

## Request for Reconsideration after Final Action

The table below presents the data as entered.

Input Field	Entered
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<b>LAW OFFICE ASSIGNED</b>	LAW OFFICE 115
<b>MARK SECTION (no change)</b>	
<b>GOODS AND/OR SERVICES SECTION (009)(current)</b>	
<b>INTERNATIONAL CLASS</b>	009
<b>DESCRIPTION</b>	
computer software for enabling natural language dialog with a human user; computer software for enabling natural language dialog between a human user and a web-site contact center or digital device; computer software that enables dialog with human users	
<b>FILING BASIS</b>	Section 1(a)
<b>FIRST USE ANYWHERE DATE</b>	At least as early as 05/14/2004
<b>FIRST USE IN COMMERCE DATE</b>	At least as early as 05/14/2004
<b>GOODS AND/OR SERVICES SECTION (009)(proposed)</b>	
<b>INTERNATIONAL CLASS</b>	009
<b>DESCRIPTION</b>	
computer software for enabling natural language dialog with a human user; computer software for enabling natural language dialog between a human user and a web-site contact center or digital device; computer software that enables dialog with human users	
<b>FILING BASIS</b>	Section 1(a)

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<b>FIRST USE IN COMMERCE DATE</b>	At least as early as 05/14/2004
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<b>GOODS AND/OR SERVICES SECTION (042)(current)</b>	
<b>INTERNATIONAL CLASS</b>	042
<b>DESCRIPTION</b>	
Computer programming services to customers than enables the customer's web-site to process natural language queries; computer programming services for customers that enables the customer's digital devices to process natural language queries from end users; computer programming services that enable dialog with human users	
<b>FILING BASIS</b>	Section 1(a)
<b>FIRST USE ANYWHERE DATE</b>	At least as early as 05/14/2004
<b>FIRST USE IN COMMERCE DATE</b>	At least as early as 05/14/2004
<b>GOODS AND/OR SERVICES SECTION (042)(proposed)</b>	
<b>INTERNATIONAL CLASS</b>	042

Input Field	Entered
<b>DESCRIPTION</b>	
Computer programming services to customers than enables the customer's web-site to process natural language queries; computer programming services for customers that enables the customer's digital devices to process natural language queries from end users; computer programming services that enable dialog with human users	
<b>FILING BASIS</b>	Section 1(a)
<b>FIRST USE ANYWHERE DATE</b>	At least as early as 05/14/2004
<b>FIRST USE IN COMMERCE DATE</b>	At least as early as 05/14/2004
<b>STATEMENT TYPE</b>	"The substitute specimen(s) was in use in commerce at least as early as the filing date of the application."
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<b>SPECIMEN DESCRIPTION</b>	Applicant's marketing brochures showing computer software services promoted in connection with the mark ACTIVELAB
<b>SIGNATURE SECTION</b>	
<b>DECLARATION SIGNATURE</b>	/Jembaa N. Cole/
<b>SIGNATORY'S NAME</b>	Jembaa N. Cole
<b>SIGNATORY'S POSITION</b>	Attorney of Record, Washington State Bar Member
<b>DATE SIGNED</b>	09/08/2009
<b>RESPONSE SIGNATURE</b>	/Jembaa N. Cole/
<b>SIGNATORY'S NAME</b>	Jembaa N. Cole

Input Field	Entered
<b>SIGNATORY'S POSITION</b>	Attorney of Record, Washington State Bar Member
<b>DATE SIGNED</b>	09/08/2009
<b>AUTHORIZED SIGNATORY</b>	YES
<b>CONCURRENT APPEAL NOTICE FILED</b>	YES
<b>FILING INFORMATION SECTION</b>	
<b>SUBMIT DATE</b>	Tue Sep 08 21:58:26 EDT 2009
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PTO Form 1930 (Rev 9/2007)  
OMB No. 0651-0050 (Exp. 4/30/2009)

## Request for Reconsideration after Final Action

### To the Commissioner for Trademarks:

Application serial no. 77438494 has been amended as follows:

#### CLASSIFICATION AND LISTING OF GOODS/SERVICES

**Applicant proposes to amend the following class of goods/services in the application:**

**Current:** Class 009 for computer software for enabling natural language dialog with a human user; computer software for enabling natural language dialog between a human user and a web-site contact center or digital device; computer software that enables dialog with human users

Original Filing Basis:

**Filing Basis: Section 1(a), Use in Commerce:** The applicant is using the mark in commerce, or the applicant's related company or licensee is using the mark in commerce, on or in connection with the identified goods and/or services. 15 U.S.C. Section 1051(a), as amended. The mark was first used at least as early as 05/14/2004 and first used in commerce at least as early as 05/14/2004, and is now in use in such commerce.

**Proposed:** Class 009 for computer software for enabling natural language dialog with a human user; computer software for enabling natural language dialog between a human user and a web-site contact center or digital device; computer software that enables dialog with human users

**Filing Basis: Section 1(a), Use in Commerce:** The applicant is using the mark in commerce, or the applicant's related company or licensee is using the mark in commerce, on or in connection with the identified goods and/or services. 15 U.S.C. Section 1051(a), as amended. The mark was first used at least as early as 05/14/2004 and first used in commerce at least as early as 05/14/2004, and is now in use in such commerce.

Applicant hereby submits a new specimen for Class 009. The specimen(s) submitted consists of Applicant's marketing brochures showing software promoted in connection with the mark ACTIVELAB.

For an application based on 1(a), Use in Commerce, "The substitute specimen(s) was in use in commerce as of the filing date of the application."

**Original PDF file:**

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Specimen File5

Specimen File6

Specimen File7

**Applicant proposes to amend the following class of goods/services in the application:**

**Current:** Class 042 for Computer programming services to customers than enables the customer's web-site to process natural language queries; computer programming services for customers that enables the customer's digital devices to process natural language queries from end users; computer programming services that enable dialog with human users

Original Filing Basis:

**Filing Basis: Section 1(a), Use in Commerce:** The applicant is using the mark in commerce, or the applicant's related company or licensee is using the mark in commerce, on or in connection with the identified goods and/or services. 15 U.S.C. Section 1051(a), as amended. The mark was first used at least as early as 05/14/2004 and first used in commerce at least as early as 05/14/2004, and is now in use in such commerce.

**Proposed:** Class 042 for Computer programming services to customers than enables the customer's web-site to process natural language queries; computer programming services for customers that enables the customer's digital devices to process natural language queries from end users; computer programming services that enable dialog with human users

**Filing Basis: Section 1(a), Use in Commerce:** The applicant is using the mark in commerce, or the applicant's related company or licensee is using the mark in commerce, on or in connection with the identified goods and/or services. 15 U.S.C. Section 1051(a), as amended. The mark was first used at least as early as 05/14/2004 and first used in commerce at least as early as 05/14/2004, and is now in use in such commerce.

Applicant hereby submits a new specimen for Class 042. The specimen(s) submitted consists of Applicant's marketing brochures showing computer software services promoted in connection with the mark ACTIVELAB.

For an application based on 1(a), Use in Commerce, "The substitute specimen(s) was in use in commerce as of the filing date of the application."

**Original PDF file:**

[http://tgate/PDF/RFR/2009/09/08/20090908215826715124-77438494-004\\_003/SPU1-2051491630-214736540\\_.\\_ACTIVELAB\\_Specimen\\_\\_090809\\_.pdf](http://tgate/PDF/RFR/2009/09/08/20090908215826715124-77438494-004_003/SPU1-2051491630-214736540_._ACTIVELAB_Specimen__090809_.pdf)

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- Specimen File18
- Specimen File19

**SIGNATURE(S)**

**Declaration Signature**

If the applicant is seeking registration under Section 1(b) and/or Section 44 of the Trademark Act, the applicant has had a bona fide intention to use or use through the applicant's related company or licensee the mark in commerce on or in connection with the identified goods and/or services as of the filing date of the application. 37 C.F.R. Secs. 2.34(a)(2)(i); 2.34 (a)(3)(i); and 2.34(a)(4)(ii); and/or the applicant has had a bona fide intention to exercise legitimate control over the use of the mark in commerce by its members. 37 C.F. R. Sec. 2.44. If the applicant is seeking registration under Section 1(a) of the Trademark Act, the mark was in use in commerce on or in connection with the goods or services listed in the application as of the application filing date. 37 C.F.R. Secs. 2.34(a)(1)(i); and/or the applicant has exercised legitimate control over the use of the mark in commerce by its members. 37 C.F.R. Sec. 244. The undersigned, being hereby warned that willful false statements and the like so made are punishable by fine or imprisonment, or both, under 18 U.S.C. §1001, and that such willful false statements may jeopardize the validity of the application or any resulting registration, declares that he/she is properly authorized to execute this application on behalf of the applicant; he/she believes the applicant to be the owner of the trademark/service mark sought to be registered, or, if the application is being filed under 15 U.S.C. §1051(b), he/she believes applicant to be entitled to use such mark in commerce; to the best of his/her knowledge and belief no other person, firm, corporation, or association has the right to use the mark in commerce, either in the identical form thereof or in such near resemblance thereto as to be likely, when used on or in connection with the goods/services of such other person, to cause confusion, or to cause mistake, or to deceive; that if the original application was submitted unsigned, that all statements in the original application and this submission

made of the declaration signer's knowledge are true; and all statements in the original application and this submission made on information and belief are believed to be true.

Signature: /Jembaa N. Cole/ Date: 09/08/2009

Signatory's Name: Jembaa N. Cole

Signatory's Position: Attorney of Record, Washington State Bar Member

**Request for Reconsideration Signature**

Signature: /Jembaa N. Cole/ Date: 09/08/2009

Signatory's Name: Jembaa N. Cole

Signatory's Position: Attorney of Record, Washington State Bar Member

The signatory has confirmed that he/she is an attorney who is a member in good standing of the bar of the highest court of a U.S. state, which includes the District of Columbia, Puerto Rico, and other federal territories and possessions; and he/she is currently the applicant's attorney or an associate thereof; and to the best of his/her knowledge, if prior to his/her appointment another U.S. attorney or a Canadian attorney/agent not currently associated with his/her company/firm previously represented the applicant in this matter: (1) the applicant has filed or is concurrently filing a signed revocation of or substitute power of attorney with the USPTO; (2) the USPTO has granted the request of the prior representative to withdraw; (3) the applicant has filed a power of attorney appointing him/her in this matter; or (4) the applicant's appointed U.S. attorney or Canadian attorney/agent has filed a power of attorney appointing him/her as an associate attorney in this matter.

The applicant is filing a Notice of Appeal in conjunction with this Request for Reconsideration.

Serial Number: 77438494

Internet Transmission Date: Tue Sep 08 21:58:26 EDT 2009

TEAS Stamp: USPTO/RFR-205.149.16.30-2009090821582671

5124-77438494-430147ebaf4f5e61f2ccd3763d

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# ActiveAgent Product Suite

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5.2.0

## Installation Process Overview

6/16/2008

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**Proprietary Next IT Corporation Materials**

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## Contacting Next IT Corporation and Customer Support

Next IT Corporation support can be contacted through any of the means listed below:

Address	Next IT Corporation 421 W. Riverside Avenue Suite 1600 Spokane, WA 99201
Telephone	509-242-0767
Support Extension	8950
Customer Support	888-243-6806 (Toll Free)
Customer Support E-Mail:	support@nextit.com

All customer support is based on maintenance agreements. See your maintenance agreement for specific support information.

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# SECTION 1 - INTRODUCTION

This installation guide is one part of a set of guides provided with the ActiveAgent Product Suite. The Document Map below shows the successful process steps with associated guide(s) listed for each one. The order of activity flows as numbered, from top to bottom, starting with planning and configuration development, followed by pre-installation steps, and then installation of databases, servers, and workstations.

## ActiveAgent Product Suite – Installation Document Map

- |   |   |   |
|---|---|---|
| 1 |    | <p><i>ActiveAgent – Product Suite Installation Guide</i> </p> <p><i>ActiveAgent – Product Suite Data Collection</i></p> <p><i>ActiveAgent – Product Suite Supplemental Material</i></p>  |
| 2 |    | <i>ActiveAgent – Pre-Installation Guide</i>   |
| 3 |   | <i>ActiveAgent – Database Installation Guide</i>  |
| 4 |  | <div style="border-left: 1px solid black; padding-left: 10px;"> <p><b>4.1 ActiveChat</b><br/><i>ActiveChat Server Installation Guide</i><br/><i>ActiveChat Admin Console Installation Guide</i></p> <p><b>4.2 ActiveAgent</b><br/><i>ActiveAgent Installation Guide</i></p> <p><b>4.3 ActiveReports</b><br/><i>ActiveReports Installation Guide</i></p> <p><b>4.4 DiscussionReview</b><br/><i>DiscussionReview Chat Retrieval Service Installation Guide</i></p> </div> |
| 5 |  | <p><i>ActiveChat Client Installation Guide</i></p> <p><i>DiscussionReview Client Installation Guide</i></p>   |

**Note** on the Document Map where *this document* falls in the set. If your current installation is the INITIAL INSTALLATION and the installation steps represented by documents *above* the current document HAVE NOT BEEN COMPLETED, please do not execute the instructions contained herein until all other preceding processes have been completed.

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## Document Purpose & Use

This document is provided to facilitate an overall understanding of the installation process, including planning and configuration development, that allows for successful installation of the ActiveAgent Product Suite. The intended use for a new installation is to guide the process, assisting in the proper environment preparation and order for the ActiveAgent software. It is assumed that a Next IT Implementation team has been assembled and is working together with you, our customer, in all phases of the process, particularly in initial installation. For upgrades, this information is intended to provide insight on the system as well as the order of changes when they occur.

*Note that if you are receiving this apart from the documentation set described in Section 2, it is simply because your implementation team is managing the delivery in a logical fashion that facilitates your particular need.*

## Topics Covered

This guide provides an overview of the ActiveAgent Product Suite components installation types, followed detail on planning activities for all areas of the system: database, server installs, and workstation installs. These include:

- Instruction on the use of the full documentation set
- Overview of installation methods
- Installation environment planning
- Database Considerations

## Related Documents

*ActiveAgent Product Suite Data Collection*

## Materials Required:

The materials required for the planning and development process outlined in this guide are the set of Installation guides, the ActiveAgent Suite Software, and the Data Collection document provided by Next IT. Other specifications about your environment, either in documents or diagrams, may also be of use in this process. Resources are assumed, both from Next IT and your company.

## General Assumptions

Implementation of the ActiveAgent Product suite assumes that you, the customer, are in communication with your Next IT Implementation team and are working toward installation goals collaboratively. Further, this instruction set assumes that some parts of the Integrated ActiveAgent system are installed at your location while some are hosted apart from your environment to facilitate communications and data between you and Next IT.

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## SECTION 2 - USING THIS DOCUMENTATION SET

This section addresses use of the documentation set; if you have not received the full set, please skip and go to Section 3.

The use of the documentation set is alluded to in the introduction section. However, the forms and other materials provided to assist in the installation of the ActiveAgent Product Suite are identified in this section. Main topics included in each document and the associated files from Next IT are also noted.

### Documentation Materials

The chart below lists the full documentation set with associated materials as well as installation files provided in the Q1, 2008, Packaged Release:

<i>Document</i>	<i>Contents</i>	<i>Software/Files Required</i>
ActiveAgent Product Suite Installation Guide	Installation Methods Overview Document Set Overview/Use Environment Planning Example Environment Setup Config & Batch File Development	N/A
ActiveAgent Product Suite Data Collection	Data Collection Worksheets	N/A
ActiveAgent - Pre-Installation Guide	Network Requirements Domain User Setup Server Pre-Installation Setup Workstation Pre-Installation Setup	N/A
ActiveAgent - Databases Installation Guide	Install ActiveAgent DB Install Extract DB Install ActiveChat DB Setup Extract/Purge Job Setup Reports Statistics Job	Agent_DB_3.28_full.sql ActiveAgent_UserCreate.sql Extract_DB_3.28_full.sql ActiveChat_5.8.8_db.sql ActiveCaht_5.8.8_tables.sql ActiveChat_ProfunityWords_SqlServer.sql
ActiveChatServer Installation Guide	Install ActiveChatServer Verification	ActiveChatServer5.8.8.1564.msi ActiveChatServerProfile.config install-activechat-server.bat
ActiveChatAdmin Installation Guide	Install ActiveChatAdmin Verification	ActiveChatAdmin5.8.8.1564.msi ActiveChatAdminProfile.config install-activechat-admin.bat

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<i>Document</i>	<i>Contents</i>	<i>Software/Files Required</i>
ActiveAgent Installation Guide	Install ActiveAgent Verification	ActiveAgent5.1.1.8623.msi ActiveAgentProfile.config install-activeagent.bat
ActiveReports Installation Guide	Install ActiveReports Verification	ActiveReports2.7.1.8608.msi ActiveReportsProfile.config install-activerreports.bat
DiscussionReview Chat Retrieval Service Installation Guide	Install Chat Retrieval Service Verification	Generic.ChatRetrievalService.intel.msi chatretrievalservice.bat install-chatretrievalservice.bat
ActiveChat Client Installation Guide	Install ActiveChat Client Verification	ActiveChatClient5.8.8.1564.msi
DiscussionReview Client Installation Guide	Install DiscussionReview Client Verification	DiscussionReview.NextIT.msi install-discussionreview.bat

This list, similar to the Document Map, depicts the order in which the process is to occur. Be sure to review each document, in order, prior to working through the process. This prevents assumptions about what comes next and enables the Next IT implementation team to provide answers to any questions that you may have.

Section 4 provides information on the larger view of the Integrated ActiveAgent Environment, including what software is installed at both your site and at the hosted location.

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## SECTION 3 - INSTALLATION PROCESS OVERVIEW

The assembled Next IT Implementation team works collaboratively with you to deliver the most straightforward installation possible. The process to install the ActiveAgent Product Suite involves four main activities:

- Hardware & Network Environment Planning and Setup
- Configuration and Batch File Development
- Pre- Installation Machine Preparation
- Software Installation for ActiveAgent Suite Components

Section 5 of this document addresses the first activity while Section 6 provides detail on the configuration and batch files needed for the automated installation packages. The Pre-Installation activity is outlined in a separate document dedicated to the enterprise (network and machine focused). ActiveAgent Suite applications are then installed in the order indicated on the Document Map and in the Section 2 of this document.

### Installation Methods Overview

#### *Methods Used for Application Software*

Installation of the ActiveAgent Product Suite components is designed to be a repeatable process that can be executed many times during upgrades and routine maintenance. Information is gathered upfront and is reused through the creation of installation configuration or batch files and the use of Windows Installer "MSI" technology.

Next IT components are designed for placement in either a server environment or a workstation environment, depending on their function within the suite. Server components are typically installed as web sites running under IIS and the support/development components (such as DiscussionReview) are installed as standalone applications on a user's workstation.

The server components installed under IIS have MSI installation files that use a configuration or batch file, which contains information about all installation environments relevant for your company (i.e. Test, Production). The MSI expects that the targeted installation environment will have variables available to indicate how that specific environment is set up. This method of installation, then, allows you to specify where the components will be installed and how they will be configured. These web-based components are designed to be installed in a virtual directory under an IIS web site on the target server, each using its own application pool. The Windows registry is used to store necessary configuration parameters. Other configurations can be accommodated as required.

The web service components that are installed using the configuration file are:

- ActiveAgent
- ActiveChat Server
- ActiveChat Admin
- ActiveReports

The web service component that is installed using a batch file is:

- Chat Retrieval Service

The workstation components are installed as standalone programs. They follow the standard installation process for windows with the files being installed in the C:\Program Files\Next IT directory with subdirectories for each product. The Windows registry is used to store necessary configuration parameters.

- DiscussionReview Client

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- ActiveChat Client

### *Installation Method for Databases*

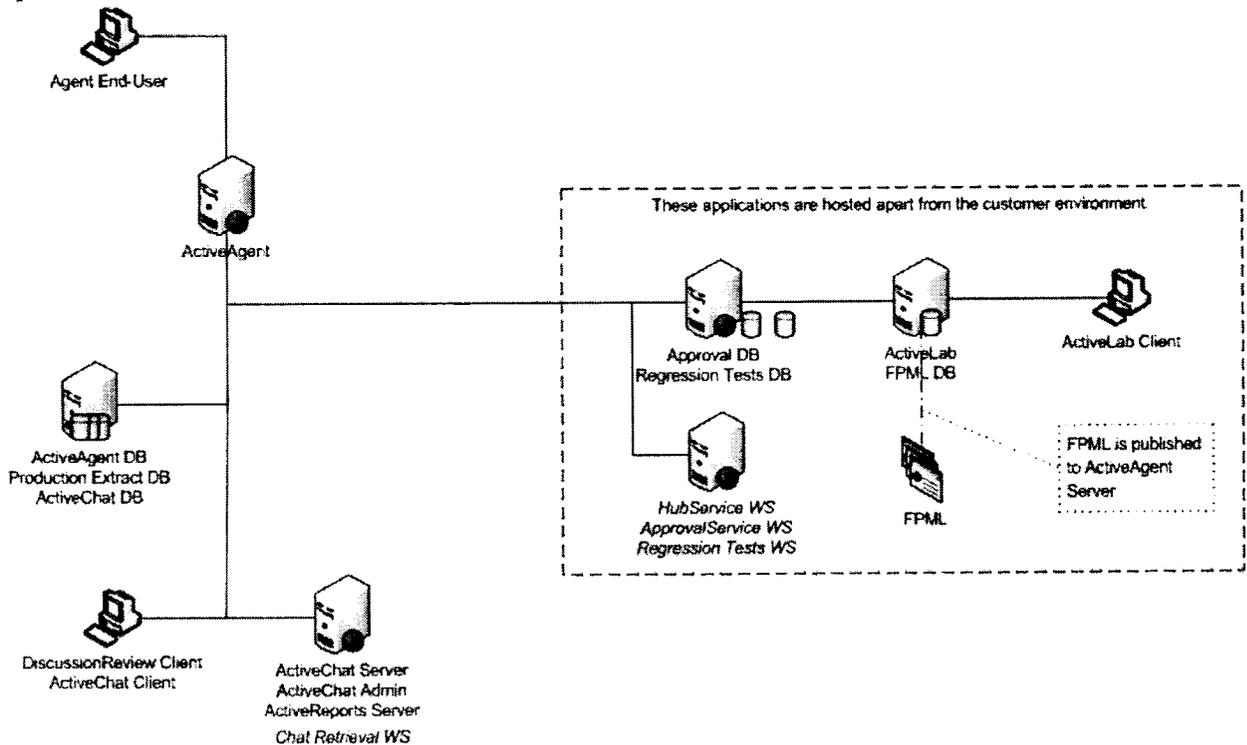
The database installations are provided in SQLScript form with an installation document that provides specific information on the steps necessary to install successfully. These installations do not require pre-installation work to develop of any type of batch or configuration file.

# SECTION 4 - THE INTEGRATED ACTIVEAGENT ENVIRONMENT

Your site's installation process, start to finish, is assisted by a basic understanding of the larger installation picture as well as the activity workflow being facilitated by the integrated ActiveAgent Suite. This section will address both.

## The Integrated Installation

The diagram below shows a basic topology of the full, integrated environment. Both your site installed software and the hosted site installed software are shown. This type of layout is considered minimal, appropriate for a development or testing lab but not an end-user facing production environment. It is the complete installation of all identified software that enables ActiveAgent business and technology processes.

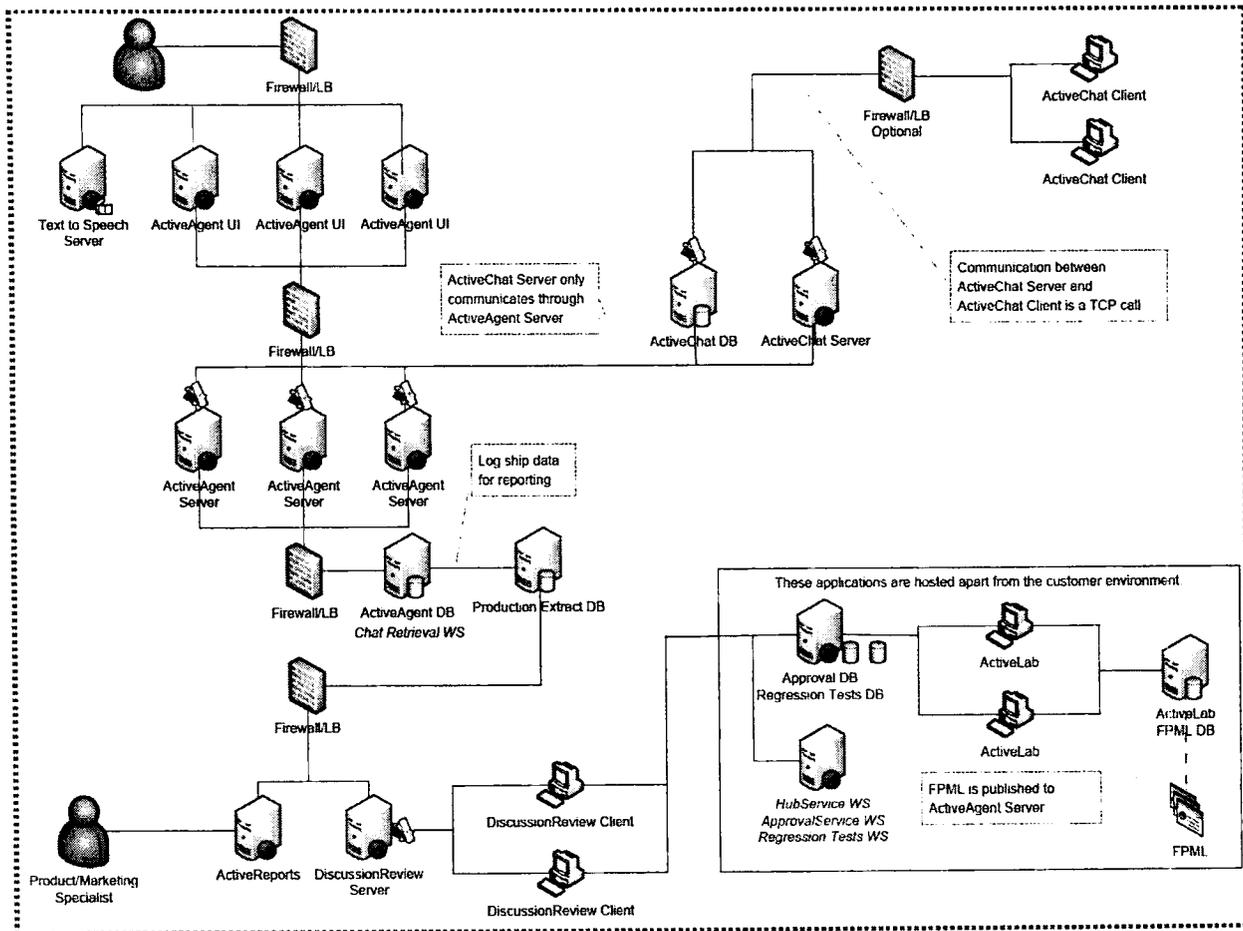


As you are working through the planning, development, and installation of your site's software, Next IT will work with you to understand any additional configurations required for the hosted software. This will facilitate completion of the fully integrated environment.

As your project progresses, the final production layout will be defined. You will then be able to leverage the work accomplished installing the basic environment to setup the production environment. The diagram on the next page shows what a production environment for a public-facing Agent may look like.

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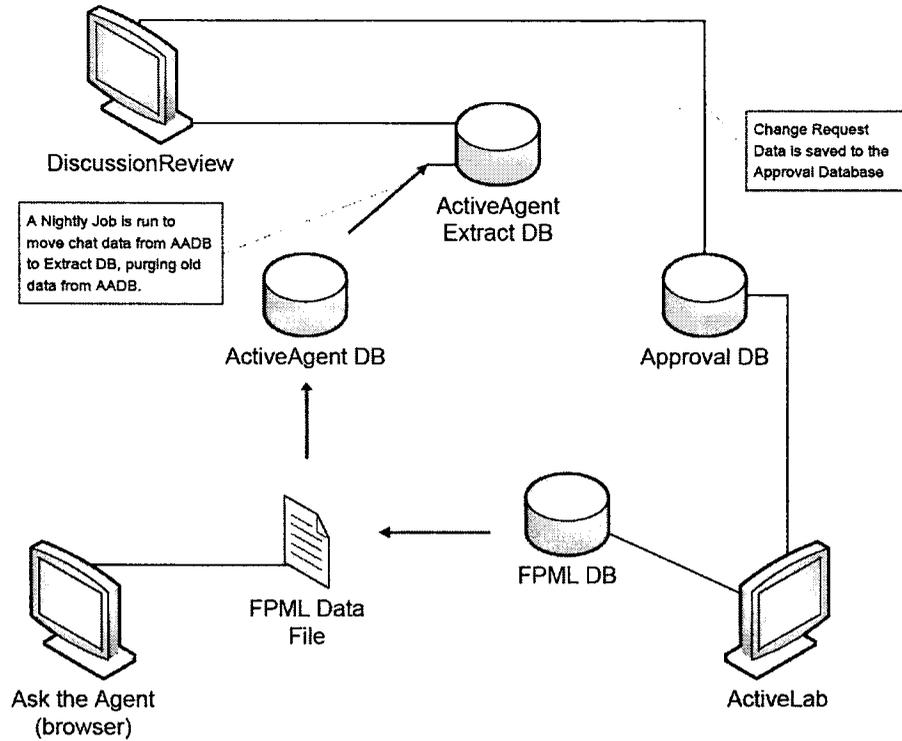


### Process Workflow

The main business process facilitated in the software being installed is the Content Maintenance process. This process is the feedback mechanism for requesting changes to the ActiveAgent content. The diagram at right depicts the flow of data and the User Interfaces used in the process. When setup of the integrated system is completed, this process can be demonstrated. This validates that the installation and setup of all components and connectivity is complete.

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## SECTION 5 - ENVIRONMENT PLANNING

The key to having a repeatable installation process is to understand the target environment and to remove, to the extent possible, the need for human intervention during the installation. This section provides guidance and reference to materials that assist in environment planning. Detail on building up the configuration and batch files is found in the Section that follows.

### Network Considerations

The first subject of discussion often needed is that of detailing the connectivity between your company and Next IT locations. Since this connectivity is required for the integrated maintenance process, it is important to involve the appropriate people right away and get any required business processes started. The requirements for connectivity, as well as any other items that may required lead time in an organization, is part of a discussion you should have with your Next IT Implementation team prior to their arrival at your site to support installation. For more information on the workflow facilitated through this process, please see Section 4 of this document.

### Environment Planning

While connectivity is being worked on, determine from the scope of work the type(s) of environment being installed and the purpose of that environment. For a lab, development, test, or production environment, it is ideal to identify the minimum number of servers and workstations needed to facilitate the purpose outlined. The combination of ActiveAgent software to be installed also factors in; your Next IT implementation team will provide guidance in this determination. Generally speaking, the diagram that follows depicts a minimum configuration that may be considered for such an environment. Note that the diagram shows installation of the following at your site:

- ActiveAgent
- ActiveChat
- ActiveReports
- DiscussionReview

All requisite database, server, and workstation software necessary is also installed.

On the hosted location, the following is installed:

- ActiveLab
- Approval Service
- Other Related Services

All requisite database, server, and DiscussionReview software necessary is also installed.

### *Database Considerations & Recommendations*

ActiveAgent saves chat data in real-time, which can put great load on the database server. To improve the user experience in production environments, we must be watchful of the performance of the ActiveAgent database.

This is achieved with the following practices:

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1. To avoid slowdowns and interruptions, ActiveAgent should be the exclusive user of its database. This means off-loading other database-tied products that may affect the databases performance to a separate database and preferably a different server.  
(This database is referred here as the "Extract" database. Software that needs to reference this "Extract" database include the DiscussionReview and ActiveReports products.)
2. To maintain performance, the ActiveAgent database must be purged to improve lookup times.
3. Other database optimizations are recommended for performance and data security. Some of these will be explained below.

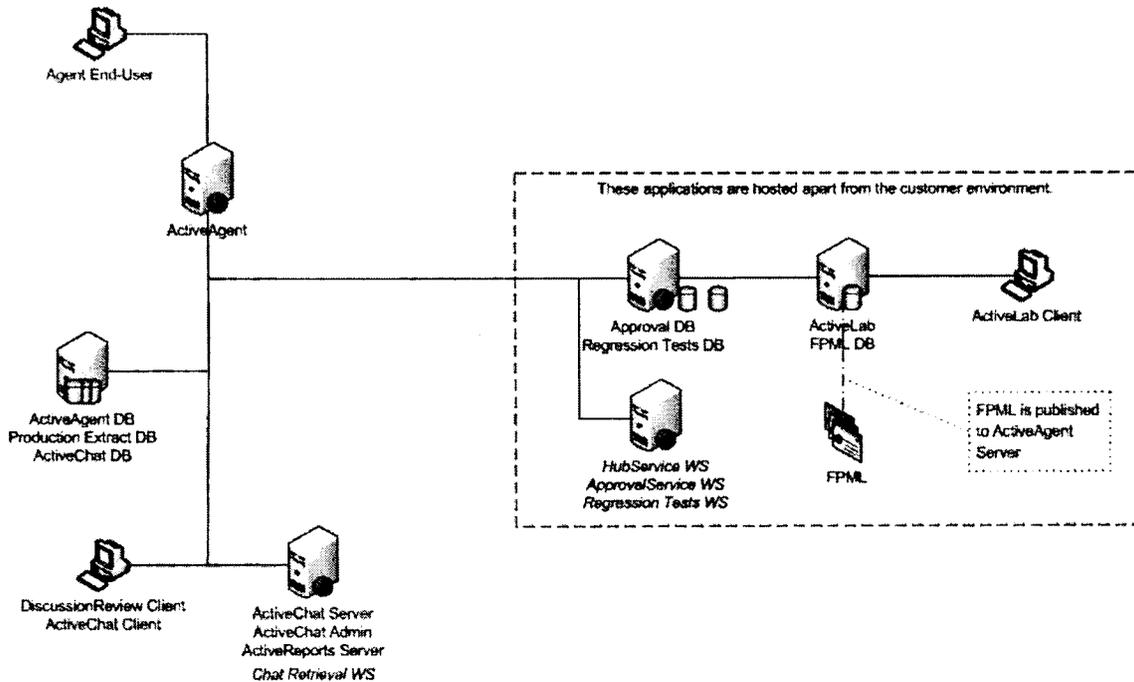
A separate database for DiscussionReview and ActiveReports is required, even if a separate database server cannot be provided, due to table locking and long running queries from these applications.

To keep this separate database updated with recent data, an extract schedule must be implemented (a nightly schedule is typical). This extract process will synchronize data with the production database and should be scheduled to run off peak hours.

A purging schedule must be setup to prevent performance from degrading and/or running out of disk space. Purging \*must\* be performed only after the data to be purged has safely arrived in the extract database. The purge process, defined in the next section, ensures this requirement.

Since purging and extracting moves the desired data into separate databases, the backup procedure may change from the regular process. The ActiveAgent database is purged and therefore will contain an incomplete set of data. The Extract database, however, contains the full set of information, yet most of its transactions occur from the extract process. Backups of the ActiveAgent database would be mainly for investigating a transaction during a particular day, and would otherwise have little value. Backups of the Extract database on the other hand would be mainly to secure a copy of the data, and would have little value for transactional information (only DiscussionReview transactions would be of interest in the transaction logs). Also, due to these transactional differences, "Simple" logging may be considered for the Extract database, and perhaps even the ActiveAgent database.

Other optimizations such as database partitioning and spanning disks may be supplied by a dba.



*Action Required:* develop a map of the environment(s) to be installed. Include all servers, workstations and the software to be installed on each. Work with your Next IT Implementation team to answer any questions you may have as you do so. When completed, proceed to the next section.

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## SECTION 6 - CONFIGURATION AND BATCH FILE DEVELOPMENT

This section offers an overview of Pre-Installation and MSI processing, followed by steps for developing the configuration and batch installation files.

### Overview of Pre-Installation & Expected MSI Processing

For installations using the configuration file, the first step in the pre-installation process is to create a registry entry that is used by the MSI files to locate the configuration files. This registry entry is created by manual entry as outlined in the *ActiveAgent Suite Pre-Installation* document.

Once the registry entry pointing to the configuration files has been established, the configuration files are copied to the specified location, and the MSI installation files are copied to their staging area, the product is ready to install.

The action of installing takes place when the MSI files are executed. The MSI files follow these steps:

1. Read the registry to locate the configuration file
2. Read the environmental variable to determine which section of the configuration file to use for the installation
3. Read the configuration file to get installation specific information
4. Install the components as directed.

Configuration files are not used for the applications which install directly onto a workstation. The MSI files for workstation installation may contain all necessary information for installing; ActiveChat Client interacts to obtain required information. The installation process for installing workstations consists of simply executing the MSI file and entering pertinent data at the time of install.

### Data Collection

Data collection worksheets specific to each type of software being installed is contained in a separate document, *ActiveAgent Product Suite Data Collection*, which should be delivered to you with this document. The worksheets contain the set of knowledge required for installing the software in your specific environment(s) via an installation configuration or batch file. Your Next IT Implementation Team will go over both documents with you as a step toward installing ActiveAgent software in your environment.

#### *Action Required:*

You should have received an Environment Specification document from Next IT. Fill it out according to the Environment Map you have developed; there is a section for each environment to be installed.

Meet with Next IT to discuss both documents and the process your teams will go through to collect the needed information

Identify the ActiveAgent Suite software required for your installation, and be prepared with a printout of the data collection document for your discussion with Next IT.

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## Configuration File Development

This section applies to developing configuration files for the installation of:

- ActiveAgent
- ActiveChat Server
- ActiveChat Administration Console
- ActiveReports

Gather the necessary information for each component:

- Environment Map
- Environment Specification sheets
- Data Collection Worksheets

These items will be used to construct the configuration file for the installation of the software. Typically the initial version of the configuration file is created by the Next IT engineering staff with consultation from you and your team. In that case, provide the worksheets to Next IT to enable the completion of your installation files.

Follow-up maintenance to the configuration files can be done either by Next IT or your team, as needed, to adapt to changes in the target infrastructure. If you are responsible for constructing the configuration files for your installation, be sure to use the baseline provided by Next IT (or contained in the software package). There should be a file for each type of software.

### *Some Notes about the Configuration File:*

More tokens exist in the file than are noted in this document. It is important that you only modify the environment parameters outlined herein. The other tokens are pre-set according to your implementation requirements and the source contained in the installer supports these tokens as-is.

The configuration file is designed to work in all of your environments. It is divided into sections with only the applicable sections being used in a particular installation.

The *ActiveAgent Product Suite Supplemental Material* shows an example of a configuration file designed for two environments called QA and PROD. The Configuration file starts with common definitions and then has environment specific definitions for each environment supported.

Because the configuration file contains information about all installation environments the MSI expects that each target environment will have an environmental variable available to indicate which of the environments is being installed. For the example, the environmental variable "Customer\_Env=QA" would direct the installation to use the QA section of the configuration file. The steps to set the environment variable for your machines are found in the *ActiveAgent Suite Pre-Installation* document.

### *Action Required:*

If you are developing the configuration files for the installations, collect all data information worksheets together with the base file for each applicable software piece and edit each file appropriately. Call on the Next IT Implementation team as often as needed to ensure a successful installation.

If Next IT is developing the configuration files, provide data collection information to Next IT.

## Batch File Development

This section applies to installation of the following:

- Chat Retrieval Service

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Use the data collected about the environment and the specific Chat Retrieval Service parameters in combination with the base batch file provided to develop the batch file for installing the ChatRetrievalService MSI. See the example below which shows only the parameter section of the batch file:

```
set MSIFILE=ChatRetrievalService.2.7.0.6023.msi
set CRWEBSITEDESCRIPTION=ChatRetrievalService
set CRWEBSITEHEADER=<host.header>
set CRWEBSITEEROOT=C:\Inetpub\wwwroot\NextIT
set CRVDIRROOT=D:\WebRoot-32\ChatRetrievalService
set CRWEBAPPLICATIONNAME=ChatRetrievalService
set CRWEBAPPLICATIONPOOLNAME=ChatRetrievalService
set CRDBCONNECTIONSTRING=server=<servername>;database=<extract_db_name>;user id=<uid>;password=<pwd>;trusted_connection=false;
set DRDOMAINGROUP=NextIT_DiscussionReview_Users
```

Note that the value for DRDOMAINGROUP is set to the default group; if you have setup a different domain group for using DiscussionReview, make the appropriate change to the batch file.

*Action Required:*

If you are developing the batch file for the installations, collect all data information worksheets together with the base file for each applicable software piece and edit each file appropriately. Call on the Next IT Implementation team as often as needed to ensure a successful installation.

If Next IT is developing the batch file, provide data collection information to Next IT.

**IMPORTANT:** unlike use of configuration files, when using a batch file as described in this section, you will want to create a batch file for **each** environment.

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ActiveAgent™ Implementation Methodology



## ActiveAgent Implementation Methodology

Next IT's Human Emulation Software™, ActiveAgent, is a unique solution that creates a trained Virtual Expert, much like an employee that has the ability to bring all of an organization's existing information on products and services together in a language that users will understand. In order to construct messaging to achieve this while also supporting branding, customer relations and sales support strategies, the implementation of ActiveAgent requires a specific methodology and a tailored implementation process that's been drawn throughout our development history.

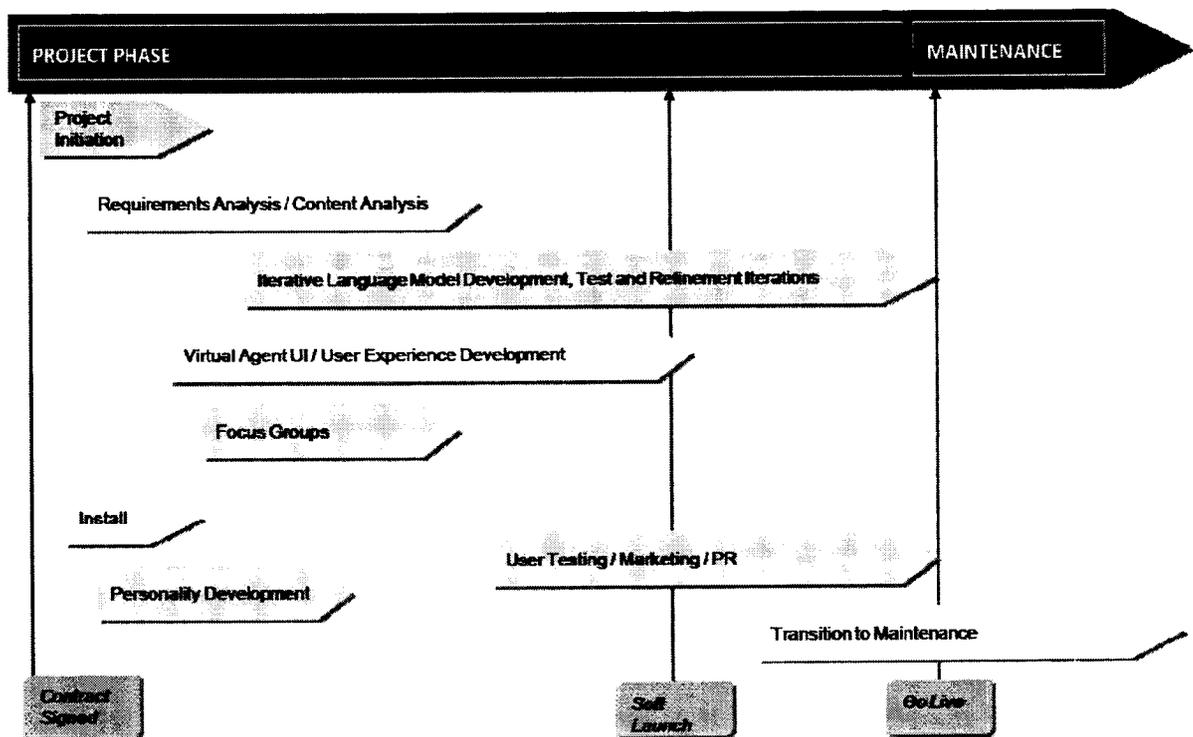
The purpose of this paper is to discuss Next IT's implementation process including the project lifecycle, resources, roles, workflow, and tools.

### Implementation Process

Building a successful Virtual Expert with ActiveAgent is much like training a new employee. It takes time, training, and testing before your new Virtual Expert is ready to assist your employees and customers. Next IT understands that each business has a unique set of challenges, terminology, and concepts. That's why collaboration with your internal experts and an iterative project plan leads to a successful ActiveAgent™ implementation. It also allows your organization flexibility in the content ActiveAgent learns, while providing predictable project results.

### Project Lifecycle

Next IT has developed a flexible project framework to accommodate the unique needs of your organization while optimizing our ability to deliver in a timely manner. The illustration below depicts a "typical" project life cycle for an ActiveAgent™ implementation. The actual length of the project is determined by the overall scope, as well as the mutually agreed-upon "Go Live" strategy.



### *Project Initiation*

When the contract is complete, both project teams get together for a Project Initiation. Here the teams are introduced, their roles are defined and the "rules of engagement" are determined. The first objective of the group is to confirm a common understanding of the vision and objectives. The project team will become familiar with the objectives and goals expressed by the stakeholders in the *Statement of Work* and determine the appropriate execution of the project.

### *Requirements & Content Analysis*

Next IT will conduct an intensive content analysis in order to document requirements and understand your business and your users' needs and challenges. The *Requirements Work Plan* provides the framework for executing a systematic approach to extract, organize, and document the requirements of your Virtual Expert.

The content analysis process includes developing mind maps. Mind mapping is a form of brainstorming that encourages you to capture ideas and concepts in a non-linear format. Next IT employs mind mapping during the initial analysis phase to visually represent all of the ideas from your organization's existing informational systems. This visual depiction allows Next IT to streamline and organize the knowledge gathering process in order to fully understand the depth and breadth of the information needed to incorporate into your ActiveAgent Virtual Expert. Mind mapping gives Next IT an intimate view of your business so that the Language Model can be configured to meet the needs of the end users.

### *Natural Language Model*

ActiveAgent's Language Model is the entity that holds all of the information in which the Virtual Expert will be trained. Creating and maintaining this Language Model is critical to a successful implementation of a Virtual Expert. It is this "trained" model, which allows ActiveAgent to have a conversational dialog with a user in an effort to understand their intent. The Language Model is comprised of responses, navigation URLs, voice files, vocabulary terms, and concepts. These items are organized into units of knowledge that typically hold a response (or set of responses), URL and links to the associated voice file.

Whether a consumer is interested in financial trends, or a CSR simply needs quick information, the Language Model is designed to understand the complex terminology and vernacular involved with an organization's specific industry, in order for the Virtual Expert to effectively communicate its expertise to the user.

### *Virtual Agent UI/User Experience Development*

The development of your Virtual Expert's personality supports the brand and promotes user engagement with your Virtual Expert. The development of this personality is a collaborative effort between your marketing and media teams, as well as Next IT's engagement and marketing team. The project teams utilize feedback from targeted end-users, product owners, subject matter experts and focus groups, throughout the process in order to validate that your objectives are realized and that users will engage your Virtual Expert.

### *Install*

Setting up infrastructure and testing environments very early in the implementation helps foster confidence in the technology early on as the Virtual Expert gains intelligence with each Language Model update.

### *Language Model Development & Refinement*

The process of defining, building and fine-tuning the Language Model for the Virtual Expert, is by nature empirical and also uses an iterative development methodology.

Next IT will work with you to identify the resources within your organization that can best provide the information required to develop and refine a successful Language Model. As the Language Model evolves, one or more subject matter experts can work to fine tune points in their area of expertise, allowing ActiveAgent to correctly address in-depth questions about complex products, services, and informational channels.

### *Soft Launch & 'Go Live'*

"Soft Launch" denotes the point in time when you start your Virtual Expert's live exposure with a limited number of users. Once the Language Model has reached a satisfactory level of accuracy, Next IT will work with you to determine an appropriate "Go Live" strategy, also known as "Hard Launch". During the first few weeks of live use, the project team will monitor the chats, recommending weekly content updates. This time is used to fill in any gaps within the Language Model by using chats from real world users. It is common to update the Language Model multiple times to improve the Virtual Experts overall impact on the user's experience.

### *Planning the Transition to Maintenance*

Once final launch of ActiveAgent has occurred and the correct maintenance documents have been identified, the project will enter into the final stage of the transition period known as the Stabilization Period. During this time, your team will validate that all ActiveAgent components are performing as expected within their production environment. Any issues found and reported during this period will receive priority attention from the Next IT project team. After this period, most of the project team member roles and responsibilities will be transitioned to a knowledgeable maintenance team.

Planning the transition to maintenance begins prior to "hard launch." Next IT's Customer Support Team will begin working with you on the plan and process of transitioning to maintenance. The transition requirements are agreed upon and then defined within the *Transition to Maintenance Plan* document. The detailed information on expected engagement strategies, ongoing operational processes, and other solution maintenance objectives will be defined within an *Operating Level Reference Guide (OLR Guide)*.

## Collaboration

No one understands your organization's needs better than your internal experts. Your informed participation through the life cycle of the ActiveAgent™ project is vital to its success. Our teams will work together to ensure that the necessary organizational structure, operations staff, training, and tools are in place to support the project.

The following summarizes the roles and responsibilities of your chosen team members for the project. These roles do not necessarily represent the individual resources required, in some instances roles may be combined, depending on staff availability and breadth of knowledge. The size of your team depends on the goals set for the project. Depending on the scope of the project, we have worked with teams as small as 2 to 3 dedicated people and as large as 8 to 12 distributed people working part-time or simply as needed.

### *Customer Team Roles*

<b><i>Executive Sponsor</i></b>	High-level support and backing of the project. This role is critical in defining, facilitating and reinforcing the overall project vision through regular Steering Committee meetings.
<b><i>Project Manager</i></b>	Responsible for project planning and coordination. Obtains and schedules resources for timely completion of the project. Provides oversight of communications and acts as the primary point of contact

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	during project engagement. Will organize and schedule team meetings, training and other events. Also responsible for verifying the gathered requirements around implementation and customization of the project.
<b>Marketing/Brand Representative</b>	Responsible for both contributing to and approving facets of ActiveAgent. Primarily concerned with brand compliance, from the look and feel of the Agent to personality, voice and the tone of responses, as well as ensuring that all design and messaging elements support the brand's core values.
<b>Content Administrator(s)</b>	User(s) of the DiscussionReview tool, the Content Administrator(s) should have a general understanding of each of the topic areas in order to correctly and efficiently assign chats to the appropriate SMEs. With insight into what users are asking ActiveAgent, Content Administrators guide the SME's project-related workload, and reach out to the SME community as needed. They also facilitate the communication between your organization and the Next IT Language Modeling team, as necessary.
<b>Subject Matter Experts (SME)</b>	These individuals will need to be proficient in their topic area, as well as trained to use the DiscussionReview tool, in order to facilitate the creation and testing of the natural Language Model. These team members are heavily involved in the development and refinement of the Language Model throughout phases of the project.
<b>Natural Language Testing Team</b>	Internal testers that work within a controlled environment testing the natural Language Model in advance of the initial launch.

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### *Next IT Team Roles*

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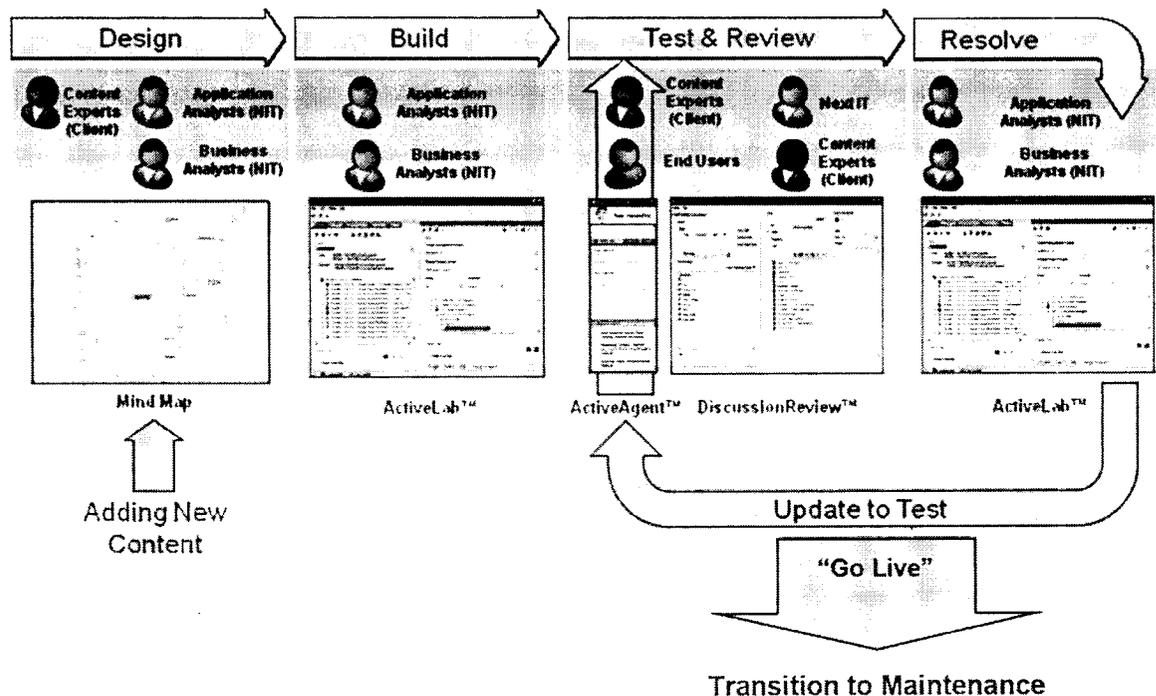
<b>Strategic Client Executive (SCE)</b>	<i>Manages the overall relationship between Next IT and your organization and is ultimately responsible for ensuring that the solution provided meets all of your organization's goals. The SCE is also responsible for all contractual issues.</i>
<b>Project Manager</b>	<i>Responsible for project delivery. Obtains and schedules resources for timely completion of the project. Provides oversight of communications between Next IT and your organization's project teams. Will organize and schedule team meetings, training and other events.</i>
<b>Business/Content Analyst(s)</b>	<i>Responsible for gathering requirements for implementation and configuration of the project along with analysis of your organization's business, content and/or knowledge to be delivered by the ActiveAgent solution.</i>
<b>Application/Technical Analyst(s)</b>	<i>Responsible for Natural Language Model development.</i>
<b>Software Engineer</b>	<i>Technical experts responsible for the configuration and installation of the ActiveAgent suite to allow for interaction within the client environment.</i>
<b>Quality Assurance</b>	<i>Responsible for ensuring the integrated solution meets the customer requirements for functionality and performance as documented in the Detailed Requirements Specification.</i>

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## Workflow Process: Design, Build and Maintain

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The following illustration depicts the workflow process for project development and illustrates the typical resources and tools involved in the process.



### Tools Dataset

ActiveAgent includes a highly developed, built-in system of training tools used to streamline the creation and maintenance of the Virtual Expert. However, the human dimension is a critical differentiator in Next IT's approach to safeguarding the integrity of the solution. Next IT empowers human administrators to review and refine ActiveAgent responses. ActiveAgent itself reports when it is non-responsive to a user's question. Using ActiveAgent's robust set of tools, administrators are able to monitor this feedback, review user interactions and comments to determine improvements to ActiveAgent's Language Model. If the administrator decides a modification will make future exchanges more accurate, the change can be performed easily and implemented quickly, with built-in testing to ensure stability.

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ActiveAgent combines cutting edge human emulation technology with simple business principles to create a solution that improves user satisfaction, loyalty, and organizational growth across the business spectrum. ActiveAgent works. We can prove it.



421 West Riverside Avenue  
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### The Next IT Partnership

By using a targeted and unique implementation strategy to provide Human Emulation Software™ solutions to our customers, Next IT is changing the way people connect with technology.

At Next IT, we measure our success through the success of our clients. Our integrity is what makes us unique. Software companies do a lot of talking. We let our technology speak for itself. And it does.

You are committed to serving your customers. Next IT is the key to delivering on that promise.

ActiveAgent™ Implementation Methodology



## ActiveAgent Implementation Methodology

Next IT's Human Emulation Software™, ActiveAgent, is a unique solution that creates a trained Virtual Expert, much like an employee that has the ability to bring all of an organization's existing information on products and services together in a language that users will understand. In order to construct messaging to achieve this while also supporting branding, customer relations and sales support strategies, the implementation of ActiveAgent requires a specific methodology and a tailored implementation process that's been drawn throughout our development history.

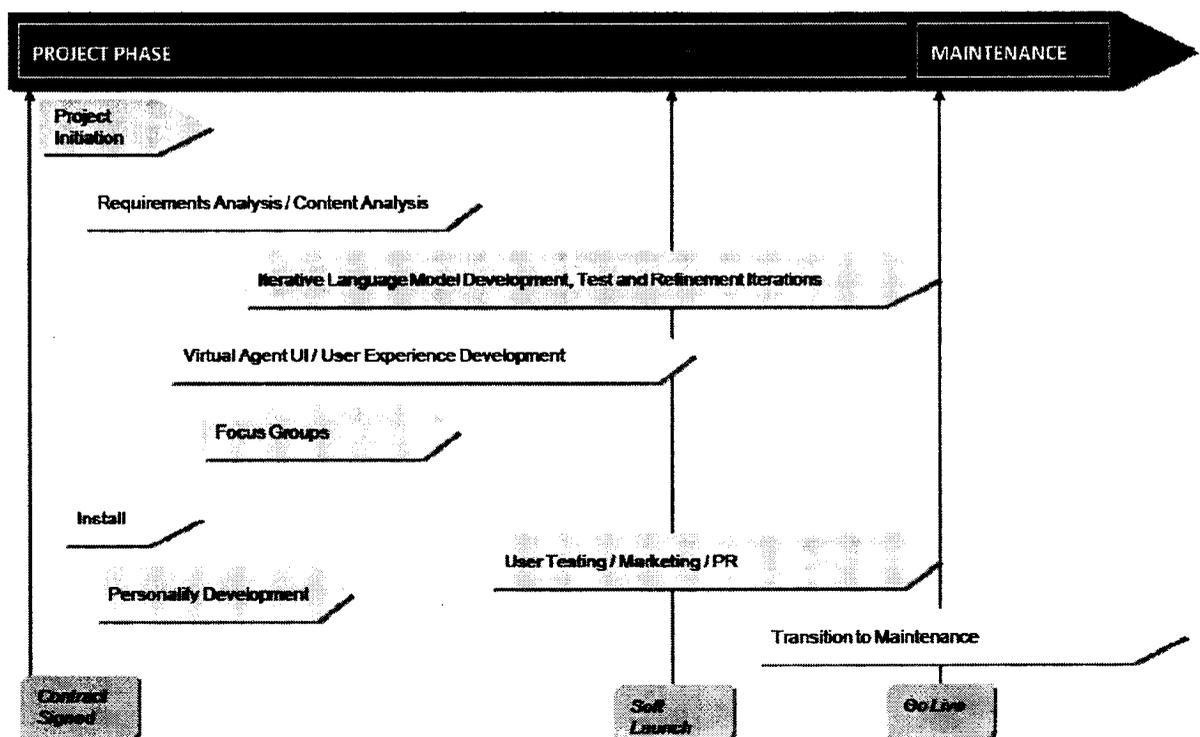
The purpose of this paper is to discuss Next IT's implementation process including the project lifecycle, resources, roles, workflow, and tools.

## Implementation Process

Building a successful Virtual Expert with ActiveAgent is much like training a new employee. It takes time, training, and testing before your new Virtual Expert is ready to assist your employees and customers. Next IT understands that each business has a unique set of challenges, terminology, and concepts. That's why collaboration with your internal experts and an iterative project plan leads to a successful ActiveAgent™ implementation. It also allows your organization flexibility in the content ActiveAgent learns, while providing predictable project results.

## Project Lifecycle

Next IT has developed a flexible project framework to accommodate the unique needs of your organization while optimizing our ability to deliver in a timely manner. The illustration below depicts a "typical" project life cycle for an ActiveAgent™ implementation. The actual length of the project is determined by the overall scope, as well as the mutually agreed-upon "Go Live" strategy.



### *Project Initiation*

When the contract is complete, both project teams get together for a Project Initiation. Here the teams are introduced, their roles are defined and the "rules of engagement" are determined. The first objective of the group is to confirm a common understanding of the vision and objectives. The project team will become familiar with the objectives and goals expressed by the stakeholders in the *Statement of Work* and determine the appropriate execution of the project.

### *Requirements & Content Analysis*

Next IT will conduct an intensive content analysis in order to document requirements and understand your business and your users' needs and challenges. The *Requirements Work Plan* provides the framework for executing a systematic approach to extract, organize, and document the requirements of your Virtual Expert.

The content analysis process includes developing mind maps. Mind mapping is a form of brainstorming that encourages you to capture ideas and concepts in a non-linear format. Next IT employs mind mapping during the initial analysis phase to visually represent all of the ideas from your organization's existing informational systems. This visual depiction allows Next IT to streamline and organize the knowledge gathering process in order to fully understand the depth and breadth of the information needed to incorporate into your ActiveAgent Virtual Expert. Mind mapping gives Next IT an intimate view of your business so that the Language Model can be configured to meet the needs of the end users.

### *Natural Language Model*

ActiveAgent's Language Model is the entity that holds all of the information in which the Virtual Expert will be trained. Creating and maintaining this Language Model is critical to a successful implementation of a Virtual Expert. It is this "trained" model, which allows ActiveAgent to have a conversational dialog with a user in an effort to understand their intent. The Language Model is comprised of responses, navigation URLs, voice files, vocabulary terms, and concepts. These items are organized into units of knowledge that typically hold a response (or set of responses), URL and links to the associated voice file.

Whether a consumer is interested in financial trends, or a CSR simply needs quick information, the Language Model is designed to understand the complex terminology and vernacular involved with an organization's specific industry, in order for the Virtual Expert to effectively communicate its expertise to the user.

### *Virtual Agent UI/User Experience Development*

The development of your Virtual Expert's personality supports the brand and promotes user engagement with your Virtual Expert. The development of this personality is a collaborative effort between your marketing and media teams, as well as Next IT's engagement and marketing team. The project teams utilize feedback from targeted end-users, product owners, subject matter experts and focus groups, throughout the process in order to validate that your objectives are realized and that users will engage your Virtual Expert.

### *Install*

Setting up infrastructure and testing environments very early in the implementation helps foster confidence in the technology early on as the Virtual Expert gains intelligence with each Language Model update.

### *Language Model Development & Refinement*

The process of defining, building and fine-tuning the Language Model for the Virtual Expert, is by nature empirical and also uses an iterative development methodology.

Next IT will work with you to identify the resources within your organization that can best provide the information required to develop and refine a successful Language Model. As the Language Model evolves, one or more subject matter experts can work to fine tune points in their area of expertise, allowing ActiveAgent to correctly address in-depth questions about complex products, services, and informational channels.

### *Soft Launch & 'Go Live'*

"Soft Launch" denotes the point in time when you start your Virtual Expert's live exposure with a limited number of users. Once the Language Model has reached a satisfactory level of accuracy, Next IT will work with you to determine an appropriate "Go Live" strategy, also known as "Hard Launch". During the first few weeks of live use, the project team will monitor the chats, recommending weekly content updates. This time is used to fill in any gaps within the Language Model by using chats from real world users. It is common to update the Language Model multiple times to improve the Virtual Experts overall impact on the user's experience.

### *Planning the Transition to Maintenance*

Once final launch of ActiveAgent has occurred and the correct maintenance documents have been identified, the project will enter into the final stage of the transition period known as the Stabilization Period. During this time, your team will validate that all ActiveAgent components are performing as expected within their production environment. Any issues found and reported during this period will receive priority attention from the Next IT project team. After this period, most of the project team member roles and responsibilities will be transitioned to a knowledgeable maintenance team.

Planning the transition to maintenance begins prior to "hard launch." Next IT's Customer Support Team will begin working with you on the plan and process of transitioning to maintenance. The transition requirements are agreed upon and then defined within the *Transition to Maintenance Plan* document. The detailed information on expected engagement strategies, ongoing operational processes, and other solution maintenance objectives will be defined within an *Operating Level Reference Guide (OLR Guide)*.

## Collaboration

No one understands your organization's needs better than your internal experts. Your informed participation through the life cycle of the ActiveAgent™ project is vital to its success. Our teams will work together to ensure that the necessary organizational structure, operations staff, training, and tools are in place to support the project.

The following summarizes the roles and responsibilities of your chosen team members for the project. These roles do not necessarily represent the individual resources required, in some instances roles may be combined, depending on staff availability and breadth of knowledge. The size of your team depends on the goals set for the project. Depending on the scope of the project, we have worked with teams as small as 2 to 3 dedicated people and as large as 8 to 12 distributed people working part-time or simply as needed.

### *Customer Team Roles*

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<b><i>Executive Sponsor</i></b>	High-level support and backing of the project. This role is critical in defining, facilitating and reinforcing the overall project vision through regular Steering Committee meetings.
<b><i>Project Manager</i></b>	Responsible for project planning and coordination. Obtains and schedules resources for timely completion of the project. Provides oversight of communications and acts as the primary point of contact

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	during project engagement. Will organize and schedule team meetings, training and other events. Also responsible for verifying the gathered requirements around implementation and customization of the project.
<b>Marketing/Brand Representative</b>	Responsible for both contributing to and approving facets of ActiveAgent. Primarily concerned with brand compliance, from the look and feel of the Agent to personality, voice and the tone of responses, as well as ensuring that all design and messaging elements support the brand's core values.
<b>Content Administrator(s)</b>	User(s) of the DiscussionReview tool, the Content Administrator(s) should have a general understanding of each of the topic areas in order to correctly and efficiently assign chats to the appropriate SMEs. With insight into what users are asking ActiveAgent, Content Administrators guide the SME's project-related workload, and reach out to the SME community as needed. They also facilitate the communication between your organization and the Next IT Language Modeling team, as necessary.
<b>Subject Matter Experts (SME)</b>	These individuals will need to be proficient in their topic area, as well as trained to use the DiscussionReview tool, in order to facilitate the creation and testing of the natural Language Model. These team members are heavily involved in the development and refinement of the Language Model throughout phases of the project.
<b>Natural Language Testing Team</b>	Internal testers that work within a controlled environment testing the natural Language Model in advance of the initial launch.

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### *Next IT Team Roles*

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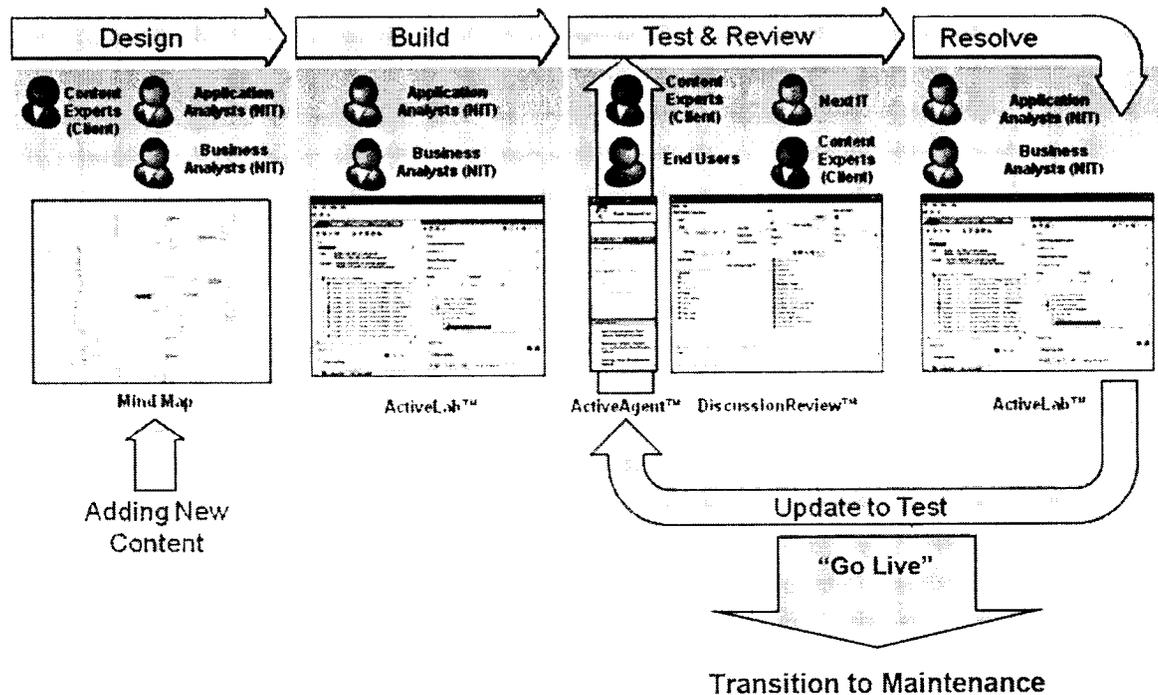
<b>Strategic Client Executive (SCE)</b>	<i>Manages the overall relationship between Next IT and your organization and is ultimately responsible for ensuring that the solution provided meets all of your organization's goals. The SCE is also responsible for all contractual issues.</i>
<b>Project Manager</b>	<i>Responsible for project delivery. Obtains and schedules resources for timely completion of the project. Provides oversight of communications between Next IT and your organization's project teams. Will organize and schedule team meetings, training and other events.</i>
<b>Business/Content Analyst(s)</b>	<i>Responsible for gathering requirements for implementation and configuration of the project along with analysis of your organization's business, content and/or knowledge to be delivered by the ActiveAgent solution.</i>
<b>Application/Technical Analyst(s)</b>	<i>Responsible for Natural Language Model development.</i>
<b>Software Engineer</b>	<i>Technical experts responsible for the configuration and installation of the ActiveAgent suite to allow for interaction within the client environment.</i>
<b>Quality Assurance</b>	<i>Responsible for ensuring the integrated solution meets the customer requirements for functionality and performance as documented in the Detailed Requirements Specification.</i>

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## Workflow Process: Design, Build and Maintain

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# ActiveAgent Product Suite

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5.2.0

## Installation Process Overview

6/16/2008

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## Contacting Next IT Corporation and Customer Support

Next IT Corporation support can be contacted through any of the means listed below:

Address	Next IT Corporation 421 W. Riverside Avenue Suite 1600 Spokane, WA 99201
Telephone	509-242-0767
Support Extension	8950
Customer Support	888-243-6806 (Toll Free)
Customer Support E-Mail:	support@nextit.com

All customer support is based on maintenance agreements. See your maintenance agreement for specific support information.

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# SECTION 1 - INTRODUCTION

This installation guide is one part of a set of guides provided with the ActiveAgent Product Suite. The Document Map below shows the successful process steps with associated guide(s) listed for each one. The order of activity flows as numbered, from top to bottom, starting with planning and configuration development, followed by pre-installation steps, and then installation of databases, servers, and workstations.

## ActiveAgent Product Suite – Installation Document Map

- |   |   |  |
|---|---|--|
| 1 |    | <ul style="list-style-type: none"> <li><i>ActiveAgent – Product Suite Installation Guide</i> </li> <li><i>ActiveAgent – Product Suite Data Collection</i></li> <li><i>ActiveAgent – Product Suite Supplemental Material</i></li> </ul>  |
| 2 |    | <i>ActiveAgent – Pre-Installation Guide</i>  |
| 3 |   | <i>ActiveAgent – Database Installation Guide</i>   |
| 4 |  | <ul style="list-style-type: none"> <li><b>4.1 ActiveChat</b></li> <li><i>ActiveChat Server Installation Guide</i></li> <li><i>ActiveChat Admin Console Installation Guide</i></li> <li><b>4.2 ActiveAgent</b></li> <li><i>ActiveAgent Installation Guide</i></li> <li><b>4.3 ActiveReports</b></li> <li><i>ActiveReports Installation Guide</i></li> <li><b>4.4 DiscussionReview</b></li> <li><i>DiscussionReview Chat Retrieval Service Installation Guide</i></li> </ul> |
| 5 |  | <ul style="list-style-type: none"> <li><i>ActiveChat Client Installation Guide</i></li> <li><i>DiscussionReview Client Installation Guide</i></li> </ul>   |

**Note** on the Document Map where *this document* falls in the set. If your current installation is the INITIAL INSTALLATION and the installation steps represented by documents *above* the current document HAVE NOT BEEN COMPLETED, please do not execute the instructions contained herein until all other preceding processes have been completed.

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## Document Purpose & Use

This document is provided to facilitate an overall understanding of the installation process, including planning and configuration development, that allows for successful installation of the ActiveAgent Product Suite. The intended use for a new installation is to guide the process, assisting in the proper environment preparation and order for the ActiveAgent software. It is assumed that a Next IT Implementation team has been assembled and is working together with you, our customer, in all phases of the process, particularly in initial installation. For upgrades, this information is intended to provide insight on the system as well as the order of changes when they occur.

*Note that if you are receiving this apart from the documentation set described in Section 2, it is simply because your implementation team is managing the delivery in a logical fashion that facilitates your particular need.*

## Topics Covered

This guide provides an overview of the ActiveAgent Product Suite components installation types, followed detail on planning activities for all areas of the system: database, server installs, and workstation installs. These include:

- Instruction on the use of the full documentation set
- Overview of installation methods
- Installation environment planning
- Database Considerations

## Related Documents

*ActiveAgent Product Suite Data Collection*

## Materials Required:

The materials required for the planning and development process outlined in this guide are the set of Installation guides, the ActiveAgent Suite Software, and the Data Collection document provided by Next IT. Other specifications about your environment, either in documents or diagrams, may also be of use in this process. Resources are assumed, both from Next IT and your company.

## General Assumptions

Implementation of the ActiveAgent Product suite assumes that you, the customer, are in communication with your Next IT Implementation team and are working toward installation goals collaboratively. Further, this instruction set assumes that some parts of the Integrated ActiveAgent system are installed at your location while some are hosted apart from your environment to facilitate communications and data between you and Next IT.

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## SECTION 2 - USING THIS DOCUMENTATION SET

This section addresses use of the documentation set; if you have not received the full set, please skip and go to Section 3.

The use of the documentation set is alluded to in the introduction section. However, the forms and other materials provided to assist in the installation of the ActiveAgent Product Suite are identified in this section. Main topics included in each document and the associated files from Next IT are also noted.

### Documentation Materials

The chart below lists the full documentation set with associated materials as well as installation files provided in the Q1, 2008, Packaged Release:

<i>Document</i>	<i>Contents</i>	<i>Software/Files Required</i>
ActiveAgent Product Suite Installation Guide	Installation Methods Overview Document Set Overview/Use Environment Planning Example Environment Setup Config & Batch File Development	N/A
ActiveAgent Product Suite Data Collection	Data Collection Worksheets	N/A
ActiveAgent - Pre-Installation Guide	Network Requirements Domain User Setup Server Pre-Installation Setup Workstation Pre-Installation Setup	N/A
ActiveAgent - Databases Installation Guide	Install ActiveAgent DB Install Extract DB Install ActiveChat DB Setup Extract/Purge Job Setup Reports Statistics Job	Agent_DB_3.28_full.sql ActiveAgent_UserCreate.sql Extract_DB_3.28_full.sql ActiveChat_5.8.8_db.sql ActiveCaht_5.8.8_tables.sql ActiveChat_ProfnityWords_SqlServer.sql
ActiveChatServer Installation Guide	Install ActiveChatServer Verification	ActiveChatServer5.8.8.1564.msi ActiveChatServerProfile.config install-activechat-server.bat
ActiveChatAdmin Installation Guide	Install ActiveChatAdmin Verification	ActiveChatAdmin5.8.8.1564.msi ActiveChatAdminProfile.config install-activechat-admin.bat

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<i>Document</i>	<i>Contents</i>	<i>Software/Files Required</i>
ActiveAgent Installation Guide	Install ActiveAgent Verification	ActiveAgent5.1.1.8623.msi ActiveAgentProfile.config install-activeagent.bat
ActiveReports Installation Guide	Install ActiveReports Verification	ActiveReports2.7.1.8608.msi ActiveReportsProfile.config install-activereports.bat
DiscussionReview Chat Retrieval Service Installation Guide	Install Chat Retrieval Service Verification	Generic.ChatRetrievalService.intel.msi chatretrievalservice.bat install-chatretrievalservice.bat
ActiveChat Client Installation Guide	Install ActiveChat Client Verification	ActiveChatClient5.8.8.1564.msi
DiscussionReview Client Installation Guide	Install DiscussionReview Client Verification	DiscussionReview.NextIT.msi install-discussionreview.bat

This list, similar to the Document Map, depicts the order in which the process is to occur. Be sure to review each document, in order, prior to working through the process. This prevents assumptions about what comes next and enables the Next IT implementation team to provide answers to any questions that you may have.

Section 4 provides information on the larger view of the Integrated ActiveAgent Environment, including what software is installed at both your site and at the hosted location.

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## SECTION 3 - INSTALLATION PROCESS OVERVIEW

The assembled Next IT Implementation team works collaboratively with you to deliver the most straightforward installation possible. The process to install the ActiveAgent Product Suite involves four main activities:

- Hardware & Network Environment Planning and Setup
- Configuration and Batch File Development
- Pre- Installation Machine Preparation
- Software Installation for ActiveAgent Suite Components

Section 5 of this document addresses the first activity while Section 6 provides detail on the configuration and batch files needed for the automated installation packages. The Pre-Installation activity is outlined in a separate document dedicated to the enterprise (network and machine focused). ActiveAgent Suite applications are then installed in the order indicated on the Document Map and in the Section 2 of this document.

### Installation Methods Overview

#### *Methods Used for Application Software*

Installation of the ActiveAgent Product Suite components is designed to be a repeatable process that can be executed many times during upgrades and routine maintenance. Information is gathered upfront and is reused through the creation of installation configuration or batch files and the use of Windows Installer "MSI" technology.

Next IT components are designed for placement in either a server environment or a workstation environment, depending on their function within the suite. Server components are typically installed as web sites running under IIS and the support/development components (such as DiscussionReview) are installed as standalone applications on a user's workstation.

The server components installed under IIS have MSI installation files that use a configuration or batch file, which contains information about all installation environments relevant for your company (i.e. Test, Production). The MSI expects that the targeted installation environment will have variables available to indicate how that specific environment is set up. This method of installation, then, allows you to specify where the components will be installed and how they will be configured. These web-based components are designed to be installed in a virtual directory under an IIS web site on the target server, each using its own application pool. The Windows registry is used to store necessary configuration parameters. Other configurations can be accommodated as required.

The web service components that are installed using the configuration file are:

- ActiveAgent
- ActiveChat Server
- ActiveChat Admin
- ActiveReports

The web service component that is installed using a batch file is:

- Chat Retrieval Service

The workstation components are installed as standalone programs. They follow the standard installation process for windows with the files being installed in the C:\Program Files\Next IT directory with subdirectories for each product. The Windows registry is used to store necessary configuration parameters.

- DiscussionReview Client

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- ActiveChat Client

### *Installation Method for Databases*

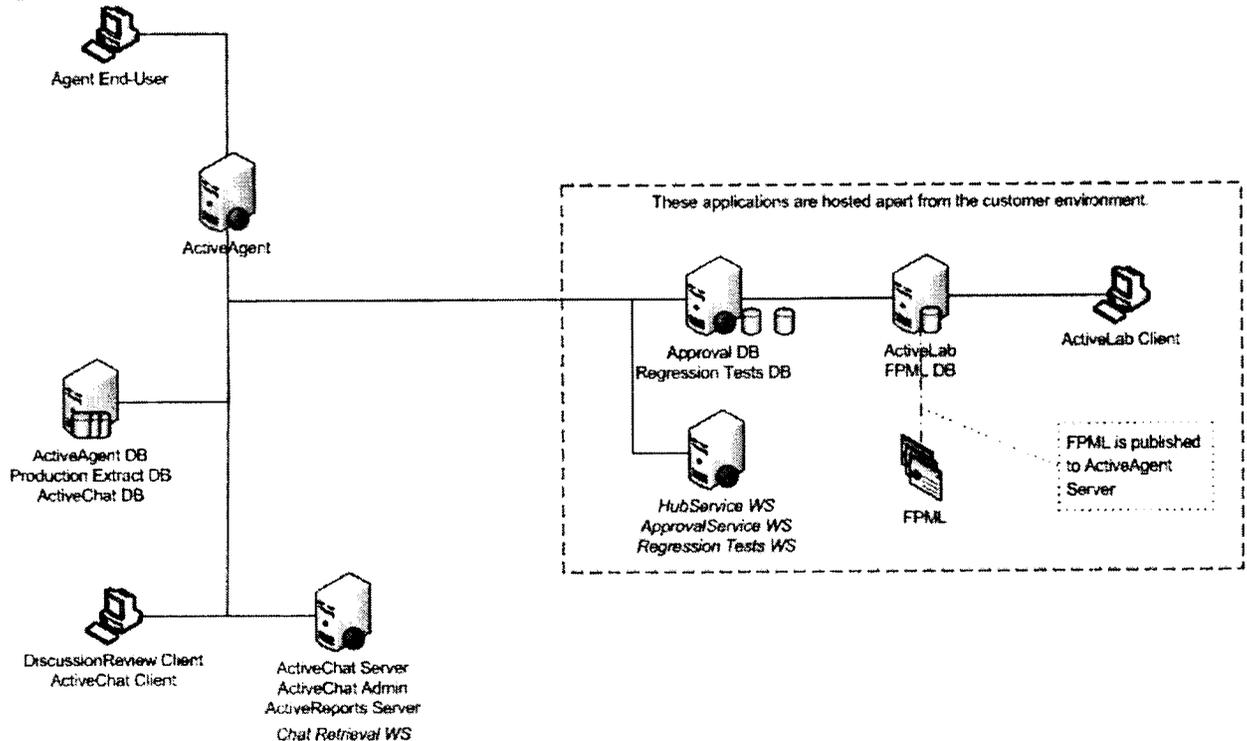
The database installations are provided in SQLScript form with an installation document that provides specific information on the steps necessary to install successfully. These installations do not require pre-installation work to develop of any type of batch or configuration file.

## SECTION 4 - THE INTEGRATED ACTIVEAGENT ENVIRONMENT

Your site's installation process, start to finish, is assisted by a basic understanding of the larger installation picture as well as the activity workflow being facilitated by the integrated ActiveAgent Suite. This section will address both.

### The Integrated Installation

The diagram below shows a basic topology of the full, integrated environment. Both your site installed software and the hosted site installed software are shown. This type of layout is considered minimal, appropriate for a development or testing lab but not an end-user facing production environment. It is the complete installation of all identified software that enables ActiveAgent business and technology processes.

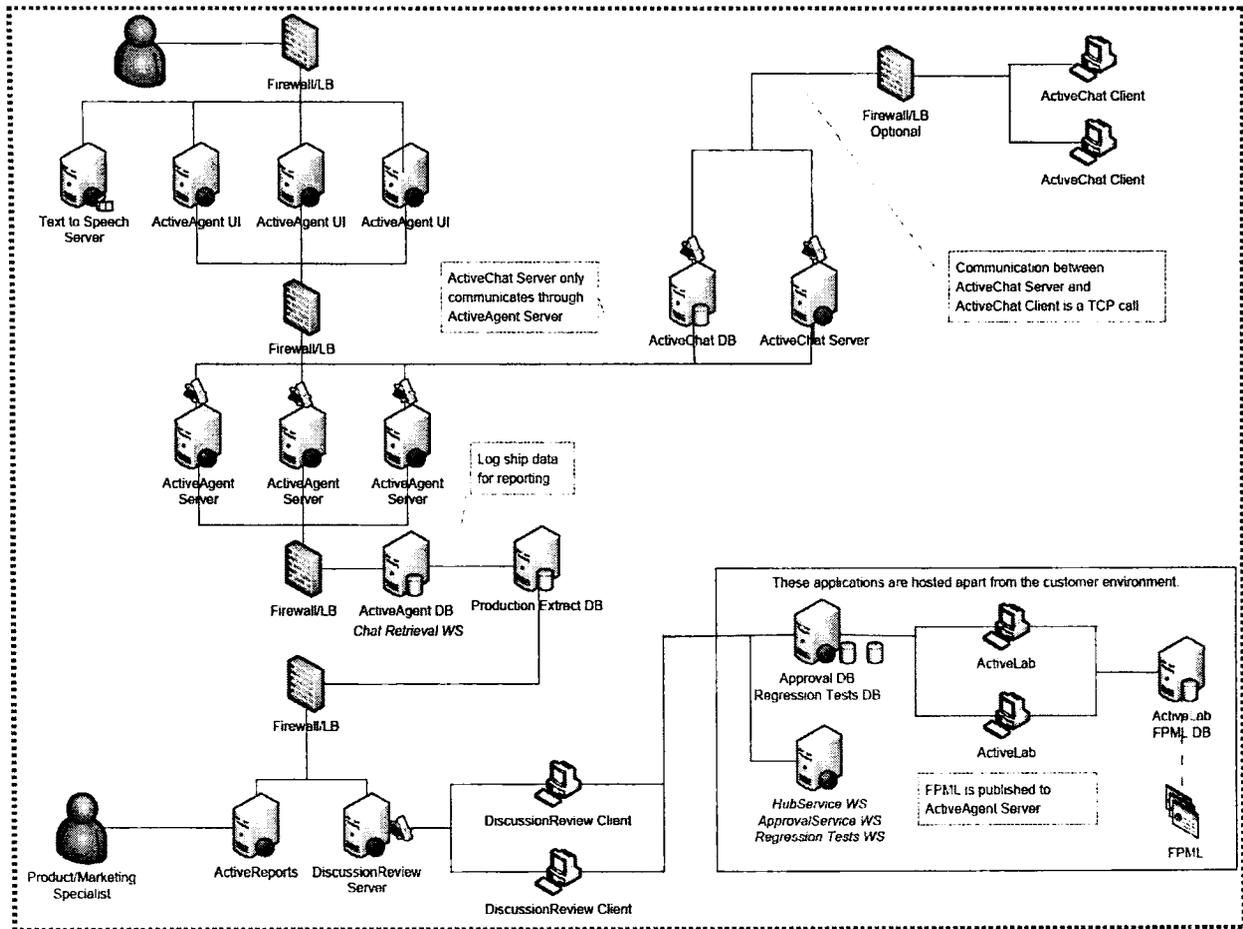


As you are working through the planning, development, and installation of your site's software, Next IT will work with you to understand any additional configurations required for the hosted software. This will facilitate completion of the fully integrated environment.

As your project progresses, the final production layout will be defined. You will then be able to leverage the work accomplished installing the basic environment to setup the production environment. The diagram on the next page shows what a production environment for a public-facing Agent may look like.

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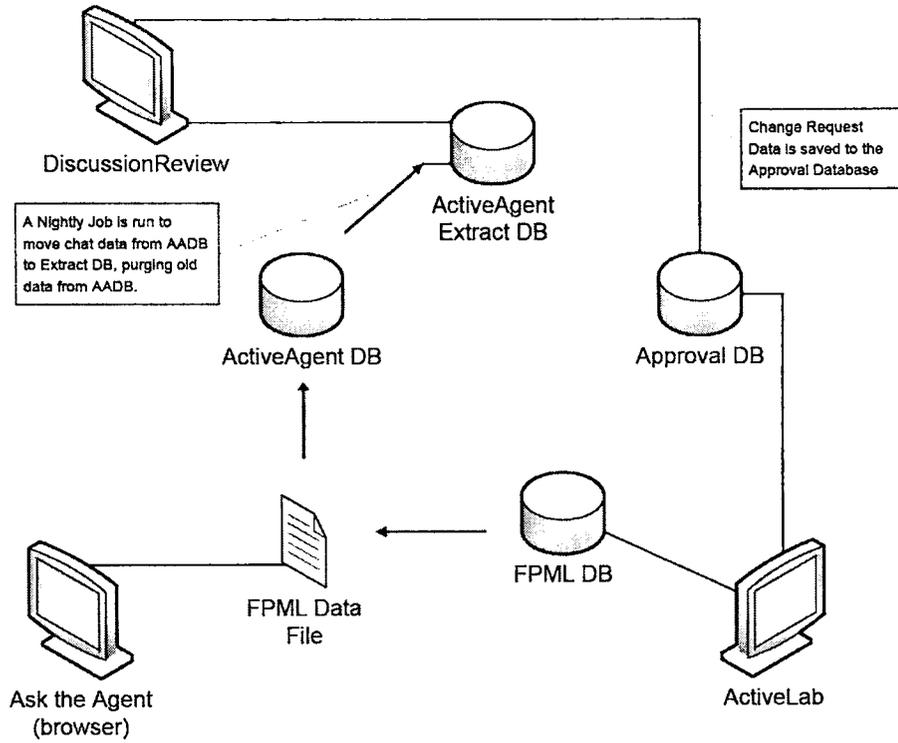


### Process Workflow

The main business process facilitated in the software being installed is the Content Maintenance process. This process is the feedback mechanism for requesting changes to the ActiveAgent content. The diagram at right depicts the flow of data and the User Interfaces used in the process. When setup of the integrated system is completed, this process can be demonstrated. This validates that the installation and setup of all components and connectivity is complete.

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## SECTION 5 - ENVIRONMENT PLANNING

The key to having a repeatable installation process is to understand the target environment and to remove, to the extent possible, the need for human intervention during the installation. This section provides guidance and reference to materials that assist in environment planning. Detail on building up the configuration and batch files is found in the Section that follows.

### Network Considerations

The first subject of discussion often needed is that of detailing the connectivity between your company and Next IT locations. Since this connectivity is required for the integrated maintenance process, it is important to involve the appropriate people right away and get any required business processes started. The requirements for connectivity, as well as any other items that may required lead time in an organization, is part of a discussion you should have with your Next IT Implementation team prior to their arrival at your site to support installation. For more information on the workflow facilitated through this process, please see Section 4 of this document.

### Environment Planning

While connectivity is being worked on, determine from the scope of work the type(s) of environment being installed and the purpose of that environment. For a lab, development, test, or production environment, it is ideal to identify the minimum number of servers and workstations needed to facilitate the purpose outlined. The combination of ActiveAgent software to be installed also factors in; your Next IT implementation team will provide guidance in this determination. Generally speaking, the diagram that follows depicts a minimum configuration that may be considered for such an environment. Note that the diagram shows installation of the following at your site:

- ActiveAgent
- ActiveChat
- ActiveReports
- DiscussionReview

All requisite database, server, and workstation software necessary is also installed.

On the hosted location, the following is installed:

- ActiveLab
- Approval Service
- Other Related Services

All requisite database, server, and DiscussionReview software necessary is also installed.

### *Database Considerations & Recommendations*

ActiveAgent saves chat data in real-time, which can put great load on the database server. To improve the user experience in production environments, we must be watchful of the performance of the ActiveAgent database.

This is achieved with the following practices:

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1. To avoid slowdowns and interruptions, ActiveAgent should be the exclusive user of its database. This means off-loading other database-tied products that may affect the databases performance to a separate database and preferably a different server.  
(This database is referred here as the "Extract" database. Software that needs to reference this "Extract" database include the DiscussionReview and ActiveReports products.)
2. To maintain performance, the ActiveAgent database must be purged to improve lookup times.
3. Other database optimizations are recommended for performance and data security. Some of these will be explained below.

A separate database for DiscussionReview and ActiveReports is required, even if a separate database server cannot be provided, due to table locking and long running queries from these applications.

To keep this separate database updated with recent data, an extract schedule must be implemented (a nightly schedule is typical). This extract process will synchronize data with the production database and should be scheduled to run off peak hours.

A purging schedule must be setup to prevent performance from degrading and/or running out of disk space. Purging \*must\* be performed only after the data to be purged has safely arrived in the extract database. The purge process, defined in the next section, ensures this requirement.

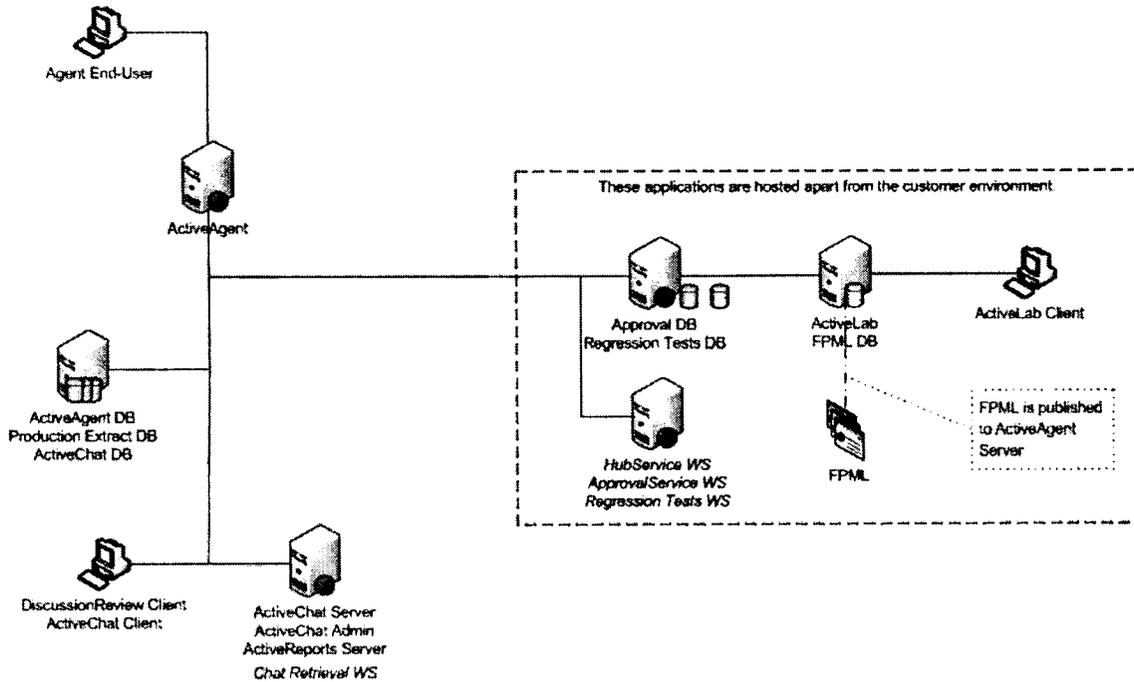
Since purging and extracting moves the desired data into separate databases, the backup procedure may change from the regular process. The ActiveAgent database is purged and therefore will contain an incomplete set of data. The Extract database, however, contains the full set of information, yet most of its transactions occur from the extract process. Backups of the ActiveAgent database would be mainly for investigating a transaction during a particular day, and would otherwise have little value. Backups of the Extract database on the other hand would be mainly to secure a copy of the data, and would have little value for transactional information (only DiscussionReview transactions would be of interest in the transaction logs). Also, due to these transactional differences, "Simple" logging may be considered for the Extract database, and perhaps even the ActiveAgent database.

Other optimizations such as database partitioning and spanning disks may be supplied by a dba.

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*Action Required:* develop a map of the environment(s) to be installed. Include all servers, workstations and the software to be installed on each. Work with your Next IT Implementation team to answer any questions you may have as you do so. When completed, proceed to the next section.

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## SECTION 6 - CONFIGURATION AND BATCH FILE DEVELOPMENT

This section offers an overview of Pre-Installation and MSI processing, followed by steps for developing the configuration and batch installation files.

### Overview of Pre-Installation & Expected MSI Processing

For installations using the configuration file, the first step in the pre-installation process is to create a registry entry that is used by the MSI files to locate the configuration files. This registry entry is created by manual entry as outlined in the *ActiveAgent Suite Pre-Installation* document.

Once the registry entry pointing to the configuration files has been established, the configuration files are copied to the specified location, and the MSI installation files are copied to their staging area, the product is ready to install.

The action of installing takes place when the MSI files are executed. The MSI files follow these steps:

1. Read the registry to locate the configuration file
2. Read the environmental variable to determine which section of the configuration file to use for the installation
3. Read the configuration file to get installation specific information
4. Install the components as directed.

Configuration files are not used for the applications which install directly onto a workstation. The MSI files for workstation installation may contain all necessary information for installing; ActiveChat Client interacts to obtain required information. The installation process for installing workstations consists of simply executing the MSI file and entering pertinent data at the time of install.

### Data Collection

Data collection worksheets specific to each type of software being installed is contained in a separate document, *ActiveAgent Product Suite Data Collection*, which should be delivered to you with this document. The worksheets contain the set of knowledge required for installing the software in your specific environment(s) via an installation configuration or batch file. Your Next IT Implementation Team will go over both documents with you as a step toward installing ActiveAgent software in your environment.

#### *Action Required:*

You should have received an Environment Specification document from Next IT. Fill it out according to the Environment Map you have developed; there is a section for each environment to be installed.

Meet with Next IT to discuss both documents and the process your teams will go through to collect the needed information

Identify the ActiveAgent Suite software required for your installation, and be prepared with a printout of the data collection document for your discussion with Next IT.

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## Configuration File Development

This section applies to developing configuration files for the installation of:

- ActiveAgent
- ActiveChat Server
- ActiveChat Administration Console
- ActiveReports

Gather the necessary information for each component:

- Environment Map
- Environment Specification sheets
- Data Collection Worksheets

These items will be used to construct the configuration file for the installation of the software. Typically the initial version of the configuration file is created by the Next IT engineering staff with consultation from you and your team. In that case, provide the worksheets to Next IT to enable the completion of your installation files.

Follow-up maintenance to the configuration files can be done either by Next IT or your team, as needed, to adapt to changes in the target infrastructure. If you are responsible for constructing the configuration files for your installation, be sure to use the baseline provided by Next IT (or contained in the software package). There should be a file for each type of software.

### *Some Notes about the Configuration File:*

More tokens exist in the file than are noted in this document. It is important that you only modify the environment parameters outlined herein. The other tokens are pre-set according to your implementation requirements and the source contained in the installer supports these tokens as-is.

The configuration file is designed to work in all of your environments. It is divided into sections with only the applicable sections being used in a particular installation.

The *ActiveAgent Product Suite Supplemental Material* shows an example of a configuration file designed for two environments called QA and PROD. The Configuration file starts with common definitions and then has environment specific definitions for each environment supported.

Because the configuration file contains information about all installation environments the MSI expects that each target environment will have an environmental variable available to indicate which of the environments is being installed. For the example, the environmental variable "Customer\_Env=QA" would direct the installation to use the QA section of the configuration file. The steps to set the environment variable for your machines are found in the *ActiveAgent Suite Pre-Installation* document.

### *Action Required:*

If you are developing the configuration files for the installations, collect all data information worksheets together with the base file for each applicable software piece and edit each file appropriately. Call on the Next IT Implementation team as often as needed to ensure a successful installation.

If Next IT is developing the configuration files, provide data collection information to Next IT.

## Batch File Development

This section applies to installation of the following:

- Chat Retrieval Service

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Use the data collected about the environment and the specific Chat Retrieval Service parameters in combination with the base batch file provided to develop the batch file for installing the ChatRetrievalService MSI. See the example below which shows only the parameter section of the batch file:

```
set MSIFILE=ChatRetrievalService.2.7.0.6023.msi
set CRWEBSITEDESCRIPTION=ChatRetrievalService
set CRWEBSITEHEADER=<host.header>
set CRWEBSITEROOT=C:\Inetpub\wwwroot\NextIT
set CRVDIRROOT=D:\WebRoot-32\ChatRetrievalService
set CRWEBAPPLICATIONNAME=ChatRetrievalService
set CRWEBAPPLICATIONPOOLNAME=ChatRetrievalService
set CRDBCConnectionString=server=<servername>;database=<extract_db_name>;user id=<uid>;password=<pwd>;trusted_connection=false;
set DRDOMAINGROUP=NextIT_DiscussionReview_Users
```

Note that the value for DRDOMAINGROUP is set to the default group; if you have setup a different domain group for using DiscussionReview, make the appropriate change to the batch file.

*Action Required:*

If you are developing the batch file for the installations, collect all data information worksheets together with the base file for each applicable software piece and edit each file appropriately. Call on the Next IT Implementation team as often as needed to ensure a successful installation.

If Next IT is developing the batch file, provide data collection information to Next IT.

**IMPORTANT:** unlike use of configuration files, when using a batch file as described in this section, you will want to create a batch file for **each** environment.

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