period of the token (start and end dates).
6. Click **Save** to validate your entry.

   ALE Connect assigns a **unique ID** to the token: this code is used by the request to allow the access to the ALE Connect public REST API. It must remain confidential. The token is immediately added to the existing list.
7. Click the **List of URL** tab.

   Here you must specify all the ALE Connect APIs that this authentication token can access:
   attachment: attachments of folders.
   document: documents attached to the folders (only call recordings in this version).
   interaction: exchanges performed when processing a folder.
   thread: management of folders.
   user: control of the user interface.

8. Click the **Add** button.
9. Enter the name of the API to be authorised in lower cases only.

10. Click **Save**.

11. Repeat steps 8 to 10 for each resource you wish to authorise.

7.4.4 Defining the URLs authorised to a token

This action is possible once the token is created. You can define the authorised URLs, knowing that a token is associated with one or more domains.

1. From the **Administration** tab, click **Tenants** > **API Authentication Tokens**.
2. Select, from the lists the affected token.
3. Click the **List of URL** tab.
4. Click **Add**.
5. Enter the URL directly in the dedicated field. Regular expressions are allowed.
6. Click **Save** to validate the entry.

   If necessary, you can modify or delete a URL from the list at any time, using the corresponding functionalities.

7.4.5 Modifying a token

This action allows you to revoke a token, i.e. to make it unusable even if its validity period has not expired yet.

Warning: when adding a new API (thread, attachment, etc.), it may take a few minutes for the change to be taken into account by AIP, the portal exposing the ALE Connect public APIs.

1. From the **Administration** tab, click **Tenants** > **API Authentication Tokens**.
2. Click the **Modify** () button located on the line of the affected token.
3. Perform the changes you wish.
4. If necessary, specify whether the token should be revoked or not.
5. Click **OK** to save your entry.

7.4.6 Deleting a token

1. From the **Administration** tab, click **Tenants** > **API Authentication Tokens**.
2. Click the **Delete** () button located on the line of the affected token.

   ALE Connect asks you to confirm this action.
3. Click **OK**.

   ALE Connect immediately updates the list: the deleted token is no longer in the list.

8 Webbox

The Webbox is a web interface that can be integrated into the page(s) of your company's website. It offers the web users to be connected to the contact centre by chat: the web user can thus dialogue directly with an agent.

Note: the Webbox tab is only displayed if the ALE Connect license includes the Chat media (and/or Voice media). Otherwise, the tab is hidden.

8.1 Help with setup

This page lists the setup steps to be performed in the ALE Connect administration interface in order to set up the chat service provided by the Webbox.

8.1.1 Prerequisites

- The installed ALE Connect licenses must include the **Chat media.**
- A minimum **dataset** is set up on ALE Connect: tenant, business unit(s), user group(s) and users.

Warning: the technical configuration of the Webbox (visual appearance, retrieval of context data, etc.) as well as its integration into the website pages must be performed at the same time. For more information, please refer to the *Webbox* technical guide.

8.1.2 Steps to be performed

No.	Step description	Chat
1	Configure the inactivity times of web users	Optional
2	Generate the Webbox authentication token	✔
3	Create the Chat queues	✔
4	Create the skills	Optional
5	Create the realtime queues	✔
6	Assign rights to agents on queues	✔
7	Create the realtime profiles	✔
8	Create the chat profiles	✔
9	Create the template responses of message type	✔
10	Create the introduction messages	✔
11	Create the behaviour rules	✔
12	Create the presentation calendar	Optional
13	Update the chat forms	Optional

Configuring the inactivity times of web users

Objective: customise the values of the following two parameters to manage the inactivity of the web user. This operation is strictly reserved to the technical operator of the ALE Connect platform.

- chat.inactivityWebuserDelayAlert
- chat.inactivityWebuserDelayDisconnect

Generating the authentication token

Objective: generate the authentication token that allows the Webbox to communicate with AIP, the service that exposes the ALE Connect public APIs. This token is mandatory to perform the minimal technical configuration of the Webbox.

Creating the Chat queues

Objective: create the queue(s) allowing to handle the chat interactions requested by the web users.

Creating the skills

Objective: create the skills needed to agents to manage chat interactions, if the existing ones cannot be reused.

Create the realtime queues

Objective: create the realtime queue(s) in which chat interactions will be directed. A realtime queue is a queue to which a language and a skill have been assigned.

Assigning rights to agents on queues

Objective: for each group of internal users, define the access rights of users for the queues previously created.

Creating the realtime profiles

Objective: manage the pop-up processing and folder closing, and define the operational statuses to which agents can access.

Creating the chat profiles

Objective: define the parameters related to the processing of chat conversations, for example, the maximum number of simultaneous chats an agent is allowed to process.

Creating the response templates of message type

Objective: in the ALE Connect knowledge base, create the pre-formatted written messages that an agent can use while processing a chat folder. Its insertion avoids entry errors, reduces processing time, and allows frequently asked requests to be answered.

Creating the introduction messages

Objective: for each business unit, create customised messages that are inserted at the beginning of the chat conversation.

Creating the behaviour rules

Objective: define when and under which condition(s) the Webbox will offer to a web user to contact the centre.

Creating the presentation calendar

Objective: determine when the Webbox should be displayed on the pages of the website.

Updating the chat forms

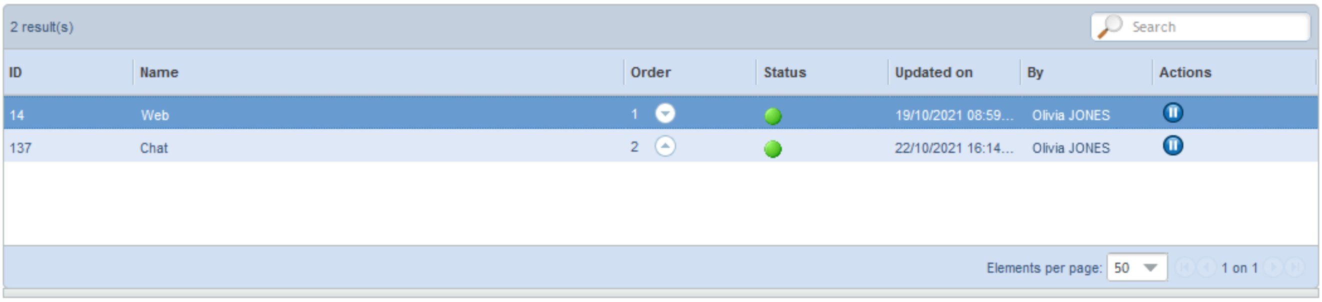
Objective: display the web user's context data in the corresponding tab of the folder (title of the affected web page and URL address) as well as the content of the Subject area in the Info tab of the folder

8.2 Behaviour rules

A behaviour rule defines the conditions to display the Webbox on a website page, and allows the user's request to be directed. **You must create at least one behaviour rule to manage and display the Webbox.** Depending on the activity and the degree of customisation required, you may need to set up one or more rules. In a simple case, one behaviour rule may be more than enough to manage your activity.

8.2.1 Overview

This functionality is available from the **Webbox** > **Behaviour Rules** menu. The upper part of the screen displays the list of all rules set up, regardless of their status:



For each rule, you can view:

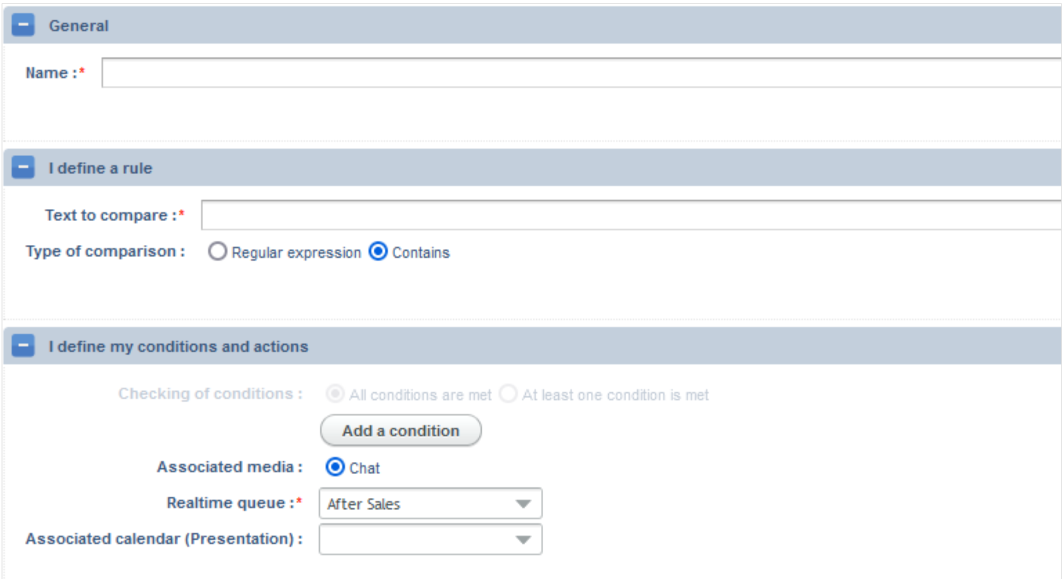
- unique ID,
- name,
- order in which it is applied (can be modified by using the up and down arrows),
- current status illustrated by a colour indicator,
- date and time of last update,
- name and first name of the user who created or updated it,
- possible actions represented by an icon.

8.2.2 Creating a behaviour rule

Warning: if no rule has been set, the Webbox will not be displayed.

1. From the **Webbox** tab, click **Behaviour Rules**.
2. Click the **New rule** button.

   The following screen is displayed:



3. Fill in the following parameters:

   General

   Name
   Enter a name that clearly identifies the behaviour rule.

   I define the rule

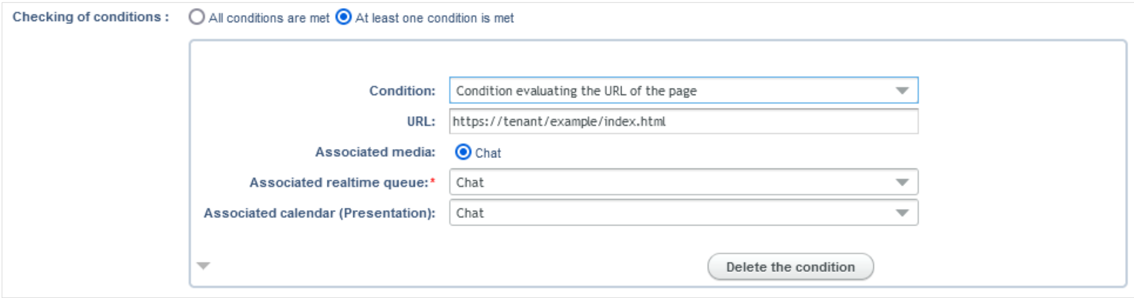
   Define the web pages in which the Webbox can be can displayed, by filling in the following two parameters:

   Text to compare (mandatory)
   Enter the text that will be analysed by ALE Connect in the web page on which the web user is positioned. The value to be entered depends on the type of comparison chosen.

   Type of comparison
   Check the desired option:
   Regular expression: ALE Connect analyses the URL address of the web page on which the web user is positioned, according to a regular expression that you have to define (see the JavaScript documentation on regular expressions for any related questions). If the syntax of the regular expression is not correct, an error message is displayed when you try to save the rule.
   Contains: ALE Connect checks that the URL address of the web page, on which the user is positioned, contains the character string entered. It can be a single word or a part of the URL.

I define my conditions and actions

When ALE Connect detects a web page that is eligible to display the Webbox, the software checks whether the display conditions are met. You must therefore define these conditions (one or more depending on the need). Click the **Add a condition** button.



Condition

Select the condition to be checked:
Condition evaluated by a JavaScript expression every 3 seconds: ALE Connect checks the web user's browsing environment every 3 seconds, according to a JavaScript expression to be defined. As soon as the condition is met, the Webbox is displayed. Enter the **description for statistics** that will be used in the D+ reports at the supervision interface level. Then enter the **JavaScript expression** to be checked (reserved to an audience experienced with the writing of JavaScript code). For any questions, please refer to the JavaScript documentation describing regular expressions.
In the example below, the expression only displays the Webbox if the total amount of the customer's basket is greater than 100.
`document.getElementById('panier').value > 100`
Condition evaluating the URL of the page: ALE Connect displays the Webbox as soon as the web user visits a specific page for which the full URL address must be entered.
Condition evaluating the time spent on the page: enter, in seconds, the time spent on the page by the web user after which the Webbox is automatically displayed (e.g. 5 seconds).

Associated media

Check the Chat media.

Warning: the associated media available vary depending on your ALE Connect license. For example, if the license does not include the Chat media, the corresponding option will not be displayed.

Associated realtime queue

Select a chat realtime queue, if the one suggested by default is not appropriate. This realtime queue is mandatory to redirect any conversation initiated following the Webbox display. If you have chosen to display the Webbox upon checking of all conditions, the interaction will be directed to this realtime queue. However, if you have chosen to display the Webbox upon checking of at least one condition, you must select a realtime queue for each condition.

Associated calendar (Presentation)

This field is optional: if you select a presentation calendar, the Webbox will only be displayed during the opening periods defined by it. If this field is not filled in, the Webbox will be displayed permanently on the website.

Checking of conditions

You have the possibility to impose several conditions to be checked in order to display the Webbox.
All conditions are met: all added conditions without exception must be met to display the Webbox. They will use the same realtime queue.
At least one condition is met: ALE Connect checks the conditions in the defined order. Only one condition in the list needs to be met for the Webbox to be displayed. In that case, the previous parameters must be defined for each condition.

Once the Webbox is displayed, ALE Connect stops checking the conditions. Checks only resume when the web user changes pages.

4. Click **Save**.

8.2.3 Modifying a behaviour rule

This action is only possible when the rule is deactivated. Otherwise, the button is hidden.

Warning: changes are taken into account after 60 seconds (cache). In addition, the Webbox must be relaunched from a new browser tab so that the changes are effective.

1. From the **Webbox** tab, click **Behaviour Rules**.
2. Click the **Modify** button ( ) located on the line of the affected rule.
3. Perform the desired changes (refer to creation).
4. Click **Save** to save your entry.

8.2.4 Deleting a behaviour rule

This action is only possible when the rule is deactivated. Otherwise, the button is hidden.

1. From the **Webbox** tab, click **Behaviour Rules**.
2. Click the **Delete** button ( ) located on the line of the affected rule.

   ALE Connect asks you to confirm the deletion.
3. Click **Yes** to delete permanently the rule, or **No** to abandon this action.

   ALE Connect immediately deletes the rule and updates the list.

8.2.5 Activating a behaviour rule

Creating a rule is not enough: you must activate it so that the Webbox is itself active.

1. From the **Webbox** tab, click **Behaviour Rules**.
2. Select, from the list, the rule to be activated.
3. Click the **Activate the rule** () button on the corresponding line.

   The behaviour rule is now activated.

8.2.6 Deactivating a behaviour rule

This action consists in temporarily suspending the application of the behaviour rule, and therefore the use of the Webbox. In other words, the agents will not be able to process chat conversations during this time. After deactivation, the behaviour rule can be modified or deleted again.

1. From the **Webbox** tab, click **Behaviour Rules**.
2. Select, from the list, the rule to be deactivated.
3. Click the **Deactivate the rule** () button on the corresponding line.

   The behaviour rule is now deactivated.

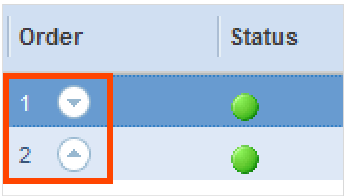
8.2.7 Ordering the behaviour rules

When several rules have been defined, they must be ordered to determine which one should be applied. Indeed, ALE Connect selects the behaviour rules in the order in which they appear in the list: **the first rule found and checked is applied.** When a rule has several exclusive conditions (separated by ORs), the system checks whether any of the conditions are met.

Example 1: a behaviour rule with 2 condition blocks separated by an OR has been created. The first condition assigns the chat conversations to the A realtime queue and the second one to the B realtime queue. Both conditions are met and agents are only available on the B realtime queue. In that case, the invitation is presented to the available agents on the B realtime queue.

Example 2: a behaviour rule with 2 condition blocks separated by an OR has been created. The first condition assigns the chat conversations to the A realtime queue and the second one to the B realtime queue. Both conditions are met and agents are available on both queues. In that case, the invitation is presented to available agents on the A realtime queue.

1. From the **Webbox** tab, click **Behaviour Rules**.
2. In the **Order** column, click the **Move up** and/or **Move down** buttons to order the behaviour rules in the list.



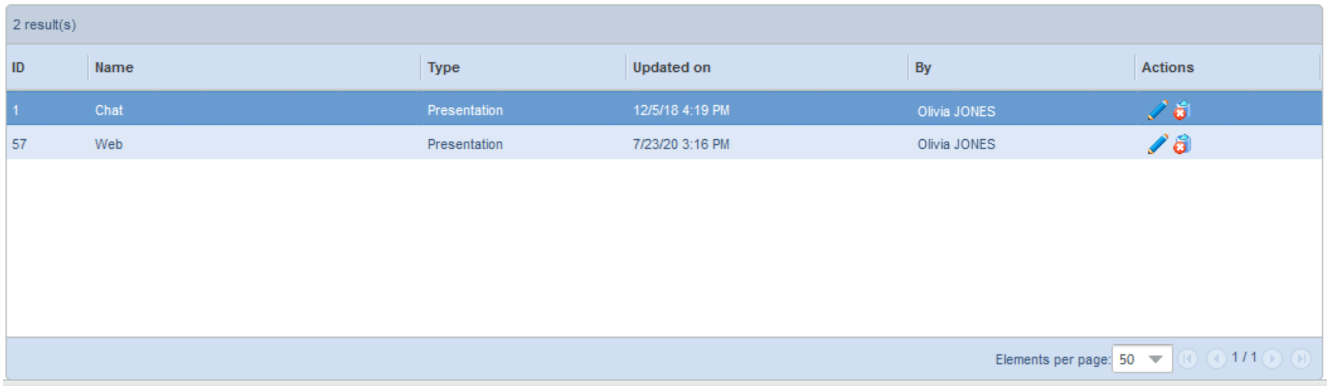
8.3 Calendars

A calendar details the activity periods of the various teams in charge of processing chat. Outside the working hours fixed by the calendar (opening and closing dates and hours), they will not be available. The presentation calendar determines when the Webbox should be displayed on the website pages.

Calendars are defined by tenant. That is why, before starting your entry, check that you have selected the tenant affected by the setup.

8.3.1 Overview

This functionality is available from the **Webbox** > **Calendars** menu. The upper part of the screen displays the list of existing calendars. By default, they are sorted by name in ascending alphabetical order (A-Z).



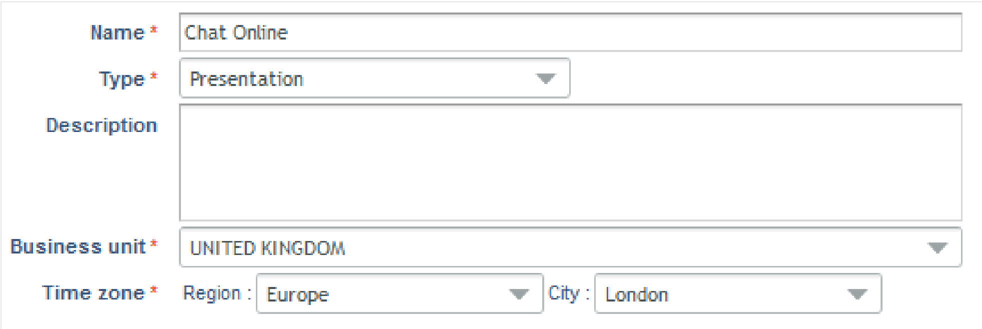
For each calendar, you can view:

- unique ID,
- name,
- type (presentation or callback),
- date and time of last update,
- name and first name of the user who created or modified it,
- possible actions represented by an icon.

8.3.2 Creating a presentation calendar

It defines the time ranges during which the Webbox is displayed on the website.

1. From the **Webbox** tab, click **Calendars**.
2. Click the **New calendar** button.



3. Fill in the following parameters:

   Name (mandatory)
   Enter a name that clearly identifies the calendar.

   Type (mandatory)
   You must select the Presentation value.

   Warning: this field cannot be changed after saving the calendar.

   Description
   If necessary, enter a comment describing the purpose of the calendar.

   Business unit (mandatory)
   Select, from the list, the business unit to which this calendar must be assigned.

   Time zone (mandatory)
   Select, from the list, the region and the city that determine the time zone of the current calendar. The lists of values are hard-coded in the system and cannot be customised.

4. Click **Save**.

   The calendar is created and immediately added to the list: you can now define its opening and closing time ranges.

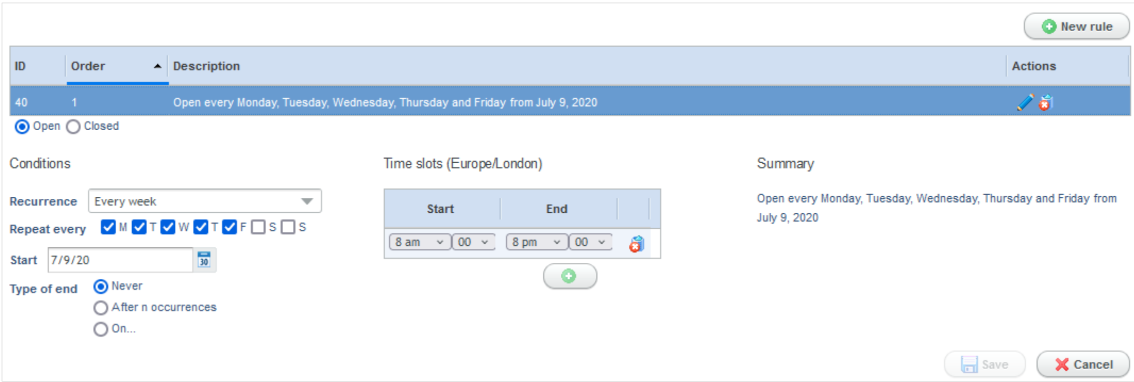
8.3.3 Opening and closing time ranges

You must define the specific opening and closing time ranges of the calendar, by creating rules: standard weekly hours, public holidays, etc. This action is performed after the creation of the calendar. It is advised to define the general rule first (e.g. Monday to Friday from 8am to 6pm) and then define the possible exceptions (e.g. Saturday from 8am to 12pm).

8.3.3.1 Creating a rule

A rule corresponds to a specific time range in the calendar. It is possible to create as many as needed.

1. From the **Webbox** tab, click **Calendars**.
2. Select, from the list, the desired calendar.
3. Click the **Rules** tab.
4. Click the **New rule** button.



5. Fill in the following parameters:

   Open/Closed
   Check the availability of the contact centre during this time range: open or closed. According to your choice, the fields to be filled in vary.

   Recurrence
   Indicate how often the rule is repeated: every day (default choice), every week, every month or every year (e.g. every year if it is a closing rule for a public holiday).

   Start
   Enter the start date of the rule either by entering it manually or by selecting it from the calendar. It can be past, present or future. By default, this is the current date.

Type of end

A rule may have a limited duration or not, depending on whether it is a punctual event (e.g. service closed exceptionally for one day), or a permanent one. You must therefore check the type of end for the rule:
Never: the rule is unlimited in time.
After n occurrences: the rule is repeated a certain number of times, to be specified in the **End after** mandatory field. When this number is reached, the rule is no longer applied and disappears from the calendar.
On: the rule stops at a specific date that you have to define.

Time slots

In the case of an opening rule, add the time slots. If it is valid for one or more specific time slots, you must add them here (e.g. service open continuously from 9 am to 7 pm). Click Add (⊕) then select the start and end times of the slot. Repeat this entry as many times as there are time slots to be created. You can delete a time slot at any time, if needed.

Warning: time slots should not overlap. If that is the case, it is not possible to save you entry (greyed out button).

Summary

Check the summary of the rule to make sure that there are no errors.

6. Click **Save** to validate your entry.

   The rule is immediately displayed in the calendar in last position.

8.3.3.2 List of rules

Each new rule created is immediately added to a list, displayed at the top of the tab. You can view for each one: its ID, its order number, its description and the possible actions. The opening and closing rules of the calendar can be modified or deleted, following the standard process.

If you define several rules, make sure that they are consistent with each other.

8.3.3.3 Modifying a rule

Warning: if you modify a rule while the calendar is in production, the change may not take effect immediately. The rule is applied after a delay set up in the AIP configuration file (Checkdelay parameter of the Task tag).

1. From the **Webbox** tab, click **Calendars**.
2. Select, from the list, the calendar to be modified.
3. Click the **Rules** tab.
4. Click the **Modify** button ( ) located on the line of the affected rule.
5. Perform the desired changes (refer to creation).
6. Click **Save** to save your entry.

8.3.3.4 Deleting a rule

1. From the **Webbox** tab, click **Calendars**.
2. Select, from the list, the calendar to be modified.
3. Click the **Rules** tab.
4. Click the **Delete** button ( ) located on the line of the affected rule.

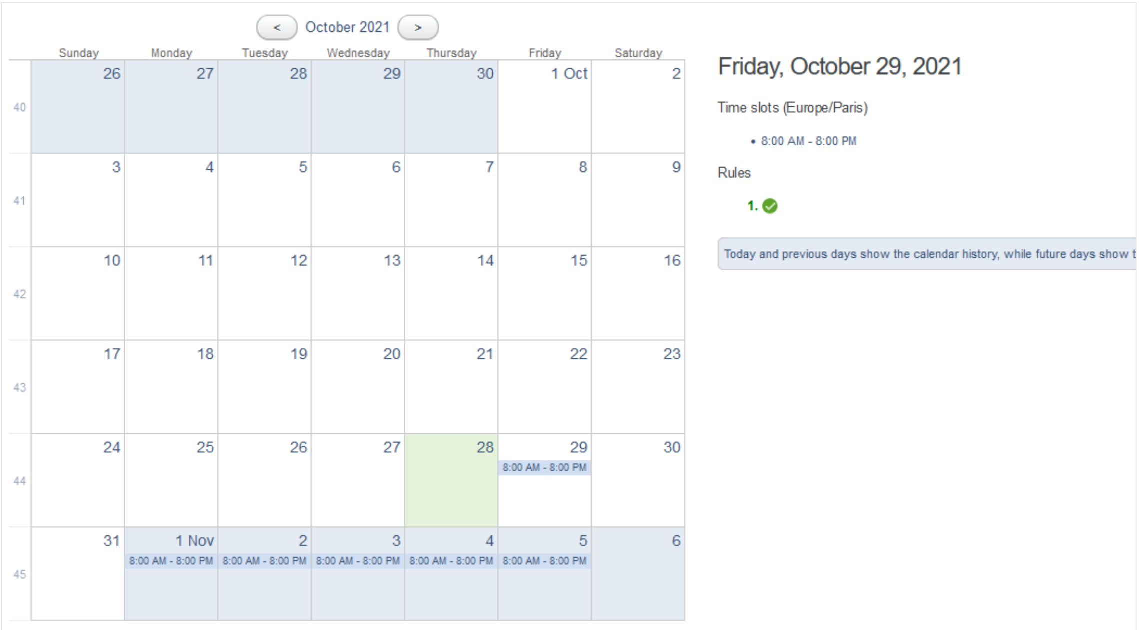
   ALE Connect asks you to confirm the deletion.
5. Click **Yes** to delete permanently the rule, or **No** to abandon this action.

   ALE Connect immediately deletes the rule and updates the calendar.

8.3.4 Viewing the calendar

You can view the final calendar: it displays the opening and closing periods, as defined in the Rules tab. In other words, you cannot change anything here. By default, you will view the calendar for the current month. Today's date is highlighted by a green cell as a reference point.

1. From the **Webbox** tab, click **Calendars**.
2. Select, from the list, the calendar to be viewed.
3. Click the **Calendar** tab.



On the right of the screen, a summary displays the opening and closing rules at the current date.

To change the month, simply click the **Previous** and **Next** arrows.

8.4 Contact association

This functionality allows you to choose which fields of the contact sheet ALE Connect should use to search and identify the web user who starts a chat.

8.4.1 How does it work?

ALE Connect retrieves the context data from the website where the web user is positioned, then checks whether there is any match in its contact database.

If so, two specific cases may happen:

- **Several contact sheets match**: they are suggested to the agent so that he chooses the one to associate with the conversation.
- **Only one contact sheet matches**: it is automatically associated with the current conversation.

The suggested fields (name, first name, postcode, etc.) are those for which a match between a field in the contact sheet and a field in the form has been found. ALE Connect also uses the context data provided at the beginning of the chat.

The setup is always performed by business unit.

8.4.2 Advice to guide your choice

- Think carefully about which fields to select for the search, because it will be performed on all checked fields. In other words, if a data does not find a match, the contact sheet will not be found.
- Since the email is the only field for which a match between the form and the contact sheet cannot be defined, the search on this field is mandatorily performed with the frm_mail context data.

8.4.3 Procedure

1. From the **Webbox** tab, click **Contact Association**.
2. Select a business unit from the scrolling list.
3. Check the fields to be used for the search.
3. Check the **Display the most recent contact** option if you wish only the contact sheet with the most recent creation date to be selected by the system, even if there are several matches. In that case, the sheet is automatically associated with the conversation.
4. Click **Save** to save your entry.

9 ALE

This tab allows you to manage the provisioning of ALE Connect and set up the connection with OXE, the ALE communication server responsible for distributing ALE Connect incoming voice interactions (see the ALE editor's OXE documentation for more information).

9.1 O2G connection

O2G is the "cloud gateway" responsible for connecting OXE to ALE Connect by publishing a secured API. The O2G - ALE Connect link is encrypted and a certificate must be deployed when installing O2G. Then, the secured connection between O2G and ALE Connect can be configured in two steps:

1. Generate a new authentication token
2. Define the connection parameters to O2G

9.1.1 Setting up the O2G connection

9.1.1.1 Step 1: generating a new authentication token

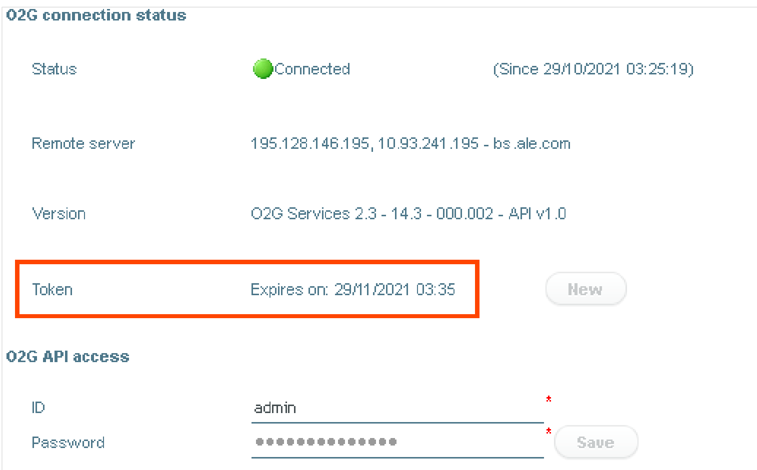
In order to secure exchanges, the O2G API must submit a valid authentication token when requesting the connection to ALE Connect. This token is valid for the tenant level and therefore all its business units. This operation must be performed by a coordinator who wishes to set up a tenant for which no authentication token is valid.

Warning: once the token is generated, you must configure it in O2G. This token is valid for 30 days. It is automatically renewed every 28 days by O2G.

1. From the **ALE** tab, click **O2G connection**.
2. Click the **New** button.

   Warning: this button is only active if you are a coordinator. Otherwise, it is greyed out.

   A warning message informs you of the consequences of this action and asks you to confirm it.
3. Click **Continue** to confirm the creation of the token. A new authentication token is generated and its expiry date is displayed:



The token is automatically copied to the **clipboard**, so that you can paste it into a text editor to view its content, if needed. You can now **declare this token in O2G**.

9.1.1.2 Step 2: declaring the connection parameters

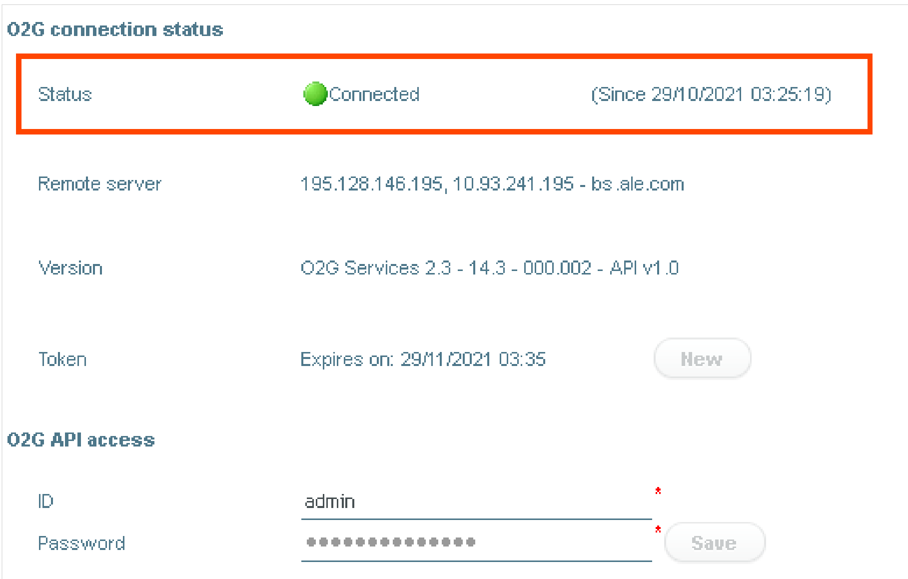
Once the token created, you must define the ID and password that ALE Connect should use to call the O2G API. This information is mandatory and saved at the tenant level. If necessary, it is possible to modify them later. In that case, the changes are taken into account after restarting the ALE O2G microservice (operation strictly reserved to the technical operator of the ALE Connect platform).

1. From the **ALE** tab, click **O2G connection**.
2. Enter a connection **ID** (30 alphanumeric characters maximum).
3. Enter a **password** (30 alphanumeric characters maximum).
4. Click **Save**.

9.1.2 Viewing the O2G connection status

In case of doubt, you can easily check whether the O2G API is connected to ALE Connect. Please note that the values displayed are those available at the time the screen is opened. They are not refreshed automatically. You must reopen the menu to view any changes.

1. From the **ALE** tab, click **O2G connection**.
2. Check the status and colour of the indicator:



Status

Connected: the connection is operational since the date and time indicated (green light).
Disconnected: the connection is momentarily suspended (red light).

Remote server

Local IP address, remote IP address, hostname of the server.

Version

O2G server version.

9.1.3 Forcing a disconnection

In case of technical problems, you have the possibility to terminate the connection between O2G and ALE Connect, for the affected tenant. By forcing a disconnection, O2G will attempt to automatically and cleanly reconnect to ALE Connect which will have to authenticate this new connection with the last valid token generated.

Warning: check beforehand that this action will not impact the activity in progress, agent login and data synchronisation. Agents and supervisors will be informed of this disconnection by a message on their ALE Connect interface.

1. From the **ALE** tab, click **O2G connection**.
2. Click the **Disconnection forced** button.

   A confirmation message is displayed informing you of consequences of this action.
3. Click the **Continue** button.

   Disconnection is requested. O2G automatically reconnects to ALE Connect.

9.1.4 What if the O2G connection is suspended?

The following are reasons why disconnection may occur:

O2G cannot reach ALE Connect. This may be, for example, a network routing problem. In that case, the global network configuration should be checked. Contact the ALE Connect platform coordinator to report the malfunction.

O2G submits an invalid token. The connection cannot be established with ALE Connect. You must then regenerate a token on your ALE Connect administration interface, and then declare it in O2G.

ALE Connect uses a login and/or password that are rejected by O2G. Make sure you have the rights identifiers. Then, check the login and password set up in ALE Connect are identical to those declared in O2G.

9.1.5 Renewing an authentication token

You wish to generate a new token when one already exists and is active. This action will invalidate the token being used. The current connection to ALE Connect will be preserved but the new token will be required by ALE Connect to the next O2G reconnection. If the creation of the new token fails, the former token remains valid.

1. From the **ALE** tab, click **O2G connection**.
2. Click the **New** button.

   Warning: this button is only active if you are a coordinator. Otherwise, it is greyed out.

   A warning message informs you of the consequences of this action and asks you to confirm it.
3. Click **Continue** to confirm the creation of the token.

A new authentication token is generated and its expiry date is displayed:

It is also automatically copied to the **clipboard**, so that you can paste it into a text editor to view its content. You must now declare the generated token in O2G.

9.1.6 Checking the validity of an authentication token

1. From the **ALE** tab, click **O2G connection**.
2. Check the expiry date of the current token.

9.2 Synchronisation

The provisioning is the operation which consists in supplying ALE Connect with some key data from OXE and/or Rainbow: users, operational statuses, etc. To this end, ALE Connect will query O2G to get and retrieve the data to be created. This functionality allows you to manually trigger a provisioning processing from your administration interface.

9.2.1 Prerequisites

ALE Connect performs the following controls when you request to run a provisioning processing:

- you are connected to Rainbow,
- AND the setup of the O2G connection has been correctly performed,
- AND the O2G connection is operational.

If you launch the provisioning when these requirements have not been met, the processing cannot be started.

9.2.2 When should provisioning be triggered?

You have the possibility to trigger the provisioning of a tenant at any time. The **first execution** initialises the data in ALE Connect, and must be triggered manually via this screen. Once the provisioning is complete, you can complete and finish setting up ALE Connect.

The **next executions** update the data (e.g. new user) at the desired frequency. At each provisioning, ALE Connect will check the expected data exists: default business unit, default skill, etc. If the data does not exist, it will be automatically created.

The provisioning can be executed as many times as desired, especially in case of desynchronisation between ALE Connect and O2G. It is executed asynchronously so that you can continue to use the administration interface freely. The result of the provisioning is saved in a report to be downloaded.

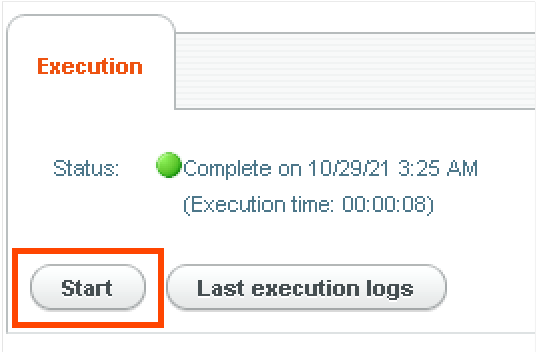
9.2.3 Data created by the provisioning

Data	Information
User	Users must be declared in Rainbow and OXE to be declared in ALE Connect during the provisioning. Each user has a login in the form of an e-mail address. This login is the link between ALE Connect and O2G/Rainbow and should not be changed. The user data comes from OXE, except for the time zone which is supplied by Rainbow. **Warning**: when updating a user, information from O2G/OXE overwrites those from ALE Connect **except for the name, last name, language and time zone.**
User groups	Default group assigned to ALE Connect users.
Business unit	Default business unit of the tenant.
Skill	Default skill of the default business unit. It is automatically attached to the default skill group, also created by the provisioning.
Realtime queue	O2G provides the list of pilots. ALE Connect creates for each of them a couple of queue/realtime queue. Voice queues are created for the default business unit, which is created by the provisioning. Note: if a pilot name contains characters which are not supported by ALE Connect, they will be automatically replaced by a _ character (underscore) when creating the queues and realtime queues.
Operational status	Operational statuses that the agent can use when working on his/her ALE Connect interface (Withdraw, Push Voice, etc.). They will be associated with the default realtime profile of the tenant.

9.2.4 Launching a provisioning

This action allows you to trigger a provisioning processing. If a provisioning is already running, your request will be rejected.

1. From the **ALE** tab, click **Synchronisation**.
2. Click the **Start** button.

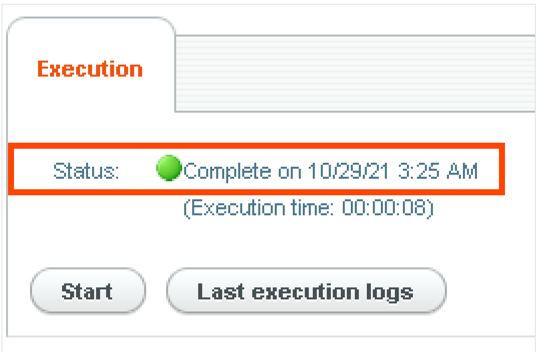


Once the processing has been successfully completed, you can download the execution report.

9.2.5 Viewing the provisioning execution report

At any time, you can check the execution status of the last provisioning processing requested. This information avoids restarting the same processing on a tenant, when it is already in progress.

1. From the **ALE** tab, click **Synchronisation**.
2. The status of the last execution is displayed:



In progress: the data synchronisation is running since the specified date and time.

Complete: the synchronisation is complete with no errors at the specified date and time.

Complete with errors: the data synchronisation is complete at the specified date and time, but there were one or more errors.

Information unavailable: a technical problem has been detected. Try running the provisioning again. In case of new failure, please contact you ALE Connect administrator.

9.2.6 Downloading the execution report

The provisioning execution generates a report that you can download to check what happened. It only contains the results of the last execution: ALE Connect does not keep a history of past executions. Each line of the report is time stamped.

1. From the **ALE** tab, click **Synchronisation**.
2. Click the **Last execution logs** button.

10 More help

10.1 Glossary

A

Access: number of users simultaneously logged in to ALE Connect. The accesses are split into two pools: one reserved to V.I.P. users (coordinator or supervisor) and the other accessible to all.

Acknowledgement of receipt: automatic email sent by ALE Connect to a contact, confirming the receipt of his/her message and usually indicating an informative processing deadline.

Address book: list of persons internal or external to the company with whom the agents may communicate when processing folders, whether to obtain additional information before replying to a contact, or copy them for example.

Agent: also known as advisor, he or she is responsible for processing requests performed from contacts, whatever the media used: phone call, email or chat. He/She belongs to a group of agents and shares the same rights as them.

Aggregation: in reporting, process which consists in cumulating values to get a single value that will be used. Usually, values are aggregated over a given period (week, month or year for example) or a geographical area (region, country, continent, etc.).

ALE Connect application freeze: temporary blocking of the ALE Connect interface, when the agent has ignored several successive pop-up notifying the arrival of an interaction. This mechanism is intended to temporarily suspend the distribution of e-mails and chats.

Animated GIF: GIF (Graphics Interchange Format) is an image format frequently used on the Web. An animated GIF is a variant: this GIF file includes a series of ordered images, displayed very quickly in a loop, thus allowing to obtain a short animation. Usually comical or parodic, they are used to illustrate a situation, a thought or an emotion. They can be used in Facebook Messenger conversations between an agent and a web user.

API: Application Programming Interface that allows applications to exchange data with each other. ALE Connect provides a library of API to exchange data with any third party application (usually a CRM software).

B

Behaviour rule: set of parameters that define the time and conditions to display a chat invitation to the web user, via the Webbox, depending on the web page on which he/she is positioned, as well as the conditions related to his/her activity on this page.

Business unit: sub-division of the tenant. The business unit is a set of queues with its own knowledge base.

C

Chat: instant messaging that allows contact centre agents to chat with web users in real time.

Contact: person (customer or not) who initiates an exchange with the contact centre. This exchange can be performed by email, telephone, chat, etc. Each contact is identified by an individual sheet in the software.

Coordinator: this user has access to a single tenant and some extensions (e.g. advanced routing). The coordinator role is usually reserved to the Business Partner in charge of the configuration of the ALE Connect tenant.

Cube: in BI, abstract representation of multidimensional information that is exclusively digital, based on the OLAP (On-line Analytical Processing) approach. A cube is based on a relational database built in a structured way and organised by business axis to allow simple access (DataMart). This method is offered for interactive analysis purposes by one or more persons (often computer and statistical novices) whose job is represented by the data.

D

Dashboard: dashboard displaying Key Performance Indicators (KPIs) that measure trends and performance of contact centre activity, either in real time or historically for the current day.

Desktop: working directory presenting a list of folders, as a mailbox, all media included.

Dimension: in a statistical report, business axis you wish to analyse (e.g. media, agents, calls, etc.). The dimensions are specific to each cube and can be used as filters. A report can contain several dimensions.

Drill-through: in a statistical report, computer action that allows you to zoom in on the finest level of information with a single click, from aggregated data.

E

No entry in the glossary.

F

Facebook Messenger: instant messaging system provided by the social network Facebook. ALE Connect allows contact centre agents to process requests performed by web users through this media.

Folder: request from a contact that includes the various exchanges and processings related to this request, whatever the media used to initiate it.

Form: set of fields allowing to store metadata related to an interaction in the ALE Connect tables. This data is usually extracted from emails, voice scenarios (for voice) or context data (chat).

G

No entry in the glossary.

H

Handling time: measure used to evaluate the time spent by an agent to process a folder.

I

No entry in the glossary.

J

Job: scheduled computer task to be executed in the system. A job can be triggered either manually, at the most appropriate time chosen by the user, or automatically according to a programming at a scheduled date.

K

Knowledge base: library of shared elements facilitating the processing of folders by the agents. It contains response templates, among other things. Any agent can thus use the knowledge base when processing folders.

KPI: acronym for Key Performance Indicator. Key performance indicator also called counter in ALE Connect. In a statistical context, numerical value used to measure the performance of the contact centre. ALE Connect natively includes a wide range of key indicators to feed the dashboards or D+ reports.

L

No entry in the glossary.

M

Measure: numerical indicator representing a number, duration or percentage. It is also called KPI (Key Performance Indicator). It evaluates the trend, positive or negative, at a given moment, according to the object measured. A measure can be aggregated, i.e. cumulated over one or several dimensions such as a time unit: by day, by week, by month, etc.

N

No entry in the glossary.

O

Operational status: status specifying in real time what the agent or supervisor is doing, while communicating its availability to other logged in agents/supervisors. On the ALE Connect interface, it is represented by a round icon and a description specifying the task performed.

P

Picking: random sampling of messages written by agents. It is requested by the supervisor in order to check the content for qualitative or training purposes.

Pull mode: working method that allows the agent to freely select the interaction to be processed from one of the available desktops (email or Facebook Messenger conversation for example).

Push mode: working method that consists in automatically submitting to an agent any new interaction that arrives (call, chat, etc.) without the agent having to do anything. The software “pushes” the interaction. A pop-up is displayed in the lower right corner of the screen to notify this arrival.

Q

Quality of Service: QoS. Ability of the centre to respond to requests from contacts, all media included. It evaluates satisfaction in terms of response according to different criteria: responsiveness, handling time of folders, etc. It can be calculated over a day or a longer period depending on the need. Different calculation methods are available in ALE Connect. The higher the quality of service, the better the customer service.

Queue: set of folders from the same media. A queue mandatorily depends on a business unit.

R

Realtime queue: queue to which a language and a skill has been assigned. It automatically inherits from the media of the queue to which it is linked.

Report: statistics table with one or several rows and/or columns, depending on the case, presenting the results according to the chosen dimensions, measures and filters.

Response template: pre-formatted written message that agents and supervisors can use when processing a folder. Its insertion avoids entry errors, reduces handling time, and allows frequently asked questions to be answered. Response templates are particularly useful to process emails and chats with the web users.

S

Script: computer program that describes a sequence of commands or instructions in order to automate a task. In ALE Connect, scripts can be used by the management and routing rules to route interactions.

Skill: professional ability or know-how required to process a folder. A skill is always assigned to a new folder (as well as a queue and a language).

Spontaneous email: email sent by an agent/supervisor, for which there was no prior request from the contact.

Supervisor: in a contact centre, the supervisor is in charge of one or several groups of agents. He/She often combines the roles of agent and supervisor. As operational, he/she manages the activity and supports the agents he/she supervises in their daily tasks. He/She accesses the administration interface where he/she can, among other things, see the queues he/she supervises, manage the knowledge base and his/her user groups.

T

Token: in the ALE Connect license, number of media on which a user has a write access. The tokens are dispatched by business unit, then for each of them into two pools, one reserved to V.I.P. users and the other accessible to all.

U

No entry in the glossary.

V

No entry in the glossary.

W

Wallboard: dashboard whose ergonomics and display are adapted to remote reading, on large screens. It is used as a visual communication tool for teams grouped in the same open space, which can thus follow up the evolution of the activity in real time.

Webbox: web interface complementary to ALE Connect which offers to web users to be connected to the contact centre. Integrated into the company’s website page(s), it offers a chat service (a web user can chat directly with an agent).

Webhook: notification system that alerts a third party application when a specific event occurs in ALE Connect. Acting as a messenger, it provides additional details of the event related. Communications between the two systems use the HTTPS protocol.

Wrap-up: when the interaction is over (call, chat, etc.), time remaining for the agent to complete the folder. This time can be set up by the ALE Connect coordinator.

X

No entry in the glossary.

Y

No entry in the glossary.

Z

No entry in the glossary.

10.2 Frequently asked questions (FAQ)

Below you will find answers to the most frequently asked questions about ALE Connect.

10.2.1 User accounts

An agent has left the company. What action(s) should I do?

Start by deactivating the account, by entering an expiry end date in his/her user sheet, to prevent any login to ALE Connect with this account. Deactivation does not result in the deletion of any data (folders, statistics, etc.). In addition, you will have the possibility to reactivate the account later if, for example, you work with occasional/seasonal providers.

Move the affected user to an obsolete user group: we invite you to contact your customer support, to study the possibilities of implementation.

The statistical reports and dashboards need to be updated. Each customised report using lists of values filtered on agents or logins must be modified by its owner: the agent must be removed from these filters. Otherwise, if a programming exists for this report, its sending by email will fail. In addition, all the dashboards that contain list widgets in which the agent appears must also be updated manually.

A supervisor has left the company. What action(s) should I do?

Perform the actions described in the previous answer. Then:

The supervisor must be removed from the list of recipients for all programmings of statistical/picking reports. Please note that only the creator of a programming is authorised to modify it. If this is not done, ALE Connect will continue to send the reports to the supervisor. Since his/her email address has been deactivated, the system will generate mailer-daemon emails unnecessarily. Note: if the supervisor used private customised reports, we invite you to contact your customer support to discuss possible recovery options.

Make sure that another supervisor has the same rights, to avoid leaving folders to be validated/deleted indefinitely, in the respective Validation and Recycle Bin desktops.

A coordinator has left the company. What action(s) should I do?

Perform the actions described in the two previous answers. On the administration interface, assign the coordinator authorisations to his/her substitute.

10.2.2 Statistical reports

I do not receive / no longer receive a programmed report.

Various reasons may explain this fact. The following controls must be performed on the agent/supervisor interface in the Reporting menu ().

No programming has been defined for the report. Select the desired report. Move the cursor over the icon to the left of the report name: if a blue clock () is displayed, it means that no programming has been set up. You must create one (at least), so that the report can be sent.

A programming does exist, but it is suspended. If you have created it, you are the only one who can modify it: open the list of programmings for the affected report, then click the Activate button (▶) located on the corresponding line. Otherwise, contact the creator of the programming to perform the correction.

The sending frequency/day of the report has been set up incorrectly. It is necessary to correct the wrong programming(s) of the report. If you have created it, you are the only one who can modify it: open the corresponding list, then click the programming to be modified. Check the parameters of the sending frequency and, if necessary, the days checked. Perform the desired corrections. Otherwise, contact the creator of the programming to perform the correction.

You are not on the list of recipients. It is necessary to correct the wrong programming(s) of the report. If you have created it, you are the only one who can modify it: open the corresponding list, then click the programming to be modified. In the Recipients field, add the missing email address. After saving, it is recommended to check all the parameters of the report: the correction must be repeated as many times as necessary. However, if you are not the owner of the wrong programming, contact the creator to perform the correction.

The report contains too much data. The query failed to extract the results and the report was not sent. It is generally recommended to refine the criteria (filters, period, etc.) to reduce the number of results. You have two options: contact the supervisor who created the report to correct it, or contact the customer service.

The report uses a filter on a list of values among which one of them is not valid. The report must be updated by its owner to remove the obsolete values. As the previous case, you have two options: contact the supervisor who created the report to correct it, or contact your customer support.

How can I change the recipients of programmed reports that I do not own?

We recommend using a mailing list: with this single email address, all recipients are set up and managed by your company's mail server, independently of ALE Connect. This solution offers several advantages: when one of the recipients leaves the company, you do not need to change the programmings one by one, for each report affected. Simply update the mailing list. In addition, the number of recipients is no longer limited.

10.2.3 Folders

I cannot find a folder after a search.

Various reasons may explain this fact:

You have selected the wrong desktop. Make sure that the selected desktop is the one where the search must be performed.

The folder is no longer visible. You can no longer find the folder via the desktops, because of its characteristics: you do not have the rights to this folder, it is waiting to be validated, it has been merged, etc. We then advise to go through the contact sheet: you will find there all his/her history of folders, whatever their status. Simply click the folder to view it.

The folder no longer exists. It was permanently deleted by a supervisor.

The folder has been merged with another one. To find it, perform a search in the notepad (Notes field) entering the folder reference. Indeed, ALE Connect systematically adds a comment in the notepad of folders following a merge.

You have activated the Filtered display mode. This interface option only displays the folders that are assigned to the logged in agent, or unassigned. Folders assigned to other agents are hidden. Return to the List mode, to display all in progress or processed folders (depending on the case).

You have selected the wrong search field (message, subject, etc.). Check that the selected criterion (In field) matches the content in which you wanted to search. If it is wrong, select another criterion from the scrolling list.

There are too many results and they cannot be displayed. By default, ALE Connect restricts the display to the first 10,000 folders found, for performance reasons. When the number of results exceeds this limit, no results are displayed. It is therefore advised to refine the search, by specifying other criteria.

The indexing of the folders has not yet been updated. There is a time period between the last action performed on a folder and the update of the search index. Indeed, it is refreshed every 15 minutes. Wait a few minutes before restarting the search, or change your criteria.

I do not view the folders sent for validation by the agents.

This is because you are not declared as supervisor of the agents affected. Ask an authorised coordinator to check the parameters of your user sheet, from the administration interface: the group of supervised agents must be selected in the corresponding tab. If you are authorised, you can perform this control yourself.

Remember that these folders are stored in a separate desktop Validation, accessible from the taskbar on the left of your screen.

I need to export the email addresses from a selection of folders, for marketing purposes / for integration into our CRM system.

Only a supervisor can export, from the agent interface, a list of email addresses matching a selection of folders. Start by selecting a desktop, then perform a search by targeting the folders you want to export. Click the Export button. The email addresses are exported in a file in .csv format.

What is the difference between closing and archiving a folder?

These two actions move the folder in the Processed desktop, with the Closed or Archived status respectively. The Close action closes the folder by generating a new exchange, visible in the history of exchanges of the folder. The Archive action also closes the folder without any particular action.

The major difference between these two actions concerns the statistics: when you close a folder with the Close action, the folder is taken into account in the calculation of the Quality of Service. But this is NOT the case if you archive it.

10.2.4 Email

The volume of emails to be processed is unusually low compared to the usual activity. What is happening?

If the volume is lower than usual (but not null), there may be several reasons:

There is an incident on the mail server. Only an authorised system administrator can check this, diagnose and solve the issue.

The routing rules are inappropriate / have been modified. As a result, new interactions are misdirected to the different queues and skills in ALE Connect. That is why we recommend to create a "universal" user account belonging to a group with access to all queues, skills and languages. This user will thus be able to view the folders on his/her interface, then redirect them manually while waiting the parameters of routing rules be updated (performed by an authorised administrator or coordinator).

I wrote a draft response. Is it visible to other agents?

Yes, the draft is visible to all collaborators in the contact centre.

10.2.5 Chat

The Webbox is displayed too often: can we make it so that it only appears when an agent is actually available?

Yes, you need to set up ALE Connect so that the software refuses to place web users in realtime queue when no agent is available to process the chat.

For this purpose, a coordinator must change the properties of the queue in which the chat conversations arrive: this is the Adjustment of the realtime queue size (% of the number of agents logged in x maximum number of conversations) parameter that sets up the number of web users placed in realtime queue, when all the agents authorised to process chat conversations have reached their maximum quota of authorised conversations. By defining a value equal to 0, no web user is placed in realtime queue and the Webbox is therefore not displayed.

Can a survey be triggered at the end of a chat?

Yes, it is possible technically (e.g. inserting a link to an external survey at the end of the conversation). To identify the most appropriate solution to your needs and context, we invite you to contact your customer support.

When chatting, is it possible to use autocomplete sentences to go faster?

Yes, it is possible to define response templates to the most frequently asked questions in the ALE Connect knowledge base (from the administration interface). Warning, they must have the Message type, otherwise they will not be usable during a chat. Only a coordinator or supervisor can perform this operation.

I want to use a response template that exists in our knowledge base, but it does not appear when I start typing my text.

This is because the type of this response is wrong: only message type responses can be used in chat conversations. Since this characteristic cannot be modified, a coordinator or supervisor must re-create this response template in the knowledge base from the administration interface, being careful to select the Create message option.

How to set up a chat service opening calendar?

From the administration interface, a coordinator must create a calendar of the tenant. It details the time slots (opening and closing hours) of the teams handling chat conversations. Outside the working hours set up by the calendar, this service will not be available.