Netopia eCare 4.5 Server Manual

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Contents

Chapter 1: Introduction to eCare

This document describes how to install and configure the server-side components of Netopia's eCare software application. It is intended to provide the server administrator with a good foundation for understanding Netopia's eCare server and how it operates. This document is written for the professional audience and assumes a professional-level understanding of Unix or Unix-like operating systems, Resin, and Java.

This document includes

- A description of the Netopia eCare application and server components.
- A detailed discussion of planning an eCare installation, including preplanning considerations such as system requirements and server-software configuration.
- Instructions for installing eCare, including installing multiple services, customizing services, and upgrading existing services.
- A summary of proxy server requirements.
- A list of download locations for required software components.

Successful installation and administration of the eCare application may also require technical documentation from the vendors of the associated required software.

What is eCare?

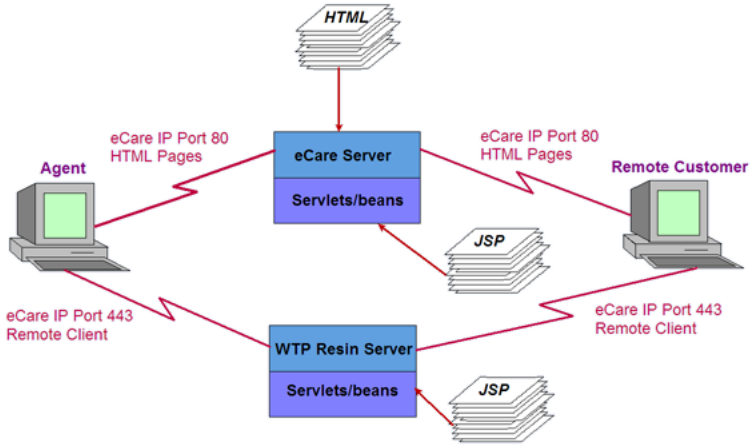
Netopia's eCare application is a cost-effective remote support service that allows Support Agents and their customers to interact in real time. Using a thin-client architecture, eCare enables remote problem solving over the Internet or your IP enterprise network.

Highlights of the eCare feature set include

- Screen sharing services that directly connect your Support Agents and the users they're assisting. Support agents can view the customer's screen and remotely operate their mouse and keyboard.
- Instantaneous text-chat communication between Support Agents and remote users. If the remote user needs additional help at any time, the chat session can be seamlessly escalated to Control Remote User or one of the other screen sharing services.
- Real-time Push URL, which allows your Support Agents to sell products and help customers navigate through entire Web sites.
- File Transfer from the Support Agent's desktop directly to the customer's desktop instantaneously and vice versa.
- An online support request queue that allows your Support Agents to connect to customers instantly by clicking on a Web link.

eCare Server Components

The eCare server is comprised of two communications servers.



eCare Page Server A Resin server that handles requests associated with eCare HTML and JSP pages. The eCare page server has an Internet-available IP address and runs on port 80.

Web Tunneling Protocol (WTP) Server

A Resin server that handles requests from the remote eCare client via Secure Socket Layer (SSL). The WTP server is available to the Internet and is used only by the eCare client. Customers will never load the WTP URL in their browsers. The WTP server has an Internet-available IP address and runs on port 443 (SSL).

eCare Services

An *eCare service* is an instance of eCare with its own Support Agents, queue, and maximum number of concurrent Support Agents. You may configure as many services as you wish. A Support Agent may be a member of more than one service and view multiple queues.

You may add services at any time, provided that you have created the databases and JNDI resource references for these services in advance. To remove services, however, you must shut down the WTP and eCare page servers. We suggest that you have a "test" service available at all times for troubleshooting.

You may give your services any name you wish. The service name is attached to the end of the eCare URL. For example,

http://support.ntpa.com/ecare

eCare Entry Portal URLs

eCare uses four primary URLs to allow individual access points for customers and remote users, Support Agents, and eCare administrators. The primary entry point, located at the top level of the eCare service, is intended for your eCare customers. This top-level URL is in the form

```
http://<ecare-server>/<service-name>
```

or

```
http://<ip-address>/<service-name>
```

For example,

http://support.ntpa.com/ecare

This URL opens the trouble-ticket submission form.

In the following URLs, `<service-root>` is the path to the top-level eCare service. In most cases, this is in the form

```
http://<ecare-server>/<service-name>
```

The four primary eCare entry portal URLs are

http://[service-root] Opens the eCare trouble ticket submission form. Remote users who require assistance will use this URL to access your eCare service center. This is the link you should provide to your customers.

http://[service-root]/agent
Opens the eCare trouble-ticket queue. Support Agents must log in before they can access the queue.

http://[service-root]/admin
Opens the main eCare administration page. eCare administrators must log in before they can access the administration features.

http://[service-root]/manage
Opens the Marae Administration page. eCare administrators can use this entry portal to stop and restart individual eCare services. Only site and super admin-level accounts can log in to stop and restart an eCare service. Other eCare accounts are not authorized to access this entry portal.

Planning an eCare Installation

Before installing eCare, make sure your server meets the following system requirements. If your organization uses a proxy server, it must meet the requirements listed under "Proxy Server Requirements" on page 11.

System Requirements

Your eCare system requires the following hardware, software, and settings.

Recommended Hardware and Operating Systems

eCare is supported on the following systems.

- Sun Solaris 8 or higher—Sparc platform
- Red Hat Enterprise Linux 3 or higher—Intel platform

For Red Hat installations, be sure to make the following choices at the package selection screen during the installation procedure for Red Hat Enterprise Linux.

- Uncheck *Web Server*
- Uncheck *PostgreSQL Database*
- Check *Development Tools*

System Memory

Follow these guidelines for system memory sizing requirements.

- 20MB for Resin
- 12MB for each eCare service
- 4MB per Support Agent that will be logged into the eCare service

Netopia eCare Server Software

To run eCare, you will need to obtain the following files from Netopia.

- One or more *appLicense.xml* license files
- The eCare distribution ZIP file
- If SSL is enabled, certain certificate resources (such as a Verisign certificate)

Required Software and Download Locations

To install eCare, you must download, install, and properly configure the following software. This software can be downloaded from the URLs provided below. (Note that these URLs may be changed at any time by the respective vendors of the listed software.)

J2SE SDK

Java should come pre-installed with your Solaris OS. However, you may need to download and install the latest version and patches from Sun Microsystems.

Download J2SE SDK 1.4.2_10 or higher, but not 1.5. (eCare is not yet certified for the Java 1.5 series.)

http://java.sun.com/products/archive

PostgreSQL

Download PostgreSQL 7.4.10 or higher, but not 8.0, and a matching JDBC3 driver.

http://wwwmaster.postgresql.org/download/mirrors-ftp

or

http://www.postgresql.org/mirrors-ftp.html

The JDBC driver (*pg74.215.jdbc3.jar*) is available from

http://jdbc.postgresql.org/download

Resin

eCare uses Resin as its servlet container. Download Resin 2.1.12 or higher, but not 3.*x*. (eCare is not yet certified for the Resin v3 series.)

Netopia performs most development with Resin 2.1.16.

http://www.caucho.com/download/index.xtp

Perl

eCare uses Perl 5.0 or higher, which is typically installed automatically with the operating system. To determine the version of Perl installed on your server, run the command `perl -v`.

Perl can be downloaded from

http://www.perl.com

For Solaris platforms, you can get a pre-compiled binary from

http://www.sunfreeware.com

Operating System Considerations

Red Hat Enterprise Linux

By default, Red Hat comes installed with a firewall enabled. During the Red Hat installation procedure remember to configure the firewall to allow network access to port 80 for the eCare page server, port 443 for the eCare WTP server, and port 5432 for the PostgreSQL server.

For Red Hat installations, be sure to make the following choices at the package selection screen during the installation procedure for Red Hat Enterprise Linux.

- Uncheck *Web Server*
- Uncheck *PostgreSQL Database*
- Check *Development Tools*

Solaris There are several patches required for Java to operate correctly. The Java installation instructions include procedures for checking your system and installing the necessary patches.

Proxy Server Requirements

eCare can make connections using any proxy that correctly implements SSL. You must enable SSL on the eCare server to properly support these proxies.

The following methods of proxy-server determination are supported.

- No proxy
- Explicit or direct proxy for all protocols (with and without exceptions)
- Explicit or direct proxy for specific protocols (with and without exceptions)
- Auto configure script (.dat or .pac script)
- Auto detection (WPAD)

In addition, the proxy server must be WPAD compliant. It may use either Basic or Digest authentication. eCare does not currently support wildcard forms of the DNS name or IP address in the exception list in your browser. Your network administrator must configure one or all these methods.

For organizations using the WPAD protocol, eCare will request the DAT file located at *http://wpad/wpad.dat*. Successful connections require your organization to have a Domain Name resolved computer with a domain name that resolves to WPAD.

Chapter 2: The eCare Installation Process

The installation procedures outlined in this document are for installing eCare on an Red Hat Linux platform using the recommended versions of prerequisite software. With the exception of the J2SE SDK, the installation procedure is identical on a Sun Solaris system. Consult your documentation from Sun Microsystems on how to properly install the J2SE SDK.

Unless otherwise noted, all commands in the following installation procedure are run using a regular user account. A sudo command is issued (and noted) when root privileges are required. If your regular user account does not have sudo privileges then you will need to run these commands under the root account instead.

All commands specified in this document should be entered exactly as described. If a command is too long to fit on one line within this document, it will be broken up into multiple pieces with the Unix continuation character, a backslash (\).

Placeholders are noted in red and surrounded by brackets: [placeholder]. Always substitute placeholders with values appropriate for your installation.

Making Configuration Decisions

Before beginning the installation process, make sure you know the answers to the following questions.

1. What host name, port, and service name do you want to use for the eCare server and the WTP server? Your choices will determine the eCare portal URLs, and they will affect the values used to configure communication between the page server and WTP server.
2. Where will the Postgres server be hosted? You will need the host name and port number.
3. What name will you give the eCare database? There are benefits to using the same name for the database and the database user.

4. What user will eCare be when it accesses the database? Decide now on a user name and password.
5. Select your JNDI name. Single-service installations should use the default JNDI name **ecare-postgres**, which will be supplied automatically by certain installation scripts. Multiple service installations will want to use a different naming scheme.
6. Decide whether you will run WTP as a secure service (SSL) or not. If WTP will run as a secure service, you will need to set up a keystore and have the password available during eCare installation.
7. Will you need the TicketConnector portal? If you are planning to integrate eCare with an existing CRM system, the answer will be yes.
8. Will you need to install the Email Invite and Reconnect portals?
9. Determine the email addresses from which eCare surveys will be mailed, and the delivery address to which they will be sent.

Selecting an Installation Script

eCare 4.5 contains one interactive and four batch-mode installation scripts.

You should select and use only the script which is appropriate for your situation. These top level scripts are as follows.

INSTALL.SH

An interactive script that will configure and install all eCare and WTP components needed for a typical single-service eCare installation. Most self-hosted sites who are installing eCare for the first time, and not upgrading an existing eCare 4.x server, should use this script.

This script prepares all scripts you need for an installation in which WTP and eCare are co-located on the same machine, at the same URL, but at different ports. The configuration assumes WTP and eCare will run in separate instances of Resin and that WTP will run on port 8080.

A record of the install values will be written to the directory from which the install runs, as well as to the overrides directory.

INSTALL2.SH

A properties-driven installer. This installer reads the configuration information for the install from the properties files "left behind" by an earlier use of `install.sh`. (If will also read properties files created manually.)

NORMALSERVICEINSTALL.SH

The command-line version of `install.sh`. Some options (such as the JNDI name for the database connection) which are not configurable in `install.sh` can be set using this script. A hosting service installing the first eCare service on a new server may want to use this script.

ADDSERVICEINSTALL.SH

A command-line script that will add another service to a server that is already hosting other eCare services. Hosting services can use this script to add additional instances of the eCare page server to their existing installation.

UPGRADESERVICEINSTALL.SH

If you wish to upgrade an existing 4+ installation to 4.5, **back up your existing eCare installation, including the database**. Then run this command-line script. It will upgrade an existing 4+ installation to 4.2.2.

This script will attempt to preserve all site-specific data and information, including local configuration (the overrides file), branding, archived files, and the ticket counter. The upgrade does not preserve log files.

While this installer attempts to preserve data across the upgrade, it is not robust under certain types of interruptions. Be sure to back up your entire eCare installation before attempting to upgrade.

UPGRADESERVICEINSTALL_4_2_2_TO_4_5_0.SH

If you wish to upgrade an existing 4.2.2 installation to 4.5, **back up your existing eCare installation, including the database**. Then run this command-line script.

This script will attempt to preserve all site-specific data and information, including local configuration (the overrides file), branding, archived files, and the ticket counter. The upgrade does not preserve log files.

While this installer attempts to preserve data across the upgrade, it is not robust under certain types of interruptions. Be sure to back up your entire eCare installation before attempting to upgrade.

Installing eCare

Step 1: Downloading Needed Files

Before you begin installation, download all needed software and configuration files and save them to a convenient location. You will need the distribution and license files from Netopia as well as the software listed under "Required Software and Download Locations" on page 9.

Step 2: Extracting the eCare Distribution File

Copy the eCare distribution file to a directory on the server and unzip it. You will need one of its component scripts later in this procedure. However, do not attempt to install eCare at this time.

Step 3: Installing the J2SE SDK

Linux Operating System

If Java is already installed on your Linux system, remove it before proceeding.

1. Locate the J2SE SDK file you downloaded from Sun Microsystems and extract the RPM.

   ```
   sh j2sdk-1_4_2_10-linux-i586-rpm.bin
   ```

   When prompted to agree to the license terms, answer **yes**.

2. Install the RPM for the J2SE SDK.

   ```
   sudo rpm -ivh j2sdk-1_4_2_10-linux-i586.rpm
   ```

3. Set the JAVA_HOME environment variable and add the Java executable to the PATH by adding these two lines to the end of the */etc/profile* configuration file.

   ```
   export JAVA_HOME=/usr/java/j2sdk1.4.2_10
   export PATH=$PATH:/usr/java/j2sdk1.4.2_10/bin
   ```

4. Log out and log back in for these environment variables to take effect.

Solaris Operating System

Sun Microsystems uses their own package management system for installation and removal of Java. Please follow Sun's directions for Java installation.

Step 4: Installing PostgreSQL

1. Create an operating-system user as which the Postgres process will run.

   If you select a user name other than **postgres,** please remember to substitute it for all instances of the **postgres** user name that occur throughout the remainder of this manual. You will also need to provide this alternate user name to the eCare installation script when prompted.

   ```
   sudo /usr/sbin/useradd postgres
   ```

2. Locate the PostgreSQL archive file you downloaded and extract the source code.

   ```
   tar xzvf postgresql-7.4.10.tar.gz
   ```

3. Configure the compiler to compile the PostgreSQL source code, and then compile the source code. (Readline is the command-line editor used in the Postgres tool.)

   ```
   cd postgresql-7.4.10
   ./configure --prefix=/usr/local/pgsql7410
         --enable-nls --without-readline
   make
   ```

4. Install the compiled PostgreSQL binary files.

   ```
   sudo make install
   ```

5. Create the directories where PostgreSQL will store its data and log files.

   ```
   sudo mkdir /usr/local/ecare4_pgsql \
         /usr/local/ecare4_pgsql/data \
         /usr/local/ecare4_pgsql/log
   sudo chown ÐR postgres /usr/local/ecare4_pgsql
   ```

6. Assume the identity of user **postgres** and add the PostgreSQL *bin* directory to the PATH of the **postgres** user by adding the following line to the end of the *.bash_profile* file for the **postgres** account.

   ```
   PATH=$PATH:/usr/local/pgsql7410/bin
   ```

7. Log out of the **postgres** account and log back in to allow the *.bash_profile* changes to take effect.
8. As user **postgres**, initialize the database.

```
sudo su - postgres
initdb -W -E UNICODE --locale en_US.UTF-8 -D \
      /usr/local/ecare4_pgsql/data
```

9. Select and confirm a superuser password when prompted. You will be prompted again for this password by the eCare installation script.
10. Start a postmaster to run your database in the background.

```
postmaster -D /usr/local/ecare4_pgsql/data >> \
      /usr/local/ecare4_pgsql/log/logfile 2>&1 &
```

11. Verify that you are able to access the database.

```
psql template1
```

12. At the `psql` prompt enter the following command.

```
select now();
```

    If you are unable to run this command successfully without any error messages, there is a problem with the database.

    Enter the following command to exit.

```
\q
```

13. Add a database to store logging information for your eCare service. For easier tracking of your databases, you may wish to name your database with the same name you intend to use for your eCare service.

```
createdb [db_name]
```

14. Locate the *pgsql_schema.sql* file from the eCare distribution file. Run the file to populate the database with tables.

```
psql -d [db_name] -f <path>/pgsql_schema.sql
```

15. In the */usr/local/ecare4_pgsql/data/postgresql.conf* file, configure PostgreSQL to accept incoming TCP/IP connections by uncommenting the line

```
#tcpip_socket = false
```

    and setting it to **`true`**.

16. Set PostgreSQL to listen on port 5432 by uncommenting the line

```
#port = 5432
```

Note: If you select a different port number, take note of it because the eCare installation script will prompt you for this port number. You will also need to adjust the firewall in Red Hat Linux to allow traffic on the port that you just selected.

17. Now you will configure PostgreSQL to accept incoming TCP/IP connections from the eCare page server. Edit the `Ipv4-style local connections` section in the */usr/local/ecare4_pgsql/data/pg_hba.conf* file.
    - Change `trust` to `password`.
    - Add a line for the IP address of the eCare page server that will make a connection to the database.

```
host  all  all  127.0.0.1      255.255.255.255  password
host  all  all  [ip_address]   255.255.255.255  password
```

18. Stop and restart PostgreSQL for the changes you just made to take effect.

```
pg_ctl -D /usr/local/ecare4_pgsql/data stop
postmaster -D /usr/local/ecare4_pgsql/data >> \
      /usr/local/ecare4_pgsql/log/logfile 2>&1 &
```

19. Log out of the **postgres** account back into your regular user account.

```
exit
```

Step 5: Installing Resin and the PostgreSQL JDBC Driver

1. Locate the Resin archive file you downloaded from Caucho and extract the source code to the */usr/local* directory.

```
cd /usr/local
sudo tar xzvf <path>/resin-2.1.16.tar.gz
```

2. Create a soft link to Resin.

```
sudo ln -s resin-2.1.16 resin
```

3. Modify */usr/local/resin/bin/httpd.sh* to point to the version of Java you installed previously by uncommenting and editing the following lines.

```
JAVA_HOME=/usr/java/j2sdk1.4.2_10
export JAVA_HOME
```

4. Locate the PostgreSQL JDBC3 driver you downloaded and copy it to the */usr/local/resin/lib* directory.

```
cp <path>/pg74.215.jdbc3.jar /usr/local/resin/lib/
      pg74.215.jdbc3.jar
```

Step 6: Enabling SSL for Screen Sharing

This step is optional. If you are not using SSL, skip to the next step.

1. Create a keystore using the keytool supplied with the Java SDK.

   ```
   cd /usr/local/resin
   sudo mkdir keys
   cd keys
   sudo keytool -genkey -keyalg RSA -validity 1000
         -keystore server.keystore
   ```

2. Enter a keystore password of your choosing. You will be prompted for this password again by the eCare installation script.
3. Accept the default answer of `[unknown]` for all the questions. When asked to verify that your selections are correct enter **yes**.
4. When asked for a key password, press ENTER to use the same password as the keystore password.
5. Extract a certificate from the keystore using the `keytool` application.

   ```
   sudo keytool -export -keystore server.keystore -rfc
         -file theCert.cer
   ```

6. When prompted, enter the password you selected in step 2.
7. Add the certificate to the JVM's list of authorized certificates.

   ```
   cd /usr/java/j2sdk1.4.2_10/jre/lib/security
   sudo keytool -import -file /usr/local/resin/keys/
         theCert.cer -keystore cacerts -storepass
         changeit
   ```

8. When asked if you want to trust this certificate, enter **yes**.

Step 7: Running the Installation Script

Before you install eCare, consult the *Install-HOWTO.txt* file in your eCare distribution ZIP file for additional installation instructions and tips not discussed in this document.

Then proceed with the installation. If you are using `install.sh`, continue with "Step 7a: Running the install.sh Script." If you are using one of the other scripts, see "Step 7B: Running an Alternate Installation Script." (See "Selecting an Installation Script" on page 13 for information about selecting the appropriate script.)

Step 7a: Running the install.sh Script

1. Change to the directory containing the expanded eCare distribution. Copy the *appLicense.xml* license file provided by Netopia into the directory.
2. Launch the eCare installation script.

   ```
   /bin/bash ./install.sh
   ```

   Note that you MUST use `bash` (or a `bash`-like) shell to run this script. It uses pattern-matching features not present in `sh`.
3. Using the information you collected in "Making Configuration Decisions" on page 12, answer the following prompts. Default values, when they exist, are enclosed in brackets.

   `What is the path to the directory where resin is installed?` *example: /usr/local/resin*

   `What do you want to name the new service? [ecare4]:` *The default service name is ecare4 if you do not specify one.*

   `What is the host name/address for this service (Ex: ecare.host.com or 192.168.0.2)?` *Enter the host name or IP address of your server.*

   `What is the port number that the server will be running on? [80]:` *The default port is 80 if you do not specify one.*

   `What SMTP server should the page server use to relay email?` *Enter the host name of an SMTP server that eCare can use to send email.*

   `What email address should be notified in event of a server failure?` *Enter the email address of an administrator responsible for the eCare server.*

   `From what address should ticket notifications be emailed?` *Enter the source email address that you want eCare to place in the From field for email notifications.*

   `From what address should transcripts be emailed?` *Enter the source email address that you want eCare to place in the From field for ticket transcripts.*

   `Will you be running the wtp server over SSL (y/n)? [n]:` *Enter **y** if you enabled SSL for screen sharing.*

`What is the password you used for your keystore? [ ]:` *Enter the password you previously selected for your keystore.*

`What is the hostname of the postgres database that this service will use?` *Enter the host name or IP address of the PostgreSQL server. This will usually be the same as the address for your eCare server unless you installed PostgreSQL on a different physical machine.*

`What is the port number that the postgres server is running on? [5432]:` *The default port is 5432 if you do not specify one.*

`What is the name of the database that the eCare service will use?` *Specify a database name; usually the name is the same as the name of your eCare service.*

`What is the username that the service should use to access the postgres server?` *Enter the user name, for example,* ***postgres****.*

`What is the password for postgres user?` *Enter the password, for example,* ***pgsql****.*

`What default email address should the surveys be sent from?` *Enter the source email address that you want eCare to place in the From field for surveys.*

`What default email address should the surveys be sent to?` *Enter the email address to which you want eCare to send survey results.*

`It appears that you do not have a postgres jdbc driver installed in /usr/local/resin/lib. Would you like to install pg74.215.jdbc3.jar (y/n)? [y]:` *This prompt will only appear if you incorrectly installed the JDBC driver.*

Step 7B: Running an Alternate Installation Script

If you wish to use one of the alternate installation scripts, follow this procedure.

If you are upgrading an existing eCare 4.0, 4.1, or 4.2 service to eCare 4.5, see "Upgrading an eCare 4.x service to eCare 4.5" on page 26.

1. If you are repeating an existing installation, **make a back up of your existing installation**.

   At the least, make a copy (with the `-R` option) of the database contents, as well as the following directories:

- *resin/bin/**
- *resin/conf/**
- *resin/webapps/service/**
- your overrides directory

In particular, if you have made changes to *web.xml*, *ecare.xml*, or *marae.xml*, copy those files to a safe place BEFORE launching the installer. The installation will **always** overwrite those files.

2. Change to the directory containing the expanded eCare distribution.
   - If this is a first-time installation, copy the *appLicense.xml* license file supplied with your distribution into the directory containing the expanded eCare distribution.
   - If this is a properties install (using `install2.sh`), locate a copy of `install.record`.

     If you have previously completed an installation of this service, you should find the record of that installation under the overrides directory in a subdirectory with a name following the pattern

     `Install-<date>__<time>`

     If you made a mistake during the original installation, you can edit the values in this file, delete the WAR file and service directory from your server's *webapps* directory, and then repeat the installation with

     `/bin/bash ./install2.sh <path to properties files>`
3. Navigate to the distribution directory and invoke the desired installation script with no arguments. It will display a brief usage summary. The arguments correspond to a subset of the information described for the `install.sh` script. The documentation at the top of each script provides more details about the form expected for certain arguments.
4. Invoke the desired installation script with the arguments appropriate for your installation.

   Because some of the installation scripts require numerous arguments, you may find it helpful to copy the description from the script and place it above this command in its own script file.

   If you work at the command line, we recommend using the line continuation character to keep the command visible. For example,

```
/bin/bash ./AddServiceInstall.sh /usr/local/resin \
      usr/local/resin/overrides \
      mail.local.server \
```

```
admin@my.com www.companysite.com \
- helpdesk - false - false
```

Note the use of hyphens (–) to request default values. Also notice that you must use `bash`, not `sh`.

5. When the installation is complete, you may need to manually merge site-specific customizations (saved in step 1 above) into your new *web.xml*, *marae.xml*, or *ecare.xml* files.

Step 8: Testing Your Installation

1. Start WTP. Navigate to */usr/local/resin/bin* and execute the command

   ```
   ./run_wtp.sh start
   ```

   Once Resin has expanded the WAR file, you should be able to view a diagnostics page at

   http://‹hostname›:8080/wtp

   If you installed WTP in SSL mode, you will need to load

   https://‹hostname›/wtp

2. Wait at least 1 minute after starting the WTP server before starting the eCare page server.
3. Start the page server. In */usr/local/resin/bin* execute the command

   ```
   ./run_eCare.sh start
   ```

   Once Resin has expanded the WAR file, you should be able to access the ticket submission page by visiting

   http://‹hostname:portnumber›/‹serviceName›

Now you can access your new eCare service using one of the following URLs.

Customer ticket submission

http://‹hostname:portnumber›/‹serviceName›

Support Agent portal

http://‹hostname:portnumber›/‹serviceName›/agent

Administrator portal

http://‹hostname:portnumber›/‹serviceName›/admin

Adding Additional eCare Services

Once your first eCare service is installed, you can add additional services with the `AddServiceInstall.sh` script.

To add additional eCare services

1. Add another database to store logging information for your new eCare service. For easier tracking of your databases, you may wish to name your database with the same name you intend to assign your eCare service.

   ```
   sudo su - postgres
   createdb [db_name]
   ```

2. Populate your new database with tables.

   ```
   psql -d [db_name] -f <path to extracted eCare
         files>/conf/pgsql_schema.sql
   exit
   ```

3. Edit the */usr/local/resin/conf/resin.conf* file to add a JNDI resource reference for your new database. Copy the original resource reference entry for your initial eCare service, paste it below this original entry, and replace `[db_name]` with the name of the database for the service you are adding. It is easiest to assign the JNDI resource reference the same name as the eCare service you intend to add.

4. If you will need to add additional services in the future without bringing down the eCare page server, create several generic JNDI resource references and their associated databases in advance. This allows you to add new eCare services without interrupting access to existing ones. Otherwise, you must restart the eCare page server for the new resource references to take effect.

   ```
   <resource-ref>
      <res-ref-name>jdbc/ecare-postgres-[db_name]</
         res-ref-name>
      <res-type>javax.sql.DataSource</res-type>
      <init-param driver-name="org.postgresql.
         Driver"/>
      <init-param url="jdbc:postgresql://[hostname]:
         [port]/[db_name]"/ >
      <init-param user="[username]"/>
      <init-param password="[password]"/>
   ```

```
    <init-param max-connections="20"/>
    <init-param max-idle-time="30"/>
</resource-ref>
```

5. Run the `AddServiceInstall.sh` script to add your new eCare service. The values requested by the placeholders are identical to those that you were prompted for when you initially installed eCare and created your first service.

   ```
   sudo bash AddServiceInstall.sh /usr/local/resin
         ecare4overrides [smtp_server]
         [admin_email_address] [hostname]
         - [eCare_service_name]
         - [true / false] (true if SSL; false if not)
         jdbc/ecare-postgres-[db_name] false
         [default-survey-from-email-address] [default-
         survey-to-email-address]
   ```

   For usage instructions, you may run the `AddServiceInstall.sh` script by itself without any parameters.

   ```
   sudo bash AddServiceInstall.sh
   ```

Now you can access your new eCare service using one of the following URLs.

Customer ticket submission

http://[service-root]

Support Agent portal

http://[service-root]/agent

Administrator portal

http://[service-root]/admin

Upgrading an eCare 4.x service to eCare 4.5

Before You Upgrade

1. **Make a back up of your existing installation.**

   At the least, make a copy (with the `-R` option) of the database contents, as well as the following directories:

   - *resin/bin/**
   - *resin/conf/**
   - *resin/webapps/service/**
   - your overrides directory

   In particular, if you have made changes to *web.xml*, *ecare.xml*, or *marae.xml*, copy those files to a safe place BEFORE launching the upgrade installer. The upgrade will **always** overwrite those files.

   In addition, certain new or updated functionality may require modification of data stored in the eCare database. Pre-upgrade database backups allow you to maintain a complete audit trail of all eCare data.

2. If you have chat, survey, or ticket elements in your existing overrides file, the installation script may need to add configuration for new email addresses to your overrides file. (Any addresses you have already defined within these elements will not be changed.)

   The default behavior is to set all added addresses to **`UNCONFIGURED`**. You can choose a different behavior by copying the file *./conf/fromDefaults.properties* into the directory containing the expended eCare distribution and editing the properties to suit your installation. For example,

   ```
   cp ./conf/fromDefaults.properties .
   vi fromDefaults.properties
   ```

   If you do not have chat or ticket elements in your current overrides file, and you want to force configuration of email addresses as part of the upgrade, add empty chat and ticket elements to the configuration element. See *simple-ecare.xml* in the */conf* subdirectory of the expanded distribution for an example.

3. Once you have completed the upgrade, you may need to manually merge site-specific customizations (saved in step 1 above) into your new *web.xml*, *marae.xml*, or *ecare.xml* files.

Performing the Upgrade

To upgrade an eCare 4.0.*x* or 4.1.*x* service to eCare 4.5, you must first upgrade it to eCare 4.2. The following procedures are used for the upgrade.

If you are already running eCare 4.2, skip to that upgrade procedure.

Upgrading eCare 4.0.X or 4.1.X to eCare 4.2

The `UpgradeServiceInstall.sh` upgrade script upgrades (in place) an eCare 4.0.*x* or 4.1.*x* service to version 4.2. It assumes that the overrides file has been named using the *[service]-ecare.xml* convention, and that all site-specific configuration has been confined to the overrides file.

The upgrade script will preserve service-specific information and data including the service configuration (overrides file), branding, ticket archives, and the ticket counter. The upgrade does not, however, preserve log files.

You should always back up your eCare services and overrides directory before running this script. All non-default localizations will be preserved, as will the site's existing license.

To upgrade your eCare service from eCare 4.0.x or 4.1.x to 4.2

1. Access the Marae Administration page at the following URL to shut down the eCare service that you want to upgrade.

   http://[server]/[service]/manage

2. Click the *Initiate Marae System Shutdown* link and wait for the shutdown to complete.

   The eCare service is not completely shut down until the current state is shown as *Shutdown* and the *Start Marae System* link appears. The eCare service will then be unavailable until you restart it after the upgrade is complete.

3. Run the upgrade script to upgrade your eCare service.

   ```
   sudo bash UpgradeServiceInstall.sh /usr/local/resin
         ecare4overrides [service]
   ```

4. Update the text strings in the upgraded service from eCare 4.0.*x* or 4.1.*x* to eCare 4.2.

   - If you have localized or customized any of the eCare text strings previously, copy the new ones from the *Resource.properties* file into the *Resource_en_US.properties* file.

- If you have not localized or modified any of the eCare text strings run the following commands to update the text strings.

```
cd /usr/local/resin/webapps/[service]/WEB-INF/
      classes/com/netopia/app/ecare/localization
sudo mv Resource_en_US.properties Resource_en_US.
      properties.bak
sudo cp Resource.properties Resource_en_US.
      properties
```

5. Return to the Marae Administration page and click the *Start Marae System* link to restart your eCare service. Check the startup logs to make sure the upgrade was completed without errors.

Once you have tested the eCare 4.2 installation, you are ready to complete the upgrade to eCare 4.5.

Upgrading eCare 4.2 to eCare 4.5

The `UpgradeServiceInstall_4_2_2_to_4_5_0.sh` upgrade script upgrades (in place) an eCare 4.2 service to eCare 4.5. It assumes that the overrides file has been named using the *[service]-ecare.xml* convention, and that all site-specific configuration has been confined to the overrides file.

The upgrade script will preserve service-specific information and data including the service configuration (overrides file), branding, ticket archives, and the ticket counter. The upgrade does not, however, preserve log files.

You should always back up your eCare services and overrides directory before running this script. All non-default localizations will be preserved, as will the site's existing license.

To upgrade your eCare service from eCare 4.2 to 4.5

1. Access the Marae Administration page at the following URL to shut down the eCare service that you want to upgrade.

   http://[server]/[service]/manage

2. Click the *Initiate Marae System Shutdown* link and wait for the shutdown to complete.

   The eCare service is not completely shut down until the current state is shown as *Shutdown* and the *Start Marae System* link appears. The eCare service will then be unavailable until you restart it after the upgrade is complete.

3. Run the upgrade script to upgrade your eCare service.

```
sudo bash UpgradeServiceInstall_4_2_2_to_4_5_0.sh
      /usr/local/resin ecare4overrides [service]
      [default-survey-from-email-address] [default-
      survey-to-email-address]
```

4. Return to the Marae Administration page and click the *Start Marae System* link to restart your eCare service.

   The first time you start your eCare service after performing an upgrade, eCare will reprocess the database. Depending on the size of your database and your eCare configuration, this processing make take some time. Subsequent restarts will not require this processing.

5. In the *Available Operations* area, click the *View Upgrade Log* link to display the upgrade report.

   The upgrade report includes such items as updates, changes, or additions to database tables, changes to certain configuration files, and certain bug fixes. It also includes a listing of any changes made during the upgrade to data stored in the eCare database. This report, along with pre-upgrade database backups, allows you to maintain a complete audit trail of all eCare data.

   See the eCare *eCare Administrator's Guide* for more information about the upgrade report.

6. In the *Startup Log* area, check the startup logs to make sure the upgrade was completed without errors.

Now you can access your upgraded eCare service using one of the following URLs.

Customer ticket submission

http://[service-root]

Support Agent portal

http://[service-root]/agent

Administrator portal

http://[service-root]/admin

Adding Portals

Once you have completed the normal installation or upgrade process, you can add new portals. By default, only the customer, Support Agent, and administrator portals are created with the standard eCare installation process. If you wish to use the Email Invite, Reconnect, or TicketConnector portals, you will need to install them separately.

Adding the Email Invite Portal

To install the Email Invite portal

1. Run the `AddEmailInvitePortal.sh` script.

   ```
   bash AddEmailInvitePortal.sh <ecare override infile>
         <hostname> <ecarePort> <serviceName>
         <clientconnecttimeout> <agentconnecttimeout>
         <ecare override outfile>
   ```

   For usage instructions, you may run the `AddEmailInvitePortal.sh` script by itself without any parameters.

   ```
   bash AddEmailInvitePortal.sh
   ```

2. Access the Marae Administration page at the following URL to restart the eCare service.

   http://[server]/[service]/manage

3. Click the *Initiate Marae System Shutdown* link and wait for the shutdown to complete.

   The eCare service is not completely shut down until the current state is shown as *Shutdown* and the *Start Marae System* link appears. The eCare service will then be unavailable until you restart it after the upgrade is complete.

4. When the shutdown is complete, click the *Start Marae System* link to restart your eCare service.

To test the Email Invite portal

1. Sign into the eCare system as a Support Agent.
2. Verify that the *Email Invite* button appears above the trouble-ticket queue.

3. Click the *Email Invite* button and fill out the invitation with an email address you can check *on a different computer*. Then click *Submit*.

   Note: If you receive the email on the same computer, you will not be able to submit the trouble ticket correctly while you are signed in to eCare as a Support Agent. If you sign out from the Support Agent portal, you will not be able to confirm that the ticket appears in the queue.

4. When the email arrives, click the eCare link in the message body.

   The trouble-ticket is submitted automatically and you are placed in the eCare queue.

5. On the Support Agent computer, verify that the trouble ticket appears in the queue.

Adding the Reconnect Portal

1. Run the `AddReconnectPortal.sh` script.

   ```
   bash AddReconnectPortal.sh <ecare override infile>
         <hostname> <ecarePort> <serviceName>
         <clientconnecttimeout> <agentconnecttimeout>
         <ecare override outfile>
   ```

   For usage instructions, you may run the `AddReconnectPortal.sh` script by itself without any parameters.

   ```
   bash AddReconnectPortal.sh
   ```

2. Access the Marae Administration page at the following URL to restart the eCare service.

   http://[server]/[service]/manage

3. Click the *Initiate Marae System Shutdown* link and wait for the shutdown to complete.

   The eCare service is not completely shut down until the current state is shown as *Shutdown* and the *Start Marae System* link appears. The eCare service will then be unavailable until you restart it after the upgrade is complete.

4. When the shutdown is complete, click the *Start Marae System* link to restart your eCare service.

To test the Reconnect portal

1. Sign into the eCare system as a Support Agent.
2. On a different computer, submit an eCare trouble ticket.

   You must submit the trouble ticket from a Windows 2000 or Windows XP computer.

   Verify that you are prompted to install the eCare ActiveX control.
3. On the Support Agent computer, make a note of the ticket ID number. Then accept the trouble ticket.
4. On the customer computer, verify that you are prompted to accept the Reconnect control.

   This Reconnect control will allow you to reconnect to eCare if your session is interrupted. eCare will place a shortcut on your desktop. Verify that the shortcut is saved there.
5. On the Support Agent computer, verify that the *Reconnect Computer* control appears on the *Remote Tasks* tab in the eCare session window. Then click *Reconnect Computer*.
6. On the customer computer, verify that you are prompted to accept the Reconnect control again.

   This Reconnect control will write a key to your Windows registry. When the computer is rebooted, it will automatically start the Web browser and reconnect to eCare.
7. On the customer computer, click *Accept*.
8. Verify that the computer reboots normally. Log in to Windows when prompted.
9. Verify that the Web browser opens and reconnects to eCare.
10. On the Support Agent computer, verify that the trouble ticket reappears in the queue with the same ticket ID number.

Adding the TicketConnector Portal

The TicketConnector portal provides an integration point for eCare into your existing CRM solution. eCare's TicketConnector portal feature lets external systems circumvent the ticket submission page and submit a ticket directly to an eCare queue. This is done by sending a request to the TicketConnector portal URL while passing all of the ticket submission fields as query string parameters.

When a ticket is submitted to the TicketConnector portal, eCare will automatically create a ticket and forward the browser directly to the waiting-in-line screen. By default the TicketConnector portal expects the following query string parameters.

`firstname` (the customer's first name)
`lastname` (the customer's last name)
`email` (the customer's email address)
`phone` (the customer's phone number)
`problem` (a description of the customer's problem or issue)

These are the same fields that normally appear in the ticket submission form. Depending on what customer information you want to track, you can pass as many or as few of these fields in the TicketConnector portal URL as you want.

To bypass the ticket submission page and submit a ticket automatically via the TicketConnector portal, use a URL like the following.

http://[server]/[service]/TicketConnector.jsp?firstname=Joe&lastname=User&email=juser@company.com&phone=999-999-9999&problem=Help!

When the customer's browser accesses this URL, they are forwarded automatically to the waiting-in-line screen.

To activate the TicketConnector portal feature for a particular eCare service, run the `AddPassthruPortal.sh` script. This script will make the necessary changes to the overrides file for you.

```
sudo bash AddPassthruPortal.sh /usr/local/resin/
      ecare4overrides/[service]-ecare.xml [hostname]
      "" [service] /usr/local/resin/ecare4overrides/
      [service]-ecare.xml
```

For usage instructions, run the `AddPassthruPortal.sh` script by itself without any parameters.

Note: You will be able to submit trouble ticket with the TicketConnector portal only after your eCare service has been restarted.

Removing an eCare Service

1. Stop the WTP and eCare page servers.

```
cd /usr/local/resin/bin
sudo ./run_eCare.sh stop
sudo ./run_wtp.sh stop
```

2. Determine which JNDI resource reference is associated with the service to be deleted.

```
grep jndi /usr/local/resin/ecare4overrides/
      [service]-ecare.xml
```

3. Use the information returned by the command in the previous step to find the JNDI resource reference associated with the service to be deleted in the */usr/local/resin/conf/resin.conf* file. For example, the command returned

```
<jndi-name>jdbc/ecare-postgres-myservice
      </jndi-name>
```

4. Search for the corresponding resource reference in the resin.conf file.

```
<res-ref-name>jdbc/ecare-postgres-myservice
      </res-ref-name>
```

5. Once you find the resource reference associated with the service to be deleted, determine which database this associated with this resource reference by examining the line that contains the `<init-param url>` tag. The last piece of text following the port number is the name of the database associated with this JNDI resource reference. In the following example, the `msdb` database is associated with the `ecare-postgres-myservice` JNDI resource reference.

```
<resource-ref>
   <res-ref-name>jdbc/ecare-postgres-myservice
      </res-ref-name>
   <res-type>javax.sql.DataSource</res-type>
   <init-param driver-name="org.postgresql.
      Driver"/>
   <init-param url="jdbc:postgresql://
      192.168.1.141:5432/msdb"/ >
   <init-param user="postgres"/>
   <init-param password="pgsql"/>
   <init-param max-connections="20"/>
```

```
    <init-param max-idle-time="30"/>
</resource-ref>
```

6. Remove the JNDI resource reference associated with the service to be deleted. This includes everything between the opening and closing `<resource-ref>` element tags.
7. Delete the database associated with the service being removed.

```
sudo su - postgres
dropdb msdb
exit
Delete the files for the service.
sudo rm Ðrf /usr/local/resin/webapps/[service]
      /usr/local/resin/webapps/[service].war
rm /usr/local/resin/ecare4overrides/
      [service]-ecare.xml
```

8. Restart the WTP and eCare page servers. Wait at least 1 minute after starting the WTP server before starting the eCare page server.

```
cd /usr/local/resin/bin
sudo ./run_wtp.sh start
sudo ./run_eCare.sh start
```

Server Maintenance

On occasion, you may need to stop and restart the PostgreSQL, WTP, and eCare page servers. Below are instructions on how to accomplish this.

Stopping and Restarting the WTP and eCare Page Servers

In some instances you may need to stop and restart the WTP and eCare page servers for changes to the system to take effect, such as when adding a JNDI resource reference to the resin.conf file. Run the following commands to stop the eCare servers.

```
cd /usr/local/resin/bin
sudo ./run_eCare.sh stop
sudo ./run_wtp.sh stop
```

To restart the WTP and eCare page servers execute the commands below.

```
cd /usr/local/resin/bin
sudo ./run_wtp.sh start
sudo ./run_eCare.sh start
```

Wait at least one minute after starting the WTP server before starting the eCare page server.

Stopping and Restarting PostgreSQL

At times you may need to stop and restart PostgreSQL. The commands to do this must be run under the postgres system user account. Use the following commands to stop the PostgreSQL server.

```
sudo su - postgres
pg_ctl -D /usr/local/ecare4_pgsql/data stop
exit
```

The following commands restart the PostgreSQL server.

```
sudo su - postgres
postmaster -D /usr/local/ecare4_pgsql/data >> \
      /usr/local/ecare4_pgsql/log/logfile 2>&1 &
exit
```

Chapter 3: Configuring Your eCare Installation

All of the following eCare customizations require changes to an eCare configuration file such as the overrides, *ecare.xml*, or localization file for the particular eCare service you are changing.

- Changes to these configuration files are noted in blue.
- [placeholders] are noted in red and surrounded by brackets. Always replace placeholders with values appropriate for your eCare installation.
- In some cases, line numbers are included in the configuration examples to help you distinguish between a new line and a one that is wrapped around because it is too long to fit on one line.

Problems with the overrides file or the *ecare.xml* file may prevent your eCare service from starting correctly. Before making any changes to either file be sure to make a backup copy in case you need to restore it later.

For changes to these files to take effect you must shut down and restart the eCare service. Shutting down an eCare service only affects that specific service and is different than restarting the entire eCare page and WTP servers. When you shut down a specific eCare service all other services are unaffected and still accessible. Use the following URL to stop and restart a specific eCare service.

http://[server]/[service]/manage

You will be prompted to log in. Enter the credentials for a site or super admin-level account for this eCare service; standard administrator accounts do not have privileges to access this page.

Click the *Initiate Marae System Shutdown* link and wait for the shutdown to complete. The eCare service is not completely shut down until the current state is shown as *Shutdown* and the *Start Marae System* link appears. The eCare service will then be unavailable until you restart it after the upgrade is complete.

Localizing eCare

Depending on the customers that you need to support with eCare, you may wish to translate it to another language besides English or alter the default text strings used in the product for the purposes of branding it. The process of configuring your eCare server to support and display Web pages in a language other than English is known as *localization*. Localizing eCare and altering the default text strings both require you to modify a copy of the *Resource.properties* file for the particular service you want to change.

To create a localized eCare service, you must

- Translate the properties file into the language you wish to use.
- Enable the language-specific settings in the *[service]-marae.xml* file.

The following sections cover these processes in detail.

Creating and Translating the Properties File

All the text that appears in the eCare user Web interface resides in one file, known as the resources or properties file. The resources file is named in the format

`Resource_`*`language_country`*`.properties`

where *language* is a two-letter code for the language used and *country* is a two-letter code for the country supported by the server. For example, the US English resources file is named *Resource_en_US.properties* and the Japanese resources file is named *Resource_ja_JP.properties*.

To create a localized properties file

1. Create a localization directory.

   ```
   sudo mkdir /usr/local/resin/webapps/[service]/
         ecare4/custom/localization
   ```

2. Copy the default *Resource.properties* file and rename it with the applicable two-letter country and language codes.

   ```
   cd /usr/local/resin/webapps/[service]/ecare4/
         custom/localization
   ```

```
sudo cp /usr/local/resin/webapps/[service]/WEB-INF/
      classes/com/netopia/app/ecare/localization/
      Resource.properties
      Resource_[language]_[country].properties
```

The two-letter codes you use must match standard codes you can find at

http://www.w3.org/International/O-misc-iso3166.html

Note that some countries also have three-letter codes. You must use the two-letter code for localization to occur correctly.

If you wish to customize some of the default eCare text strings without fully localizing the file, retain the en_US naming scheme.

3. Open the new resources file in a text editor.

   The resources file includes many text strings, each of which is comprised of a string name and a string value. Each string name starts on a new line and begins with the characters `jsp` or `java`. Each string name is followed by several tabs, an equals sign (=), and a string value.

   ```
   jsp.client.submit.introLine = Welcome To eCare
         Support
   ```

   The English phrase following the equals sign is the string value, which you must translate to the desired language.

4. Translate the string values into your desired language. Keep in mind the following details.

   - You must translate only the string values, NOT the string names. The string names (the text that begins with `jsp` or `java` and precedes the equals sign) are used by the eCare server to identify the text strings. They will not be visible to your eCare users.
   - You must use Unicode Escape (UTF-8) formatting for all non-English string values. These Unicode Escape characters for non-English strings take the form `\`*unnnn* where *nnnn* is a 4-character code for the non-English character.

5. Once translation is complete, save the new resources file.

6. Create a soft link to the localized *Resource_[language]_[country].properties* file.

   ```
   cd /usr/local/resin/webapps/[service]/WEB-INF/
         classes/com/netopia/app/ecare/localization
   sudo ln -s /usr/local/resin/webapps/[service]/
         ecare4/custom/localization/
   ```

```
Resource_[language]_[country].properties
Resource_[language]_[country].properties
```

Make sure to use the actual name of the file, replacing [*language*] and [*country*] with the appropriate two-letter codes.

Turning on Localization

To enable your eCare service to run in a language other than US English, you must specify the desired language and country codes in the *[service]-marae.xml* file for your service.

The language and country codes you need are the same as those you used to create the resources file (see the previous section, "Creating and Translating the Properties File").

To specify the localized file

1. Create a *[service]-marae.xml* file in the */usr/local/resin/ecare4overrides* directory with the following contents. Specify the new language and country codes with the <locale> element. Specify the two-letter language code first, followed by a hyphen (—) and the two-letter country code.

```
<marae>
   <configuration>
      <locale action="replace">[language]-[country]
         </locale>
      <!-- en-US should be the default -->
      <!-- de-DE is German -->
      <!-- ja-JP is Japanese -->
   </configuration>
</marae>
```

   Note that the language and country codes are separated by a hyphen (–) and not an underscore (_) as in the resources file name.

2. Save the *[service]-marae.xml* file and restart your eCare service.

Note: The eCare pages will continue to be displayed in English instead of your localized language until after your eCare service is restarted.

Localization Limitations

Please note the following limitations in the current eCare localization scheme.

- The eCare client software is not yet localized. Some messages that appear during screen sharing and Examine System sessions, which are generated by the client, will appear in English.
- Some Web browsers and operating systems do not fully support localization. If the remote user's browser is not the language specified for the eCare server, some characters may not appear correctly in some locations.

  For example, if the eCare server is running a Japanese localization, but the remote computer is using an English operating system and Web browser, Japanese characters will not display correctly in the title bar and browser alert messages. This occurs even if the browser has Japanese language support installed.

Configuring eCare Surveys

eCare's survey feature lets you monitor customer service levels and find out how your Support Agents are using eCare. As an eCare administrator, you have direct, immediate control over many aspects of surveys:

- Which surveys are offered, and when
- The number of questions
- The content of each question and the response options
- The appearance of the survey, through either the parent eCare style sheet or a special survey-only style sheet
- Where the results are sent

The survey results can even include dynamic content, such as trouble-ticket information or the Support Agent's name, by referencing JavaScript objects that are pre-populated by the eCare server.

Most survey configuration is performed during installation and in the eCare Administrator portal. See the *eCare Administrator's Guide* for information about the survey-management tasks you can perform there.

Adding Service Names to Surveys

If your eCare server hosts multiple eCare services, you may wish to add the eCare service name to your survey results. This allows you to determine which eCare service a particular survey came from.

This configuration requires access to the *ecare.xml* file. Therefore, it cannot be performed with the eCare Administrator interface.

To add the eCare service name to a surveys

1. Add the following configuration text immediately before the closing `</configuration>` tag at the end of the overrides file for your eCare service. The overrides file for a particular service is located at

   /usr/local/resin/ecare4overrides/‹servicename›-ecare.xml

   ```
   <ticket-queue>
      <queue-name action="replace">[service]</queue-
         name>
   </ticket-queue>
   ```

   Then save your changes and close the file.

2. Open your Web browser and download the following ZIP file from your eCare service.

   http://‹ecare-server›/‹service-name›/ecare4/templates.zip

   This file includes the default HTML files, JSP file, and CSS file that control eCare surveys.

3. In any text editor, open the HTML include file for the survey to which you wish to add the service name.

4. Add the following line to the top of the `<form>` section in the file.

   ```
   <input type=hidden name="info_service" value="<ecare:
      ConfigValue element='ticket-queue.queue-name'/>">
   ```

5. Save and close the file.

6. Repeat steps 3-5 for any other surveys to which you wish to add the service name.

7. Sign in to the eCare Administrator portal. Open the Preferences Manager and use the *Upload* tab to upload the changed HTML files to your eCare server. See “Upload: Uploading Custom Files” in the *eCare Administrator’s Guide* for details.

8. Restart your eCare service for these changes to become effective.

Setting Up IP Blocking

In some eCare installations, you may wish to prevent certain computers or IP addresses (or all computers except those you specifically allow) from accepting trouble tickets or from submitting eCare trouble tickets to the queue.

For example, you may wish to restrict access to the Support Agent portal to the IP addresses used by your Support Agents, which prevents anyone else from accepting trouble tickets. Or you may wish to prevent your Support Agents from submitting trouble tickets, which could then be accepted by other Support Agents.

Specifying Support Agent IP Addresses

The following procedure allows you to specify the IP addresses from which Support Agents are allowed or not allowed to sign in to the eCare service.

To allow or restrict the IP addresses that may sign in

1. In a text editor, open the *[service]-ecare.xml* file, located in the */usr/local/resin/ecare4overrides* directory for the service you want to edit.
2. For the **agent–login** entry portal, specify the IP addresses to allow or block using the <allow> or <deny> property. For example,

```
<portal name="agent-login">
   <role>agent</role>
   <login-form>loginform.jsp</login-form>
   <required-permission>ecare:conversation.
      ecareconversation.agent</required-permission>
   <hours>open</hours>
   <wtp-host-provider>
      <plugin>com.netopia.app.ecare.plugins.
      DefaultWTPHostProvider</plugin>
   </wtp-host-provider>
   <ip-restriction>
      <allow>34.23.20.0/5</allow>
      <allow>34.23.20.76</allow>
      <allow>34.23.48.0/8</allow>
   </ip-restriction>
</portal>
```

This will allow the following addresses to accept trouble tickets.

- 34.23.20.0 netmask 255.255.255.224 (5 zero bits on the end)
- 34.23.20.76 netmask 255.255.255.255
- 34.23.48.0 netmask 255.255.255.0 (8 zero bits on the end)

You must use only the <allow> property or only the <deny> property, not both. If both the <allow> and <deny> options are in use, a Java Servlet Exception error will result and the eCare service will fail to restart, making it inaccessible to both customers and Support Agents.

You may create as many instances of the <allow> or <deny> element as you need. Each IP address or IP address block must be specified in a separate <allow> or <deny> element.

3. Save the *[service]-ecare.xml* file and restart your eCare server.

Specifying Remote User IP Addresses

The following procedure allows you to specify the IP addresses that are allowed or not allowed to submit trouble tickets.

To allow or restrict the IP addresses that may submit trouble tickets

1. In a text editor, open the *[service]-ecare.xml* file, located in the */usr/local/resin/ecare4overrides* directory for the service you want to edit.
2. For the **client–login** entry portal, specify the IP addresses to allow or block using the <allow> or <deny> property. For example,

```
<portal name="client-login" default="true">
   <role>client</role>
   <login-form auto="true">GuestLogin.jsp</login-
      form>
   <required-permission>ecare:conversation.
      ecareconversation.client</required-
      permission>
   <hours>open</hours>
   <wtp-host-provider>
      <plugin>com.netopia.app.ecare.plugins.
      DefaultWTPHostProvider</plugin>
   </wtp-host-provider>
   <ip-restriction>
      <deny>34.23.20.0/5</deny>
```

```
            <deny>34.23.20.76</deny>
            <deny>34.23.48.0/8</deny>
        </ip-restriction>
    </portal>
```

This will prevent the following addresses from submitting trouble tickets.

- 34.23.20.0 netmask 255.255.255.224 (5 zero bits on the end)
- 34.23.20.76 netmask 255.255.255.255
- 34.23.48.0 netmask 255.255.255.0 (8 zero bits on the end)

You must use only the <allow> property or only the <deny> property, not both. If both the <allow> and <deny> options are in use, a Java Servlet Exception error will result and the eCare service will fail to restart, making it inaccessible to both customers and Support Agents.

You may create as many instances of the <allow> or <deny> element as you need. Each IP address or IP address block must be specified in a separate <allow> or <deny> element.

3. Save the *[service]-ecare.xml* file and restart your eCare server.

Setting Up a Dual-Homed Server

When an eCare server supports two different networks that cannot be joined, usually for security reasons, the eCare server requires two network interface cards (NICs). Although eCare supports dual homing, the installation script does not. You must manually configure the eCare server to accept dual homing.

To configure the eCare server for dual homing

1. Open the *[service]-ecare.xml* file. This overrides file can be found in the directory

   /usr/local/resin/ecare4overrides

2. Find the configuration block enclosed by the <entry-portals> tags. Remove the entire contents between these tags and replace it with the text below.

   When you enter the new configuration, replace the placeholders [external_ip] and [internal_ip] with appropriate values for your eCare server.

```
<entry-portals action="replace">

<shortcuts>
<mapping match="full-url">
   <url-pattern>http://[external ip]/[service]/ecare4/
      </url-pattern>
   <portal-name>external-client-login</portal-name>
</mapping>
<mapping match="full-url">
   <url-pattern>http://[external ip]/[service]/ecare4/
      agent/</url-pattern>
   <portal-name>external-agent-login</portal-name>
</mapping>
<mapping match="full-url">
   <url-pattern>http://[external ip]/[service]/ecare4/
      admin/</url-pattern>
   <portal-name>external-admin-login</portal-name>
</mapping>
<mapping match="full-url">
   <url-pattern>http://[internal ip]/[service]/ecare4/
      admin/</url-pattern>
   <portal-name>internal-admin-login</portal-name>
</mapping>
<mapping match="full-url">
   <url-pattern>http://[internal ip]/[service]/ecare4/
      agent/</url-pattern>
   <portal-name>internal-agent-login</portal-name>
</mapping>
<mapping match="full-url">
   <url-pattern>http://[internal ip]/[service]/ecare4/
      </url-pattern>
   <portal-name>internal-client-login</portal-name>
</mapping>
</shortcuts>

<portal name="external-client-login" default="true">
   <role>client</role>
   <login-form auto="true">GuestLogin.jsp</login-form>
   <required-permission>ecare:conversation.
      ecareconversation.client</required-permission>
```

```
    <hours>open</hours>
    <wtp-host-provider>
       <plugin>com.netopia.app.ecare.plugins.
       StaticHostProvider</plugin>
       <server-url>https://[external_ip]/wtp</server-
       url>
    </wtp-host-provider>
    <download-policy>always</download-policy>
</portal>

<portal name="external-agent-login">
    <role>agent</role>
    <login-form>loginform.jsp</login-form>
    <required-permission>ecare:conversation.
       ecareconversation.agent</required-permission>
    <hours>open</hours>
    <wtp-host-provider>
       <plugin>com.netopia.app.ecare.plugins.
       StaticHostProvider</plugin>
       <server-url>https://[external_ip]/wtp</server-
       url>
    </wtp-host-provider>
<download-policy>always</download-policy>
</portal>

<portal name="external-admin-login">
    <role>admin</role>
    <login-form>loginform.jsp</login-form>
    <required-permission>ecare:superadmin</required-
       permission>
    <hours>open</hours>
    <wtp-host-provider>
       <plugin>com.netopia.app.ecare.plugins.
       StaticHostProvider</plugin>
       <server-url>https://[external_ip]/wtp</server-
       url>
    </wtp-host-provider>
    <download-policy>always</download-policy>
</portal>
```

```
<portal name="internal-client-login">
   <role>client</role>
   <login-form auto="true">GuestLogin.jsp</login-form>
   <required-permission>ecare:conversation.
      ecareconversation.client</required-permission>
   <hours>open</hours>
   <wtp-host-provider>
      <plugin>com.netopia.app.ecare.plugins.
      DefaultWTPHostProvider</plugin>
   </wtp-host-provider>
   <download-policy>always</download-policy>
</portal>

<portal name="internal-agent-login">
   <role>agent</role>
   <login-form>loginform.jsp</login-form>
   <required-permission>ecare:conversation.
      ecareconversation.agent</required-permission>
   <hours>open</hours>
   <download-policy>always</download-policy>
   <wtp-host-provider>
      <plugin>com.netopia.app.ecare.plugins.
      DefaultWTPHostProvider</plugin>
   </wtp-host-provider>
</portal>

<portal name="internal-admin-login">
   <role>admin</role>
   <login-form>loginform.jsp</login-form>
   <required-permission>ecare:superadmin</required-
      permission>
   <hours>open</hours>
   <download-policy>always</download-policy>
   <wtp-host-provider>
      <plugin>com.netopia.app.ecare.plugins.
      DefaultWTPHostProvider</plugin>
   </wtp-host-provider>
</portal>

</entry-portals>
```

Save your changes to the *[service]-ecare.xml* overrides file and restart your eCare service. Note that your eCare service will respond to both the internal and external addresses only after it has been restarted.

Enabling and Configuring eCare Features

In certain environments you may wish to enable certain eCare features that are not enabled by default, or you may wish to configure features that cannot be modified through the administrator interface. eCare provides a built-in mechanism for you to accomplish this by editing the *ecare.xml* file or the overrides file for the particular service that you want to modify.

In most cases, it is best to modify the overrides file. To do so, open the *[service]-ecare.xml* file in a text editor. This overrides file can be found in the following directory for the service you want to manage.

/usr/local/resin/ecare4overrides

Note: Problems with the *ecare.xml* or overrides file may prevent your eCare service from starting correctly. Before making any changes to the *ecare.xml* file, be sure to make a backup copy in case you need to restore it later.

Enabling Session Recording

For security, auditing, and quality assurance purposes, eCare allows you to save and play back recordings of all eCare screen sharing sessions. To enable session recording for an eCare service, make sure the following configuration is present and enabled in the overrides file for that service. (In most cases, the configuration is present but set to `never`.)

```
    <desktop-assist>
       <audit action="replace">always</audit>
       <audit-path action="replace">/usr/local/
             resin/webapps/[service]/archive
             </audit-path>
    </desktop-assist>
</configuration>
```

Note: Your eCare service will not start recording your screen sharing sessions until it has been restarted. Links to the actual session recording files will not

appear in the Ticket Archive window of the eCare Reporting Center until after you have restarted the eCare page server.

Enabling Audible Alerts

eCare can be configured to sound an alert (a bell sound) for different eCare events. Each of these events may be individually enabled. The available alerts are

New ticket `ecare:audibleAlert.ticket.new`

Escalated ticket `ecare:audibleAlert.ticket.escalated`

Remote customer chat message `ecare:audibleAlert.chat.client`

Connection lost `ecare:audibleAlert.lostconnection`

By default, audible alerts for new tickets are active while the remaining audible alerts are disabled. The other alerts are disabled by their presence within a set of `<disabled-features>` tags in the service's overrides file. Therefore, to enable other audible alerts for an eCare service, you will *comment out* the alert features that you want to enable.

In the following example, audible alerts have also been activated for escalated tickets in addition to the default alerts for new tickets.

```
<disabled-features>
   <!--<permission>ecare:audibleAlert.ticket.new</
      permission> -->
   <!--<permission>ecare:audibleAlert.ticket.
      escalated</permission> -->
   <permission>ecare:audibleAlert.chat.client</
      permission>
   <permission>ecare:audibleAlert.lostconnection</
      permission>
</disabled-features>
```

Note: The new audible alerts that you have turned on will become active only after your eCare service has been restarted.

Configuring Report Order and Disabling Reports

You can also use the overrides file to control the order in which eCare report names appear in the eCare Reporting Center, rename reports, and remove specific default reports from the reporting interface.

Each eCare report is enabled and configured within a <report> tag.

```
<report>
   <report-id>agent-activity-2</report-id>
   <name>Daily Agent Activity Profile</name>
   <query-page>agentActivity2Query.jsp</query-page>
   <presentation-page>agentActivity2.jsp</
      presentation-page>
   <query-plugin>com.netopia.app.ecare.beans.reports.
      AgentActivity2QueryPlugin</query-plugin>
   <bean-plugin>com.netopia.app.ecare.beans.reports.
      AgentActivity2BeanPlugin</bean-plugin>
   <permissions>
      <permission>ecare:report</permission>
   </permissions>
</report>
```

The report names appear in the eCare Reporting Center in the same order in which they appear in the *ecare.xml* file.

- To reorder reports, move the entire <report> section for each report to the desired location within the <reports> parent tag. Do not move any reports out of the <reports> section.
- To rename a report, edit the text within its associated <name> tag.
- To remove a report from the reporting interface, comment it out.

Note: The changes you make will become active only after your eCare service has been restarted.

Disabling eCare Features

In certain environments you may wish to disable certain eCare functionality, particularly those features that you do not want available to your Support Agents. eCare provides a built-in mechanism for you to accomplish this by editing the

ecare.xml file or the overrides file for the particular service that you want to modify.

In most cases, it is best to modify the overrides file. To do so, open the *[service]-ecare.xml* file in a text editor. This overrides file can be found in the following directory for the service you want to manage.

/usr/local/resin/ecare4overrides

Note: Problems with the *ecare.xml* or overrides file may prevent your eCare service from starting correctly. Before making any changes to the *ecare.xml* file, be sure to make a backup copy in case you need to restore it later.

Disabling Screen-Sharing Functionality

By default, all screen-sharing features are enabled. However, a line for each feature permission is located within a set of `<disabled-features>` tags in the *ecare.xml* file. Each permission is within a commented-out section to prevent the feature from being disabled. Therefore, to disable a screen-sharing feature, you will copy or move its permission outside the commented-out section.

The following example disables the Share My View (Invite Observe) and Share My Control (Invite Control) features.

```
<desktop-assist>
   <disabled-features>
      <permission>agentInviteObserve</permission>
      <permission>agentInviteControl</permission>
      <!--
      <permission>agentChangeColorDepth</permission>
      <permission>agentObserve</permission>
      <permission>agentControl</permission>
      <permission>agentInviteObserve</permission>
      <permission>agentInviteControl</permission>
      -->
   </disabled-features>
```

The following screen sharing features can be disabled.

agentChangeColorDepth

Disabling this feature removes the Select Color Depth slider from the Support Agent interface. As a result, all screen sharing sessions will be run at the default color depth of

256 colors (8-bit color). If you wish to select another default color depth, change the following line located elsewhere within the *ecare.xml* file.

```
<default-bit-depth>color8
   </default-bit-depth>
```

Valid color depth values are **bw**, **gray2**, **gray4**, **gray8**, **color8**, and **lossless**.

agentObserve Disabling this feature removes the View Remote User button from the Support Agent interface.

agentControl Disabling this feature removes the Control Remote User button from the Support Agent interface.

agentInviteObserve Disabling this feature removes the Share My View button from the Support Agent interface.

agentInviteControl Disabling this feature removes the Share My Controls button from the Support Agent interface.

Note: These screen sharing features continue to be available to Support Agents in the eCare interface until your eCare service has been restarted.

Disabling Examine System

By default, the Examine System feature is enabled. However, two lines for the feature permission are located within a set of `<disabled-features>` tags in the *ecare.xml* file. The lines are within a commented-out section to prevent the feature from being disabled. Therefore, to disable the Examine System feature, you will copy or move the permission lines outside the commented-out section.

```
<system-analyzer>
   <disabled-features>
      <permission>agentAnalyze</permission>
      <permission>agentPrivilegedAnalyze</permission>
      <!--
      <permission>agentAnalyze</permission>
      <permission>agentPrivilegedAnalyze</permission>
      -->
   </disabled-features>
   <content-level>generic</content-level>
```

```
        <!-- generic, sensitive -->
</system-analyzer>
```

Note: The Examine System service continues to be available to Support Agents in the eCare interface until your eCare service has been restarted.

Disabling File Transfer

By default, the File Transfer feature is enabled. However, two lines for feature permissions are located within a set of <disabled-features> tags in the *ecare.xml* file. Each permission is within a commented-out section to prevent the feature from being disabled. Therefore, to disable part or all of the File Transfer feature, you will copy or move the permission lines outside the commented-out section.

In the example below, only the Request File feature has been disabled.

```
<file-transfer>
   <disabled-features>
      <permission>clientFileTransfer</permission>
      <!--
      <permission>clientFileTransfer</permission>
      <permission>agentFileTransfer</permission>
      -->
   </disabled-features>
   <audit>false</audit>
   <!-- following path must be relative to the service
      directory. -->
   <temp-upload-path>WEB-INF/tmp</temp-upload-path>
   <max-file-size>2</max-file-size> <!-- in megabytes
      -->
   <file-life-span>1</file-life-span> <!-- number of
      hours before file will be deleted -->
   <ssl-mode>false</ssl-mode>
</file-transfer>
```

The following file-transfer features can be disabled. Disabling both features will cause the entire *Files* tab to be removed from the Support Agent interface.

clientFileTransfer Disabling this feature removes the *Request File* button from the Support Agent interface.

agentFileTransfer Disabling this feature removes the *Send File* button from the Support Agent interface.

Note: File transfer services continue to be available to Support Agents in the eCare interface until your eCare service has been restarted.

By default, eCare's file transfer facility has a file size limit of 2MB. You can increase this limit with the `<max-file-size>` element. In the example below, the file size limit has been set to 30MB.

```
<max-file-size>30</max-file-size> <!-- in megabytes
      -->
```

Disabling Push URL and Support Agent Tools

By default, the Push URL and Support Agent Tools features are enabled. However, several lines for feature permissions are located within a set of `<disabled-features>` tags in the *ecare.xml* file. Each permission is within a commented-out section to prevent the feature from being disabled. Therefore, to disable any of the Push URL or Support Agent Tools features, you will copy or move the permission lines outside the commented-out section.

In the example below, the Push URL and Email Transcript features have been disabled.

```
<ticket>
   <disabled-features>
      <permission>subscribe</permission>
      <permission>pushUrl</permission>
      <!--
      <permission>subscribe</permission>
      <permission>pushUrl</permission>
      <permission>pushUrlShortcuts</permission>
      <permission>agentTools</permission>
      -->
   </disabled-features>
```

The following features can be disabled.

subscribe Disabling this feature removes the *Email Transcript* button from both the customer and Support Agent interfaces. Disable this feature if you do not want customers or Support Agents to be able to request emailed session transcripts.

pushUrl	Disabling this feature removes the *Select a Shortcut URL* drop-down list and the *Push URL* text field and button from the Support Agent interface.
pushUrlShortcuts	Disabling this feature removes the *Select a Shortcut URL* drop-down list from the Support Agent interface. However, Support Agents can still push a URL to the customer by manually entering a Web address in the text entry area next to the *Push URL* button.
agentTools	Disabling this feature removes both the *View URL* button and the *Support Agent Tools* drop-down list from the Support Agent interface.

Disabling Chat

By default, the Chat features are enabled. However, several lines for feature permissions are located within a set of `<disabled-features>` tags in the *ecare.xml* file. Each permission is within a commented-out section to prevent the feature from being disabled. Therefore, to disable Chat shortcuts or the entire Chat feature, you will copy or move the permission lines outside the commented-out section.

In the following example, the *Select a Shortcut Message* drop-down list, which allows the Support Agent to send preset Chat messages, has been disabled.

```
<chat>
   <disabled-features>
      <permission>chatShortcuts</permission>
      <!--
      <permission>chat</permission>
      <permission>chatShortcuts</permission>
      -->
   </disabled-features>

   <audit>true</audit>
   <transcript-from-address>UNCONFIGURED</transcript-
      from-address>
</chat>
```

The following Chat features can be disabled.

chat	Disabling this feature removes the Chat text entry area and *Send* button from the both the customer and Support Agent interface. Do not disable this functionality unless your customers and Support Agents will be able to communicate in some other way, such as over the telephone. Disabling Chat will also automatically disable the *Select a Shortcut Message* drop-down list.
chatShortcuts	Disabling this feature removes the *Select a Shortcut Message* drop-down list from the Support Agent interface. Support Agents can still chat by manually entering messages in the Chat text entry area.

Note: Chat features continue to be available to Support Agents in the eCare interface until your eCare service has been restarted.

Appendix A: Installing the eCare Remote-Control Component

Before your Support Agents can use eCare's screen-sharing services, they will need to install the *eCare remote-control component*, which is a control that enables the computer to use these services. Windows computers use the eCare ActiveX control, while Macintosh computers use the eCare plugin.

In eCare version 4, you can pre-install the Netopia eCare remote-control component on the computers on your network. By default, eCare downloads the eCare remote-control component the first time a Support Agent accesses your eCare Service Center and anytime the eCare remote-control component is upgraded. However, your organization may have implemented policies or security measures that prevent users from downloading or installing ActiveX controls or plugins. Your IT organization will be able to bypass these security measures to install the eCare remote-control component.

To install the eCare ActiveX control on Windows computers, you must have Windows Administrator privileges. Therefore, you may also need to deploy the eCare ActiveX control to those computers whose regular users do not have permission to download or install it.

Note: The eCare system also uses the eCare reconnect component to allow customers to reconnect to eCare automatically after the Support Agent reboots their computer or after a session interruption. If your organization's policies allow the Support Agent to download the eCare remote-control component automatically, the eCare reconnect component will be downloaded at the same time. However, the reconnect component is not used by the Support Agent's computer. If you must pre-install the remote-control component, you will not need to install the reconnect component.

Pre-Installing the eCare ActiveX Control on Windows Computers

You may pre-install the eCare ActiveX control on both local and remote Windows computers.

Pre-Installing the eCare ActiveX Control on a Remote Windows Computer

Before you can install the eCare ActiveX control on a remote computer, you must download a local copy. To do so, use the following procedure.

To download the eCare ActiveX control

1. In a text file, enter the following lines.

   ```
   <html>
   <a href="http://<server>/<service>/ecare4/components/
       CobAgent_4.0_w98.cab">eCare ActiveX for Windows 98</a>
   <a href="http://<server>/<service>/ecare4/components/
       CobAgent_4.2.1.314.cab">eCare ActiveX</a>
   </html>
   ```

   In place of <*server*> and <*service*>, enter the location of your eCare service. For example,

   ```
   <a href="http://ecare.netopia.com/247service/ecare4/
       components/CobAgent_4.2.1.314.cab">eCare ActiveX</a>
   ```

2. Save this file as an HTML file (for example, *activex.html*).
3. Open the file in Internet Explorer.
4. Right-click each link and choose *Save Target As* to save the ActiveX file to your computer.

   Note: Internet Explorer may attempt to save the ActiveX file as an HTM file. Be sure to specify the correct CAB file extension and the *All Files* file type before you save the file.

Now you are ready to deploy the eCare ActiveX control to the computers on your network.

To deploy the eCare ActiveX control to remote computers

1. Download the CAB file for the eCare ActiveX control by following the above procedure.
2. Using a file-extraction utility, open the CAB file and extract the files that comprise the eCare remote-control component: *CobAgent4.dll* and *CobAgent4.inf* for Windows 98, and *CobAgent4_2_1_314.dll* and*CobAgent4_2_1_314.inf* for Windows XP.
3. Using the software deployment tool of your choice, distribute the appropriate files (**not** the directories) to the target computers.
   - Use the *CobAgent* files for Windows 2000 and Windows XP computers.
   - Use the *CobAgent98* files for Windows 98 and Windows ME computers.

   Place the files in the *\WINNT\Downloaded Program Files* or *\WINDOWS\ Downloaded Programs Files* folder on the target computers.

   Note that you cannot copy files to the Downloaded Program Files folder using Windows Explorer. You must copy them at the command line with the copy command.
4. On the command line, enter the following command to register the eCare ActiveX control with Windows.

   ```
   regsvr32 /s C:\WINDOWS\Downloaded Program Files\
      CobAgent4_2_1_314.dll
   ```

   For Windows 98, use

   ```
   regsvr32 /s C:\WINDOWS\Downloaded Program Files\
      CobAgent4.dll
   ```

The ActiveX control is now installed and registered for use with Windows. (Note that it will *not* appear in the Downloaded Program Files folder in Windows Explorer.)

If you need to unregister the ActiveX control, run the following command.

```
regsvr32 /s /u C:\WINDOWS\Downloaded Program Files\
   CobAgent4_2_1_314.dll
```

For Windows 98, use

```
regsvr32 /s /u C:\WINDOWS\Downloaded Program Files\
   CobAgent4.dll
```

Pre-Installing the eCare ActiveX Control on the Local Windows Computer

On the Support Agent's computer, open Internet Explorer and make sure the following options are set.

- JavaScript and ActiveX enabled
- Java enabled, if the Support Agent will have eCare administrator privileges (Java is required to play session recordings, which are accessible only to administrators)
- Medium security or lower
- Cookies must be allowed

In addition, *all* pop-up blocking software *must be turned off* before the Support Agent can use eCare. This includes the pop-up blockers that are built in to Internet Explorer, as well as third-party blocking software for all platforms.

Then, load the URL for the Support Agent portal. Sign in to eCare with your administrator user name and password. (Your eCare administrator credentials allow you to sign in to both the Support Agent and Administrator portals. However, the Administrator portal does not require the eCare remote-control component.)

To install the ActiveX control

Once you have signed in, the eCare system will automatically detect the missing or outdated eCare ActiveX control and prompt you to install the newer version. (Macintosh users will be prompted to download the eCare plugin as described below.)

1. Click the *Accept* button.
2. In the next dialog box, which asks you to confirm your intention to install the remote-control component, click *Yes*.
3. On Windows XP computers, an additional window appears: Installing Browser Add-On.

   Click the yellow ActiveX warning bar and select *Install ActiveX Control* to begin installing the eCare remote-control component. When a window appears asking if you want to install the software, click *Install*.

The ActiveX control will download and install automatically. The ActiveX control is named *CobAgent4 Class*. It will be installed in the *WINNT/Downloaded Program Files* or *WINDOWS/Downloaded Program Files* folder.

Pre-Installing the eCare Remote-Control Component on Macintosh Computers

You may pre-install the eCare plugin control on both local and remote Macintosh computers.

Pre-Installing the eCare Plugin on a Remote Macintosh Computer

Before you can install the eCare plugin control on a remote computer, you must download a local copy. To do so, use the following procedure.

To download the eCare plugin

- Open Safari and enter the following URL.
  http://‹server›/‹service›/ecare4/components/Netopia RC Installer.dmg
  The plugin disk image will download.

To deploy the eCare plugin to remote computers

1. Download the DMG file for the Netopia RC Installer by following the above procedure.
2. Using the software deployment tool of your choice, distribute the file to the target computers.
3. Execute the installer.

Pre-Installing the eCare Plugin on the Local Macintosh Computer

On the Support Agent's computer, open Safari and make sure the following options are set.

- Plug-ins and JavaScript enabled
- Cookies must be allowed

In addition, *all* pop-up blocking software *must be turned off* before the Support Agent can use eCare. This includes the pop-up blockers that are built in to Safari, as well as third-party blocking software for all platforms.

Then, load the URL for the Support Agent portal. Sign in to eCare with your administrator user name and password. (Your eCare administrator credentials allow you to sign in to both the Support Agent and Administrator portals. However, the Administrator portal does not require the eCare remote-control component.)

To download and install the eCare plugin

Once you have signed in to eCare, the eCare system will automatically detect the missing or outdated eCare plugin and prompt you to install the newer version. (Windows users will be prompted to download the eCare ActiveX control as described above.)

1. Click the *Accept* button.

   The eCare plugin is downloaded as a disk image and opened automatically.
2. To install the plugin, double-click the *Netopia RC Installer* file.
3. A dialog box appears, indicating that the browser plug-in will be installed. Click *Yes*.

Installation then proceeds automatically. When installation is complete, you will be notified. Quit and restart Safari for the make the eCare plugin available for use.

The eCare plugin is named *Netopia RC Plugin*. It is located in the *Library/Internet Plug-ins* folder in the current user's home folder.

Remote-Control Component Installation for Customers

By default, the eCare remote-control component is installed when the customer loads the eCare URL for the first time. This maximizes the efficiency of your Support Agents by avoiding delays during active eCare sessions. However, eCare can also be configured to download the eCare remote-control component only when the Support Agent needs to use a remote-control service.

This "serve on demand" option may be desirable if your organization commonly serves customers that most often require only chat, Push URL, or file-transfer services. This choice optimizes the customer experience.

Appendix B: Netopia Contacts

Netopia Customer Service

http://www.netopia.com/support/ecaresupport.html

Customer Support is available Monday–Friday from 6AM–5:30PM Pacific time.

6001 Shellmound Street, 4th Floor
Emeryville, CA 94608 USA

North America Software Sales

14285 Midway Road
Suite 350
Addison, TX 75001 USA

(800) 485-5741

Europe Software Sales

Becanusstraat 13-15, bus5
6216 BX
Maastricht Netherlands

+31 (0) 43 354 5020