

# OSvC TECHNICAL SUPPORT WEBINARS:

## Understanding Chat Permissions

*our experts are your guides*

**Laura Rizea**

**Technical Support Engineer**

**OSvC Technical Support**

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**ORACLE®**

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# About Chat

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- 3 Conference/Transfer to Other Groups
- 4 Supervisor: Monitor, Edit & Delete
- 5 Max Active Chats & Delay
- 6 Chat queue policies

# 1 Minimal chat access

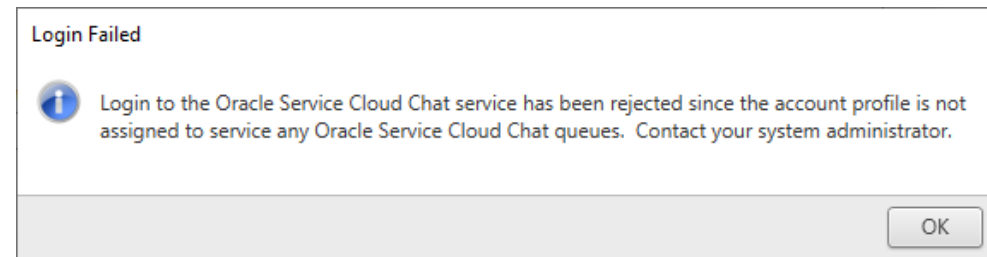
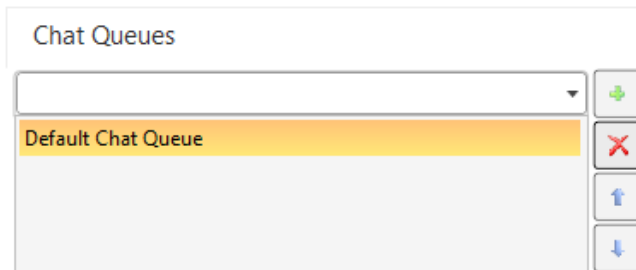
Chat

Select to allow staff members with this profile to chat with customers. Without this option, the Live Media Bar will not show.



Chat Queues

An agent must be assigned to a chat queue to log in to Chat and accept chat requests from customers.



Pull Chat

Allow agents to pull chats from the wait queue

Chat Agent Statuses

Change labels or add new ones from Customizable Menus

## 2

## Allow Decline & Auto Decline

Allow Decline



Allow agents with this profile to manually decline chat requests.

Auto Decline



Allow the system to automatically decline chat requests when the toast notification expires.

- If Allow Decline is selected, but Auto Decline is not, chats will automatically be assigned to agents if they click X on the top of toast invitations.
- The chat toast expiration timeout can be configured through the `CHAT_ALERTFORM_AUTOCLOSE_TIMEOUT` configuration setting.

- ✓ Answer Link: Incoming Chat Toast Invitation (ID 5217)
- ✓ Answer Link: Difference between “Agent Engagement Declined” and “Agent Engagement Auto Declined” chat events (ID 10313)
- ✓ Answer Link: Length of time the Incoming Chat Toast Invitation is displayed (ID 7765)

## 3 Conference/Transfer to Other Groups

Conference/Transfer to Other Groups

Allow staff members to conference with agents in other groups and transfer customers to agents in other groups.

- Agents can conference with agents in their own group and transfer customers to agents within their own group, without having this option enabled.
- In order to remove conference/transfer capabilities completely, remove these elements from the Ribbon in the Chat Workspace

- ✓ Answer Link: Describes what can occur when selecting the 'Transfer to Agent' option during a chat (ID 10796)
- ✓ Answer Link: Explains with regards to transferring a chat to an agent in a different queue (ID 5340)
- ✓ Answer Link: What happens to incident assignment during a chat transfer? (ID 5926)

## 4

## Supervisor: Monitor, Edit &amp; Delete

## Monitor

→ Allow supervisors with this profile to monitor other agents.

- Cannot be selected unless the Supervisor check box is selected, as monitoring can be performed only by supervisors.
- The supervisor can send private messages, or can join a conference to chat with the customer
- Only the owner of the chat can terminate the chat session

## Edit

→ Allow staff members to edit these fields in the chats table from reports:  
first name, last name, email, IP address, or subject.

## Delete

→ Allow staff members to delete chats.

- To edit a chat report inline, the report must have inline editing enabled and your profile must include Edit permission for chats.
- To delete a selected chat, the report must have the delete command enabled and your profile must include Delete permission for chats.

## 5 Max Active Chats & Delay

\*Max Active Chats

→ Minimum value is 1, maximum value is 11, the default value is 3

\*Max Total Chats

→ Both active sessions and those that are in wrap-up mode.  
Minimum value is 1, maximum value is 20, the default value is 3.

\*Delay Between Chats

→ The number of seconds that elapse before a new chat is presented to an agent.

Set Max Active Chats

→ Overrides the \*Max Active Chats value set by profile.  
The agent can set the number of maximum active chats. Cannot be a value higher than set in the profile

Set Delay Between Chats

→ Overrides the \*Delay Between Chats value set by profile.

- ✓ Answer Link: Chat agents receive more chats than they have selected (ID 10294)
- ✓ Answer Link: Chat agents can adjust the maximum available chat sessions (ID 10298)

## 6 Chat queue policies

### Pull Policy

- First Due - The first chat requested is the first chat pulled from a queue.
  - Strict Priority - Chats are pulled from the top queue in the list first.
- First Due evaluates all chats waiting in all queues and looks for the chat session that has been waiting the longest.
  - Strict Priority assesses the order of the queues on the Profile, and then distributes the longest waiting chats in the prioritized queue first.
  - Using Strict Priority can lead to chat queue starvation unless you've properly configured chat routing rules and chat agent profiles in a way that prevents chat queue starvation.

- ✓ Answer Link: [Understanding Chat Permissions: Chat Queue Pull Policy \(ID 8179\)](#)
- ✓ Answer Link: [Routing chat requests to agents \(ID 1174\)](#)



## Oracle Service Cloud Support Webinars

- Service Request
- Support Hotline
- Updates
- Suggestion Box
- Manager Connect

### Upcoming Webinars

#### Email with the Oracle Service Cloud **New**

**Scheduled:** Wed May 30th, 2018 9:00 am MDT

**Presenter:** Andrei Vatamanu

**Description:**

After sharing best practices for setting up mailboxes, tips for troubleshooting delayed or seemingl...[More](#)

[Register](#)

#### Demystifying CPM **New**

**Scheduled:** Wed June 06th, 2018 9:00 am MDT

**Presenter:** Johnny Meehan

**Description:**

Walk through the development of a CPM, including the idiosyncrasies of implementing a test harness....[More](#)

[Register](#)

#### Managing and Monitoring OSvC Health **New**

**Scheduled:** Wed July 11th, 2018 2:09 pm MDT

**Presenter:** Owen Sood-Giddings

**Description:**

There's a lot going on in your support organization and a lot going on in your site. Let Owen tal...[More](#)

[Register](#)

Have a suggestion for a webinar topic? [Send us your idea!](#)

#### Ask the Experts: Best Practices for Implementing and Maintaining Single Sign On (SSO)

**Date Recorded:** Thu January 11th, 2018 8:47 am MST

**Presenter:** Shane Parsons

**Description:**

Learn best practices for implementing SSO.

[Watch It Now](#)

#### Ask the Experts: Extending Data into your Site

**Date Recorded:** Thu January 25th, 2018 8:46 am MST

**Presenter:** Levi Dyckman

**Description:**

Explore different options for adding data points into a site with custom fields and objects.

[Watch It Now](#)

#### Ask the Experts: Troubleshooting Wizardry

**Date Recorded:** Thu February 08th, 2018 8:35 am MST

**Presenter:** Elizabeth Trithart

**Description:**

Reduce the resolution time of your service request by learning some useful troubleshooting techniqu...[More](#)

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