



# **Contact Center Anywhere Release Notes**

Version 8.1.0

April 2007

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# Overview

Oracle's Contact Center Anywhere 8.1.0 release represents a significant milestone in the evolution of Oracle's industry-leading contact center applications. Contact Center Anywhere 8.1.0 includes a robust set of innovative and improved capabilities. These capabilities are especially strong in agent and supervisor productivity, flexible provisioning, and resilient systems operation. Contact Center Anywhere 8.1.0 is a powerful tool in making contact center staff much more productive in carrying out their duties.

Contact Center Anywhere is based on a distributed, network-based architecture using industry standard communications interfaces and protocols. This distributed, network-based model has been consistent throughout the evolution of the product. Such consistency has provided a straightforward migration path from prior releases of Contact Center Anywhere, including this new version. In most cases, database migration is accomplished with the use of migration scripts. Contact Center Anywhere 8.1.0 is also designed to minimize service disruption during the upgrade process. These considerations help to improve the overall cost of ownership in deploying Contact Center Anywhere.

The 8.1.0 Release Notes provides the latest details specific to the 8.1.0 Release that are available. These provide the information you need to understand the specific changes in 8.1.0 vs. the 7.1.7 SP4 and 7.2 releases.

Contact Center Anywhere 8.1.0 is compatible with 7.1.7 SP4. Any patch activity post-release of 7.1.7 SP4 may not be included and will still require a patch. Contact Center Anywhere 8.1.0 is also compatible with 7.2. All 7.2 patches are included in 8.1.0 at time of release.

Additional high level and detailed information is available from Oracle at <http://supportweb.siebel.com>. Please consult this site for the full complement of information material available with 8.1.0.

## Contact Center Anywhere 8.1.0 Benefits

### Improved Client Interface Usability

Contact Center Anywhere 8.1.0 further empowers users with new graphical user interfaces. The new Integrated Client design provides a clean, universal approach to contact center interaction and staff management. The Interaction Manager interface makes agent-based contact center operations easier to use with less real estate used on the desktop. Using less space results in providing more usable area for data and functionality, better supporting the customer's business needs.

The interface framework is Java-based and has been designed to simplify the incorporation of integrated and independent functionalities. A common Tool Bar is provided for users to initiate and handle all media types.

The new Supervision Manager interface allows for customizable displays so supervisors can create special views of agent activity, workgroup effectiveness and service levels to suit their company's unique needs. Supervisors have a great degree of flexibility in creating custom alarms and views of alarms.

The three main areas dealing with improved client interfaces are:

- New, Integrated Client Design, Java-based, extensible, common tool bar
- Complete Redesign of the Interaction Manager and Supervision Manager
- Predictive Dialing enhancements to both interfaces, including enabling contact lists

## Increased Operational Flexibility

Contact Center Anywhere 8.1.0 provides a new partitioning capability to the platform which is accessed via the Administration Manager interface. This allows you to segment the platform so common agents may work on behalf of separate business entities while also restricting both real-time and reporting views of their activity to specific supervisors and administrators. This segmentation also applies to reports, projects, IVR Scripts and workgroups. This is especially helpful for outsourcers and service providers that enable agents to answer the phone on behalf of customers whose data stores, views and activities must be kept private – especially in an outsourcer context. This partitioning capability is also useful for enterprises with many separate lines of business, where partitioned reporting, project menus, and agents may be advantageous.

## Oracle Standardization

Contact Center Anywhere 8.1.0 is certified on the “Oracle Stack.” That is to say that Contact Center Anywhere is now compatible with Oracle standard database and operating environments. This is a significant undertaking as it paves the way for smoother integration with other Oracle products and especially the basis for Oracle Fusion Applications. In addition, this opens the door for more enterprises to take advantage of Contact Center Anywhere along with complementary products from Oracle’s broad portfolio of core technology and CRM offerings. Oracle Stack certification for Contact Center Anywhere 8.1.0 includes:

- Oracle Database 10g
- Oracle Application Server
- Red Hat Linux for Intel x86
- Documentation

## Enhanced Reliability, Scalability and Manageability

Contact Center Anywhere 8.1.0 offers many improvements that affect overall manageability of the platform. For example:

- Backend Resource Improvements
- Database Improvements
- Network Administration Improvements
- Reporting Improvements
- Standardized 3<sup>rd</sup> Party Interconnectivity

## Naming Convention

With this release, we will be streamlining our naming convention. The naming definition will be as follows:

**1<sup>st</sup> Number:** Edition Release

**2<sup>nd</sup> Number:** Feature Release

**3<sup>rd</sup> Number:** Service Pack designation will include fixes & small features, maintenance builds and patch inclusions. The “SP” notation has been removed for simplicity.

# Release Summary

## Significant New Capabilities

### Significantly Improved Client Interfaces

- New, Integrated Client Design, Java-based, extensible, common tool bar, large workspace
- Completely Redesigned Interaction Manager
- Completely Redesigned Supervision Manager
- Predictive Dialing enhancements to both interfaces, including Predictive List Management
- Integrated Help and Documentation

### Increased Operation Flexibility

- Partitions

### Oracle Standardization

- Oracle Database 10g
- Oracle Application Server
- Red Hat Linux for Intel x86
- New and Improved Documentation

### Release Compatibility

- Equivalent to 7.1.7SP4 Feature Set and major bug fixes
- Equivalent to 7.2 Feature Set

## Feature Enhancements

### Platform Enhancements

- MS-Internet Explorer Version 7.0 support added
- BEA support upgraded to WebLogic 8.1 SP5
- SQL 2005 supported for new installations (includes replication support)

### Miscellaneous Usability Improvements (Agents and Supervisors)

- Grid Enhancements - Flexible Column Ordering, multi-column sorting
- Powerful Find Capability for Company Directory and Transfer Applications
- Chat – User is typing notification

### Configuring CCA further simplified

- Company Feature Package replaces the Application Key & License Dongle while simplifying company creation.

## Feature – Behavioral Changes

### General Behavioral Changes

- URL/Login Changes
- DNIS Libraries vs. DNIS Numbers
- Enabling SQL Query Option in Project Menus
- Disabling Wrap up and Elapsed Timers
- Transferring a Held Interaction to an Active Interaction
- Licensing Changes
- The Predictive Outcome handling has changed.

### Handling of Open Source

- VNC - No longer delivered with the build, for upgrades, must retain previously delivered software.
- LAME – No longer delivered with the build, must be obtained separately by the customer.

## Discontinued Features

### Discontinued Features or Configurations

- Compaq Tru64 UNIX V5.1 support
- Browser-based Supervision Manager

## Issues Fixed:

Track No	Description
<b>CCA System</b>	
15113/15105	Email Distributor - Increased queue size
15003/14810	EmailDistributor - 15% Emails Rejected
14942	Personal Voicemail – Name with apostrophy (')
14765	Virtual Memory Leak on Server Resources
14701	DST Change for 2007
14423	Ghost Interactions during Master/Bkup
14334	Overflow – Not occuring due to Priority
14197	ACD Server - Agent Reserved Status Issue
13469	SQL Error Queries –Logfile Format
13383	Intelligent Chat Templates – Dynamic Change
<b>Administration Manager</b>	
15027	Disable Partitions Effects – Agents, Workgroup & Projects
13400	Speed Dial List – Dynamic Change
12006	Speed Dial List – IP Phone number Entry
<b>Interaction Manager</b>	
14650	Auto Assign Contact – Information Lost
12136	Customer Chat Page – Agent Name
14934	IMServer – IM/SM Logout
13974	Interaction Clearing after Disconnect
12772/12504/9095	Email – Customer Email Address Display
12631	Duplicate Chat History Records
11582	CRM – Screen Pop on Disconnect
<b>Supervision Manager</b>	
13919/13601	Monitoring - Audio Quality
14174	Interaction History - Project Menu Name
14760	Interaction History - Unknown Action IDs
13596	Interaction History – Warm Transfer Notation
14067 / 10534	Interaction & Agent Views – Column Sorting
14019	Agent View – Agent Selection
12387	Incorrect Agent Status – ACD Call
11560	Admin Permission Login to SM

Track No	Description
<b>Reporting</b>	
15072	Selecting 23:59 as End time
14751/10604	Advanced Reports – Default End Time
14332	Interval Workgroup Performance Report - User Thresholds
14217	Workgroup Segments Report - AHT
13931	Agent Utilization – Login Time
13884	Direct Dialing Statistics Report - Average Talk Time
<b>IVR Campaigns and Project Menus</b>	
14891/14350/13878	CallCenter CPU Increase – Project Menu updates
13349	Deployed Campaign Listing
14321	Project Menu SQL statement - < > Symbols
14838	Stored Procedure – Results Set
<b>Outsourcer/Partitions</b>	
15016	Partition Loading – new SM
14934	IMServer - Force Logout
14909	User ID – Delete (within Partition Environment)
14689	Admin Partition Assignment
13620	SM Partition List Choices
11752	Speed Dial List – Not Partition Restricted
11277	Interaction History – Not Partition Restricted



# Compatibility

The section defines compatibility for Contact Center Anywhere Release 8.1.0. The Highlights section provides emphasis to the significant changes. The details are available in the table that follows.

## Highlights/Changes

### Operating Systems & Java

- Upgraded Sun Solaris support to include 5.9 & 5.10
- Linux – Red Hat ES4 support added
- Discontinued support for Compaq Tru64 UNIX V5.1
- \*Java SDK upgraded to J2SDK 1.4.2\_13
- \*Java Runtime Environment upgraded to 1.5.0\_10

### Browsers

- MS-Internet Explorer Version 7.0 support added

### Databases

- Oracle support upgraded to support Oracle 10g
- SQL 2005 supported for new installations (includes replication support)

### Web Servers

- BEA support upgraded to WebLogic 8.1 SP5
- Oracle OAS Support is added.

### Client Applications

- A new Java Eclipse-based Interaction Manager is available
- A new Supervision Manager client application is available.
- The browser-based legacy Supervision Manager is discontinued.

\*Note: Java updates for the DST time change were made to versions 1.4.2\_11 (US) and 1.4.2\_13 (Canada) and Client 1.5.0\_10 (Both US & Canada). The Java updates should be performed in tandem with the CCA upgrade to v8.1 or with a new installation.

## Compatibility Matrix

Application Area	Windows 2000 SP4	Windows 2003 SP1	Solaris 5.9 & 5.10	Red Hat LINUX ES4
<b>Session Servers &amp; Java</b>				
Oracle Application Server 10g Release 3 (10.1.3)	---	Yes	Yes	Yes
BEA Weblogic 8.1 SP5	Yes	Yes	Yes	---
Sun Microsystems SunOne Java Application Server Enterprise Edition 8.1_02 (build b11-fcs).	---	---	No (1)	---
IBM Websphere Application Server, 5.1.0.5 Build Number: cf50427.04 Build Date: 07/10/2004	---	Yes	Yes	---
Java SDK J2SDK 1.4.2_13	Yes(2)	Yes(2)	Yes(2)	Yes(2)
Java Runtime Environment 1.5_10	Yes (2)	Yes (2)	Yes (2)	Yes (2)
<b>Browsers</b>				
Internet Explorer Version 6 and Version 7	Yes	Yes	Yes	Yes
<b>Databases</b>				
SQL Server 2005	New Installations Only. Validation in progress for upgrades.	---	---	---
SQL Server 2000 SP4		Yes	---	---
Oracle 9i		Yes (3)	Yes (3)	---
Oracle 10g		Yes (3)	Yes (3)	Yes (3)
<b>Telephony - SIP/Soft Switch Only</b>				
Dialogic 5.11	Yes	No	---	---
Dialogic 6.0	No	Yes	---	---
Cisco	Yes	Yes	Yes	Yes
Quintum	Yes	Yes	Yes	Yes
Audiocodes	Yes	Yes	Yes	Yes
<b>Other</b>				
RealOne Player Build 6.0.10.505				
Microsoft Media Player 9.0				
Microsoft Sound Recorder 5.0				
McAfee 2004 (Client/Server/Enterprise)				
Norton Antivirus 7.6				
Adobe v7	Required to view Advanced Reports			
Lame (V3.97)	Required for MP3 conversion. Must now be supplied by customer.			

### Notes:

- (1) SunOne JAS is not supported with CCA v8.1. Will be supported with CCA v8.1.1
- (2) Must use Server 1.4.2\_13 and Client Java 1.5\_10 due to DST changes for 2007. There is also a subsequent patch that should be applied.
- (3) Oracle 9i, 10g supported with JServer V 9.0.2



## Oracle Standardization

Contact Center Anywhere 8.1.0 is certified on the “Oracle Stack.” That means Contact Center Anywhere 8.1.0 is compatible with Oracle standard database and operating environments including:

- Oracle Database 10g
- Oracle Application Server
- Red Hat Linux for Intel x86

This is a significant undertaking because it paves the way for smoother integration with other Oracle products and especially the basis for Oracle Fusion Applications. In addition, the documentation available with 8.1 has been significantly upgraded to better support our customers.

### Oracle Database 10g

Contact Center Anywhere 8.1.0 is certified to work with Oracle Database 10g Enterprise Edition, in addition to 9i.

Oracle Database 10g Enterprise Edition provides additional performance, scalability, availability and security functions that are generally transparent to application developers.

Contact Center Anywhere 8.1.0 provides a smooth migration path for users of Oracle Database 9i and 10g. In most instances, an upgrade to Contact Center Anywhere 8.1.0 may be performed using database scripts.

### Oracle Application Server 10g R3

Contact Center Anywhere supports Oracle Application Server 10g R3 (OAS). Oracle Application Server is a J2EE compliant environment supporting Service-Oriented Architecture. Web Services, a part of Service-Oriented Architecture is the basis for Oracle's Fusion Middleware – making OAS a big part of Oracle's future. OAS is designed to provide a standards-based, mission critical platform for organizations deploying service oriented architectures. This has a special meaning in the context of deploying Contact Center Anywhere 8.1.0 because the platform now has its own Web Services-based implementation.

### Linux for Intel X86

Contact Center Anywhere 8.1.0 supports the use of Red Hat Linux for Intel x86 architecture. This is for the servers in the Tier Three Network Zone including Application Servers, File Servers, Database Servers, and Telephony Servers. Contact Center Anywhere 8.1.0 resources compiled for Linux are all compiled to work in 32-bit mode.

Oracle is fully committed to supporting and enabling Linux in the enterprise. With Oracle solutions on Linux, customers benefit from high performance, complete reliability, and data security at a fraction of the cost of proprietary platforms. Oracle's long-standing commitment to Linux started with the release of the industry's first commercial database on Linux in 1998, and that commitment and leadership continues today. With more than 9,000 developers using a Linux infrastructure to do product development, Oracle boasts one of the world's largest commercial Linux development organizations.

# ■

## Significant New Capabilities

### Improved Client Interface Usability

Contact Center Anywhere 8.1.0 marks a major leap in enterprise usability. It touts a significantly improved set of user interfaces, including an integrated client design, customizable workspaces and customizable real-time data. In this section, you will be introduced to:

- New Integrated Client Design
- Completely Redesigned Interaction Manager Application
- Completely Redesigned Supervision Manager Application
- Predictive Dialing enhancements to both interfaces, including enabling Dial Lists

### New - Integrated Client Design

Contact Center Anywhere 8.1.0 has a new approach to graphical user interfaces for supervisors and agents. Core to this release is a new Integrated Client design, which provides significant enhancements and ease of use.

A key design goal was the reduction of real estate required to handle interactions. This space is more valuable when used to present customer business data and associated functionality.

The new layout includes a Toolbar, Sidebar, Interaction Control Bar, Wallboard, Workspace, Bottom Bar and Application Tabs. This layout is consistent across both the Interaction Manager and the Supervision Manager.

Benefits of this approach include:

- Easier cross-training and orientation for agents and supervisors
- A “plug-in” foundation for continued enhancements in future releases
- Flexible use of real estate for user screens
- Customizable views for supervisors to manage real-time data

### Standards-Based Approach to Client Design

Part of the Contact Center Anywhere 8.1.0 integrated design includes a new approach to “back end” processing – that is the part users don’t see in the design itself. With both the new Interaction Manager and the new Supervision Manager, a pure Java-based design is used to make the interfaces inherently web-aware. Because the client software is web-aware, agents and supervisors can work from a broader array of standard, internet-ready computers.

You still need a browser to launch the applications and log-in, but after the interface is up and running, the browser is not being used because the new interfaces do not run in the sandbox of the browser. Once launched, the Interaction Manager and Supervision Manager interfaces communicate with Contact Center Anywhere J2EE Session Servers via SOAP (Simple Object Access Protocol) calls.

Essentially, SOAP is XML text messages sent over HTTP. These SOAP messages communicate with a new Web Services Interpretive Layer. This Web Service function operates both in the Tier Zero / User Zone where the IM and SM interfaces live, and also in the Tier Two / DMZ Zone where the J2EE Session Servers live.

Benefits of this approach include:

- Standards-based Approach to Client Development (Eclipse-based approach)
- Easier integration with new features and other Java-based components
- Less dependence on 3<sup>rd</sup> Party Browsers
- Fewer 3<sup>rd</sup> Party Browser security problems

## Supervision Manager Includes Interaction Manager

Contact Center Anywhere 8.1 combines both the design attributes between the chief agent and supervisor interfaces - and combines common functions. Essentially, the Interaction Manager interface is a sub-set of the Supervision Manager. That is to say, that anything you can do with the Interaction Manager, you can do with the Supervision Manager. The Supervision Manager has additional capabilities unique to supervisors. For example, Supervisors can monitor agents, activate outbound project contact lists, create customizable displays and special views of agent activity, workgroup effectiveness and service levels.

With Contact Center Anywhere 8.1.0, there is a common approach to layout, functions and look and feel across the Interaction Manager and the Supervision Manager. The main page is organized the same way for each interface. Each section of the page provides specific information and links to help users perform their jobs more efficiently than ever before.

The benefits of this approach include:

- Quicker training and overall orientation for Supervisors
- Common components make upgrades and maintenance less cumbersome
- Common look and feel aids overall productivity

In addition, you can enlarge or shrink the Workspace Area to fit your needs. **Figure 3** shows the main sections, which include the:

- Toolbar
- Sidebar
- Interaction Control Bar
- Wallboard
- Workspace
- Bottom Bar
- Application Tab

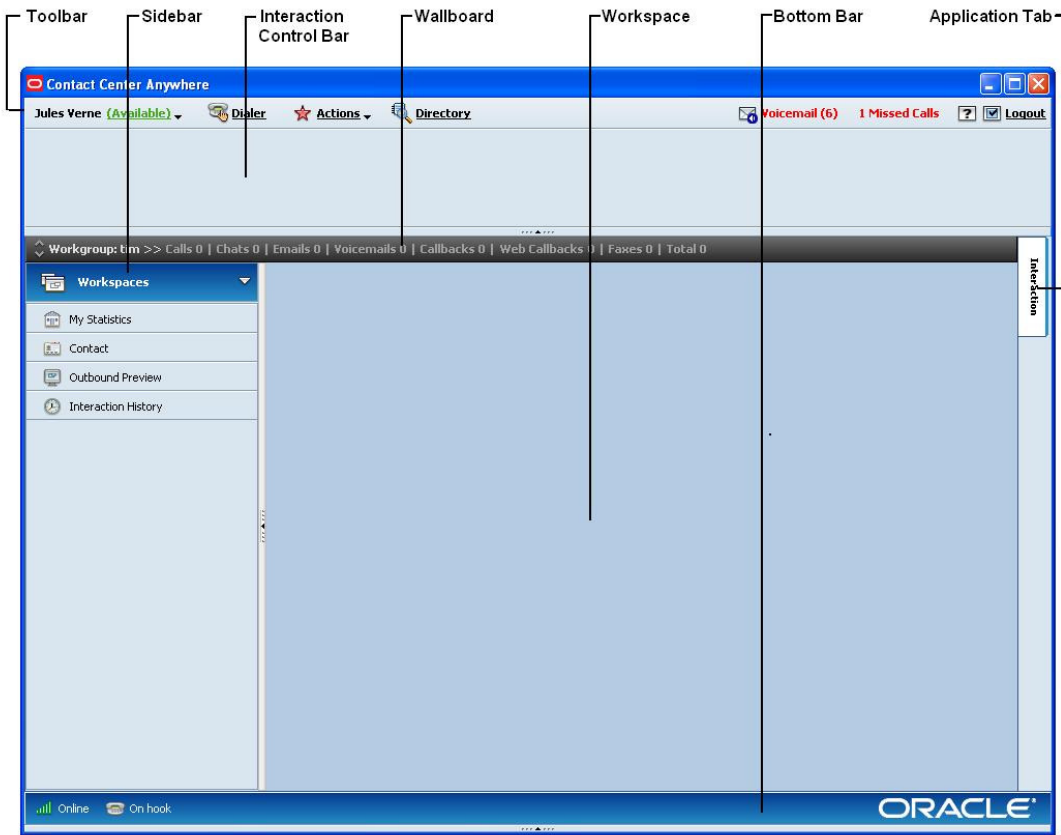


Figure 3 - Integrated Client Interface Main Screen Components

## Toolbar

No matter which page is open, the Toolbar is persistent at the top of the screen, even when the windows are collapsed for minimal real estate. Agents and Supervisors are always able to see icons representing Agent Status, the Dialer Link, popular Actions, Company Directory, Messages, Missed Calls, Help, Configuration Options and Logout. All of these are explained in **Table 4**.

Item	Description
Agent Status Display and Selection	Displays your current status, which you can change by choosing a selection from the drop-down list. The list includes both system and custom statuses, so they may vary. However, you will always see <i>Available</i> , <i>Last Call</i> , and <i>On Break</i> . (Your Administrator may define additional custom statuses, such as <i>At Lunch</i> , <i>In Meeting</i> , <i>In Training</i> , and so forth.
Dialer	Click to open the Dialer, which you can use to dial an interaction of various types (such as <i>Outbound call</i> , <i>Extension call</i> , <i>PBX call</i> , and <i>IP call</i> ). You can also access the Speed Dialer tab, where you can select a predefined number (s) assigned to a stored often used telephone number.
Actions	Click this link to select an action from a drop-down list (such as <i>Connect To Server</i> , <i>Put in the Do Not Call List</i> , <i>Predictive Login</i> , and <i>Report a Bug</i> ). This list is an extensible list of actions that allows Oracle to easily extend the capability of the application.
Directory	Click to open the Company Directory, where you can find information about another user at your company (such as <i>phone numbers</i> , <i>extension number</i> , and <i>addresses</i> ). Also included is their presence information (i.e. <i>Available</i> , <i>ACD Call</i> , etc.)
Voicemails	A red voicemail message appears when you have one or more voicemail messages waiting for you. Click the message to open the Voicemail Inbox, where you can view more information. If you do not have a voice mail message waiting, this indication will not appear on the top bar.
Missed Messages	A red missed calls message appears if someone called you and hung up before you answered. A black indicator shows that you still have uncleared calls in your message box. Click the message to open the Missed Messages box, where you can view more information, and easily dial the caller. If there are no messages, this text does not appear.
Help Icon	Click this link to open online help about the page you see. Help also includes an index and word or phrase search feature.
Configure Icon	Click to open the Configure Menu, where you can set various preferences (such as <i>Incoming interaction mode</i> , your <i>Email Client</i> , <i>Project Billing</i> for phone calls, your <i>telephone number</i> , <i>customized icons</i> , <i>time zone</i> formatting, and <i>date</i> formatting).
Logout	Click this link to logout of CCA.

Table 4 - Toolbar Items and Descriptions



## Sidebar

The Sidebar provides access to independent activities and information, which may include your statistics, contacts, outbound previews, and interaction histories. Independent activities are activities that are not directly related to an interaction in progress.

The Sidebar is another example of the extensible design built into the new Integrated Client Design. The sidebar capabilities are easily extended using .xml file extensions. This extensibility will allow Oracle to provide additional future capabilities.

## Interaction Control Bar

This area lets you access information about an unlimited number of interactions. Normally, you can only view the details of two interactions at one time, depending on your screen size and resolution. All other interactions are available from a dropdown list. Table 5 shows the details you can see, which include real-time information.

The design is self adjusting. Higher resolution monitors allow 3 interactions to be presented.

Interaction Control Bar Items	Description
Interaction Type Icon	Shows the current icon of the interaction type.
Contact information for the active interaction	If a contact (customer) is assigned to an active interaction, you will see the contact's name on visibly displayed on the interaction control. All information previously recorded about the contact is available in the workspace.
Elapsed Time	Shows both the elapsed and wrap-up times for the interaction.
Customer Priority Rating	Shows the customer priority level or the priority level of the project through which the customer call (if the customer does not have an assigned level).

Table 5 - Interaction Control Bar Items and Descriptions

## Wallboard

With Contact Center Anywhere 8.1.0, the banner display has been enhanced over previous versions and is replaced with a wallboard. The Wallboard displays the number of interactions currently in the queue for each of the workgroups to which an agent belongs, and scrolls that information by workgroup in a round-robin fashion every 10 seconds. In addition, broadcast messages are also interspersed with this data in real time. (Figure 4 shows the number of interactions for a specific workgroup and Figure 5 shows an agent broadcast message. The benefits of this approach include:

- Minimal real estate now taken to display dynamic information
- Persistent location for messages makes for less strain on users
- Workgroup scrolling aids cross-over agents in understanding overall service levels

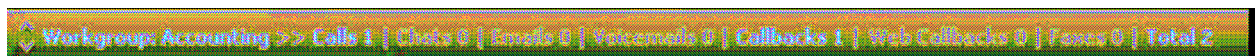


Figure 4 - Example Wallboard Display - Workgroup Interactions

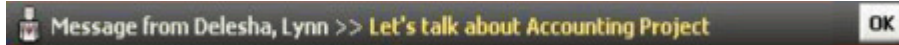


Figure 5 - Example Wallboard Display – Broadcast Message

## Workspace

The Workspace area displays contextually sensitive information relative to specific tasks and specific interactions. For example, when an agent is handling an interaction, the Workspace area is where the contact screens pop up and where searches are performed. The Workspace area now also has a “memory” which remembers the state of each interaction. This allows an agent to switch between interactions easily by maintaining the context of the interaction in the state where it was left by the agent. Workspace memory also applies to independent activities accessed through the sidebar. This allows an agent to easily switch between independent activities and interactions.

## Bottom Bar

With Contact Center Anywhere 8.1.0 both Supervisors and Agents can quickly assess the status of their current sessions with a glance towards the Bottom Bar. Here, the status of the current session is indicated with both words and icons. **Figure 6** shows a few example icons. The Offline icon, not pictured here, means the IM or SM is not connected and that no interactions will therefore be received.

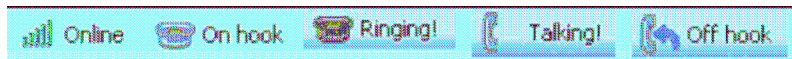


Figure 6 - Example Bottom Bar Icons



## Application Tab

One or more Application tabs appear along the right side of your workspace (**Figure 7**). The tabs that are viewable by the user depends on that user's rights, which are identified after log-in to the application.

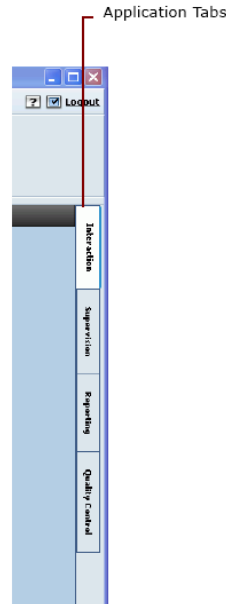


Figure 7 - Application Tab Location

## Adjusting the Workspace Area

With the Interaction Manager, the Workspace area displays most of the information agents will use in managing interactions. For example, when agents accept an interaction (such as a telephone call, chat, or email), the Interaction Manager automatically displays all known customer-contact information for a returning customer. The workspace area additionally displays custom views in the Supervision Manager so supervisors can view real-time statistics and agent activity.

You can easily adjust the size of the workspace area to view all information, without further navigation or scrolling. Do this by clicking one or all of the three arrows (positioned between the areas shown in **Figure 8**). These arrows allow user to collapse the viewable portions of the screen so the persistent elements provide only the essential information when the entire GUI is not needed. This is especially helpful in scenarios where agents and supervisors must have other applications running on the same screen. The benefits of this approach include:

- Minimizes cognitive strain for users by allowing workspace to be customized
- Managers can experiment with best practices for screen layout to improve productivity
- Allows for better co-habitation with other applications, even if they live outside of the interface

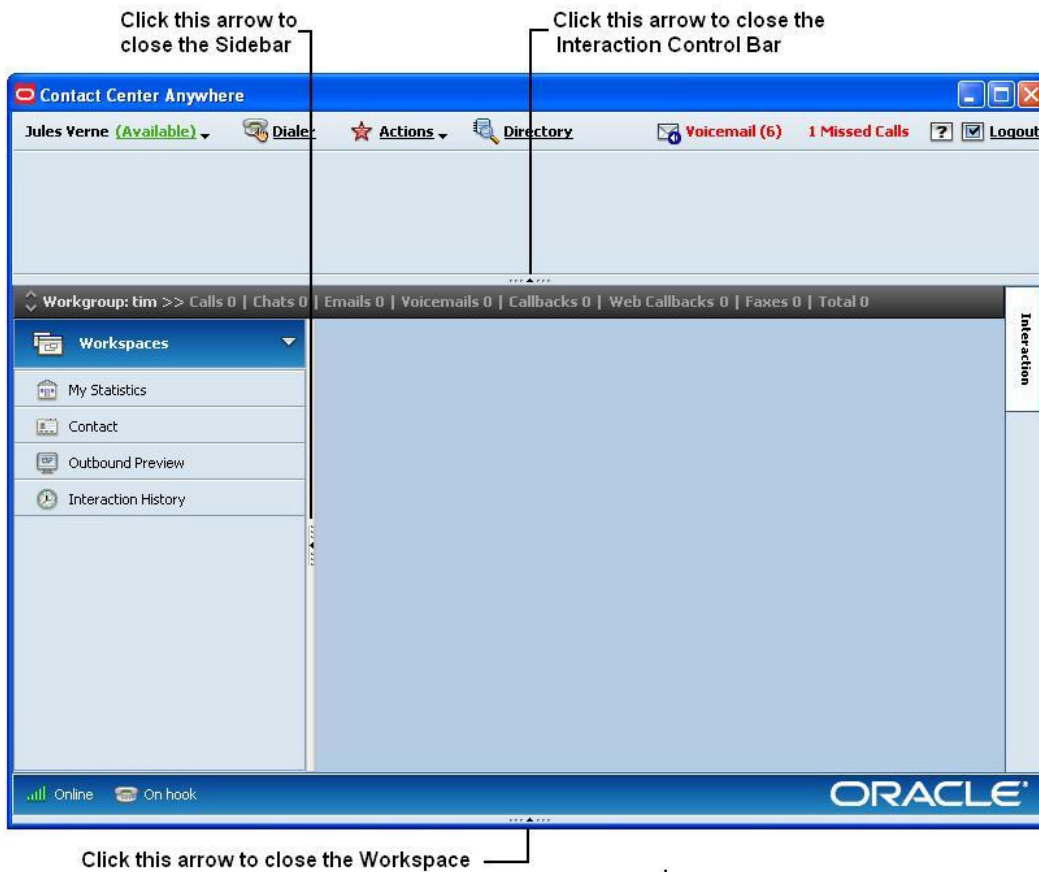


Figure 8A - Click Arrows to Resize the Workspace Area



Figure 8B – Totally collapsed application

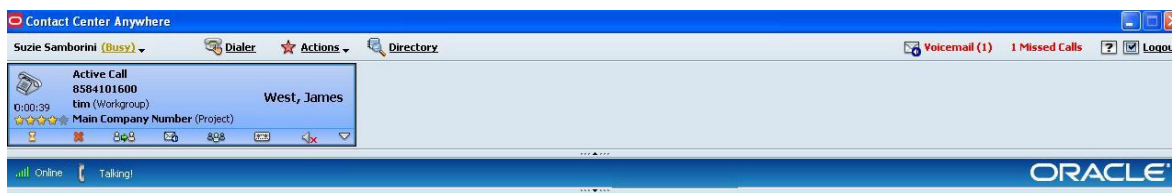


Figure 8C – Partially Collapsed Application – Interaction Control Bar Open

## Interaction Manager Highlights

Interaction Manager is a web-aware call control and contact management tool for contact center agents. With IM, agents can communicate with customers in different ways, including by phone, email, and the web. This section highlights the biggest differences and enhancements of the interface.

### Active and New Interactions

Active interactions have a new look and feel in the Interaction Manager. Interactions appear in the Interaction Control bar and “stack up” side-by-side. This is a significant enhancement because it allows agents to quickly surmise the state of not only a single – but multiple interactions with a quick peek at the Interaction Control Bar. It’s easy to hop back and forth between interactions with a mouse click in this fashion. For example, an agent may be working on an email interaction and make him or herself available for phone calls. Since phone calls are real-time, an agent can accept an incoming call, but still have a persistent reminder that an email interaction is still a work object.

Another example is multiple chat interactions. Since chats are only close-to-real-time, agents can hop back and forth between multiple chats because he or she may push URLs or other data to each “caller” (customer chat user) thus “buying time” for the users to read the agent responses. This practice frees-up the agent to respond to a second, third, etc. chat interaction. (See more on this in the section on **Accepting Multiple Interactions**).

**Figure 9** shows what an Active Call looks like inside the Interaction Control Bar. You can see how it differs from the example in **Figure 10** in that New Interactions (not yet accepted) are **orange** in background color and Active Calls (already accepted) have an overall **blue** color. Both views have a clear display indicating the type of interaction, the person who’s calling, and a time-elapse indicator.

The benefits of this approach include:

- Simple, bold color cues make prioritization easier
- Multiple interaction handling is simplified
- Context of functions carries with each interaction separately, minimizing mistakes



Figure 9 - Active Call in the Interaction Control Bar

The bottom area of an interaction is a set of buttons that can be selected by the user. The functions presented are based on the media and state of the interaction. Only appropriate actions are presented. If there are more than 4 action types for an interaction, the display reverts to an icon only display. The down arrow provides a drop-down menu with the text descriptions for the icons.

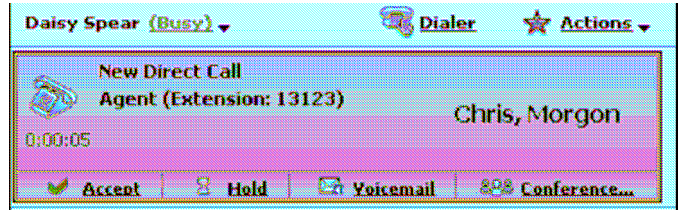


Figure 10 - Example New Interaction in the Interaction Control Bar (Text Display for Actions)

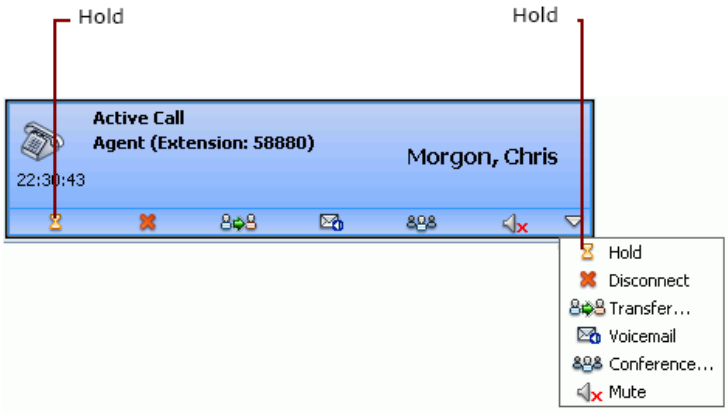


Figure 11 - Example of Icon Only Display and Dropdown

**Icons Now Modifiable**

Icons for Supervisory functions and Company Directory within the Supervision Manager Application tab can be modified to a customizable display. The customization of the icon display is done through the General tab of the Configuration for the Integrated client. The choice is two-fold: Icons only or Icons with text and large or small icons. The default is "Icons with Text".

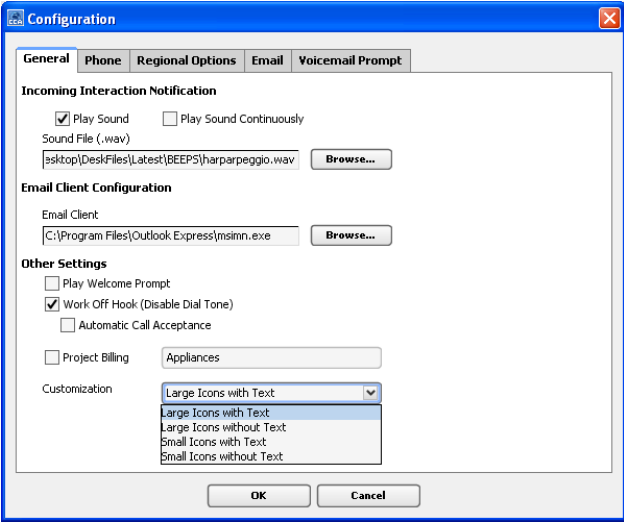


Figure 12 -User Configuration Screen



## Accepting a Chat

Any new Interaction presents itself in orange and offers the “Accept” icon in its lower, left-hand corner. In this example, the basis of the new interaction is a chat. Here, when agents click on the accept icon, a Chat page opens showing the customer’s name, system time, and the “caller’s” text message (see **Figure 12**). With Contact Center Anywhere 8.1.0, the chat window “follows” the interaction, so each chat window carries its own context relative to the active Interaction.

To facilitate ease of use, double clicking on the icon pops the active Chat Dialog. “Chat user is typing” messages are presented when users are typing. Additional improvements were made to assist agents in semi-automatic responses.

The benefits of this approach include:

- Allows Agent to focus on the context of each interaction
- Avoids confusion associated with multiple conversations inside the same window
- Allows segmentation of scripts and URLs to be discrete in each chat window
- Shows Agent when customer is typing

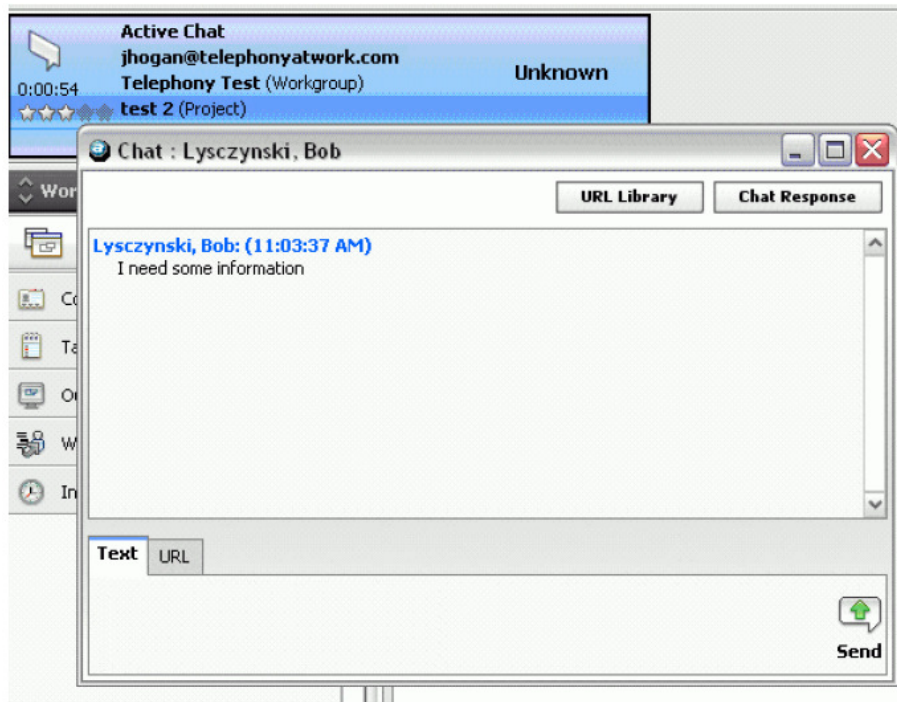


Figure 12 – Configured Chat Template used to pop a Chat Window

## Accepting an Email Interaction

When agents receive email interactions, the object displays in the Interaction Control Bar along with a display of the sender's email address. If a contact record exists that matches the email, the Contact tab opens in the workspace showing all known information about the contact. *Figure 13* shows an example of a new email interaction display and associated email client.

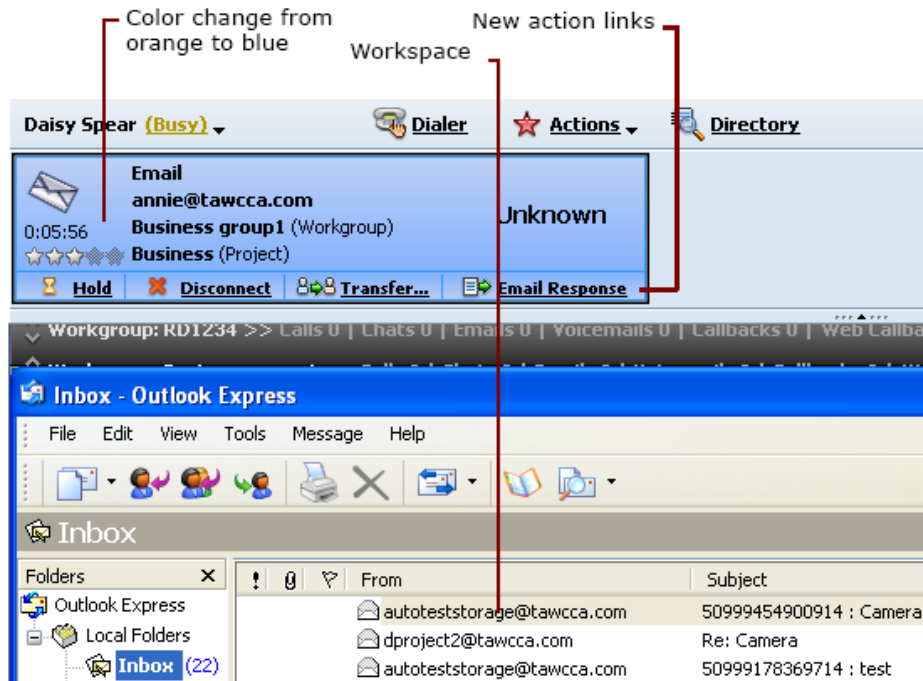


Figure 13 - Email Interaction after Accepting Multiple



## Interactions

As mentioned earlier, multiple Interactions are “stacked-up” side-by-side. When IM offers agents an interaction, it can be accepted and then it can be dealt with by speaking, chatting, etc. with the person the interaction represents. Likewise, you can always put an interaction on Hold after taking it with the Accept action. Agents can make themselves available for additional interactions by selecting “Available” from the Status drop-down list. Now Interaction Manager may present new interactions in the Interaction Control Bar.

The benefits of this approach include:

- Ability to easily manipulate multiple interactions
- Ability to easily “hold” non- real time interactions in favor of real time ones

Simple means to regulate incoming interactions with integrated status linked. Each time agents accept an interaction and change their status to available, IM will continue to present new interactions. After accepting two interactions, IM displays a scroll bar showing the total number of interactions being handled. Agents can click the “down arrow” in the Scroll Bar to open a window from which these other Interactions can be selected (see **Figure 14**).

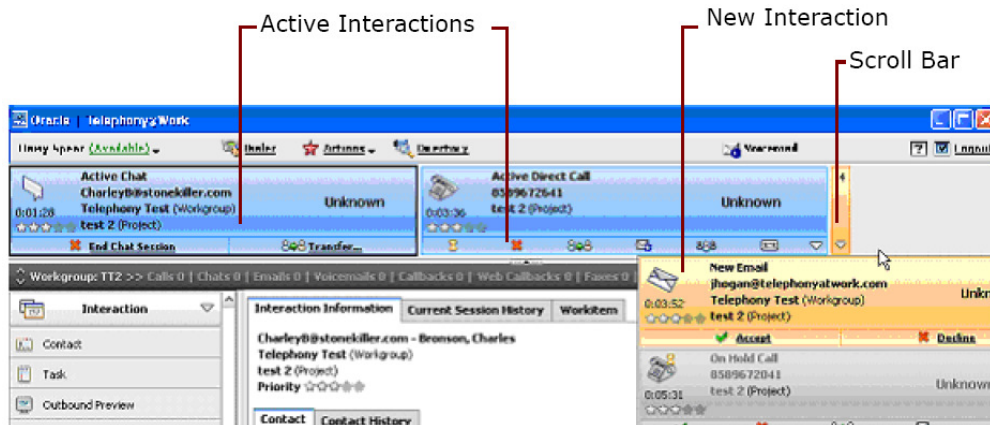


Figure 14 – Managing Multiple Interactions

## Making Calls with the New Dialer

With Contact Center Anywhere 8.1.0 both the Interaction Manager and the Supervision Manager share many attributes and features. Such is the case with the new Dialer. As with previous versions, users can make Outbound Calls, Extension Calls, IP Calls, PBX Calls and perform Speed Dial functions with the dialer. **Figure 15** shows how to access the dialer from the Dialer link in the Toolbar.

The new Dialer is compact and only presents itself when called upon. This is an improvement over previous versions of the interface, where the dialer was persistent.

The benefits to this approach include:

- Commonality of dialer across interfaces
- On-demand invocation requires less real estate than previous versions
- An uncluttered workspace makes for better agent and supervisor productivity
- Simplifies interface if no dialer is needed for specialty (cyber-only) agents



Figure 15 – Dialer Link on Toolbar

When the Dialer is launched for the first time, the default option is Outbound Call in the drop-down box positioned in the upper left-hand corner of the Dialer window (see **Figure 16**). Subsequent dials will use the last number dialed as the default. Directly underneath the “type of call” drop-down is “globe” icon signifying the country list. The Country you are calling is shown in the drop-down list and its telephone access code is pre-entered, so it’s not necessary to manually type a country code. The soft phone keypad allows for manual entries of phone numbers. Alternately, agents can use the Speed Dial tab. The new Interaction Manager remembers the numbers you dial during your current session, so users simply click the “down arrow” to access previous numbers. The system may be configured to force the assignment of a billing code for each call. If this is configured, the IM will present the Billing Project window where the agent will select a billing project from the Name list. After calls connect, the IM automatically changes the agent’s status to busy.

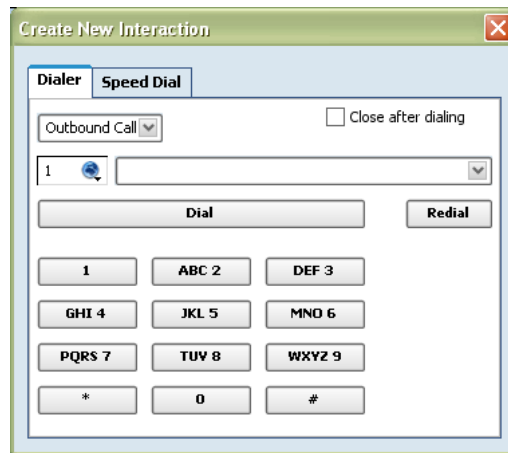


Figure 16A - New Dialer Interface



Alternately, agents can make outbound calls utilizing the Speed Dial tab, if configured for the agent. Speed numbers are defined with Administration Manager under the Dial List library. If speed numbers are not configured for the partition/system, this tab will not appear for the IM/SM dialer.

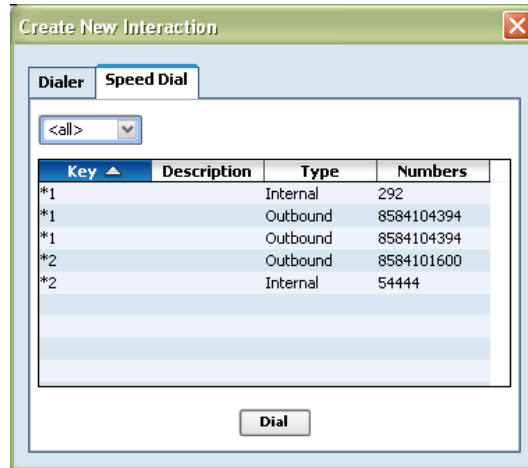


Figure 16B – Speed Dial Tab

## Hotkeys and Keyboarding

With the new Interaction Manager, you can use to perform various functions by using hotkeys. Over 50 hotkey functions are mapped to IM buttons so you can use key combinations instead of mouse clicks. For example, to load the interaction history, press the CTRL key at the same time you press K on your computer's keyboard. The effect is the same as using the mouse to click on the Interaction History Tab. Power users can use keyboarding shortcuts to quickly enter data into data entry tabs such as Contacts.

The benefits of this approach include:

- Easy migration path for agents not at ease with mouse operation
- Alternative keyboard approach for highly efficient agents (faster operation)

## Hot Key Table

Main function	Hot key
Logout	ALT + L
Help	F1
Configure	ALT + J
Connect To Server	CTRL + S
Hang up	CTRL + S
Company Directory	CTRL + T
Auto Redial	CTRL + J
Put in Do Not Call List	CTRL + U
Accept Interaction	ALT + N
Hold	ALT + O
Activate a hold interaction	ALT + O
Disconnect (also does discard, chat disconnect and end wrapup)	ALT + Z
End Wrapup	ALT + Z
Conference	ALT + C
Transfer to	ALT + W
Voicemail	ALT + M
Enter Conference	ALT + P
Exit Conference	ALT + P
Mute	ALT + U
UnMute	ALT + U
Start Rec	ALT + R
Stop Rec	ALT + R
Available	ALT + B
Last Call	ALT + Y
Missed Calls	ALT + I
Change Status	ALT + G
Transfer	ALT + W
Chat Response	ALT + X
Clear Display	ALT + M
URL Library	ALT + U
Personal Voicemail Popup	ALT + K

### Windows Shortcut (common shortcuts available)

Closes Current popup or open program	ALT + F4
Switch backwards between open applications.	ALT + Shift + Tab
Switch between open applications.	ALT + Tab
Move focus or selection in a group of controls or items.	Arrow keys
Move between tabs when focusing on the control.	Arrow keys
Select all text.	CTRL + A
Copy selected item.	CTRL + C
Paste	CTRL + V
Cut selected item.	CTRL + X
Delete selected items	DELETE
Carry out the default command of the dialog box or ENTER command of the selected control.	
Cancel the current task.	ESC

Help F1

Refresh the active window or reload document in the active window. F5

Integrated Client Help - Help is appropriate to the Application Tab / State active. F1

### Dropdown List

Expand and Contract	SPACEBAR
Expand and Navigate Down, 1 entry at a time	DOWN ARROW
Navigate UP 1 entry at a time	UP ARROW
First Selection	PAGE UP
Last Selection	PAGE DOWN
SELECT entry selected	ENTER

### List/Grid

Navigate Down, 1 entry at a time	DOWN ARROW
Navigate UP 1 entry at a time	UP ARROW
First Selection	PAGE UP
Last Selection	PAGE DOWN

### Text Field

Select All Text in field	CTRL + A
Navigate before 1 <sup>st</sup> character	HOME
Navigate after last character	END
Delete selection	BACKSPACE, SPACEAR, DELETE, CTRL + H
Navigate Text	LEFT ARROW, RIGHT ARROW
Select Text from beginning to cursor	SHIFT + HOME
Select Text from cursor to End of Line	SHIFT + END

### Interaction / Workspace Controls

Interaction Information tab	CTRL + SHIFT + I
Current Session History tab	CTRL + SHIFT + H
FAQ tab	CTRL + SHIFT + F
Custom tab	CTRL + SHIFT + C

### SideBar Options

My Statistics	ALT + SHIFT + M
Contact side bar	ALT + SHIFT + C
Preview side bar	ALT + SHIFT + P
Interaction History side bar	ALT + SHIFT + H

### Application Tabs

Interaction	ALT + SHIFT + I
Supervisor	ALT + SHIFT + S
Quality Control	ALT + SHIFT + Q
Reports	ALT + SHIFT + R

### Chat Dialog

Clear Display	ALT + M
Chat Response	ALT + X
URL Library	ALT + U
End Chat Session	ALT + Z
Push To Client	ENTER
Send Text To Chat Client	ENTER



## Reporting

In 8.1.0, most reports have been partitioned with a few exceptions. This affected the Supervisor, Administration Manager, and Scheduled Reports.

**Advanced Reports** are partitioned. When the Admin creates reports, defined reports and their associated dropdowns are partitioned. The results presented in the reports are partitioned. This is also true for the *All* options that can be configured and scheduled reporting.

For the Supervisor, who can be granted permission to view a report, the same is true. The reports available to them are based on their login partition. The *All Supervisors* will be presented with all reports for all partitions assigned to them. The results presented in the reports are partitioned.

**Standard Reports** are partially partitioned. Dropdowns are based on the user's login partition. The *All* option, when working in the Partition Configuration only, may show cross partition information. The workaround is to configure reports by specifying the specific workgroups and projects. When configuring user reports, you must configure specific workgroups and projects for reporting. This affects manual and scheduled reporting.

## Email Partitioning

In 7.2, Administration Manager > Agents > Email, the SMTP Group was only displayed when the SMTP group selected existed under that Partition. Email definition was largely common type objects and partitioned incorrectly. With v8.1.0, Email objects (SMTP Servers, SMTP Groups, POP3 Servers) were made common. Access can be controlled via Administration Restrictions. The SMTP Group is now available to the Administrator when configuring Agents (Agent | Email) in any partition.

## Predictive & Preview Dialing

With Contact Center Anywhere 8.1.0, Predictive Dialing activities are smoother and easier to use for agents with the new Interaction Manager. In addition, significant improvements are incorporated into the Supervision Manager interface. With Predictive calling, the system automatically calls customers and associates live answers with available agents. If a customer answers the phone, the system routes the customer to an available agent. This improves agent utilization rates by focusing agents on interactions and wrap-up activities rather than filtering non-productive unanswered calls, answering machines and non-working telephone numbers.

In Preview Dialing, as with Predictive dialing, customers are called based on a pre-defined list of phone numbers. The difference between Preview and Predictive Calling is the way that the number is dialed. In Preview Calling, the agent tells the system to dial a customer number, and then waits for the customer to answer – so no calls are made automatically. In this sense, the agents **preview** the customer contact, script, etc. and prepares his or herself for the call before activating the dial function.

With the new Interaction Manager interface, Predictive Calling is easy to login into and work with. First, the Actions link provides quick access to login and “Do not call list” activation. The Predictive workspace is also easy to select from in the left-hand persistent pane (Side Bar). **Figure 19** shows the drop-down list available inside of the Actions Link for Predictive functions.

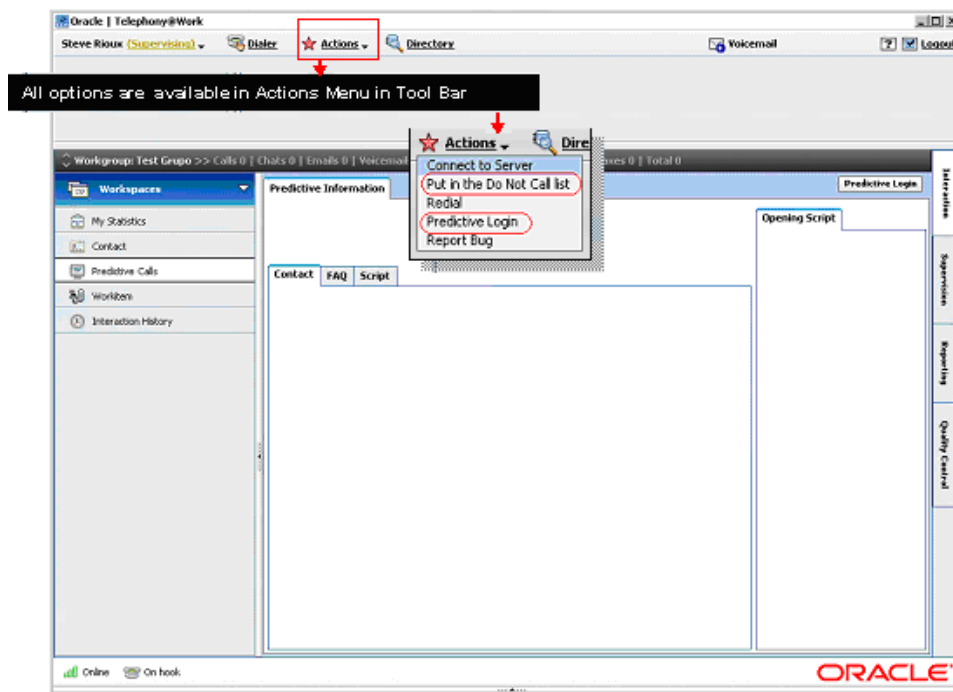


Figure 19 – Actions Link Drop Down List Example

The Predictive workspace also offers significant improvement over the previous version of the Interaction Manager. With Contact Center Anywhere 8.1.0, the new Interaction Manager consolidates all anticipated predictive activities into an easy-to-read and easy-to-navigate workspace. For example, the opening script is situated in a larger window than before. This makes it easier to begin the call before switching over to the more verbose script in the native script tab. In addition, the making notes function is embedded in the workspace, so they are all contextually linked to the contact (See **Figure 20**). The same applies to preview calls.

The benefits of this approach include:

- Smoother transitions from opening script to main dialogue
- Context-sensitive hyperlinks make note-taking
- Consolidation of all associated functions reduces agent fatigue
- Predictive Display Template that allows multiple contact numbers to be called

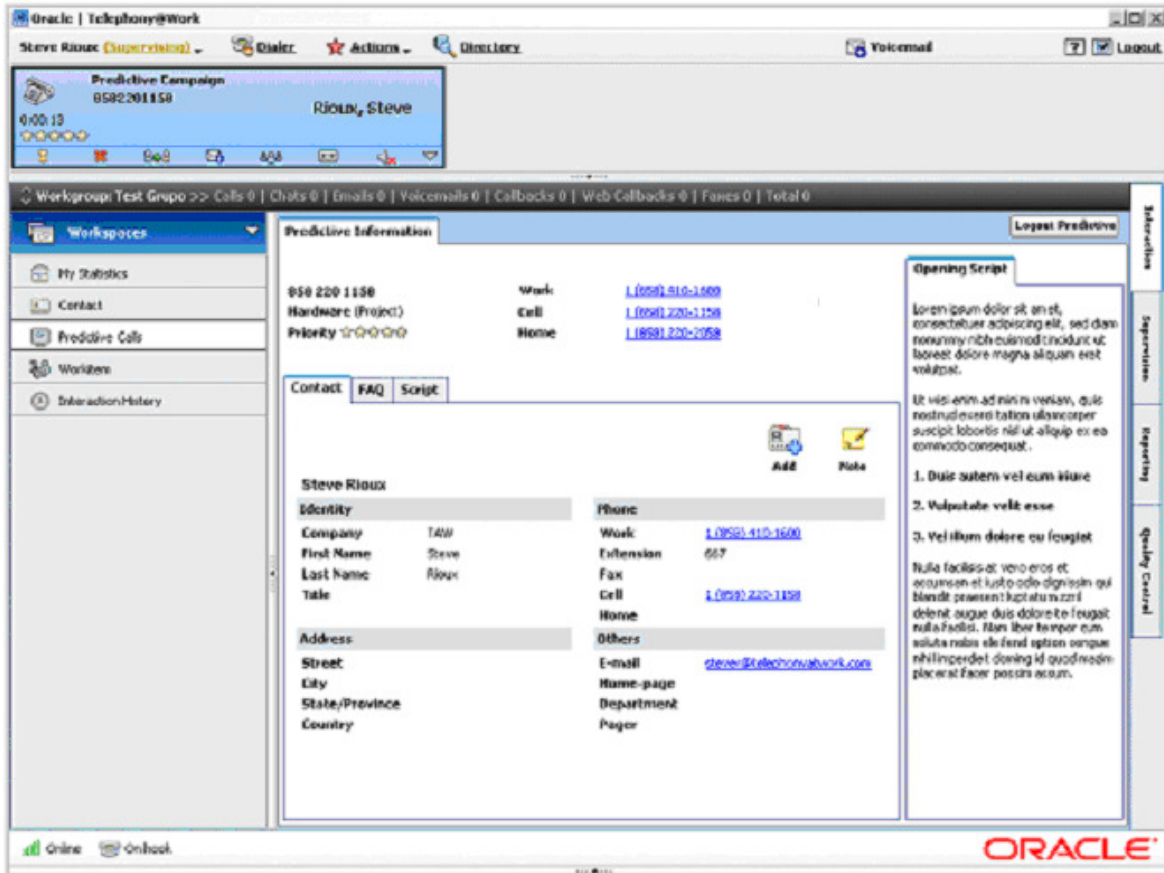


Figure 20 – Interaction Manager Workspace for Predictive Calling



## Predictive & Preview Operations

Predictive & Preview Projects are easier to work with in Contact Center Anywhere 8.1.0 because more duties and capabilities are now incorporated into the integrated client for Supervisors. Agents also have a more consolidated, easy-to-use interface. For administration and management, duties are split between the Administrator and the Supervisors for the definition and execution of predictive projects.

In the new Supervision Manager interface, the incorporation of a new Outbound Control application tab sets the stage for the addition of other supervisory and administrative functions into the client. The overall look and feel and ease of operation has been greatly improved with the new interface. There are three basic concepts that make up the management of Predictive dialing in Contact Center Anywhere 8.1.0:

- Administrator Responsibilities
- Supervisor Responsibilities
- List Activation and Monitoring Campaigns

### Administrator Responsibilities

Before Supervisors are able to manage predictive calls for their workgroups, the administrator must first:

- Create and configure a predictive project
- Upload at least one “Contact List” into the predictive project
- Start the predictive project in Administration Manager
- Give selected Supervisors access rights to predictive projects

### Supervisor Responsibilities

Once the prerequisite steps are taken care of by the administrator, the “day-to-day” activities of list activation and monitoring are the responsibility of the Supervisor. With Contact Center Anywhere 8.1.0, Supervisors have significant control over Predictive Project activation and monitoring.

Once the Administrator gives a Supervisor access to one or more predictive projects, Supervisors can start and stop the dialing for any dialer list in any predictive project. At least one agent must be logged into their Interaction Manager and logged into Predictive Dialing for a list to be activated.

### List Activation and Monitoring Predictive Projects

With Contact Center Anywhere 8.1.0, the predictive list activation feature is part of the Integrated Client. A new application tab called “Outbound Control” now presents the predictive projects and uploaded lists assigned to Supervisors by an Administrator. A check box is positioned next to each list for easy activation of that contact list.

Only the Predictive projects within the Supervisor’s permission will be displayed and available to activate or de-activate. If the Predictive/Preview features are not enabled, this application tab will not be visible to the user. Under each project, the uploaded contact lists are displayed. The user can expand or collapse the uploaded lists under each project heading. Lists that are *Active* will be in normal text and lists that are *Inactive*, the data will be indicated in faded text.

The benefits to this approach include:

- Application activation/deactivation minimizes screen clutter
- Single Screen overviews make drill-down into details easy
- Focus on active campaigns is simplified

Project/List	Description	Total Contacts	Pending	Completed	Percentage Completed
<b>Donations Campaign</b>					
<input checked="" type="checkbox"/> Undeclared		25	0	25	100%
<input checked="" type="checkbox"/> Democrats		25	0	25	100%
<input checked="" type="checkbox"/> Republicans		25	12	13	52%
<b>New Voter Opportunities</b>					
<input checked="" type="checkbox"/> Hispanic		25	25	0	0%
<input checked="" type="checkbox"/> New Voters		25	25	0	0%
<input type="checkbox"/> Independent		25	25	0	0%
<b>November Special Election</b>					
		0	0	0	0%
<b>Main Company Number</b>					
		0	0	0	0%
<b>Voter Issue Surveys</b>					
		0	0	0	0%

Figure 31 – Outbound Control Tab Example

■

**Table 6** shows the description of the data elements in each of the fields highlighted in Figure 31.

Field	Description
Project/List	Short name of the Predictive Project and associated call lists assigned to the list. A check box precedes this item for list activation.
Description	Represents the description of the project as defined in the Admin.
Agent Logins	Agents logged into the predictive project through the Action menu in the IM. Agents are associated to one or multiple projects only. There will be no entry for each list associated with the project. Note: On the Summary fields at the bottom of the page, the number of Agents Logged in has been removed from the summary line as agents can be assigned to multiple projects. The predictive agent logins are noted by project which is the same data that was presented with version 7.
Contacts In List	This represents the total number of contacts in the list, regardless of disposition.
Pending	This notes the number of contacts that are yet to be dialed and are the inventory for the list.
Completed	This is the number of contacts in the list/project that have been dialed and logged as final - not be called again
Percentage Graph	This graph displays the percentage of contacts completed for the list.

*Table 6 – Real Time Display: Outbound Control Tab Fields*

# Predictive Statistics View Types

With Contact Center Anywhere 8.1.0 Supervision Manager, the menu of Views representing Dialer Actions, Results, Outcomes and Statistics are consolidated within a single placeholder called “Predictive Project Statistics.” The workspace will now provide details of those views. (See **Figure 32**).

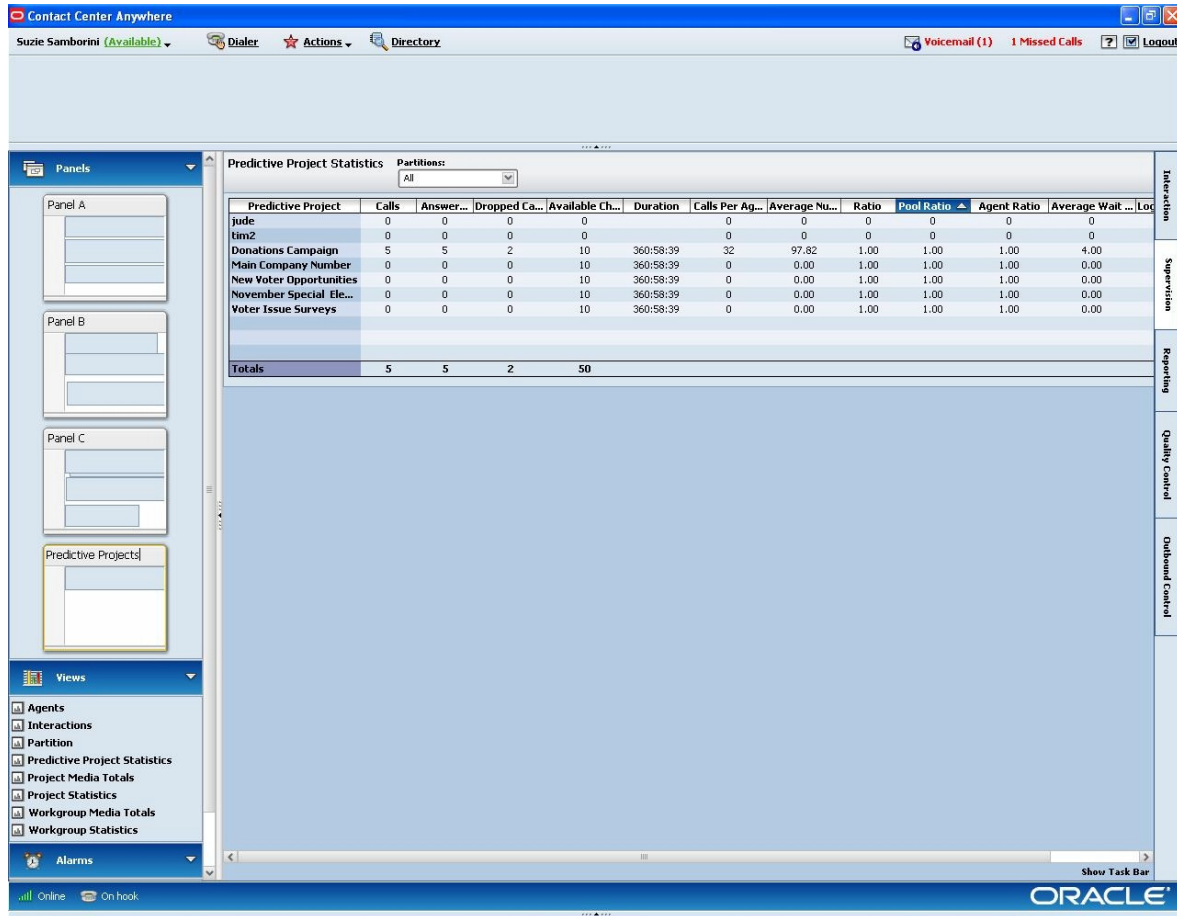


Figure 32 – Predictive Statistics Menu Selection now Collapsed



## Creation of Custom Predictive Views

With Contact Center Anywhere 8.1.0, the new Supervision Manager has great flexibility in the ability to view statistics. Much like the customizable views for Alarms, Interactions, and Agent activity, Supervisors are able to choose which data elements to display in their Predictive status screens. Users upgrading from the older 7.x Supervision Manager will be able to duplicate the statistical views provided with the older GUI. All data elements for the statistical sets of dialer results, dialer actions and predictive Statistics will be presented in a single view.

The benefits to this approach include:

- Backward compatibility to the previous Supervision Manager interface for data elements
- Supervisors can save time by generating views with only relevant data
- Broader granularity of data elements allows Supervisors to drill down into details

## Agent and Interaction Activity

Supervisors are able to create custom views of real-time activity for all agents. For example, you can see the number of interactions your agents are handling and the number of interactions that are backing up in queues.

There are 48 separate real-time statistics to choose from and combine when building a view for Agent activity. These include, for example, the percent of time when the agent's status was Available, Busy, or on Break and other metrics such as *Average Handle Time*, and *Talk Time* for each media type. You can even select data relating to availability and the *Average Ring Time* before answer for each agent. There is even a placeholder for when agents ask for assistance, so as a Supervisor, you can scan the screen quickly to see how many of your agents need help. There are many others, all of which are available from a pick list in the View configuration tool.

The benefits of this approach include:

- The ability for Supervisors to create custom views based on agent “trouble spots”
- Ability for Supervisors to drill-down and create views on high-priority agent conditions
- Ability for Supervisors to create custom views consistent with contact center KPIs

**Figure 25** is a sample view of Agent Activity. Note that all Agent Activity views also sport the familiar functions for performing classic Contact Center Anywhere supervisory functions (Listen, Coach, Join, Record, etc.).

User ▲	Extension	Interactions Total	Login Duration	Status Selected	Status Selected Dura
Morgon, Chris	58880	2	5:15:22	Available	1:23:28
Sieran, Renee	58881	2	2:28:38	Available	0:03:56
<b>Totals</b>		<b>4</b>			

Figure 25 – View of Agent Activity

In addition, there are 11 separate real-time statistics to choose from and combine when building a view for Interaction activity. These include Agent, ANI, DNIS, Extension Number, Location Duration, Media Type, Overflowed, Priority, Project, System Duration and Workgroup.



## Partition-based Activity

The capability to Partition a company is provided with Contact Center Anywhere 8.1.0. A partition allows the segregation of real time/historical statistics and call routing instructions, while allowing the resources of the company to be fully utilized across partitions.

If the system is configured for Partitions, Supervisors can see Partition-based activity such as utilization rates within a customer-distinct area or partition. If partitions are enabled, you can also see a Partition Statistics view of how interactions flow from the time that they enter the application to the time Contact Center Anywhere routes them to an IVR or workgroup. You can also see the number of internal interaction activities and the overall utilization rate within the customer-distinct areas or partitions. This is especially useful for Outsourcers who service many clients at the same time. These views, like all of the others, are customizable.

The benefits of this approach include:

- Partition-based views allow discrete service levels for each customer (or Partition) to be monitored
- Views inside of Partitions can be based on the business directives for each discrete customer
- Enterprises with multiple lines of business can use partitions to focus on LOB-based directives

There are 9 separate real-time statistics to choose from and combine when building a view for Partition-based activity. These include: Abandon First Segment, Answer First Segment, Inbound Total, Internal, IVR Completed, IVR Transfer Out, Outbound Total, Total Interactions, and Utilization Rate.

## Miscellaneous Usability Improvements

A number of other miscellaneous enhancements have been included as part of the introduction of the new integrated clients. These include:

### Grid Enhancements

All lists presented in the Agent and Supervisor Tabs are built using the same grid technologies. This has the benefit of providing the following features wherever lists are presented.

- Consistent sorting of any column by clicking any column
- Multi-column sorting
- Column order customization (move the columns around to meet your needs) via drag and drop

### Find Capabilities - Company Directory & Transfer Window

Powerful new *Find* capabilities for the company directory and transfer windows have been added to locate the person you want to call. The Find Filter provides automatic filtering across all 5 columns on the directory listing. Multi-string entries allow quick multi-criteria filtering. For example, if you were looking for an agent named Sally in the Customer Service Department, the filter search 'Sa Cu' would return all entries where 'Sa' and 'Cu' were contained within any of the fields.

# Enhancements

## Company Feature Package

A number of changes have been made to simplify the installation and configuration of Contact Center Anywhere. Previously, the application key and license dongle controlled significant feature availability in a configuration. The Option tab of the Company Options defined the features available for a company. With v8.1.0, the Key Generator, Applications Key, License Dongle, and Admin | Company | Options tab have been removed and replaced with the Feature Package capability. Instead of defining individual features per company, the service provider or end user administrator assigns a Package to a company containing the feature set to be available for that company.

First, the Administrator creates a Package with the Package Creator tool available through the Netadmin menu. Similar to the previous Options tab for the Company, the features are assigned to the package with a point and click client interface. Packages can be associated easily with any Company, thereby, defining the feature complement available for that company. In 8.1.1, additional capabilities are forthcoming that will simplify company installations with a Company Creation Wizard and display only features that are configured for the Company Package within the user applications.

Upgrades and new systems are automatically set to a system provided template (shown below). Note: Partitions must be manually enabled after an upgrade. The Netadmin can review and adjust the features configured in the package as needed. Detailed information on the Package Creator and the options supported is available in the Administration Manager User's Guide. Some Sample Screenshots are provided in the next 3 figures.



Figure – Accessing the Package Creator from the netadmin

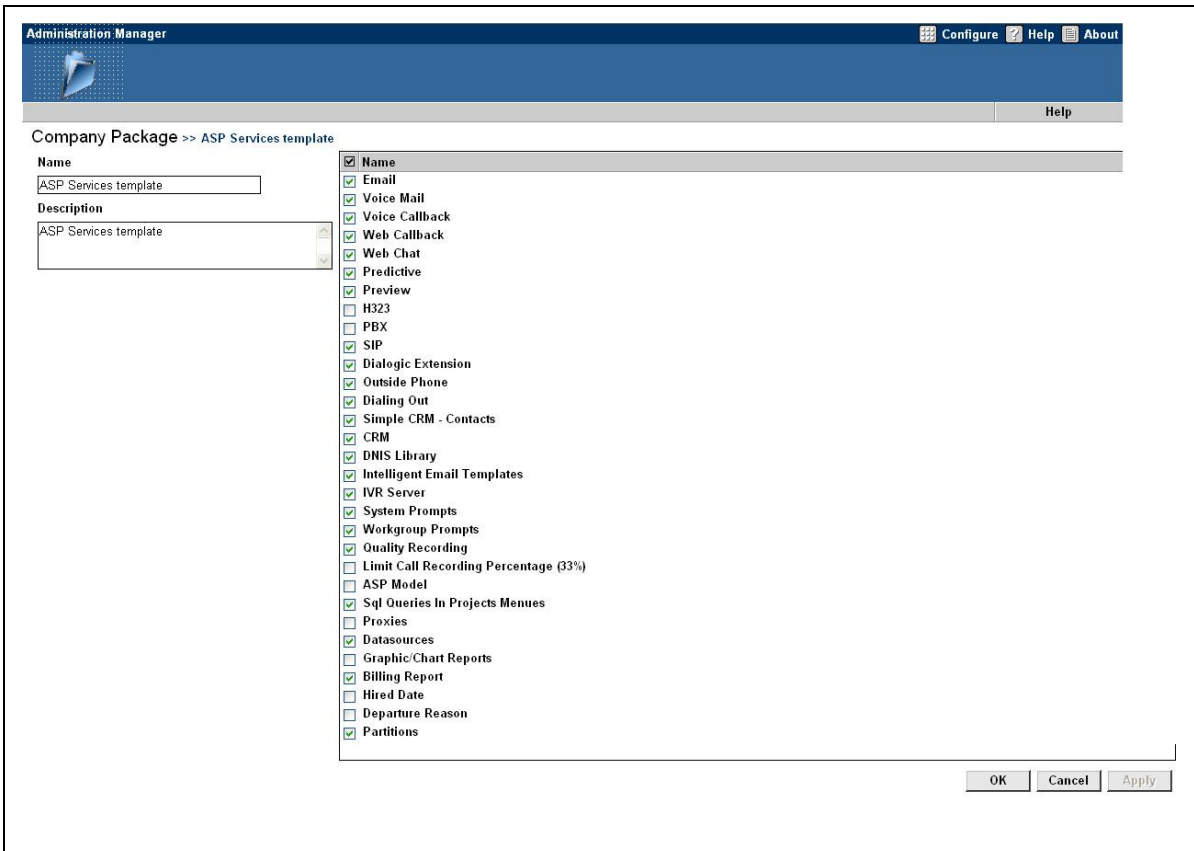


Figure – Selecting Template Options

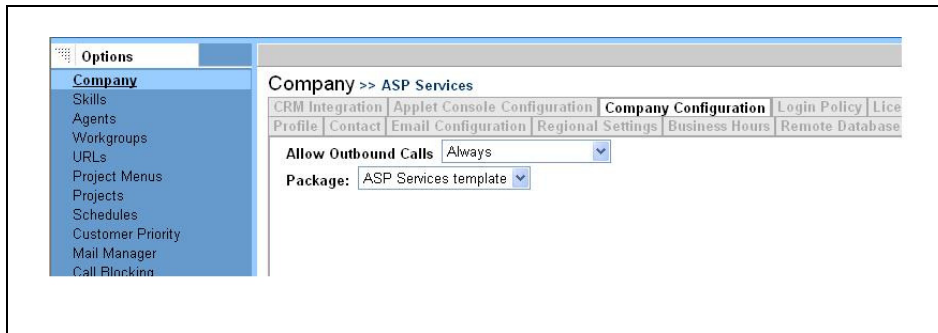


Figure – Assigning a template to a Company

## Agent Recordings

The new Interaction Manager gives agents and supervisors the ability to listen to their own recordings through the Interaction History Button available through the Sidebar. The browser-based Interaction Manager was not modified. In 8.1.0, the Search function is not functional for Agents.

The screenshot displays the Oracle Contact Center Anywhere interface. The top navigation bar includes 'Suzie Samborini (No Answer)', 'Dialer', 'Actions', and 'Directory'. The main workspace shows 'Workgroup: tim' with various call metrics. The left sidebar contains 'Workspaces', 'My Statistics', 'Contact', 'Outbound Preview', and 'Interaction History'. The central area features an 'Interaction History' table with columns for Interaction Id, Originator, Interaction Type, Destination, and Date / Time. Below the table, a 'History' section provides a detailed log of events for a selected interaction, including routing, agent assignment, and recording status.

Interaction Id	Originator	Interaction Type	Destination	Date / Time
2001232402350	8594101600	Workgroup Call	4101025	03/20/2007 11:32:54 AM
2001232402351	8594101600	Workgroup Call	4101025	03/20/2007 11:34:16 AM
2001232402352	8594101600	Workgroup Call	8594101025	03/20/2007 11:35:20 AM
2001232402353	8594101600	Workgroup Call	4101025	03/20/2007 11:36:25 AM
2001232402354	8594101600	Workgroup Call	4101025	03/20/2007 11:37:45 AM
2001232402355	8594101600	Workgroup Call	8594101025	03/20/2007 11:38:08 AM
2001232402356	8594101600	Workgroup Call	4101025	03/20/2007 11:39:47 AM
2001232402357	8594101600	Workgroup Call	8594101025	03/20/2007 11:40:20 AM
2001232402358	8594101600	Workgroup Call	4101025	03/20/2007 11:42:57 AM
2001232402359	8594101600	Workgroup Call	4101025	03/20/2007 11:48:40 AM

10 Record(s) Found

**History**

FROM: 8594101600  
 TO: 4101025  
 INTERACTION ID: 2001232402359

TIME OF INTERACTION: 03/20/2007 11:48:40 AM  
 DURATION OF INTERACTION: 0:16:09

03/20/2007 11:48:40 AM -- Interaction routed to project **main-tim** Priority ★★★★★  
 03/20/2007 11:48:50 AM -- Interaction entered workgroup **tim** Priority ★★★★★  
 03/20/2007 11:48:50 AM -- Interaction offered to agent **Jules Verne**  
 03/20/2007 11:48:50 AM -- Interaction exited workgroup **tim** time in queue duration **0:00:00**  
 03/20/2007 11:48:50 AM -- Interaction answered for workgroup **tim**  
 03/20/2007 11:48:50 AM -- Interaction accepted by agent **Jules Verne**  
 03/20/2007 11:48:50 AM -- Ring Time duration **0:00:00**  
 03/20/2007 11:49:03 AM -- Interaction assigned to **Tim Cobb**  
 03/20/2007 11:49:33 AM -- History recording started  
 03/20/2007 11:49:41 AM -- History recording stopped  
 03/20/2007 12:04:49 PM -- Agent started wrap up  
 03/20/2007 12:04:49 PM -- Interaction removed, talk time duration **0:15:59**  
 03/20/2007 12:04:49 PM -- Interaction terminated, reason: **Unknown** interaction duration **0:16:09**  
 03/20/2007 12:08:04 PM -- Outcome assigned to interaction **Donation Pledged** by agent **Jules Verne**  
 03/20/2007 12:08:04 PM -- Agent stopped wrap up duration **0:03:15**

Print Copy to Clipboard

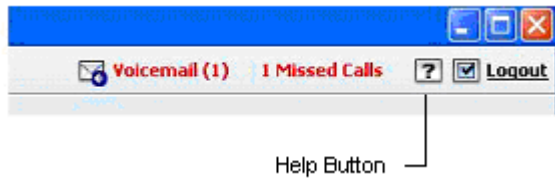
## Upgraded Help and User Manuals Available for 8.1

A significant effort for 8.1.0 has been the redesign and upgrade of the Help associated with the user applications. The Help has been redesigned to be more user friendly and easier to navigate. This includes the following areas:

- New Interaction Manager
- New Supervision Manager
- Administration Manager
- Project Menus and IVR Campaigns
- Reporting

User Guides are derived from the Help which are also available through the Support web site.

## Integrated Client Help – Context Based F1



With 8.1.0, Help is now available for the new clients, Agent and Supervisor. Using the Help button (shown above) at the top of the application while in an application tab will present the full Help document for that functional area (macro view). F1 is available to launch Help for the new clients. Pressing F1 while in a component within an Application Tab will present context-based Help specific to the area or component. A sample of the Supervisor Help is shown below.

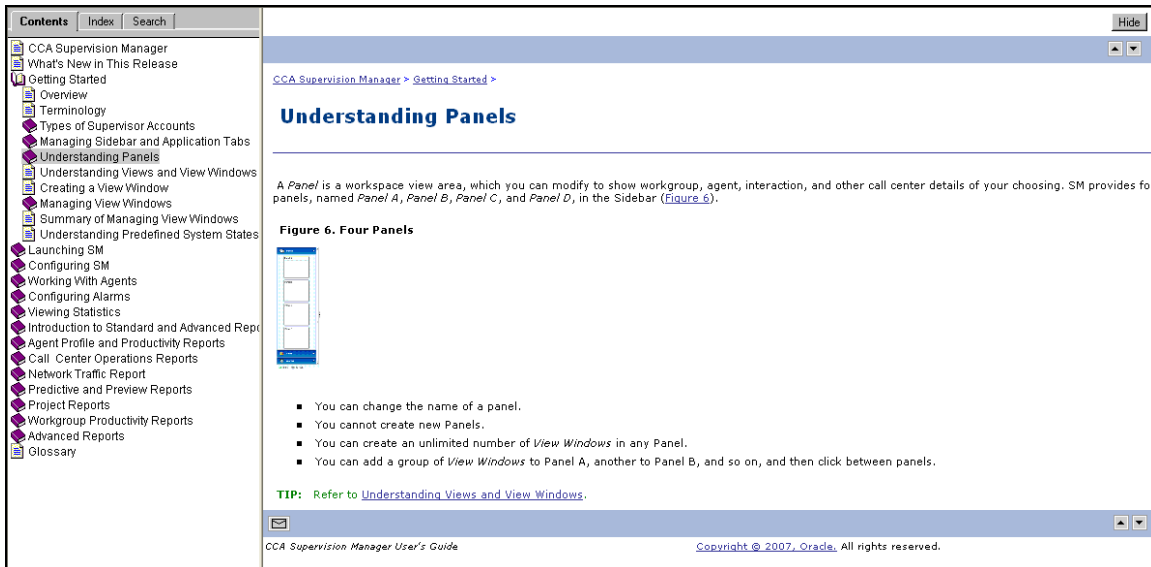


Figure – Sample Supervisor Help

# Contact Center Anywhere 8.1.0

## Discontinued Items

Some items are discontinued under Contact Center Anywhere 8.1.0. They are:

- The legacy Supervision Manager client supported in 5.x, 6.x, and 7.x versions.
- Separate Product Editions are discontinued; replaced with configurable options
- Support for Compaq Tru 64 for Alpha Server is discontinued
- Wallboard Table is removed.
- Open Source Software not provided
- Resource Bundle/GUI text changes for new Integrated Clients not available

**Browser-based Supervision Manager Discontinued** - The new Supervision Manager is based on Contact Center Anywhere's new Web Services Interpretive Layer. The browser-based Supervision Manager interface is no longer compatible and is being discontinued.

**Separate Editions Discontinued** - Contact Center Anywhere 8.1.0 combines previous editions (Service Provider, Outsourcer, Enterprise) into one, consolidated release. Predictive Dialing is now included in all systems. All features can be enabled easily via simple point-and-click checkbox configuration settings. Contact your Sales Representative for information on licensing.

**Compaq Tru-64 for Alpha Server** - Compaq Tru-64 for Alpha Server will not be supported in Contact Center Anywhere 8.1.0.

**Wallboard Table** - The wallboard table within the database has been removed in Contact Center Anywhere 8.1. This function is now performed by the CCA Statistical Connector.

**Open Source Software** – Open source 3<sup>rd</sup> party software will no longer be provided with the release. This includes VNC Remote Monitoring and Lame MP3 converter.

**Resource Bundle Changes** - The new clients (new Interaction Manager, new Supervision Manager) do not support GUI text changes through the Netadmin Menu *Resource Bundle* feature.

# Behavior Changes

## URL/Login Changes

To launch the older clients, the user was required the user to launch the URL (i.e. <http://hostname/TAW>) and select the application (Interaction Manager, Supervision Manager, or Administration Manager). With 8.1.0, the Supervision Manager icon is removed. The Interaction Manager icon for this login will launch the Browser-based IM application.



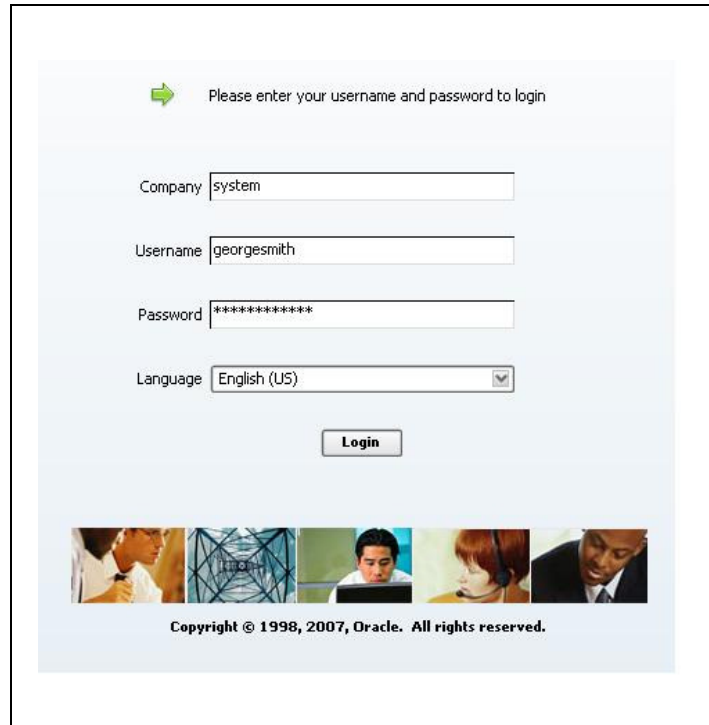
Figure – TAW Launch Page

With the new integrated clients (agent and supervisor), the URL is generalized and the login process is user aware. The default URL to launch the new clients is <http://hostname/CCA>. Select the button to launch.



Figure – CCA Launch Page

The login page will prompt the user for their username and password. Then, depending on the user permissions, the appropriate application is launched. The Application Tabs available to you will be based upon your login permission. If you are an agent, the Interaction tab only will be available. If you are a Supervisor, all Applications tabs will be available to you.



Please enter your username and password to login

Company

Username

Password

Language

**Login**

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*Figure – Login Page for New Clients*

## Enabling SQL Query Option in Project Menu

Now the option SQL Query is enabled in the Project Menu if user checks the option "SQL Queries in Project Menus" in Company Package definition.

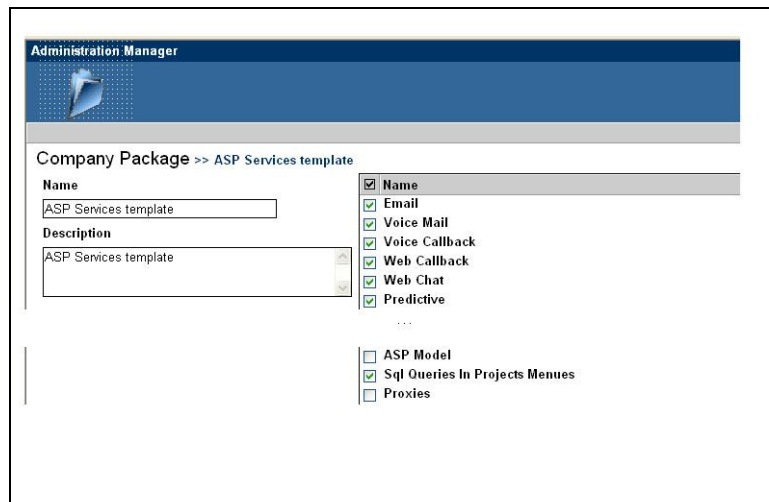


Figure – Package Creator and Enabling SQL Queries in Project Menus

## Disabling Wrap up and Elapsed Timers

With 8.1.0, the new clients being Java-based do not have the same issues that caused the strobe effect with Citrix. This applies to the new Interaction Manager and the New Supervision Manager.

The browser-based Interaction Manager is still supported. The Administration Manager still supports the Disable Options needed to turn off the timers.

## Interaction Manager - Transferring a Held Interaction to an Active Interaction

The browser-based IM allowed a call to be on hold (but selected) to be transferred to an active interaction by using the *Supervised Transfer* button. This capability allows a held interaction to be transferred to an active interaction on the agents IM. With the New IM an Action button has been added for the held interaction only (*Supervised Transfer*).

This action applies to held phone/voice type interactions only. If active interaction is a non-phone type interaction, the transfer is disallowed. The agent has the ability to take a call, put it on hold, and then connect the held call with an active interaction. For example, the agent wishes to transfer a call without speaking to the caller again.



Figure – Transfer Held Interaction using Supervised Transfer Option on Drop Down Menu

## Licensing Change

A call was counted twice, for license purposes, when it had been transferred to external number. Now a call transferred to an external number is counted as 1 license.

## DNIS Libraries vs. DNIS Numbers

DNIS Libraries, introduced in 7.2, are available in 8.1.0. A DNIS Library is a collection of DNIS numbers (one or more DNIS numbers). DNIS Libraries are configured through the Admin and Assigned to Projects or Users (Agent DIDs).

Changes: Changes were needed throughout the system. DNIS tables were added to the Database. In the Admin, The DNIS tab defined for a company was removed and replaced by DNIS Libraries. Project and User configurations now make use of DNIS libraries, not specific DNIS numbers. Upgrade scripts convert DNIS numbers to DNIS Libraries to simplify the upgrade.

## DNIS Library Changes

In 8.1.0, the following Administration changes have occurred for the DNIS Library feature of v7.2. The DNIS tab was removed from the Company definition and the two columns that used to be in the Company DNIS tab (Project's Name, Agent Direct Inward Access) have been moved to the DNIS Library List.

				Add	Edit	Delete	Help
Dnis Library							
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 1 2 3 4 5 6 7 8 9 0 Remove Filter							Find <input type="text"/> Go
Name	Description	Project Name	Agent's Direct Inward Dialing				
55555		IVR					
Tims Favorite numbers		main-tim					

Figure – DNIS Library Changes to include columns from Company DNIS Tab

## Feature "Use Max. Calls per Agents"

Previously, the feature "Use Max. Calls per Agents" was incorrectly identified and located on the Workgroup Overflow tab, creating potential confusion. This was moved in 8.1.0 to be clearer. It is now under the Call Deflection heading with a check box to enable and entry box for the value. The option description has also been changed to "Deflect calls when Max. Calls Waiting per Agent is <entry box>".

Note: Activation of this feature will reject calls back to the network.

The screenshot shows the 'Workgroup | Overflow' configuration tab. The 'Enable Workgroup overflow' checkbox is checked. Under 'Overflow occurs', the 'Use Max. Calls per Agent' checkbox is checked and circled in red, with a value of '0' entered in the adjacent text box. The 'Action' section has 'Increment Interaction priority by 1' selected.

Figure – Workgroup | Overflow Tab - Max calls in CCA 7.1.7

The screenshot shows the 'Workgroups >> tim' configuration window. The 'Call Deflection' section is visible at the bottom, with the 'Deflect calls when Max. Calls Waiting per Agent is' checkbox checked and a value of '0' entered in the text box.

Figure – Call Deflection when Max calls in 8.1

## Popup Notification Changes for the New Interaction Manager

The browser-based IM supports the feature “Always on Top” in new Integrated Client. When a new interaction is received while the user is busy on another window, the task bar icon (Interaction Manager – Microsoft Internet Explorer) flashes 3 times and then goes steady. The same capability is available with the new clients.

The user must be configured for popup notification. When the interaction arrives, the Contact Center Anywhere Taskbar icon will flash 3 times and then go steady. See the two figures that follow.



Figure – How to configure Popup Notification



Figure – Popup Notification

## Agent Transaction Recording Without Contact

In prior releases, a contact assignment was required for the record button to be enabled for the Agent. A change was made to the system to allow agent transaction recording when a contact is not assigned.

**Browser-based Interaction Manager** - In 8.1.0. The following change is required to allow agent recordings without a contact assigned. **Note:** The file where this change is required did change!

Add or change 'activeXObject's' file to include the following:

```
document.writeln('<PARAM NAME = "allowRecordingWithoutContact" VALUE="true"> ');
```

Then delete the JSP cache from the webserver so the JSP's will recompile.

**New Interaction Manager** – No special change is required to support this function.

# Issues Fixed:

## CCA System

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### Email Distributor - Increased queue size 15113/15105

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**Module:** Email Distributor

**Description:** An issue has been corrected where restarting the Email Distributor for a company increased the number of interactions by the value of 'MaxQueueEmails' and ACD emails present in the queue were not being delivered. The emails will now not increase and will be delivered properly after a restart of the Email Distributor.

---

### EmailDistributor - 15% Emails Rejected 15003/14810

---

**Module:** Email Distributor / tawemail.dll

**Description:** An issue has been corrected where approximately 15% emails were being rejected by the Email Distributor. Now the emails will be processed correctly.

---

### Personal Voicemail from agents with a ' cannot be accessed 14942

---

**Module:** CallCenter

**Description:** An issue has been corrected where personal voicemails left by a person with a single quote/apostrophe (') in the name, for example O'Neil, could not be correctly saved to the database. Modification was made to correctly write to the database for user names with a single quote within the name. These users now can leave and access voicemails successfully.

---

### Virtual Memory Leak on Server Resources 14765

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**Module:** TAWServer

**Description:** A Memory Leak was identified on several server resources (IMServer, Stats Server, CTI Server, ACD Server). It was associated with the sending of messages, which resulted in increasing virtual memory which would eventually require manual intervention. This leak was corrected within the sending queue function of the TAW Server.

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### DST Change for 2007 14701

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**Module:** Java Client and WebServer, Schedule Server, Call Center, Chat Server, Email Distributor, IM Server and Predictive Server.

**Description:** Beginning in 2007, most of the U.S. will begin Daylight Saving Time at 2:00 a.m. on the second Sunday in March (03/11/2007) and revert to standard time on the first Sunday in November (11/04/2007). In the U.S., each time zone switches at a different time. Canada has also adopted this change. Mexico has not. With this DST change, the Contact Center Anywhere software as well as the Java client and server components are updated to accommodate the new time zone handling. The DST updates for CCA are built into the 8.1 upgrade and new system installation procedures. No extra patch is required.



## Ghost Interactions during Master/Bkup

14423

**Module:** ACDServer

**Description:** An issue where the ACD Server was not clearing all interactions when a Master/Backup situation occurred has been corrected. The ACD was associating these interactions with agents which in turn kept them always busy with ghost interactions. Now, during the Master/Backup situation, all interactions will be re-associated, thus not causing ghost interactions.

## Overflow – Not occurring due to Priority

14334

**Module:** ACD Server

**Description:** An issue has been corrected where when multiple interactions were received at the same time, some of the interactions did not overflow and stayed in queue because the ones that had overflowed had a higher priority. The issue has been fixed and the ACD server will update the interactions list when overflow occurs.

## ACD Server - Agent Reserved Status Issue

14197

**Module:** ACD Server

**Description:** An issue has been corrected where the ACD Server appeared to stop routing calls and voice mails to agents. The real issue was due to a missed message. When the ACD Server reserved an agent for an interaction, but before the agent accepted the interaction, the ACD Server received a message to clear the status. The status was cleared, however the indication that the agent was reserved for an interaction was not reset. Now, if there are no more interactions pending for the agent, the reserved status will be properly changed.

## SQL Error Queries –Logfile Format

13469

**Module:** Log Files

**Description:** When the StatsServer runs into a problem writing to the database, it creates a log file of queries. Now statements written to the 'errorQueries.sql' file will be in text format. Each statement/query will be separated by a semi-colon and a new line which will allow the file to be run in batch.

## Intelligent Chat Templates – Dynamic Change

13383

**Module:** Chat Server

**Description:** Previously, Intelligent Chat Template changes were not dynamic. The Chat Server had to be restarted for an Intelligent Chat Template modification to take effect. Now, these changes are dynamic. Intelligent Chat Template changes will be available to the agent with the next Chat interaction and do not require a Chat Server Restart.

## Administration Manager

### Disable Partitions Effects – Agents, Workgroup & Projects

---

15027

**Module:** Administration Manager

**Description:** An issue with after configuring Partitions and then disabling it in the Company Package, the Admin is unable to see agents in workgroup & project dropdowns has been partially fixed. The problem still happens on ASP Service Company but works fine on the other companies.

**Workaround:** Enabling Partitions allows the administrator to define Workgroup, Projects, and other key system data for that Partition. This data is not visible or usable by other Partitions. Users can be shared across 1 or more Partitions. This feature is meant to subdivide a company into isolated Partitions. Care should be taken when disabling Partitions after data has been entered as this may result in some data not being accessible.

### Speed Dial List – Dynamic Change

---

13400

**Module:** Administration Manager

**Description:** In v7.2, changes to the Speed Dial List were not dynamic and the users had to logout/login for the changes to take effect. Now, Speed Dial List changes through the Admin are dynamic and do not require a logout/login by the user to take effect. The next time the agent accesses the Speed Dial function (example: a new list added), the agent will see the change.

### Speed Dial List – IP Phone number Entry

---

12006

**Module:** Administration Manager

**Description:** In 7.2, an Admin user could not edit an IP phone number if entering a dot (.) character in AM | Dial List. “Invalid character” message would display once user enters the dot character (.) into the phone number field. This issue has been fixed so that user can use the dot character (.) when changing the IP phone number.



## Interaction Manager

### Auto Assign Contact – Information Lost

---

14650

**Module:** New Interaction Manager

**Description:** An issue has been corrected with the auto assignment of a contact. When an interaction was routed to an agent and auto assigned to a contact, however the agent did not accept it, the interaction was returned to the workgroup queue. Later, when the interaction was offered and accepted by an agent, the contact information that had been assigned was lost. In new Interaction Manager, the contact information remains with the interaction if declined and accepted again. Agents using the browser-based Interaction Manager can find and reassign the contact.

### Customer Chat Page – Agent Name

---

12136

**Module:** Chat Server

**Description:** An issue has been corrected where the agent name did not appear in the customer-facing chat page. Now the agent's first name will be presented in the customer-facing chat page.

### IMServer – IM/SM Logout

---

14934

**Module:** IMServer

**Description:** An issue was corrected where when the IM Server was stopped, the new clients (IM/SM) were not logged out. This caused issues with the state of the users and their ability to receive interactions. Now, as with the previous clients, the IM and SM will be logged out when the IM Server is restarted.

### Interaction Clearing after Disconnect

---

13974

**Module:** IM Server

**Description:** An issue has been fixed where the interaction was not always cleared from the screen when clicking *Disconnect* and ending wrap up. This was due to a timing issue with the IM Server when two events were received within the same second. The timing issue has been corrected and interactions will clear properly when disconnected.

### Email – Customer Email Address Display

---

12772/12504/9095

**Module:** IM Server

**Description:** An issue has been corrected where the customer's email address was being displayed, even though the option "Show Customer Email Address to Agent" was disabled. The email address will now be masked properly for the IM GUI and display *ACD Email* in place of the email address in the interaction window. As a clarification, this option does not affect the history or contact information. The customer's email address will be presented to the agent if configured/present for these areas.



## Duplicate Chat History Records

12631

---

**Module:** IM Server

**Description:** An issue was corrected where duplicate chat interaction records were included in the chat history. This has been corrected and now will only include a single record.

## CRM – Screen Pop on Disconnect

11582

---

**Module:** CRMExternalApplication.java

**Description:** An issue was corrected where the HTML Window or Modal was popping up after ending an interaction with the *Disconnect* button, if configured for a new interaction. Now the window will pop only after a new interaction is accepted.

# Supervision Manager

## Monitoring - Audio Quality

13919/13601

**Module:** RTP Manager

**Description:** Quality degradation issues for Supervisory functions have been corrected with this build. Code changes with the RTP manager have corrected the audio level and choppiness issues while quality monitoring.

## Interaction History - Project Menu Name

14174

**Module:** Supervision Manager Client

**Description:** An issue has been corrected where the name of the Project Menu was not showing within Interaction History. Now the name of the menu will display properly.

Interaction History is accessible through the Interaction History Sidebar Option on the Interaction Application Tab available with the new clients. This change benefits Agents and Supervisors. Search for Interaction Type of Inbound Call or use the interaction ID.

Interaction Type	Interaction Id	Originator	Destination	Date / Time
Inbound Call	2001232402405		55555	03/26/2007 06:51:08 AM

1 Record(s) Found

**History**

**FROM:** 03/26/2007 06:51:08 AM -- Interaction routed to project **IVR** Priority ☆☆☆☆☆

**TO:** 03/26/2007 06:51:08 AM -- Interaction entered IVR menu **Project Menu Test**

**INTERACTION ID:** 2001232402405

03/26/2007 06:51:12 AM -- Digit entered

03/26/2007 06:51:12 AM -- Interaction routed

03/26/2007 06:51:12 AM -- Interaction offered to agent **Marcus O'Neil**

03/26/2007 06:51:12 AM -- Contact left a voicemail

03/26/2007 06:51:20 AM -- Interaction removed, talk time duration **0:00:00**

03/26/2007 06:51:20 AM -- Interaction terminated, reason: **Unknown** interaction duration **0:00:12**

**TIME OF INTERACTION:** 03/26/2007 06:51:08 AM

**DURATION OF INTERACTION:** 0:00:12

Figure – Sample Interaction History for Project Menu Interaction

## Interaction History - Unknown Action IDs

14760

**Module:** Interaction History

**Description:** An issue has been corrected where there were many unknown action ID lines within the Interaction History of an Interaction routed to a Campaign/IVR. These strings have been replaced with the correct description for the action.

## Interaction History – Warm Transfer Notation

13596

**Module:** Interaction History

**Description:** An issue has been corrected where in the new SM, the Interaction History for a warm transfer displayed the Action ID (70069?) in stead of “Warm Transfer. This has been corrected for the new client.



## Interaction & Agent Views – Column Sorting

14067 10534

---

**Module:** SM Application

**Description:** An issue with the sorting by project name was corrected to alphabetize the projects properly. Also, with v8.1.0, the grids were standardized and enhanced across the new clients (IM/SM). Consistent sorting is available on all columns where lists are presented.

## Agent View – Agent Selection

14019

---

**Module:** SM Application

**Description:** An issue where only a partial list of names was being returned for the selection of agents for the Agent View panel creation. Now all names will be available for selection.

## Incorrect Agent Status – ACD Call

12387

---

**Module:** IM Server

**Description:** In two cases where agents were offered calls and did not accept, their status was changed to ACD Call when in fact they were in another state. Changes were made to the messaging where the agent's proper state will be sent to the SM in these cases.

## Admin Permission Login to SM

11560

---

**Module:** Supervision Manager

**Description:** With v8.1.0, Admin users can also login to the new clients (Agent or Supervisor). For the first introduction of the new Supervision Manager with v7.1.7, the admin user could not login to the Supervision Manager.



## Historical Reporting

### Selecting 23:59 as End time

15072

**Module:** Reporting

**Description:** An issue has been corrected with the selection of 23:59 as the End Time for an Advanced Report resulting in no data being returned. This has been corrected and the reports will now execute properly.

### Advanced Reports – Default End Time

14751/10604

**Module:** Reporting

**Description:** With the Advanced Reports, the default end time was set to 00:00. If used, this would effectively provide the same start and end time for a daily report, thus not providing any data. The default has now been changed to 23:59, so the entire day will be reported.

**Note:** The Advanced reports have a start date and end date and report the start and end times within each date. The standard reports work differently with respect to the start and end times. For the standard reports, the report includes all data from the start date and time –through- the end date and time.

**Reference:** *CCA Reporting User Guide* for more information regarding report time frames.

### Interval Workgroup Performance Report - User Thresholds

14332

**Module:** Advanced Reports

**Description:** An issue with the report query has been corrected for the value of the user defined threshold was not counted properly in Interval Workgroup Performance report. The query is using *thresholdID* to compare instead of using threshold value. The threshold fields will now be reported properly.

### Workgroup Segments Report - AHT

14217

**Module:** Standard Reports

**Description:** A correction was made to the Workgroup Segments report to correctly report the average handled time. The calculation was corrected to be:  $AHT = (Total\ Talk\ Time\ (includes\ Hold\ Time) + Total\ Wrapup\ Time) / Number\ of\ Handled\ Calls$ .

### Agent Utilization – Login Time

13931

**Module:** Standard Reports

**Description:** An issue was corrected with the Agent Utilization report where the login time was being calculated incorrectly. The query was using TotWrap instead of timeWrap. The report will calculate this value correctly and be consistent with the Login by Group of Users report.

### Direct Dialing Statistics Report - Average Talk Time

13884

**Module:** Standard Reports

**Description:** An issue has been corrected with the Direct Dialing Statistics report showing incorrect data in field Average Talk Time. This happened when a customer made a call to a project that routed directly to an agent and the caller abandoned the call before the agent accepted. The report was inserting the ring time instead of 0 for this field. Now the talk time will report as 0 as expected.

## IVR Campaigns and Project Menus

### CallCenter CPU Increase – Project Menu updates

14891/14350/13878

**Module:** CallCenterVoIP

**Description:** A random memory corruption caused an issue with CallCenter CPU increased usage during updates to project menu case statements. This also caused calls not to route to agents and remain in queue even though there were available agents. The compiler component of the CallCenter handling scripts was upgraded and this issue has been corrected.

### Deployed Campaign Listing

13349

**Module:** Campaign Manager

**Description:** An issue has been corrected where a deployed Campaign was not shown in the Campaign option list, although it had been deployed successfully and was listed in the Campaign drop-down menu of a Phone Project. The Campaign Manager now shows the deployed campaign properly.

### Project Menu SQL statement - < > Symbols

14321

**Module:** Administration Manager – Project Menu

**Description:** An issue has been corrected where a user could not add the greater than/less than (< >) symbols into a SQL statement within a Project Menu. An error message was presented (“Invalid Character”). The Administration Manager was changed to allow the <> symbols when creating SQL queries in Project Menus.

### Stored Procedure - Return Results

14839

**Module:** Administration Manager – Campaign Manager

**Description:** An issue has been corrected where a stored procedure returned a results set causing DB locks to occur. The code was changed to identify an explicit or implicit select based on when the stored procedure returns an OUT variable. The CallCenter will then call the appropriate method following the parsing of the query.

## Partitions

### Partition Loading – new SM

15016

**Module:** Partions & Cache Handler Client

**Description:** With version 7.2, when attempting to log into the new Supervision Manager with a cleared CCA/Java cache, the loading partitions screen would timeout after 1 min. This occurred on large configurations with many Partitions and agents defined. Now the fetching of the Partition information will be done in chunks of 500 items so that the request will return in a short amount of time and not time out.

### IMServer - Force Logout

14934

**Module:** IM Server

Behavior Change

**Description:** Previously, stopping the IMServer did not log out the new clients (Agents or Supervisors) as previous behavior with the older clients. For the new clients, this may cause issues. In a partitioned environment, the supervisor data may be incorrect if the agent logged out and back in during the stoppage of the IMServer. The agents would appear to come back online but couldn't receive interactions as they were in an unknown partition state. To insure that the state changes are correctly recognized, in the case of an IMServer stoppage, all users will be forced off when the IMServer is restarted and required to log back in.

### User ID – Delete (within Partition Environment)

14909

**Module:** Administration Manager / Partition Environment

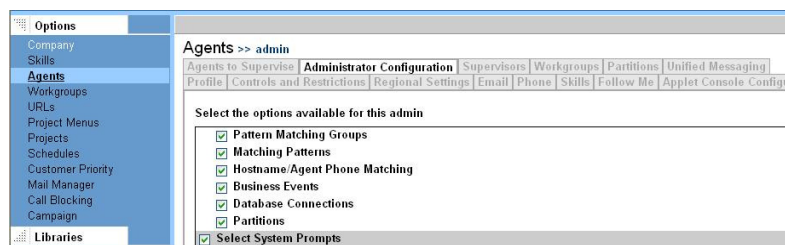
**Description:** An issue was corrected where if you remove an agent with a userID which is the same as a workgroupID, projectID, or menuID in the same Partition, this action will remove that Workgroup, Project or Menu. Changes made with the Administration Manager for a Partitioned environment will now just affect the chosen object.

### Admin Partition Assignment

14689

**Module:** Administration Manager - Configuration

**Description:** In 7.2, an issue where an Administrator assigned to one Partition could assign users to any Partition, including their own has been fixed. Now, for a Partitioned system, the Partition Library was added to the options of the Administrator Configuration tab (Libraries | Partitions). Enabling this option for an Administrative user gives access to the Partition Library and the Partition tab (Options | Agents) for assigning users to partitions. Common data access (Company Data, SMTP/POP3) can be controlled via settings in the Administrator Configuration Tab also. These settings can be configured for the desired access to provide the level of security desired.





## SM Partition List Choices

13620

---

**Module:** Supervision Manager

**Description:** An issue where Partitions were missing from the dropdown list for a Supervisor login and/or the Partitions View has been fixed. Changes were made to the database triggers, dynamic change handling, cache handling and Web services to correct this issue.

## Speed Dial List – Not Partition Restricted

11752

---

**Module:** Integrated Client

**Description:** In 7.2, Speed Dial Lists defined in one Partition were available to other Partitions. Now only Speed Dial Lists defined for the user's Partition login will be displayed to the agent and accessible.

**Module:** Supervision Manager

**Description:** In 7.2, a Supervisor could view Interaction History of another Partition. Now the Supervisor will see Interaction History from their login partition only and have access to all of their assigned user’s generated histories, plus any quality recordings. The Interaction History Option was moved to the Interaction Application tab available in the new Interaction Manager (described earlier in Enhancements section). Agents or supervisors can only see interaction history based on their login partition. The pull-downs (workgroups, projects) for setting search criteria are modified to be login partition specific.

A user, however, is common across one or more partitions. So, when a user is selected, a project or workgroup association is required to insure the correct history is shown.

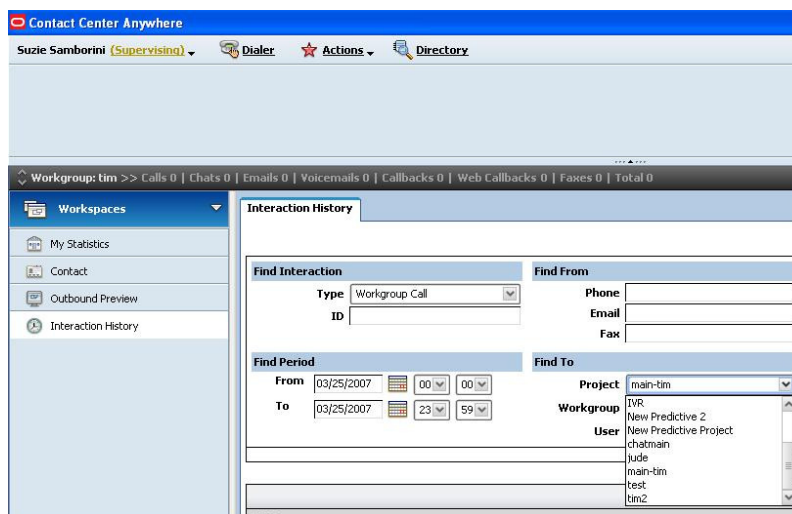


Figure – Find Interaction History for Agents and Supervisors

# Known Issues

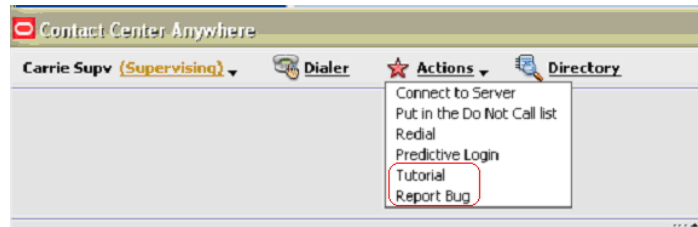
This section captures general and specific known issues with the Contact Center Anywhere 8.1.0 release.

## General

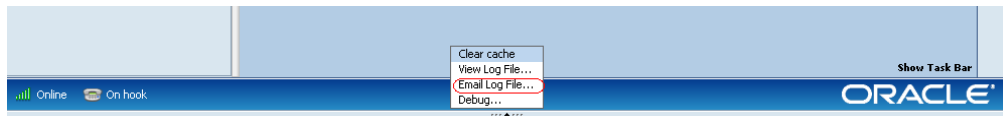
- Vista – Due to a conflict between Vista and Java webstart, the new clients are not fully functional on Vista. This inhibits the launching and downloading of the new clients. The validation of Vista is currently being done within our Quality Assurance process.
- CCA 8.1.0 does not include features and enhancements associated with 7.1.8. These are targeted for 8.1.1. This includes SNMP Support for Solaris.
- CCA supports SQL Server and Oracle implementations. SQL Server 2005 is supported for new installations. Validation for upgrades is currently underway. To satisfy a need for replication, the workaround for upgrades is to use Oracle 9i or 10g.
- CCA 8.1.0 fully supports English. Other languages are partially completed (Spanish, French). Full support is planned for 8.1.1 for the standard set of CCA languages.
- Lame software is required for the MP3 conversions, however it is no longer contained within the release. The customer must provide this software separately. It may be obtained at <http://lame.sourceforge.net/index.php>. The latest release is v3.97.
- The infrastructure for Remote Desktop Monitoring remains in the product. For customer's upgrading from a version 7.x system, use the previously supplied copy of VNC to provide the same functionality. For New implementations, please reference the Remote Monitoring Tech Note.

## Interaction Manager/ Supervision Manager – Integrated Client

- The browser-based Interaction Manager is still maintained in 8.1.0 to support existing implementations and support the transition of users to the new Integrated Client. Critical bug fixing will continue but new features and enhancements, beginning with 8.1.0, will be targeted to the new Interaction Manager as a general rule.
- The Task Feature is not yet available in the new Interaction Manager, although the appearance of the task list for in IM for My Statistics is still present. The old Interaction Manager is available for users who require the Task Feature.
- Recommended PC requirements for the new clients are similar to Vista. A minimum of 512MB memory is required. 1GB is recommended for better performance.
- Within the Actions menu of the Integrated Client, a Tutorial Option is noted. This option is a future capability to provide Tutorial based training for the applications.
- Also within the Actions Menu, a troubleshooting tool is available for bug reporting. This action invokes your email client with a "To" address for the former [Telephony@Work](mailto:Telephony@Work). With the initial release of v8.1.0, feature is operational, however the address is no longer functional. If you wish to use this feature, the To: email address must be manually changed to a known address for your company only.



- Within the IM support features for Email Log file, again the default email address is not a working address for Oracle. This feature will be removed with future releases.



- Performance Testing with CCA v8.1.0 has exposed a small memory leak. During the course of a busy day, an agent may consume some memory in the handling of continuous interactions. Depending on the PC memory available, this can degrade performance.

Workaround: The agent should relaunch the application every day to avoid this issue. Logout/Login does not clear this issue.

- The Interaction History is unavailable for abandoned call history or abandoned chat history. Records are not found. This will be corrected in a future version.
- The Warm Transfer feature uses a conference on the initiating agent to setup the connection. Any operation that causes a second conference (i.e. Warm Transfer after a conference is setup, a second warm transfer, etc.), can cause a variety of issues (ghost interactions, callers are still talking after leaving, etc.).

Workaround: If a user already has a conference established (through conference or warm transfer) then, warm transfer should be avoided. User logout/login will clear the screen of interactions.

- Dynamic changes for v8.1.0 were not fully ported over. For company directory, transfer window and other IM/SM features, the user will need to logout and back in for changes to be displayed. Updates in this area are targeted for v8.1.1.
- With the introduction of the new Supervision Manager, the Guest Supervisor that is configurable in the Administration Manager has the same capabilities as a Limited Supervisor. The Administration Option has no effect on the Guest Supervisor.
- The supervisory features for the Interactions View are not available in the new Supervision Manager with 8.1.0. These features were represented by icons at the top of the view in v7.1. The icons are for the features: Disconnect, Join, Open CRM, and Alarm.

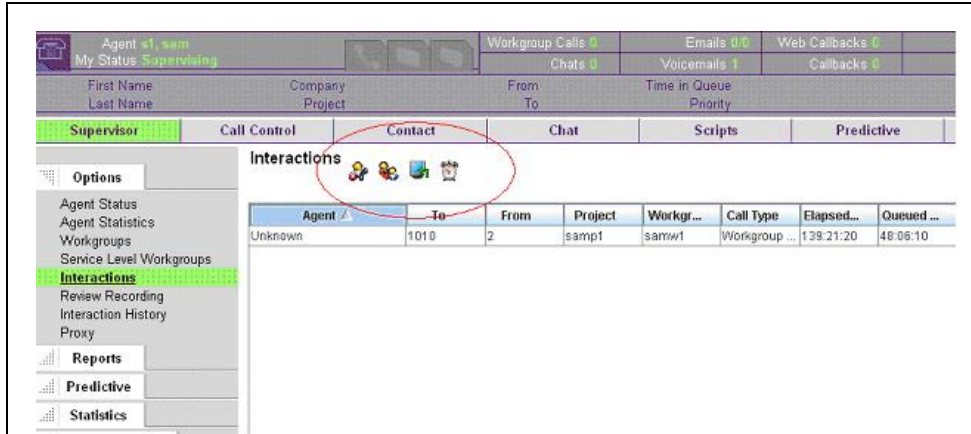


Figure –Interactions Icons in 7.1.7

Alarm – This function is not needed in the new Supervision Manager. The built-in alarm feature allows the setting of interaction alarms in a general way and this applies to the interaction view also.

- The Interaction Manager Task Feature is not available with v8.1.0. As a result the Predictive Personal Callback function is not functional with the new Interaction Manager as well. The Personal Callback option requires the Task Feature.

Workaround: The browser-based Interaction Manager can be used in situations where this feature is required.

## Open Report Issues

- Graphics do not appear in reports when viewing in the Supervision Manager. This affects the Outcome Statistics report.
- Peak Interaction and System Peak Interaction reports display incorrect results for Peak Calls, Peak Chats fields within a partitioned system.
- The Predictive Detailed report displays “no records found” when choosing option Actions and Outcomes on tab Content of report.

## Open Partition Issues

- User Hourly Average, User Status Duration, User Login/Logout, and Daily User Performance Reports are returning incorrect data for users who logged into multiple partitions.
- The Company Directory/Transfer Window should show the users who are part of the user’s login partition. The status should reflect the status of the user in relation to the user’s login partition. CCA currently shows the user’s CCA status independent of the user’s login partition to whoever is viewing the Company Directory or Transfer Window.



- After working for a while, the Company Directory starts showing agents from many partitions even though the agent does not belong to any of them. This problem happens on the browser-based Interaction Manager and the New Interaction Manager. This problem happens for agents who share a common partition but are logged into other different partitions.
- Supervisors can view, monitor and listen to calls of agents who are logged into other Partitions. This problem occurs when one Web server is stopped and the agent logs out and back into another partition, the agent logs in to another partition after a network failure, or when the agent logs in to another partition when the IMServer is down and the Supervisor is Offline.

Workaround: Stopping/Starting the IMServer should force off all new client users (Agents and Supervisors) in 8.1. 0.

# Installation Changes

## TAW web.xml Changes

The following are the changes necessary to support 8.1.0. A full sample web.xml is included with the build. This section highlights the changes necessary to support 8.1.0.

### Oracle Application Server

```
<context-param>
  <param-name>applicationPath</param-name>
  <param-value>/space/oracle/product/10.1.3/OracleAS_1/j2ee/home/applications/TAW/TAW/
</param-value>
</context-param>
```

Note: This needs to be edited for the specific installation.

### Oracle Database (9i or 10g)

```
<context-param>
  <param-name>databaseSchema</param-name>
  <param-value>ADMINCC81020</param-value>
</context-param>
```

Note: this needs to be edited for the specific installation

### ProxyContactHandler (Change of Directory)

```
<servlet>
  <servlet-name>ProxyContactHandler</servlet-name>
  <servlet-class>com.taw.web.contact.was.ProxyContactHandler</servlet-class>
  <load-on-startup>5</load-on-startup>
</servlet>
```

**Note:** Login is prevented unless changed.

## CCA web.xml Changes

The web.xml for CCA was restructured for the new clients and the webservice in 8.1.0. Take the web.xml in the build (cca.war) and edit it as needed.

**Note:** The launch URL for the new Supervision Manager in 7.1.7 has been changed in 8.1. Access to the Web Services, Interaction Manager Application, and the Supervision Manager Application are packaged into the same cca.war file.

The new launch URL is <http://hostname/cca>.



## Enabling Reporting

In some previous builds, the IMServer not sending the SOAP call to the report server to be processed. The IMServer sends the SOAP call to the report server to be processed. his requires the following configuration in the web.xml. The web.xml has 2 parameters *isreportserver* and *reportserverurl*.

```
<context-param>
<param-name>reportServerUrl</param-name>
<param-value>http://hostname/TAW</param-value>
</context-param>
```

```
<context-param>
<param-name>isReportServer</param-name>
<param-value>true</param-value>
</context-param>
```

If there are two Web Servers; One should have the parameter *isreportserver* as false and the other should have it as true. The Scheduled Reports are directed to the correct Web server with *isreportserver* true.

## MP3 Conversion

MP3 Conversion requires the use of an 3<sup>rd</sup> party wav to MP3 converter. The only software presently working with CCA is Lame. Therefore, for MP3 conversion to work, you must install the Lame executable or binary into the callcenteranywhere bin. You must also configure Lame in the Network Manager.

This issue is not new for 8.1.0 and is captured here for completeness.

## To Show the IVR Variables in the browser-based Interaction Manager:

File name: ... \TAW\InteractionManager\ **activexObjects.js**

**Change from:** document.writeln('<PARAM NAME = "includeIVRAsParameters" VALUE = "false">'); to  
document.writeln('<PARAM NAME = "includeIVRAsParameters" VALUE = "true">');

Delete cache, Login again to IM.

## To enable recording in the browser-based IM when a contact is not assigned.

The new Interaction Manager allows calls to be recorded with or without a contact assigned. The browser-based Interaction Manager requires a change to the **activexObjects.js** file.

File name: ... \TAW\InteractionManager\ **activexObjects.js**

Add this line or Change the line as follows:

```
document.writeln('<PARAM NAME = "allowRecordingWithoutContact" VALUE = "true">');
```

Delete cache, Login again into the old Interaction Manager.

## Multi-lingual Support and Help.

8.1.0 is partially localized. Help is provided in English only. To avoid a variety of errors when launching Help from other languages (i.e. cannot find the file), you need to replicate and rename the English Help directory for all languages. The paths to the Help directories are shown below:

```
.....\webapps\TAW\SupervisionManager\help\lg1
.....\webapps\TAW\InteractionManager\help\lg1
.....\webapps\TAW\AdministrationManager\help\lg1
.....\webapps\cca\doc\HTML\Help\InteractionManager\en_US
.....\webapps\cca\doc\HTML\Help\SupervisionManager\en_US
```

Lg1 is the directory for English. The language directories to include may include one or more of the following:

lg2	GB	en_GB
lg4	French	fr_FR
lg7	Spanish	es_ES
lg11	French Canadian	fr_CA

## Company Packages

Company Packages are a new Feature Enhancement in 8.1.0. A company package has replaced the application key/license dongle/Company Options configuration of past releases. This new feature has simplified installation of 8.1.0 and future releases.

Feature Options are now configurable by editing the assigned Company Package. Use the Netadmin user to view and edit the package for the company configuration desired.



Figure – New Package Creator Option available to the Netadmin



## How to Enable Partitions

Partitions are a way of grouping Agents, Workgroups, and Projects within a company. This is a new feature of version 8.1.0 as is described in the New Capabilities section. The 'Partition' option is not displayed in the template until it is enabled in the database first. Once enabled in the database, the Partitions option can be enabled for one or more companies.

The Partition feature can be enabled in the database by following these steps:

1. Update change the *packageconfigurable* column in *systempackage* table to 1 for the row associated with *systempackageid = 333*. You can optionally enable the default to be on or off by setting the column *defaultselection*. This database setting will affect the partition default setting in the packages themselves.
2. Edit the Company Package and enable partitions where desired using the Administration Manager/NetAdmin User Menu - Package Creator. This will allow Partitions to be configured on a company by company basis. Enabling Partition in this manner applies to new installations and 7.1.7 upgrades. Customers upgrading from 7.2 are migrated automatically.



## Migration/Upgrade

Depending on your configuration and the version that you are migrating from, your migration may be more complex. Oracle Professional Services is ready to assist you as needed.

Customers upgrading from 7.1.7 SP4 or 7.2 will be migrated up to 8.1.0. CCA provides a seamless upgrade path requiring no supplemental steps for data conversion. If any special steps are required, they are identified here.

**DNIS Libraries.** DNIS numbers are converted into DNIS Libraries in 8.1. Wherever a DNIS number was used in 7.1.7 SP4, it was converted to a DNIS Library. This includes all uses of DNIS numbers: Project Phone DNIS, Agent DID, etc. 7.2 DNIS libraries remained intact and are brought over.

The changes to the Admin | Company Tab and DNIS Library Tabs were identified in a previous section.

**Partitions.** CCA 7.2 introduced the Partitions feature. With CCA 8.1.0 the system partition was added, whether partitions are enabled or not, making 8.1 partition ready. This allows the enabling of Partitions for any company within the configuration through the company package.

For migrations from 7.1.7 SP4, Partitions are disabled, retaining the same behavior as before for these customers.



# Support Changes

## Upgrades

When you upgrade and run the database scripts, the 'systempackage' table is rebuilt. This has the effect of turning off the partition option and/or default setting defined. The partition option in the template will not be available.

You may need to re-enable partitions by toggling the field in the database as mentioned in the Installation Section (for enabling Partitions).

## Upgrade Issues with New Clients.

On rare occasions, the new supervisor user in 7.1.7 and 7.2 could leave their new clients open and logged in, Installers / Administrators had no mechanism to force log out these users. After an upgrade, this situation resulted in those users experiencing a variety of issues because their version was not upgraded and had conflicts with the upgraded system (i.e. API mismatch). The solution was often to shut down the application, delete the cache, and delete the downloaded files associated with the application.

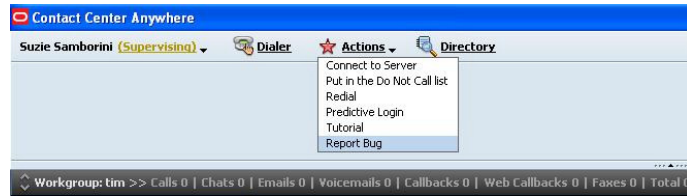
With 8.1.0, the introduction of the agent interface could cause this problem to occur more frequently. Two steps were taken to correct this situation. First, new clients (agents and supervisors) are logged out when the IMServer is stopped. This method provides a mechanism for installers / administrators to force users off. Second, the user may receive a popup indicating that their version has a mismatch problem. To correct the situation, the user should restart the application (<http://hostname/cca>). Their environment will upgrade normally.

Note: It is also recommended that 8.1.0 users using the new clients relaunch their applications daily. This will minimize degraded performance due to an outstanding memory leak.

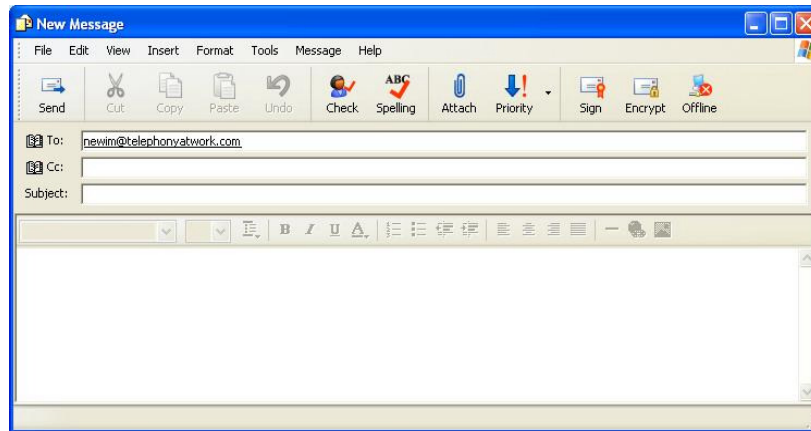
The minimum recommended memory needed to run the new clients is 512MB. 256MB memory should be available to run the application under continuous load with full URL support. This requirement is similar to the minimum Vista Requirement. As Vista support is provided going forward, the recommended memory is 1GB (see Microsoft Web site).

## New Client Error Logging (Agent and Supervisor)

New logging features are introduced with the new clients for troubleshooting and reporting issues associated with the new clients (both agent and supervisor). The Report Bug action provides an easy mechanism for a user to report issues with the new clients. Invoking the Report Bug Action launches your configured Email Client and appends the cca.log file (depending on your email client). Write a brief description of the issue that you encountered, append screenshots, and send the report to the support email address identified for your company. **Note:** The email address automatically populated is not a valid address and must be changed by the user prior to sending the email.



*New Client Logging – Available through Action Menu*



*Figure - Report Bug Action Launches Configured Email Client Logging*

## Bottom Bar – Right Click

With a right click on the bottom bar of the Integrated Client (IM/SM), new troubleshooting options are presented. A simple mechanism is provided to clear the user's cache. Expanded logging features are introduced with the new clients for troubleshooting and reporting issues associated with the new clients (both agent and supervisor).



*New Client Logging – Available through the Bottom Bar*

## Features

- **Clear cache** - Downloaded files in the cache directories below are deleted. Required files will be downloaded again as invoked or when the user logs out and logs in.

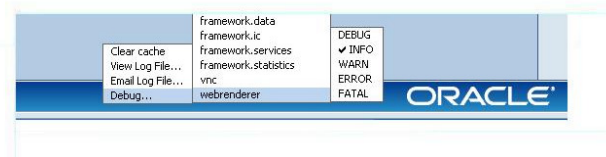
C:\Documents and Settings\username\CCA8.0\cache\hostname  
C:\Documents and Settings\username\CCA8.0\cache\system\_s1@hostname

The cache contains system and user data used by the application. Deleting the cache will cause the data to be re-downloaded on access or login. This action can be used to clear suspected cached data issues.

- **View Log File** - Provides quick access to the cca.log file found at the following address.

C:\Documents and Settings\tim\CCA8.0\logs

- **Email Log File** - Launches the email client that is configured, populates the support email address and appends the cca.log depending on the email client configured. If the email client does not append the cca.log, use the path noted above to locate, copy and attach the log to the email. The user should enter the appropriate email address defined for their company. **Note:** The default address is not a functional address.
- **Debug ...** Allows levels of debugging to be enabled for troubleshooting. This affects what is written to the log file.



*New Client Logging – Debug Log Options Available*

## Java Webstart Cache

The downloaded files are found in the Java application cache (javaws). The javaws can be deleted by going to the Java control panel, opening Java, and deleting all files. Deleting the javaws will cause the latest version to be downloaded when CCA is re-launched. This action can be used to clear suspected version/conflict issues.




Figure - How to clear the Java web start

## Agent Simulator

An Agent Simulator is released with the 8.1.0 release. The agent simulator is built on top of the same client infrastructure as the Agent and Supervisor Clients and uses the Web services of Contact Center Anywhere. The Agent Simulator is useful for logging in multiple agents to demonstrate a successful installation or load test. Agent usernames must take a common form (i.e. a1, a2, a3) with common password for the tool to function. It is not recommended to exceed 25-50 agents on a single host for correct performance. A sample screen is shown below.

The war file is loadtest.war. The launch URL is <http://hostname/loadtest>.



Host	http://pm71
Webapp Name	cca
Company	system
Agent Name Prefix	a
Agent Start Index	1
Agent End Index	5
Agent Password	

Ag...	Status	Sys St...	Messa...	Errors	Ints	Conta...	Stats	Req Ti...
a1	Logged In	Available	5	0	0	0	2	75 ms
a2	Logged In	Available	5	0	0	0	1	18 ms
a3	Logged In	Available	5	0	0	0	1	16 ms
a4	Logged In	Available	5	0	0	0	0	20 ms
a5	Loading...	Logout	0	0	0	0	0	0 ms

Figure – Agent Simulator for 8.1

# TechPubs Document Library

The following Documentation is available with the release of 8.1.0 and is available via SupportWeb.

<http://supportweb.siebel.com>

*Contact Center Anywhere Release Documentation, Version 8.1, March 2007*

- Contact Center Anywhere Release Notes v8.1
- Contact Center Anywhere Administration Manager User's Guide
- Contact Center Anywhere Supervision Manager User's Guide
- Contact Center Anywhere Interaction Manager User's Guide
- Contact Center Anywhere Network Manager User's Guide
- Contact Center Anywhere Reports User's Guide
- Contact Center Anywhere Installation User's Guide

Call Center Anywhere Interaction Manager User's Guide (user documentation on the browser-based client) is the same as 7.1.7 SP4.