Activation – contact portal and multime-dia business cards

Best Practice

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Contents

1. Introduction

1.1. Contact portal

Bring the company's official contact partners to your website. The ProCall Enterprise contact portal allows visitors to your website to choose the right contact for their needs and then contact them directly. The integrated presence management system automatically controls the availability of individual contacts.
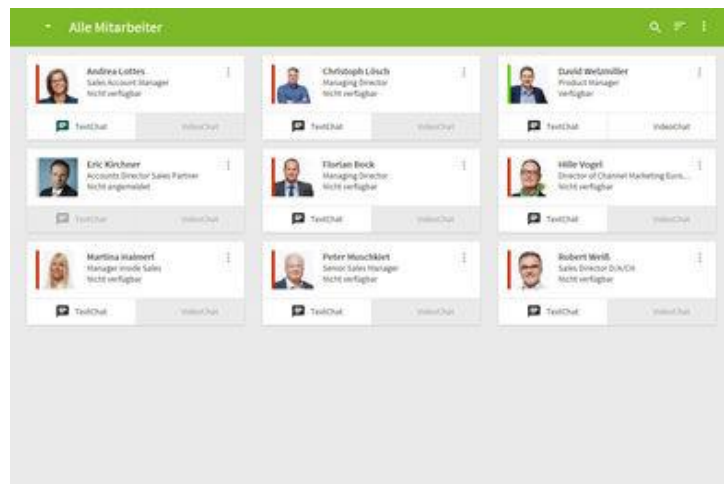
1.2. Multimedia business cards

The multimedia business card (called simply "business card" in the software) allows any estos UCServer user to be accessible via internet-based real-time communication. To this end, each enabled user receives his personal contact page with presence and contact information as well as the possibility of direct, simple contact via links. The link to this page can be easily added in the e-mail footer or the printed business card, which makes it possible to make quick contact via the intranet or the internet.

2.Requirements

It is assumed that you have deployed and configured the following infrastructure:

- ProCall 6 Enterprise

- UCServer WebService, i.e. Accessible via the Internet (for details, see Best Practice "UCServer Webservice release").

<table>
<tr><td align="center">Caution
A trustworthy certificate is mandatory.</td></tr>
</table>

3. Activation

3.1. Overview

To activate functionality, users need to be enabled (see details below). Basically, there are two different ways to set up the contact portal and the business cards for a UCServer.

1. Use of integrated websites
2. Provision of web pages via a separate web server

Integrated websites

In the default settings, the web service of the UCServer already includes a preconfigured contact portal and business cards.

By default, the built-in web pages are accessible at the following URLs:

- Contact portal: *http://<UCServer Adresse>:7224/apps/contactportal/*
- Business card: *http://<UCServer Adresse>:7224/apps/contactportal/<SIP-Adresse>*
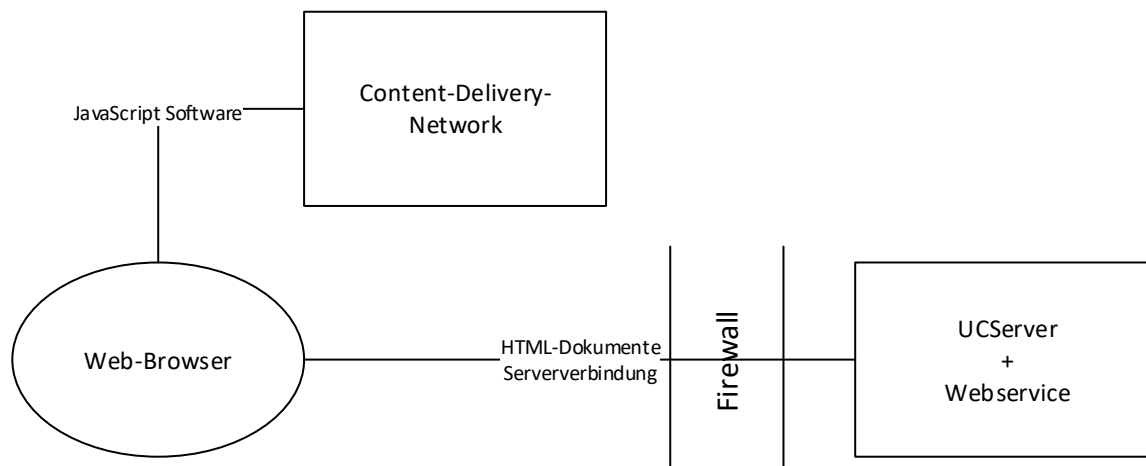
Separate web server

The contact portal and the business cards are normal web pages, which can also be delivered via a third-party web server (e.g. nginx, apache, IIS). To do this, as described in more detail below, the web pages including the configuration must be stored and made available on the web server.
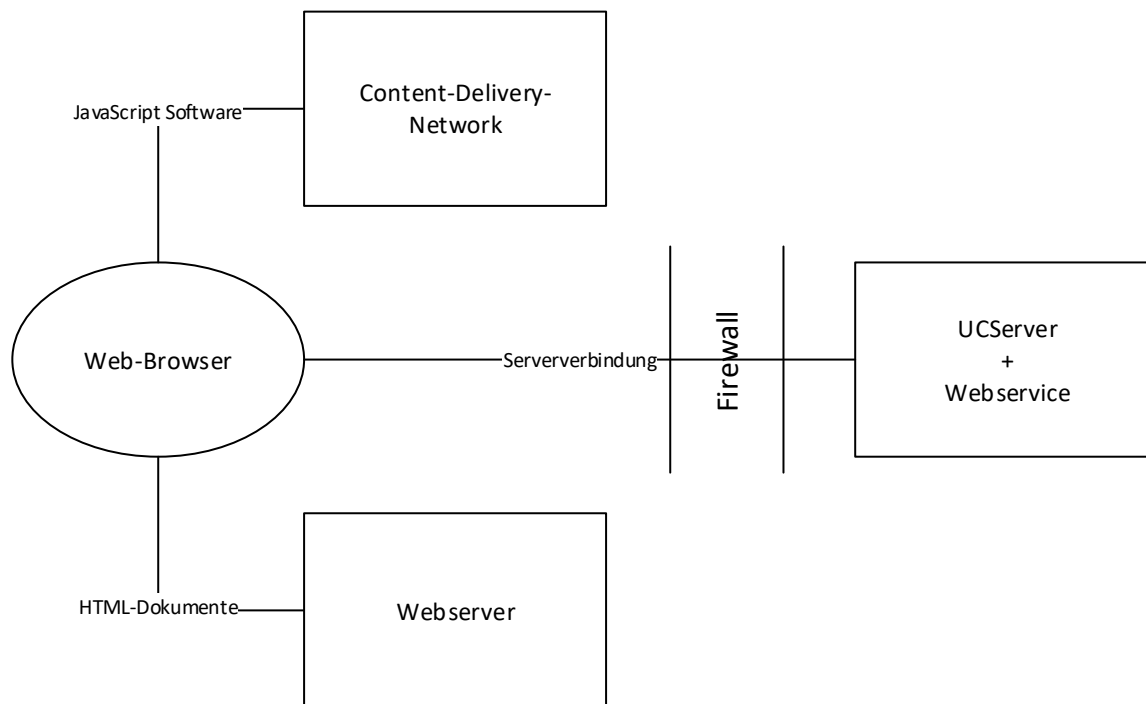
3.2. Configure UCServer

In order to use the contact portal and the multimedia business cards, adjustments to the UCServer are necessary. There you can make employees available, store pictures and configure groups for the contact portal.

3.2.1. Enable digital business card for user

Users can be activated via global settings, groups or the user settings. For this purpose, the "Business card visible for anonymous users" option must be activated under "Services".

Furthermore, all users who belong to a contact portal group are enabled for the business card. It is recommended that users be activated individually, or by groups, as global settings may reveal user contact information which should not be made visible to the public.

If a user is enabled for the business card, he receives a new "Business card" button in the ProCall Windows Client above the search input line, through which he can control his availability on the business card.

With the "Start wrap-up" button, the user can set to "busy – wrap up" to signal their non-availability to other users of the web applications by means of the presence status "busy". Pressing the button again resets the state.

3.2.2. Enable users for a contact portal

The contact portal is configured via the UC server groups. Any group can be used as a contact portal group. For this purpose, the "Contact portal group" setting, to be found in the group tab "Services", must be activated.

In the default settings, the user group "Contact portal" is considered as the contact portal group. The user group must be created manually in the UCServer and activated as a *contact portal group*. All members of the group are listed in the contact portal.

All contact portal groups are represented by additional keys with the user through which he can log on or log off. If the key is activated, the user is "logged in" and availability is displayed on the web pages. If the key is not activated, the user appears on the pages as "Not logged in" and can only be reached via mail or a telephone call.

3.2.3. Set up large profile images (optional)

In the UCServer, large profile images can be stored for users, which are used as contact details on the website.

Under *User*, add a large profile image in the *Contact Address* tab. Images should be in the portrait format (the optimal aspect ratio is 2:3) and is automatically scaled to a width of 400 pixels.

3.3. Configure web pages

As already described above, the contact portal and the business cards are normal web pages through which the corresponding clients are related and executed for visitors to the website. The following describes how integrated web pages can be configured and what steps are necessary to provide them via an external web server.

3.3.1. Integrated web pages

Publishing web pages

In order to use the integrated web pages, the web service of the UCServer must first be made accessible from the internet. You can do this either by port forwarding or using a proxy mechanism (for details, see Best Practice "Publishing the UCServer Webservice"). It is imperative to only use secure connections (HTTPS) with a trustworthy certificate (issued by a generally trustworthy certification authority). Depending on the mechanism used, the certificate must either be stored in the UCServer or in the proxy.

The integrated web pages are accessible under the following URLs:

- Contact portal:

- - *http://<UCServer Adresse>:7224/apps/contactportal/*

  - *https://<UCServer Adresse>:7225/apps/contactportal/*

- Business card:

  - *http://<UCServer Adresse>:7224/apps/contactportal/<SIP-Adresse>*

  - *https://<UCServer Adresse>:7225/apps/contactportal/<SIP-Adresse>*

Configure web pages

The actual configuration is done via a configuration file. There you can adjust the contact portal and the multimedia business cards. To ensure an update-safe configuration, first copy the *contactportalconfig.json* file from the directory *<<UCServer Pfad>\config\default* to *<UCServer Pfad>\config* and make adjustments to this file.

Note
In order to start the portal and the business cards for the first time, you must make a configuration for the parameters *linkImpressum* and *linkPrivacy*, since you are obligated under German law to provide an imprint and a data protection declaration for a website.

```
{
  "lib": {
    "baseUri": "../../",
    "loglevel": "warn"
  },

  "app": {
    "companyName": "",
    "groupFilter": "",
    "linkImpressum": "",
    "linkPrivacy": "",
    "disableTextChatForAbsentAgents": "true"
  },

  "colors": {
    "headerBackground": "#7db928",
    "headerFontActive": "#ffffff",
    "headerFontInactive": "#eaeaea",
    "highlight": "#03514b"
  }
}
```

Parameter	Description
baseUri	The URL for the web service (for integrated web pages no adjustment is necessary.)
loglevel	Log level. Possible values: error, warn, info, debug, log.
companyName	Your company name. It is displayed on the loading screen.
groupFilter	If this filter is set, only those employees who are in this group are displayed in the contact portal. You can define the group membership of the employees in the UCServer.
linkImpressum	URL to your imprint.
linkPrivacy	URL for your privacy policy.

disableTextChatForAbsentAgents	Defines whether it is possible to reach "non-available" agents via text chat.
headerBackground	Header background color.
headerFontActive	Header font color.
headerFontInactive	Header font color for inactive elements.
highlight	The highlight color, for example, mouseover effects.

3.3.2. Separate webserver

Publish webservice

In order to publish the contact portal and the business cards via a separate web server, the UCS server must first be made accessible from the internet. You can do this either by port forwarding or using a proxy mechanism (for details, see Best Practice "Publishing UCServer Webservice"). It is imperative to only use secure connections (HTTPS) with a trustworthy certificate (issued by a generally trustworthy Certification Authority). Depending on the mechanism used, the certificate must either be stored in the UCServer or in the proxy.

The integrated web service in the UCServer can be reached under:

- *http://<UCServer Adresse>:7224*

- *https://<UCServer Adresse>:7225*

Publish web pages

Next, you must launch the contact portal and business card pages via your web server. First, make sure that your HTTPS web server is supported by a trustworthy certificate, then you can copy the contents of *<UCServerPfad>\WebService\Server\public\apps\contactportal* to the desired path on your web server. The business cards are initially accessible only via a parameterized URL, for example, https://call.ucsoftware.de/call.html?sip=chris-tine.lang@ucsoftware.de. If you want the shortened URL, e.g. https://call.ucsoft-ware.de/christine.lang, you must define rewrite rules on your web server.

Example nginx

Add the following line to the location block of your nginx configuration.

```
try_files $uri $uri/ /call.html;
```

Configuration example:

```
server {

  server_name call.ucsoftware.de;

  location / {
    root /var/www/ucsoftware.estos.de;
    try_files $uri $uri/ /call.html;
  }
}
```

Example Apache

Set the following configuration as a *.htaccess* file into the same directory as *call.html*. As a prerequisite, the AllowOverride directive for this directory must also contain "FileInfo".

```
RewriteEngine on

# If requested resource exists as a file or directory go to it
RewriteCond %{REQUEST_FILENAME} -f [OR]
RewriteCond %{REQUEST_FILENAME} -d
RewriteRule (.*) - [L]

# Else rewrite requests to business card
RewriteRule (.*) /call.html?sip=$1 [L]
```

Configure web pages

A configuration file is used to configure the web pages as described above. Copy the file *contactportalconfig.json* from the directory *<UCServer Pfad>\config\default* to the same path on your web server where the web pages have already been placed.

> **Note**
> In order to start the portal and the business cards, you must have made a configuration for *baseUri*, *linkImpressum* and *linkPrivacy* parameters.

4. Advanced configuration

In addition to the standard configuration described above, the contact portal and the business cards also offer further advanced configuration options.

4.1. Integration into own websites

The estos web components can easily be integrated into existing websites, please note that integration is usually only possible via an IFrame.

First, you must add the estos web components in the *<Head>* of your HTML document.

```
<html>

    <head>

        <script src="https://static.estos.com/p/v2/estos-components.js"></script>
…
```

From now on, you can use all estos components on your site. You just need to insert the desired component within the body field.

Business cards:

```
<estos-directchat configurl="./config.json"></estos-directchat>
```

Contact portal:

```
<estos-portal configurl="./config.json"></estos-portal>
```

The *configurl* parameter specifies the path to the configuration file.

<div style="background:red;color:white;text-align:center">

Caution

If you include the configuration file from another domain, the web server that delivers the file must support CORS (instructions on how to enable CORS on your web server can be found <u>here</u>).

</div>

4.2. Amending the colors

The main colors used in the contact portal and the business cards can be easily adapted via configuration options in the configuration file. For this purpose, only the desired color value has to be stored as a hexadecimal value for the corresponding parameter.

```
"colors": {

  "headerBackground": "#7db928",

  "headerFontActive": "#ffffff",

  "headerFontInactive": "#eaeaea",

  "highlight": "#03514b"

}
```

Parameter	Description
headerBackground	Header background color.
headerFontActive	Header font color.
headerFontInactive	Header font color for inactive elements.
Highlight	The highlight color, for example, mouseover effects.

4.3. Use of other contact portal groups

In addition to the standard contact portal group ("contact portal"), any other groups from the UCServer can be used as a contact portal group. As described above (see: Enable users for a contact portal), the "Contact Portal Group" setting must be activated. This can be found in the group tab "Services".

The groups activated in this way can be used for a contact portal using the configuration file and the *groupFilter* parameter. Only the members of this group are displayed in the contact portal.

4.4. Setting up a contact form

A contact form can be set up for the contact portal and the business cards. After activation, the web page visitor is requested to enter defined data in a form before making a contact. The stored data is displayed to the ProCall user in his client and thus enables direct identification of the call partner. Depending on the setting, mandatory fields can also be defined, which ensures that the data entry can no longer be skipped.

First, set the setting for *anonymousContactFormEnabled* to *true* to enable basic functionality. You can then use *anonymousContactFormFields* to define which data should be requested from the website visitor via the form (for the list of possible fields, see Form fields). With the option *anonymousContactFormRequiredFields*, you can finally define which of the displayed fields should be treated as mandatory.

```
"anonymousContactFormEnabled": "true",

"anonymousContactFormFields": ["Param1", "Param2"],

"anonymousContactFormRequiredFields": ["Param1", "Param2"],
```

5. Overview of configuration parameters

```
{
  "lib": {
    "baseUri": "",
    "loglevel": "log"
  },
  "app": {
    "companyName": "",
    "groupFilter": "",
    "favicon": "",
    "linkImpressum": "",
    "linkPrivacy": "",
    "anonymousContactFormEnabled": "false",
    "anonymousContactFormFields": ["Param1", "Param2"],
    "anonymousContactFormRequiredFields": ["Param1", "Param2"],
    "disableTextChatForAbsentAgents": "false",
    "languages": [
      { "id": "de-DE", "label": "Deutsch" },
      { "id": "en-US", "label": "English" },
      { "id": "en-GB", "label": "English (UK)" },
      { "id": "es-ES", "label": "Español" },
      { "id": "fr-FR", "label": "Français" },
      { "id": "fr-CA", "label": "Français du Canada" },
      { "id": "it-IT", "label": "Italiano" },
      { "id": "nl-NL", "label": "Nederlands" },
      { "id": "pt-BR", "label": "Português do Brasil" },
      { "id": "ru-RU", "label": "Русский" }
    ],
    "language": "de-DE",
    "disableManualReporting": "false"
  },
  "colors": {
    "headerBackground": "#00BCD4",
    "headerFontActive": "#ffffff",
    "headerFontInactive": "#eaeaea",
    "highlight": "#006064"
  },
}
```

5.1. Configuration parameters

lib

Parameter	Description
baseUri	The URL for the web service (for integrated web pages no adjustment is necessary.)
loglevel	Log level. Possible values: error, warn, info, debug, log.

app

Parameter	Description
companyName	Your company name. It is displayed on the loading screen
groupFilter	If this filter is set, only those employees who are in this group are displayed in the contact portal. You can define the group membership of the employees in the UCServer.
favicon	URL to the website favicon.
linkImpressum	URL to your imprint.
linkPrivacy	URL for your privacy policy.
anonymousContactFormEnabled	Activates a contact form in which the website visitors contact details can be entered.
anonymousContactFormFields	Defines the one displayed in the form fields (possible values see Form fields)
anonymousContactFormRequiredFields	Defines mandatory fields in the form
disableTextChatForAbsentAgents	Defines whether it is possible to reach "non-available" agents via text chat.
languages	Defines the available language versions and their display names.
language	Defines the standard language. If not explicitly set, the browser language is used.
disableManualReporting	Disables the "report problem" function.

colors

Parameter	Description
headerBackground	Header background color.

headerFontActive	Header font color.
headerFontInactive	Header font color for inactive elements.
highlight	The highlight color, for example, mouseover effects.

5.2. Form fields

Identifier	Description
u8sFirstName	First name
u8sLastName	Surname
u8sJobTitle	Title
u8sCompany	Company
u8sDepartment	Department
u8sOfficeRoomNumber	Room number
u8sCustomerID	Customer number
u8sBusinessAddressStreet	Business street
u8sBusinessAddressPostal-Code	Business postcode
u8sBusinessAddressCity	Business city
u8sBusinessAddressState	Business state/province
u8sBusinessAddressCountry	Business country
u8sPrivateAddressStreet	Private street
u8sPrivateAddressPostalCode	Private postcode
u8sPrivateAddressCity	Private city
u8sPrivateAddressState	Private state/province
u8sPrivateAddressCountry	Private country
u8sOtherAddressStreet	Other street
u8sOtherAddressPostalCode	Other postcode
u8sOtherAddressCity	Other location
u8sOtherAddressState	Other state/province
u8sOtherAddressCountry	Other country
u8sEMail	E-mail address
u8sEMail2	E-mail address 2
u8sEMail3	E-mail address 3
u8sWebPageURL	Web page
u8sPhoneBusiness	Business telephone

u8sPhoneBusiness2	Business telephone 2
u8sCompanyMainTelepho-neNumber	Company telephone
u8sAssistantTelephoneNum-ber	Assistant telephone
u8sPhoneHome	Private telephone
u8sPhoneHome2	Private telephone 2
u8sPrimaryTelephoneNumber	Primary telephone
u8sPhoneMobile	Mobile telephone
u8sCarTelephoneNumber	Car telephone
u8sRadioTelephoneNumber	Radio telephone
u8sPagerTelephoneNumber	Pager
u8sOtherTelephoneNumber	Other telephone
u8sFaxBusiness	Business fax
u8sFaxHome	Private fax