Tealeaf Customer Experience documentation

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IBM Tealeaf Customer Experience V9.0.2 documentation

Welcome to the IBM® Tealeaf® Customer Experience documentation, where you can find information about how to install, maintain, and use IBM Tealeaf Customer Experience.

Getting started

Notices

Product Overview

New Features

Installing v9.0.2

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Common tasks

Performing Administrative Tasks

Using cxMobile

Tracking Interactions through BBR

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Find support

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IBM Software Support home page

Application Developers

Use these links to go to the documents that you use to integrate IBM Tealeaf Customer Experience into your web, iOS, and Android applications.

Customer Experience Analytics Platform SuperDevCenter

IBM Android SDK

IBM iOS SDK

IBM Tealeaf UI Capture Library

Overview

Overview topics present core business and technical concepts, including new feature descriptions and information about the IBM Tealeaf component architecture. Use the Overview to learn how Tealeaf components work together and with 3rd-party applications.

The Overview section also includes the release notes for IBM Tealeaf products.

Publications in the **Overview** section include the following:

- IBM Tealeaf Customer Experience Overview
- IBM Tealeaf Customer Experience Release Notes
- IBM Tealeaf Mobile Android Logging Framework Release Notes
- IBM Tealeaf Mobile iOS Logging Framework Release Notes
- IBM Tealeaf CX Passive Capture Application Release Notes
- IBM Tealeaf UI Capture Release Notes

Installing

Installing IBM Tealeaf involves planning and preparing your environment, installing and configuring prerequisite software, obtaining the IBM Tealeaf installation files, running the IBM Tealeaf Customer Experience installer, and installing your IBM Tealeaf products, including the IBM Tealeaf Portal.

Activities for planning and preparing your environment include:

- Learning about IBM Tealeaf installation topologies and choosing the topology that meets your needs.
- Assessing your current IT resources.
- Determining and cataloging the IBM Tealeaf Customer Experience component-to-server assignments
- Making sure your environment meets the hardware and software requirements required for your IBM Tealeaf solution.
- Installing and configuring prerequisite software and preparing the servers and your network environment to accept IBM Tealeaf.
- Determining your how to implement high-availability for your IBM Tealeaf installation .

After installing IBM Tealeaf CX, use information in **Installing** to configure the IBM Tealeaf Portal, time zone, and sessionization settings.

Installing also provides instructions for multiple upgrade scenarios for IBM Tealeaf CX.

Manuals in the **Installing** section include the following:

- IBM Tealeaf CX Installation Manual
- IBM Tealeaf CX Release Upgrade Manual
- IBM Tealeaf cxVerify Installation Guide

Configuring

Configuring IBM Tealeaf CX involves setting up and managing Tealeaf user authorization and configuring Tealeaf server components and services that process captured data.

The **Configuring** section addresses configuring IBM Tealeaf CX only. For information about configuring other IBM Tealeaf products and components, see the guides in **Administering**, **Developing**, and **Using**.

Manuals in the **Configuring** section include the following:

- IBM Tealeaf CX Configuration Manual

Administering

Administering IBM Tealeaf involves configuring and integrating the IBM Tealeaf client framework with your web applications or mobile native applications, installing and administering the databases used by IBM Tealeaf, defining event objects and configuring events, hit attributes, dimensions, and other object attributes used by IBM Tealeaf to monitor mission-critical metrics of your web application's performance.

Use the information in Administering for installing, configuring and administering IBM Tealeaf replay features and capabilities and for working with IBM Tealeaf CX Mobile, including managing user agents and configuring user agent detection in IBM Tealeaf CX Mobile.

You can also find information in Administering for installing, configuring, and managing the IBM Tealeaf cxConnect family of products that integrate IBM Tealeaf CX with 3rd party web analytic applications, voice of customer (VOC) applications, or business intelligence applications.

Manuals in the **Administering** section include the following:

- IBM Tealeaf CX Client Framework Data Integration Guide
- IBM Tealeaf CX Cookie Injector Manual
- IBM Tealeaf CX Database Guide
- IBM Tealeaf CX Event Manager Manual
- IBM Tealeaf CX Mobile Administration Manual
- IBM Tealeaf CX Passive Capture Application Manual
- IBM Tealeaf cxConnect Data Analysis Administration Manual
- IBM Tealeaf cxConnect Voice of Customer Administration Manual
- IBM Tealeaf cxConnect Web Analytics Administration Manual
- IBM Tealeaf cxImpact Administration Manual
- IBM Tealeaf cxReveal Administration Manual

Developing

IBM Tealeaf provides libraries to assist you with capturing user interface and application events.

Documentation is available for the following:

- Where is the IBM Tealeaf and UI Capture SDK documentation?
  You can use the IBM Tealeaf SDKs to capture mobile application data and to capture UI interactions from a mobile device. The IBM Tealeaf UI Capture library to capture UI interactions on a web page. The SDK and developer-oriented documentation is now located in the Developer Center.
- IBM Tealeaf CX RealiTea Viewer Client Side Capture
  You can use IBM Tealeaf CX RealiTea Viewer Client Side Capture to configure Fiddler to perform client-side capture of sessions from web and mobile devices.
- IBM Tealeaf cxReveal API Guide
  You can use the IBM Tealeaf cxReveal API Guide to integrate Tealeaf session search and session replay into a custom application.

Where is the IBM Tealeaf and UI Capture SDK documentation?

Developers can customize their application by using the IBM Tealeaf Customer Experience and UI Capture SDKs. This documentation moved from the Knowledge Center to the developerWorks developer center.

Where did my SDK documentation go?

The SDK and other developer-oriented documentation has moved from the Knowledge Center to the developerWorks developer center. All the original Knowledge Center content is now in a more developer-friendly format that continues to improve with additional resources available in one location. Since the IBM Tealeaf Customer Experience SDKs are used in IBM Watson™ Customer Experience Analytics, information for both customer bases is presented together and applies to both products.

The Developer Center

The developerWorks developer center is dedicated to providing resources for developers to customize IBM offerings. You can find the latest information from our team of experts in the Watson Customer Experience Analytics developer center.

Here are just a few of the available resources:

- Access to SDKs

- Tutorials with example code
- Documentation with conceptual and reference information
- Release notes
- Events to keep you in the loop on the latest innovations
- dW answers to ask questions of our experts

In the developer center, you can also share information, interact with our developers, try out samples, ask questions, and provide feedback. To access the Watson Customer Experience Analytics developer center, see the Customer Experience Analytics Platform.

Developer Center Relevant Links

IBM Tealeaf Android SDK

- IBM Watson Customer Experience Analytics for Android, standard and mobile editions documentation
- IBM Tealeaf Android SDK Release Notes
- Getting started with the Tealeaf SDK for Android

IBM Tealeaf iOS SDK

- IBM Watson Customer Experience Analytics for iOS, standard and mobile editions documentation
- IBM Tealeaf iOS SDK Release Notes
- Getting started with the IBM Tealeaf SDK for iOS using Swift
- Getting started with the IBM Tealeaf SDK for iOS using Objective C

IBM Tealeaf UI Capture SDK

- IBM Tealeaf UI Capture documentation
- IBM Tealeaf UI Capture Release Notes
- Getting started with the installation and deployment of the UI Capture

IBM SDK Manager

- Getting started with the SDK Manager for Windows
- Getting started with the SDK Manager for Mac OS X and Linux

Using

You use IBM Tealeaf to capture *sessions*, which are the interaction between visitors and your website, and to play back those sessions for analysis.

Replaying visitor sessions provides you with insight into the customer's experience so that you can identify areas of your website that are the cause of visitor frustration, as well as those areas that result in a successful and positive visitor experience.

You can use the IBM Tealeaf Portal to search for active and completed visitor sessions, to review and analyze data across search results, to replay a user session within a browser. Administrators can use the Portal to manage the Tealeaf system.

The Portal provides a wide variety of options for creating and viewing reports, including dashboards, scorecards, and other ad-hoc reports. Additional reporting and analysis functionality is available through Tealeaf licensing options.

Manuals in the **Using** section include the following:

- IBM Tealeaf CX Mobile User Manual
- IBM Tealeaf CX RealiTea User Manual
- IBM Tealeaf cxImpact Reporting Guide

- IBM Tealeaf cxImpact User manual
- IBM Tealeaf cxOverstat User Manual
- IBM Tealeaf cxReveal User Manual
- IBM Tealeaf cxView User Manual
- IBM Tealeaf cxVerify User Guide

Troubleshooting

Troubleshooting information helps you understand, isolate, and resolve problems that might occur when you install, configure, and use IBM Tealeaf and its components.

Additionally, troubleshooting provides tips and techniques for backing up critical IBM Tealeaf configurations and data so that you can quickly restore or migrate your system.

Manuals in the **Troubleshooting** section include the following:

- IBM Tealeaf CX Support Troubleshooting FAQ
- IBM Tealeaf CX Troubleshooting Guide

Glossary

This glossary provides terms and definitions for the IBM Tealeaf Customer Experience software and products.

The following cross-references are used in this glossary:

- *See* refers you from a nonpreferred term to the preferred term or from an abbreviation to the spelled-out form.
- *See also* refers you to a related or contrasting term.

"A" on page 5 "B" on page 6 "C" on page 6 "D" on page 7 "E" on page 7 "F" on page 7 "G" on page 8 "H" on page 8 "H" on page 8 "I" on page 8 "L" on page 8 "M" on page 8 "P" on page 9 "Q" on page 9 "R" on page 9 "S" on page 9 "T" on page 10 "U" on page 10 "V" on page 10 "W" on page 10

A

action
In an event definition, the value to record, the session attribute to populate, and the dimensions associated with the event.

active session
Any session in which a visitor is exploring the web application. Each page that the visitor sees is added to the active session.

alert
A message or other indication that signals an event or an impending event that meets a set of specified criteria.

archive
Persistent storage used for long-term information retention, typically very inexpensive for each stored unit and slow to access, and often in a different geographic location to protect against equipment failures and natural disasters.

authentication
In computer security, verification of the identity of a user or process and the construction of a data structure that contains the privileges that were granted to the user or process.

B

behavioral targeting
A set of techniques and products used for marketing and promotional content that enable dynamic and targeted content to be served to the appropriate customer's browser at the right time.

binary file
A file format that does not consist of a sequence of printable characters (text).

blacklist
A list of values that, when detected, are excluded from the list of available dimension values.

bot
A program that visits websites in an automated fashion. Some bots are used to gather information, such as Google's search indexing of web pages. Others may be employed with malicious intent, such as to cause denial of service (DoS) by causing a website to be too busy to service legitimate requests.

C

calculated metric
A metric that can be defined using a formula that is constructed from one or more existing metrics, operators, or constants. For example, users can create a metric named Repeat Visitor % using a calculated metric of [(Unique Visitors –New Visitors)/Unique Visitors].

canister
A single processing unit within a storage system.

capture filter
A software filter that collects the visitor-site traffic stream data.

capture stream
The flow of hits (request/response combinations) through a system.

client framework
A set of scripts that are deployed with a web application or mobile native application to capture user interactions on the client that would not otherwise require a server interaction. By capturing these user interface events, a client framework can provide unique insight into the activities of visitors within their browsing devices.

completed session
Any session in which the visitor is no longer actively exploring the web application or has been timed out by the web application.

condition
In an event definition, one or more criteria that must be true in order for the event to be executed. Any or all of the conditions may be configured as the requirement for event execution.

conversion
A successfully completed business transaction by a website visitor, resulting in the visitor converting to a customer.

conversion rate
The rate at which customers respond to cues provided by a website towards a specific desired action.

custom control
A control that is not included in the .NET framework library and is instead created by a third-party software vendor or a user. IBM Tealeaf supports custom controls through Tealeaf Template customization.

customer churn
The proportion of contractual customers or subscribers who leave a supplier during a given time period. Churn rate is a possible indicator of customer dissatisfaction, cheaper and/or better offers from the competition, more successful sales and/or marketing by the competition, or reasons having to do with the customer life cycle. Churn rate can be thought of as the inverse of retention rate.

customer service optimization
The practice of improving customer service operations, which is often measured by first call resolution rates, average call time, customer satisfaction with service, and other factors.

customer struggle
A condition of the online customer experience where the visitor encounters difficulties interacting with a business website. Customer struggle can cause a visitor to leave the website before completing a transaction.

D

dashboard
An interface that integrates data from a variety of sources and provides a unified display of relevant and in-context information.

deviation
An optional data structure that can be used to store the standard variations of the values for the selected event over the preceding four-week period.

dimension
A broad grouping of descriptive data about a major aspect of a business, such as products, dates, or locations. Each dimension includes different levels of members in one or more hierarchies and an optional set of calculated members or special categories.

dispute resolution
The process of resolving conflicts between two or more parties. Tealeaf facilitates dispute resolution by serving as a neutral transaction record. For example, if a customer thought they were buying a product at one price yet discovers a charge for another price, Tealeaf's session replay can be used to show the price displayed to the customer at the time of the transaction.

Document Object Model (DOM)
A system in which a structured document, for example, an XML file, is viewed as a tree of objects that can be programmatically accessed and updated.

DOM
See Document Object Model.

DOM capture
A feature of IBM Tealeaf that enables the client to capture the Document Object Model of a web page. In IBM Tealeaf, replaying the DOM provides "truer" replay experience because it uses the exact DOM that the user saw at the moment of capture, rather than a simulation produced by a rendering engine.

E

event
A condition identified in captured data that, when triggered, results in an action. For example, an event can be the appearance or absence of a specific data element or value in the request or the response, and resulting actions can include setting values and generating alerts.

F

fact
The combination of an event plus any related report groups. A fact is recorded in the request of the affected hit for search purposes and in the database for reporting.

first-call resolution rate
The percentage of customer calls resolved within a single contact. A crucial measure of quality, first-call resolution gauges the ability of the call center and the individual agent to resolve the customer issue in a single interaction with that customer.

fragment
A sequence of captured visitor hits.

G

gesture
In mobile computing, a short, uni- or multi-directional input on a touchscreen.

group list
A range of numeric values or sets of string values to be recorded as a single dimension value.

H

heat map
A color-coded data chart in which colors are used to differentiate values in a data set.

hit
A request from a visitor's browser to the web application and the response from the web server to the browser.

hit attribute
A defined set of characters in the request or the response that can be used as the condition for an event. A hit attribute may be an explicit string (such as myhit attribute) or an unknown string bracketed by a starting string tag and an ending string tag.

hybrid app
See hybrid application.

hybrid application (hybrid app)
A mobile device application that combines elements of web and native applications.

I

index
A list of entries arranged alphabetically to provide fast access to information.

L

long-term canister
A database that is stored on the local disk of the processing server to retain completed sessions and their related search indexes for a configurable length of time.

M

mobile native application
A client application that is specifically designed to work on the hosting mobile platform. For example, an Android native application only works on Android-based mobile devices. Tealeaf CX Mobile supports the capture of sessions from mobile native applications.

mobile web browser
A browser that is specifically designed to work with a mobile device.

P

passive capture
A record of all conversations between a visitor's web browser and the web application through the recording of all traffic to and from the web server or servers hosting the application.

Q

qualitative analytics
The outcome of analyzing qualitative data. Using IBM Tealeaf session capture and replay, businesses can achieve qualitative insight into how visitors interact with the businesses website. By replaying visitor sessions, the business gains insight into the quality of the visitor's experience and can use that qualitative analysis as input to improving their website design.

quantitative analytics
The outcome of analyzing quantitative data. Quantitative analysis is the systematic approach to data analysis during which measurable numerical data is collected. IBM Digital Analytics provides quantitative insight by capturing website and mobile interaction data and providing interfaces for analyzing statistics such as purchase funnels, real-time sales data, and conversion rates.

R

ratio object
An object that can be created to calculate and store the ratio of deviations between two events or dimensions.

replay
The redisplay of a visitor's session on a website, as it was originally experienced by the visitor. After a visitor's hits have been collected and sequenced into a session, that session can be replayed in the manner that the visitor experienced it, with the visitor's selections and entries highlighted for the Tealeaf user to see.

replay server template
An HTML file that is packaged and installed with IBM Tealeaf CX and is used to render and replay mobile session data.

report group
A container for a dimension. A report group can contain up to four dimensions.

request
A message from one computer to another asking for a resource.

response
A return message to a computer that made a request. After capturing a request, the PCA server then processes and assembles packets in search of the response to that request. A response may be in text or binary form.

S

scorecard
A preconfigured graphical display of one or more configurable parameters and grades. Scorecards are configured to display key performance indicators meaningful to an organization, to which users can apply parameters and comparisons to deliver immediate, meaningful graphical information through the portal.

segment
A collection of related sessions. The sessions returned from a search executed through the portal can be rendered into a segment.

session
A single start-to-finish experience of interaction with a website. In Tealeaf, a session is used as the basis for evaluating visitor experience.

session attribute
An attribute that is used to store data from events that are triggered during a user session.

sessionization
The process of properly assembling individual hits into visitor sessions.

short-term canister
An in-memory database that is used for storing active sessions.

static content
A set of files referenced in the pages of a web application that are unlikely to change during the course of a visitor's session. Examples include stylesheets, JavaScripts, and images (files in formats such as JPEG, GIF, and PNG).

step
A single user action that is captured by one of the Tealeaf client frameworks and submitted to Tealeaf for capture in JSON format.

T

TLA file
A file of a recorded session that can be exported and replayed with Tealeaf replay tools. The TLA file includes data in json format that communicates to IBM Tealeaf clients a visitor's journey through the business's website.

trigger
A user-defined point or set of points during a session at which an event is activated.

U

unstructured data
Any data that is stored in an unstructured format rather than in fixed fields. Data in a word processing document is an example of unstructured data.

user agent
A broad class of entities that can access servers across a network. This broad class includes desktop browsers, bots, and mobile devices, among others.

V

visitor
Any individual, bot, or other program that is connecting to a web application via HTTP.

visitorization
The process of tracking unique visitors across single or multiple visits to a web application. Using Tealeaf technologies, each visitor to a web application can be uniquely and permanently identified, which assists in longer-term study of customer experience and issues.

W

web page
Any document that can be accessed by a URL on the World Wide Web.

web server
A software program that is capable of servicing Hypertext Transfer Protocol (HTTP) requests.

whitelist
A list of values that, when detected, are included in the list of available dimension values.

workspace
A customizable collection of reports presented in a user interface dashboard.

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