Chat Server Administration Guide

Deploying a Chat Solution

5/10/2025

Deploying a Chat Solution

This page outlines the essential steps of deploying a Chat Solution.

Overview

To deploy Chat Server, perform the following steps:

- Create a Chat Server application in configuration. Make sure that the following configuration is specified correctly:
  - **Ports**. At least 3 ports must be configured with the following IDs: `default`, `webapi` and ESP. Additionally, if KPI must be exposed via REST API, port with ID `health` must be added.
  - **Connections**. Chat Server must be connected to Interaction Server and UCS, and optionally Chat Server could be connected to the Configuration Server application (usually confserv) and Message Server. Setting addp is recommended for all these connections.
  - **Endpoints**. The `endpoints:*tenant_dbid*` section must be renamed to contain an appropriate tenant ID value (for example `endpoints:1`) and the `default` option must be initialized with a queue name (to which Chat Server will submit interactions).
  - **Logs**. By default logs are configured to hide all possible sensitive data - which however might not be convenient if troubleshooting is required. Decide on how you want to set the hide-attached-data and message-log-print-size options in the `settings` section and options in the `log-filter-data` section.
  - Set up Chat Server High Availability configuration if needed.
  - Connect other applications to the Chat Server application:
    - **Interaction Server** must be connected to the ESP port (addp is recommended for this connection).
    - **GMS** must be connected to the `webapi` port (addp is not recommended for this connection due to short living nature of these connections).
- Install the Chat Server installation package (IP).
- Configure other applications to work with chat channels:
  - Create/modify **capacity** rule to include the `chat` media type.
  - Create/modify **workflow** (using either IR Designer or Composer) to route a chat interaction. For information about sending messages to a chat session refer to How to Send Message or Notice to Chat Session from Workflow.
  - Enable **GMS** to provide chat API (by adding the `chat.customer-support` section).
  - Configure **agents** (persons in configuration) with a chat channel access.
  - Adjust configuration of **Workspace** (agent desktop) if needed. For WDE review the `chat.*` and `chatserver.*` options and for the `openmedia.workitem-channels` option add the `chat` value.

Interaction Server Cluster Support

Please refer to Interaction Server Cluster documentation (in particular, review Special Considerations for Media Servers in Suggested Deployment Configuration) in order to configure Chat Server to work with Interaction Server Cluster.

> ### Important
> The ESP Configuration Must Be Symmetrical section means that in order to be able to send ESP messages from workflow to Chat Server using Interaction Server Cluster, each Interaction Server node in the cluster **must** have its own connection to ESP port of Chat Server.

UCS 9.1 support

In order to configure Chat Server 8.5.x with the cluster of UCS 9.1 nodes (all of which are running in active mode):

1. Configure all UCS instances as primary and backup pairs:
    a. UCS 9.1 ignores this configuration.
    b. Chat Server instances will be using this configuration.
2. Divide all instances of Chat Server into the same number of groups as the number of UCS pairs.
3. For each group, connect each instance of Chat Server only to the primary UCS of a corresponding UCS instances pair.

For maintenance/upgrade:

1. Ugrade all instances of UCS configured as backup (stop instances, upgrade the IP, and then start instances again).
2. Stop all UCS instances configured as primary. At this point Chat Server instances will switch to UCS instances which are configured as backup.
3. Upgrade all UCS instances configured as primary (stop instances, upgrade the IP, and then start instances again).

> ### Important
> It is possible that in some situations—for example, after performing the upgrade procedure—Chat Server instances could be connected to UCS instances configured as backup (you can verify this from the Chat Server logs). In a case such as this, there will simply be an additional reconnect in Chat Server instances to UCS during the upgrade procedure.